TOOLKIT

for the evaluation

of the communication activities

DIRECTORATE-GENERAL FOR COMMUNICATION

Version: February 2017

EUROPEAN COMMISSION

Directorate-General for Communication
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Version: February 2017

The toolkit

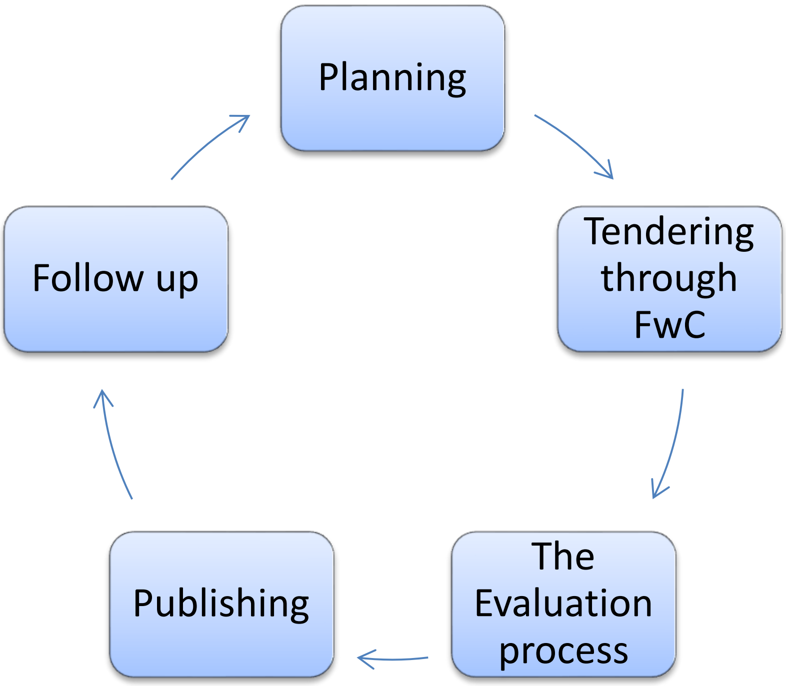
The table below presents the list of all supporting documents that are added to the main pages of the toolkit.

PART 1 of the toolkit

Evaluating communication

This toolkit provides guidance on the planning and undertaking of evaluation of communication actions. It was developed by ICF-GHK in the context of the project “Measuring the European Commission’s communication: Technical and Methodological Report” under Lot 3 – Provision of services in the field of evaluation of communication activities of the Multiple Framework Contract (PO/2012-3/A3).

The toolkit covers:



Why evaluate?

To evaluate is to assess delivery of policies and activities. Beyond being a formal requirement, evaluation is about improving the work we do; about adding to our professional skills and experience; and about helping our colleagues to improve.

Is evaluation of communication different from that of other policy activities?

While there are similarities with policy and programme evaluation, evaluation of communication actions differs in a number of respects. Beyond having some of its own terminology, it often uses different methods and communication specific metrics/indicators.[1] Best practice communication evaluation requires careful planning ahead and “on time” measurement. Once your communication activities are closed it is usually too late to measure – it may even be too late to measure once you have just started your activities.

[1] See Code of Conduct (Annex II – Page 11)

If you do not find what you are looking for …

Please ask the DG COMM evaluation team to help you further
COMM-EVALUATION@ec.europa.eu

Table A1.1 List of supporting documents

Nb	Toolkit page	Title
1	■ Planning	■ Overview of types of evaluations more info http://ec.europa.eu/smart-regulation/guidelines/tool_36_en.htm
2	■ Planning	■ How to set objectives, develop your intervention logic and plan for measurement of your communication activity
3	■ Planning	■ How to develop you indicators and your monitoring system
4	■ Tendering	■ http://ec.europa.eu/smart-regulation/guidelines/tool_39_en.htm
5	■ Tendering	■ Cost indications of different evaluation tools more information http://ec.europa.eu/smart-regulation/guidelines/tool_51_en.htm http://ec.europa.eu/smart-regulation/guidelines/tool_52_en.htm
6	■ Evaluation process	■ Tools and methods for evaluation of communication activities
7	■ Evaluation process	■ http://ec.europa.eu/smart-regulation/guidelines/tool_46_en.htm
8	■ Publishing	■ http://ec.europa.eu/smart-regulation/guidelines/tool_48_en.htm
9	■ Follow-up	■ http://ec.europa.eu/smart-regulation/guidelines/tool_49_en.htm
10	■ Quick links	■ Planning a single communication activity
11	■ Quick links	■ How to evaluate Conferences
12	■ Quick links	■ How to evaluate Newsletters
13	■ Quick links	■ How to evaluate Websites
14	■ Quick links	■ How to evaluate PR events
15	■ Quick links	■ How to evaluate Press events
16	■ Quick links	■ How to evaluate Social media activities
17	■ Quick links	■ How to evaluate Smartphones applications
18	■ Quick links	■ How to evaluate Publications

PART 2 of the toolkit

Planning

- [The EC framework for evaluations]
- [When is evaluation required]
- [Types of evaluations]
  - [Large scale evaluations]
  - [Small scale evaluations]
- [Setting out the baseline for measuring]
- [Do and don't - learned from past evaluations]

The EC framework for evaluations

All evaluations should be of high quality and respect the principles outlined in the latest Better Regulation Guidelines. The Better Regulation Guidelines published on 19 May 2015 cover the whole policy cycle from initiation to evaluation.

The European Commission's evaluation system is decentralised. Each Directorate-General (DG) must have an evaluation function responsible for co-ordinating and monitoring evaluation activities of the DG - from the planning of evaluations until their dissemination and use.

The Directorate-General for Communication (DG COMM) Evaluation Charter clarifies the tasks, responsibilities and procedures for all staff in DG COMM involved in planning, designing and conducting evaluations, as well as in dissemination of reports and use of evaluation results. The Charter is updated regularly.

The Secretariat-General issues general guidelines for the evaluation work in the DGs, it arranges training courses for staff and it organises External Evaluation Network meetings. The Management Plans outline the evaluation planning for each DG for the up-coming year and for up to five years ahead. The plans list the global and specific – and SMART - objectives of all major programmes and activities. Programmes and activities should be evaluated against these objectives.

Financial Regulation, Art. 30, Principles of economy, efficiency and effectiveness:

[…]

4. In order to improve decision−making, institutions shall undertake both *ex ante* and *ex post* evaluations

in line with guidance provided by the Commission. Such evaluations shall be applied to

all programmes and activities which entail significant spending and evaluation results shall be

disseminated to the European Parliament, the Council and spending administrative authorities..

[…]

Useful links

- EC guidelines for Evaluations
- Better Regulation Package
- Better Regulation guidelines
- Better Regulation SG toolbox
- Staff working Document guidelines
- Management Plans
- Annual Activity Reports

When is evaluation required?

Communication activities and programmes involving significant expenditure should be evaluated, as a minimum, every six years as required by article 18 in The Rules of Application (RAP) for the EU Financial Regulation.

Beyond this requirement, however, you should aim in any case to evaluate your communication activities as it will help you to improve your future efforts. Remember that the Commission has committed to the increased use of evaluation within its Better Regulation Guidelines..

When planning your evaluation, it is really important that you consider timing. Evaluation results should be available in due time so that they can feed into decisions on design, renewal, modification or suspension of activities.

Types of evaluations

Generally speaking, the following are the main types of evaluations. They are not mutually exclusive and, in practice, evaluations may contain elements of all of these:

Large scale evaluations (usually contracted to external evaluators)

Ex ante evaluation: these 'before you start' evaluations focus on data collection and evidence that will inform and guide the design of communication activities and to set out the "baseline" for your communication intervention;

Interim/process evaluation: these 'flanking the activity' evaluations usually focus on implementation processes, relevance of the intervention, outputs achieved (How can the intervention be improved to deliver better?);

Final/impact evaluation: these 'once we are finished' evaluations focus on the success of the communication intervention: Did the intervention deliver the anticipated effects?

More details on these different evaluations are provided in the document:

- Overview of types of evaluations

Small scale evaluations

Small scale evaluation usually concerns the evaluation of one or a few communication activities. They focus on measuring the effect and efficiency of your intervention. They will usually involve some 'ex-ante' elements to help define the activities and definitely a 'final' evaluation. Small scale evaluations can be contracted to external evaluators or undertaken internally. Guidance is provided here *(under construction).*

Setting out the baseline for measuring

For effective evaluation of communication interventions, a basis for measurement is necessary. Setting out the baseline involves the following steps:

Note: if you engage in a large scale activity, an ex-ante evaluation or a preparatory study can help you identify these.

Scope
- The **scope** of your communication needs to be clearly defined - which activities are to be evaluated - in which period

Objective
- **Objectives are to be set**. Clear, measurable and achievable communication objectives are the cornerstone of any evaluation plan – and your objectives should meet SMART criteria. If your objectives cannot realistically be reached, they need to be revisited before any communication activity is implemented.

Intervention logic
- Understanding and defining your objectives, your target audiences and the intervention logic **must** be done before you implement your communication activity

Metrics
- Choose the relevant indicators and develop your monitoring system.
- SMART objectives will help in guiding your choice of indicators

Financial Regulation, Art. 30, Principles of economy, efficiency and effectiveness:

[…]

3. Specific, measurable, achievable, relevant and timed objectives shall be set for all sectors of activity covered by the budget. The achievement of those objectives shall be monitored by performance indicators[2] for each activity, and the information referred to in point (e) of Article 38(3) shall be provided by the spending authorities to the European Parliament and the Council. That information shall be provided annually and at the latest in the documents accompanying the draft budget

[…]

Guidance on objective setting and indicators[3] are available here

- How to set objectives, develop your intervention logic and plan for measurement of your communication campaign/action
- How to develop your indicators[4] and your monitoring system

Do's and don'ts - learned from past evaluations

- **Don't skip planning**: vaguely formulated objectives will not guide communication choices, will make evaluation difficult, and will not allow you to prove that your intervention has achieved its objectives (therefore you cannot justify it)
- **Do focus your evaluation** on what you really want to know
- **Do use planning tools**[5] to help you map out your communication intervention

[2] See Code of Conduct (Annex II – Page 11)
[3] See Code of Conduct (Annex II – Page 11)
[4] See Code of Conduct (Annex II – Page 11)
[5] See Small-scale Evaluation Tools

PART 3 of the toolkit

Tendering through framework contracts (FwC)

Preparatory steps for tendering

The Steering/Inter service Steering Group

A first step in the tendering process is to set up a Steering Group or, if relevant, an Inter service Steering Group. It needs to be established right at the outset of any evaluation process.

The Steering Group will:

- Finalise the evaluation roadmap, help establish the Terms of Reference and the evaluation reports at different stages of the process
- Be responsible for the Quality Assessment (QA) of the final report. All members of the Committee must sign a Quality Assessment form which becomes publicly available with the final evaluation report
- Be involved in other stages of the evaluation.

Composition of the Steering/inter service Steering Group

- At least two members of Staff from the Unit responsible for implementation of the object being evaluated
- At least one representative from the lead DG's evaluation function
- Optionally representatives from other units/DGs where relevant to the evaluation topic

More information about the set-up of a Steering group is available here:

- http://ec.europa.eu/smart-regulation/guidelines/tool_39_en.htm

Consultation strategy

Consulting interested parties is an obligation for every evaluation in the Commission. All consultation must follow the Commission's guidelines as described in the Better Regulation guide. (http://ec.europa.eu/smart-regulation/guidelines/toc_tool_en.htm)

Evaluation roadmap

The evaluation roadmap presents the purpose of the evaluation, the evaluation questions, the scope of the evaluation and the evaluation planning. The Steering Group should be consulted on the drafting of the document, and they should approve the final content.

The roadmap identifies the evaluation questions to be included in the Terms of Reference.

The roadmap has to be published

Terms of Reference

The Terms of Reference for the evaluation are written by the responsible Unit in collaboration with the DG's evaluation function and the Steering Group.

Defining the budget

There are no set standards for budget definition for evaluations – and cost will vary significantly depending on the scope of the evaluation and the tools and methods used. Ensure, however, that you allow a realistic budget for your evaluation and that you respect the criteria of proportionality.

- What does individual evaluation methods and tools cost?

More information is available here:

- http://ec.europa.eu/smart-regulation/guidelines/tool_51_en.htm
- http://ec.europa.eu/smart-regulation/guidelines/tool_52_en.htm

Framework contracts (FwC)

Monitoring and evaluation contribute to improving the design, implementation and results of communication activities and help make the best choices when managing communication services, tools and products. In the Better Regulation context, monitoring and evaluation are playing an increasingly important role in performance management in communication.

For this reason, DG COMM signed on 20 December 2016 two framework contracts for the provision of impact assessments, evaluations and evaluation-related services in the field of Communication.

These contracts are open to all DGs and to the listed institutions, agencies and bodies under the section "Availability":

These contracts allow the Contracting Authorities obtaining impact assessment and evaluation services via a swift procedure while ensuring competition between contractors (multiple framework contracts with re-opening of competition).

They are adapted to cover all kinds of traditional and new forms of communication and can also integrate new tools that might emerge in future.

Their scope stretches from conduct of fully-fledged impact assessments, evaluations and studies ***(Lot 1),*** to specific tasks or set of tasks not leading to the production of a fully-fledged evaluation report or Staff Working Document ***(Lot 2).*** The lots respond to various needs for impact assessment and evaluation on different stages of the communication activity.

***Lot 1* — Impact assessments, Evaluations (i.e. ex-ante, interim, ex-post evaluations, Fitness Checks and meta-evaluations) and other evaluation-related studies in the field of communication activities**

It covers all types of fully-fledged ex-ante analyses/evaluations of communication activities (examples: impact assessments, ex-ante evaluations and feasibility studies) as well as on-going, interim and ex-post evaluations of communication activities (examples: mid-term and ex-post evaluations) and finally Fitness Checks, meta-evaluations and syntheses of evaluations, leading to the drafting of a final report and, for the Commission, of a Staff Working Document..

It includes evaluation of a broad range of simple or integrated communication activities, like a communication policy, strategy, campaign/programme, specific communication action within a strategy/campaign, a communication tool or market studies and other type of communication consultancy.

Lot 2 **— Development and implementation of monitoring and evaluation tools and systems**

This lot covers the execution of specific monitoring and evaluation tasks or sets of tasks not leading to the production of a fully-fledged evaluation report or to the drafting of a Staff Working Document. The assignments under this lot may concern the development of one or several monitoring and evaluation tools[6] to be used by the Contracting Authority and/or the implementation of this (these) tool(s) by the contractor.

The choice of tool to be used will depend on the specific need, for example:

- Before an activity takes place, for defining messages and activities by evaluating their relevance and their actual and potential effectiveness;
- During the activity, in order to adapt it quickly if needed;
- Just after completion, to assess the activity as a whole and to learn lessons for the future.

Availability

These Framework Contracts (FWC) are available to all Directorate-Generals and services of the Commission as well as to other institutions, agencies and bodies listed below who would like to design, monitor or evaluate their communication activities.

For Lot 1: European Parliament (**EP**), European Economic and Social Committee (**EESC**), Committee of the Regions (**COR**), Education, Audiovisual and Culture Executive Agency (**EACEA**), European Research Council Executive Agency (**ERCEA**), Innovation and Networks Executive Agency (**INEA**), Research Executive Agency (**REA**), European Banking Authority (**EBA**), European Union Agency for Network and Information Security (**ENISA**), European Securities and Markets Authority (**ESMA**), Single Resolution Board (**SRB**), European Fundamental Rights (**FRA**).

For Lot 2: European Parliament (**EP**), European Economic and Social Committee (**EESC**), Committee of the Regions (**COR**), Education, Audiovisual and Culture Executive Agency (**EACEA**), European Research Council Executive Agency (**ERCEA**), Innovation and Networks Executive Agency **(INEA),** Agency for the Cooperation of Energy Regulators (**ACER**), Body of European Regulators for Electronic Communications (**BEREC**), European Banking Authority (**EBA**), European Union Agency for Network and Information Security (**ENISA**), European Securities and Markets Authority **(ESMA),** Single Resolution Board **(SRB),** European Union Agency for Fundamental Rights **(FRA),** European Aviation Safety Agency **(EASA).**

The FWCs are subject to decentralised procedures and responsibility. This means that the management of the specific assignments will rest with the Services/Institution/Agencies and bodies using it while DG COMM will ensure general co-ordination. The requesting Services will then have the sole responsibility for the budget and financial management of each assignment.

The FWCs are valid (4 years) until 19 December 2020.

Contacts for the DG COMM framework contracts

For any further requests and to request authorisation to use the Framework Contract, please write to: COMM-EVALUATION@ec.europa.eu (DG COMM D.1).

More information is available here DG COMM evaluation page

[6] See Small scale Evaluation tools

PART 4 of the toolkit

The evaluation process

- Evaluations methods
- Working with the contractor and meetings
- Reports to be delivered
- Quality assurance of reports

Evaluation methods

Evaluation of communication interventions will often involve a range of methods as capturing effects of a variety of communication activities is often complicated.

Some evaluation methods are common to the evaluation trade as a whole and others are more communication specific.

- Guidance on how to evaluate small scale communication activities *(Under construction)*
- Tools and methods relevant to the evaluation of communication activities

Working with the contractors and meetings

What is the role of the Steering Group during the implementation of the evaluation?

- Organise and hold regular meetings with the contractor
- Ensure timely access to available data and define consultation strategy
- Review and comment on reports provided by the contractor
- Undertake an assessment of the quality of the report(s) and comment on draft Staff Working Document

Meetings with the contractor

The following phases/meetings are standard for most large evaluation projects:

- "Kick Off" meeting
- Meetings on each of the reports to be delivered by the contractor: Inception, Interim, Draft Final and Final reports

Reports to be delivered

The number of reports to be delivered must be defined in the Terms of Reference (ToR) for the evaluation.

Small scale evaluations may involve only one report, i.e. the Final Report.

Large evaluations generally will also involve:

- An Inception Report
- An Interim Report
- A Draft Final Report
- A Final Report

NB: Consider if the maximum length of the reports should be provided in the ToR.

Content of the inception report

The inception report presents the detailed methodology and scope agreed between the Steering Group and the contractor. It should also report on challenges and opportunities encountered, and present an updated planning for the evaluation project. The approach should take into account the availability, quality and appropriateness of existing data.

The inception report is discussed at a meeting between the Steering Group and the contractor. The Steering Group will guide and advise the contractor on the further work.

Content of the Interim Report

The interim report is delivered by the contractor after the desk and field research has been completed, and should, to the extent possible, include some preliminary conclusions. It will describe the work done to date and that which remains to be done.

Draft Final Report and Final reports

The Final Report is the **key deliverable** of the evaluation process. It should provide answers to all the evaluation questions specified in the Terms of Reference. It provides findings, conclusions and recommendations and provides inputs to the next round of decision making. The critical judgement of the report must be based on evidence.

It must be written so as to be clear enough for any potential reader to understand – whether they have been engaged in the project or not. The Draft Final Report generally provides the main context of the Report and the annexes. The Final Report also includes an Executive Summary, conclusions and recommendations.

Minimum required content of the Final Report

- **Executive summary** (Max 6 pages)

Summary of **the methodology** used – and assessment of limitations.

- **Main report**: the results of the analyses and the contractor's judgement
- **Conclusions and recommendations** arising from the evaluation – based on a clear chain of logic between the analysis and findings and the answers to the evaluation questions
- **Annexes**: The technical details of the evaluation. They must – when relevant - include questionnaire templates; interview guides; any additional tables or graphics; references and sources etc.

Quality assurance and assessment

Continued quality assurance is important throughout the evaluation process if the contractor is to deliver high quality evaluation results.

All reports provided by the contractor should be scrutinised by the Steering Committee, and comments and revisions should be passed on to the contractor at the relevant report meetings and as part of the approval procedure. The contractor has a duty to remain 'evidence based', independent and professional in respect of presenting a 'true and fair' picture of what it has found.

Approval: All draft reports should be approved by the Steering Committee, before the final version report is submitted for acceptance to the Authorising Officer.

Quality assessment form

Following the approval of the Final Report, a Quality Assessment form must be signed by the Steering Group that demonstrates that the evaluation has met all the required standards. Additional comments can be included. **The Quality Assessment form is published together with the evaluation report.**

- More information is available here: http://ec.europa.eu/smart-regulation/guidelines/tool_46_en.htm

PART 5 of the toolkit

Publishing

Why publish?

As a general rule, evaluations produced by or for the European Commission should be published. Publication is important for the following reasons:

Transparency and accountability	• Towards the European public • Towards the European Parliament • Towards national stakeholders and governnments • Towards stakeholders
Learning	• To provide useful information and guidance to policy makers and stakeholders • To support exchange of good practice and lessons learned
Compliance	• To meet the requirements of the Financial Regulation, and of one of the mandatory *Evaluation Standards, i.e.* the Commission's Internal Control Standard n°14

Requirements: What is to be made public?

The evaluation roadmap, the final evaluation report and the Staff Working Document must be published together with the quality assessment.

Important: the Final Report should use the common format of the EC Evaluation Reports, i.e. respect the EC's visual identity. The EC Visual Identity Team is working on a template for evaluations. Until finished, please use the temporary template (for 'studies'):

The dissemination plan

Your dissemination plan lists the different audiences for the evaluation report and identifies if different summaries of the final report need to be written, tailored to the needs of the different groups – without altering the nature and meaning of the findings.

Publication may include:

- A Communication on the evaluation results to the European Parliament/Council
- Final report Draft Working Document + executive summary + quality assessment in EIMS on EUROPA
- Any related contractors report must be published in the EU Bookshop
- More information is available here: http://ec.europa.eu/smart-regulation/guidelines/tool_48_en.htm

Minimum obligations - publishing:

Publication on EU Bookshop of the evaluation final report, along with the quality assessment

- How to publish evaluation reports on the EU Bookshop

Useful links

- SG database
- EU Bookshop

PART 6 of the toolkit

Follow up

Follow up of your evaluation is important. Without follow-up on the conclusions and recommendations an evaluation will be of limited value. In this section you will find information on:

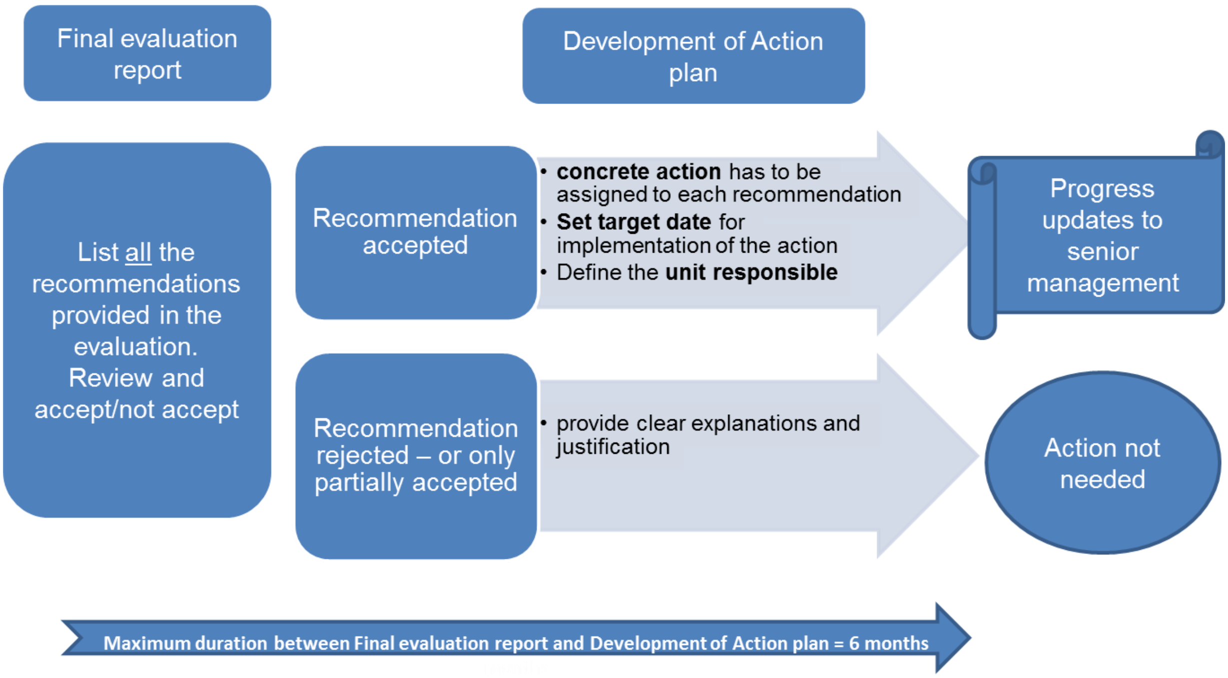
- The follow up Action Plan
- Techniques to improve the use of evaluation results
- Templates which can be used for your action plan

The follow-up Action Plan

As a part of the finalisation of the evaluation, a **follow up action plan** must be developed.

This plan is important to ensure that the Commission Services take ownership of the final evaluation results and reflects the results in future decision making/implementation process. The action plan will identify actions which are to be taken as a result of your evaluation, by whom and by when.

Your action/follow up plan should list all the recommendations of the evaluation. The following steps are mandatory.



Minimum obligations – follow up:
Appropriate follow up actions are to be defined within six months of the completion of the final evaluation report Regular progress reports/updates are to be provided to senior management

Techniques to improve use of the evaluation results

The following tips can help you to improve the use of the evaluation results:

- Ensure that you (or your contractors) have developed a "**policy briefing**". The policy briefing should be short. It should be easily accessible and focus on the recommendations which have been accepted. Circulate the policy briefing to senior management staff. Ensure that senior management support the suggested changes.

- Evaluation is about learning. Try to maximise learning from evaluation – looking at what can be improved. Ask your evaluators (or yourself!) to provide recommendations on "how to improve" – not only what to improve.
- Organise a "**final report" workshop** – where staff engaged in implementation discuss how in practical terms the recommendations can be taken forward. If your communication activity involves contractors or project holders, try to involve them. If the implementation of the recommendations have an impact on other units/DGs, it is important that you engage with them as well.
- Make staff **responsible** for the implementation of the recommendation and for reporting on progress – assign them specific tasks and organise progress reports/meetings.
- Keep a **transparent** record of the actions which have followed on from the recommendations.
- Share what you have learnt.

Format of the action plan

- More information is available here: http://ec.europa.eu/smart-regulation/guidelines/ug_chap6_en.htm

PART 7 of the toolkit

Glossary

Additionally: An impact arising from an intervention is additional if it would not have occurred in the absence of the intervention. It is the extent to which a policy objective is undertaken on a larger scale, takes place at all, or earlier, or within a specific designated area, as a result of public sector intervention.

Benchmarking: Consists of identifying practices, processes, measures or projects that contribute to high levels of performance and using them as a standard of comparison for evaluating other practices, processes, measures or projects.

Case study: An empirical enquiry drawing on a multitude of perspectives that may come from multiple data collection methods (both qualitative and quantitative). Case studies are information rich. They build up very detailed in-depth understanding of complex real-life interactions and processes.

Coherence: Evaluation issue. The extent to which the objectives, messages and the implementation of a communication activity are non-contradictory (internal coherence), and do not contradict other activities with similar objectives (external coherence). Coherence is particularly important at the policy evaluation level.

Content mapping/Audit of content: Manual structured mapping of the content of communication activities.

Contribution analysis: A qualitative approach which tests causal assumptions deduced from a logic model. Contribution analysis is an important step in "theory-based evaluation". It consists of gathering and analysing evidence to reconstruct the cause-and-effect story and reduces uncertainty about the contribution of an intervention on the observable outcomes and impacts.

Control Group: A comparison group consisting of eligible people or organisations which have been excluded from all participation in an intervention by a process of random selection. Apart from non-participation in the intervention the control group is comparable to the group of participants – it should be exposed to the same external (confounding) factors. Where random allocation is used the term Randomised Control Trial (RCT) is often used; where not the term comparison group may be used. Due to difficulties of isolation not much used in communication evaluation.

Deadweight: Expenditure to promote a desired activity that would in fact have occurred without the expenditure. These are the outputs that would arise under the base case/counterfactual.

Cost per thousand (CPT): The cost of reaching 1,000 of the target audience, e.g. 1,000 adults.

Counterfactual: The 'reference case' or counterfactual is a statement of what would have happened without the intervention or if the intervention had taken a different (but specified) form.

Customer journey mapping: The process of recording how a (potential) target audience experience a communication they are exposed to from their perspective (for example their experience when searching for information on a specific topic). This involves mapping the interactions and feelings that take place throughout the journey.

Data Mining: Interdisciplinary sub-field of computer science. Data mining is the practice of examining large data sets. The purpose is to discover and extract patterns of relevance in the data set and generate new relevant information.

Desk Research: Consists of compiling and studying secondary data and sources already available on the implementation of an activity. The purpose is to summarise, collate and synthesise existing relevant information.

Diaries: A data collection technique which captures data from participants as they live through certain experiences. The participants write up their experiences in diaries relating to observations, interpretations, perceptions, behaviours or feelings in a format which gives a temporal (time) dimension to the data collected. In communication evaluation used to collect qualitative feedback.

Effectiveness: Evaluation issue. The measurement of the extent to which the outcomes generated by the activities correspond with the objectives.

Efficiency: Evaluation issue. The extent to which the resources (inputs) used to produce the outputs are used as efficiently as possible (with lowest possible resources/costs). An activity that is assessed as having an effect may not be efficient if the same output could have been achieved with fewer resources.

Ex-ante evaluation: Evaluation type. This is a term used to describe an evaluation which occurs at the beginning of an intervention, in the planning or developmental stages. It gathers data and evidence to define the logic and rationale for an intervention and to develop a baseline and indicators.[7] These evaluations may involve elements of prior appraisal or impact assessment.

Expert panels: Data assessment method. An expert panel consists of assembling a group of experts chosen to contribute to a certain part of the evaluation which needs expert assessment. The outcome of the panel will involve the production of a qualitative value judgement based on their expert opinion.

Final/impact evaluation: Evaluation type. A final/impact evaluation is summative in nature and takes place at the end of a communication activity/intervention in order to determine the extent to which the outcomes and impacts have been achieved as a consequence of the intervention.

Focus group: A data collection technique. A qualitative technique involving a (usually) homogeneous group of individuals to discuss a topic, structured by a set of questions. A focus group is interactive and participants are free to talk to other group members. They are moderated by a professional moderator.

Footfall: The measurement of the number of persons attending an event in a given time (how many and who).

Impact: Evaluation issue. Impact indicates the ultimate effect of an intervention.

Indicator: An indicator is a quantitative or qualitative factor or variable that provides a reliable measurement which reflects the change of an intervention. They are specific observable and measurable characteristics. An indicator is about "how much" or "how many" or "to what extent" or "what size”.

Input: Evaluation issue. An input is the direct product or service provided or funded by the communication intervention. The nature of the input will vary but may be for example press releases or the conference for example.

Interim evaluation: Evaluation issue. Interim evaluations (or process evaluation) are intended to improve the decisions and actions of those responsible for communication activities. It mainly applies to an action during its implementation, and may be in the form of continuous feedback, or at specific points during the intervention.

Intervention logic: A presentation (usually visual) of the logical relationships between the resources, inputs, outputs, outtakes, intermediary outcomes and final outcomes – as well as underlying assumptions. The underlying purpose of constructing intervention logic is to map out the "if-then" (causal) relationships between the elements – and to set out the basis for measurement.

KPI: A key performance indicator, designate as such as it is a key measurement to evaluate the success of a particular activity.

Logic model: See intervention logic.

Media analysis: Media analysis is a tool used for the assessment of the effect of media/PR activities. It involves a structured analysis of media coverage.

Metric: A measure of activities and performance. Metric is a standard term used for online and social media measurements and other standard measures.

Mystery shopping: A market research tool used to measure the quality of a service or to collect specific information about products and services. It involves using people whose identity is not known by the organisation or service being evaluated.

Organisational review: Organisation reviews evaluate aspects of an organisation such as infrastructures in place, organisational strategies, systems and processes; human resources and development strategies.

OTS/OTH: Opportunity to see/opportunity to hear. A measurement of the opportunity associated with customer exposure - those who may have to the opportunity to see or hear something. Used extensively in advertising and is a measure provided by contractors responsible for campaigns.

Outcome / intermediary outcome: Evaluation issue. Intermediary outcomes are associated with the action that the target audience took as a direct effect of your communication activity. Outcome is the expected final effect of your intervention.

[7] See Code of Conduct (Annex II – Page 11)

Output: Evaluation issue. In communication measurement an output is usually a measurement of those directly reached by your activity, i.e. the number and type of participants to an event you have organised, the number of people who may have seen your advertising etc.

Outtakes: Evaluation issue. The (expected) direct effect on the intended target audience. It may refer to awareness, learning or knowledge. It is an intermediary step toward the expected effect.

Participatory observation: Data collection technique. Participatory observation involves observing and reporting on implementation, dynamics of events, as well as reactions of the participants.

Primary data: A term used by evaluators to designate data that will be collected by the evaluators during the evaluation (as opposed to secondary data).

Process evaluation: see interim evaluation.

Qualitative data: Descriptive data. Data that approximates or characterises but does not measure attributes, although it is observable. It describes, whereas quantitative data defines. Qualitative data is collected via qualitative research methods (e.g. focus groups, unstructured/semi-structured interviews, participatory observation etc.).

Quantitative data: Measurable data. Is not only limited to numbers, but covers also quantification of opinion or attitudes (e.g. the share of persons agreeing to a statement or show satisfaction with a service). Methods such as surveys are used to collect quantitative data.

Ratings: Advertising measurement. The percentage of audience within a specified demographic group which is reached at a given time (e.g. one minute, for the duration of a programme).

ROI (Return on investment)/ROMI (return on marketing investment): Calculation of the financial return of a campaign. ROI is used extensively in private sector communication. In the public sector it can only be used in cases where there is a potential financial gain of a campaign (e.g. financial return from public health saving which follows from changes in behaviour, such as people having stopped smoking).

S.M.A.R.T: Criteria which are used to guide the setting of objectives. Objectives which are SMART are Specific (target a specific area for improvement), Measurable, Attainable, Realistic and Time-bound.

Secondary data: A term used by evaluators to designate data that is already available for the evaluation. It may include monitoring data, statistical data or other sources of data that evaluators may use to inform their evaluation.

Share of voice: In Public Relations, share of voice is the weight of editorial media coverage obtained by the release/media exposure on an issue, compared to the coverage obtained by other actors on the same issue.

SWOT: Method of analysis that maps out the strengths, weaknesses, opportunities and threats that are involved in the situation to be addressed by an intervention. Can also be used to assess different options for future action.

Terms of Reference: The document setting out the requirements and scope of a contracted evaluation.

Theory based evaluation: Evaluation approach. A theory-based evaluation focuses on programme theories, i.e. the assumptions on the preconditions, mechanism and context for an intervention to work – as mapped out in the intervention logic. Theory-based impact evaluations test these assumptions against the observed results following through the different steps of the intervention logic and examine other influencing factors. Theory-based evaluations aim to explain why and how results have occurred and to appraise the contribution of the intervention and of other factors.

Tracking studies: Studies in which the same market research (surveys/polls) is deployed periodically over time (two or more times).

Web analytics: Used to monitor and evaluate web traffic. Measures reach, topical interest etc.

Website usability audit: Expert assessment of websites through testing of the website (usability, quality etc.).

PART 8 of the toolkit

Quick links: HOW TO….

In this section, you will find quick links to help you plan and evaluate your communication activities.

PLANNING: How to set objectives, develop your intervention logic and plan for measurement of your communication activity

- Planning of complex communication interventions and campaigns
- Planning a single communication activity

SETTING INDICATORS [8]

- How to develop your indicators and your monitoring system

EVALUATION of individual activities

Here you can find guidance on how to **measure** and **evaluate** information and communication activities.

The tools[9] suggested are all relatively easy to use and do not require substantial amount of resources. You can use the guidance to undertake the evaluation **yourself**. Alternatively, you can use the guidance to identify which methods you would like a contractor to use when evaluating your activity.

- How to evaluate **Conferences**
- How to evaluate **Newsletters**
- How to evaluate **Websites**
- How to evaluate **PR events**
- How to evaluate **Press events**
- How to evaluate **Social media activities**
- How to evaluate **Smartphones applications**
- How to evaluate **Publications**

TENDERING of evaluations

- Overview of types of evaluations
- What do individual evaluation methods and tools cost?

METHODS for evaluations

- Tools and methods relevant to the evaluation of communication activities

[8] See Code of Conduct (Annex II – Page 11)
[9] See Small-scale Evaluation Tools

FRAMEWORK CONTRACTS available

Lot 1 — Impact assessments, Evaluations (i.e. ex-ante, interim, ex-post evaluations, Fitness Checks and meta-evaluations) and other evaluation-related studies in the field of communication activities Lot 2 — Development and implementation of monitoring and evaluation tools[10] and systems

- Description of the FwC

Contact COMM-EVALUATION@ec.europa.eu

REQUIREMENTS for reporting (contracted evaluations)

REQUIREMENTS for publication and follow up

LINKS

- Database of evaluations -EIMS
- EU Bookshop [search 'evaluation*']
- Management Plans all DGs

[10] See Small-scale Evaluation Tools

1 Documents supporting PART 2 of the toolkit

Document 1: Overview of types of evaluations (PDF)

Ex-ante evaluations

Ex-ante evaluation is a way to gather data or evidence to guide the design of communication activities. It includes information on how issues are framed, or what the public/audience thinks about an issue. It is extremely useful to undertake an ex ante evaluation at the design phase as it helps to set out the objectives and feasibility of approach.

Ex-ante evaluations of communication could comprise one or more of the following:

- Scoping out the nature of the problem to be addressed (where, who, magnitude of the problem)
- Target group analysis and segmentation
- Exploratory research into target group's perception
- Media screening
- Research on communication choices/decisions and further orientation of communication policy (collection of information on target group and policy field)
- Stakeholders' assessment of communication options and their support for these
- Focus group research (mapping of dominant frames, emotions, arguments, concerns and opportunities in relation to communication options)
- Assessment of the relevance and potential usefulness of a planned intervention

An ex-ante evaluation is helpful for designing the communication intervention, and in particular to:

- define SMART objectives
- define the target audiences
- determine the choice of communication activities/tools [11]
- Identifying and setting performance metrics

In any case, ex-ante evaluation should be included in a more or less formal manner as an integrated part of the planning process of any communication activity.

Ex-ante impact assessments are a special form of ex-ante evaluation required for any EC legislative proposal, but normally not relevant for the evaluation of communication activities.

Interim evaluations

Interim evaluations (or process evaluation) are intended to improve the decisions and actions of those responsible for communication activities.

While ex-ante evaluations focus on collecting information to support the design of communication activities, interim evaluations focus essentially on implementation procedures and their effectiveness, efficiency and relevance.

Interim evaluations examine the implementation, or the way activities roll out as well as the efficiency of the communication intervention. Interim evaluations use the results of monitoring to make judgements on the success of the activity and to adjust it where necessary. This is one of the most common forms of evaluation in communication activities.

Interim evaluation is mostly focused on inputs and outputs and in some cases outtakes (what activities are undertaken, who are reached by the activities what happens as a direct effect). However, if the life-span of the activity is sufficiently long, it may aim at identifying outcomes. Interim evaluation can provide management-oriented information on issues such as:

- Types and number of communication tools developed, and disseminated
- Relevance of, and demand for, each type of communication tool and message
- Web site traffic, including services that assess hits to a site, visitor navigation patterns, who visited and how long they stayed
- Earned media coverage and media content
- Target audience outreach
- Initial reactions to communication activities

Final/impact evaluations

Final/impact evaluation looks at the implementation of the communication activity in order to draw conclusions about the results and outcomes of a communication intervention (effectiveness).

In line with the requirements of the Secretariat General the evaluations should also consider: relevance, efficiency, coherence and EU added value.

This type of evaluation examines the outcomes, which usually means its effects on its target audience(s), as well as the causal relationship between the activities being evaluated and the outcomes. It generally measures:

- Outputs
- Outtakes
- Intermediary outcomes (where possible)
- Final outcomes (where possible)

Changes refer to effects on the knowledge, attitudes, and behaviour within a target audience.

Document 2: How to set objectives, develop your intervention logic and plan for measurement of your communication activity (PDF)

Communication planning – planning for campaigns and complex communication interventions

Introduction

This document provides guidance for complex communication planning where there are integrated sets of communication activities with a single communication aim.

The guidance document is especially helpful for planning communication campaigns.

However, you can also use it to get advice on how to plan complex communication interventions – making sure that the associated activities are properly planned and targeted.

Are you planning a single communication activity?

Go to "Planning a single communication activity" which provides short guidance on how to set SMART objectives, target audiences and steps to success.

This document can be found in the evaluation resource.

Principles for good communication planning

There are eight key principles to effective planning of public sector communication[12]:

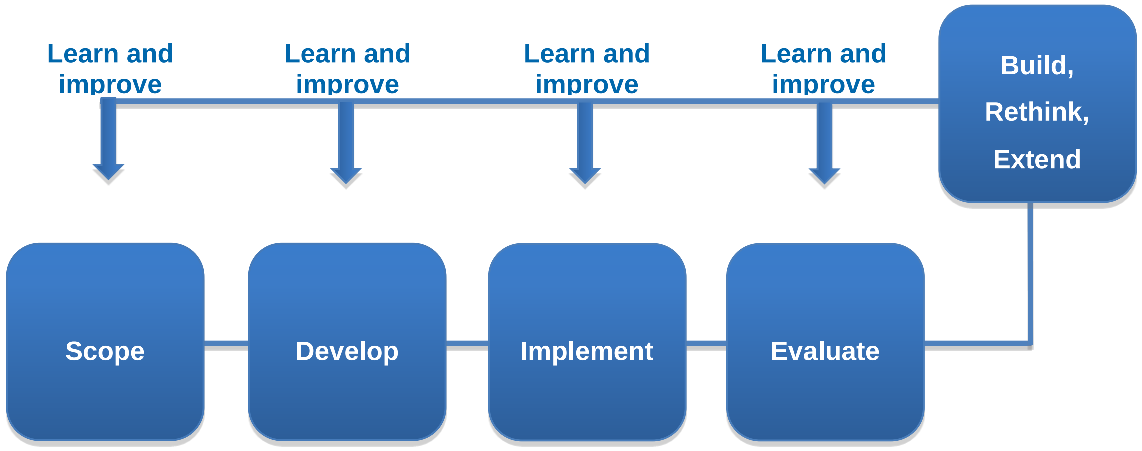
- Grounded in intelligence/through research
- Identify and target the right segments
- Aim for behaviour change (most often)
- Develop motivating propositions
- Cut through a complex environment
- Recognise people's whole experience (including delivery)
- Work with policy, delivery and stakeholders to deliver improved experience
- Be open and accountable

Best practice communication emphasises the need to continue to learn and improve continuously across the process which starts with Scope (intelligence, aims and audience), Develop (objectives, messages), Implement (actions) and Evaluate.

The process for communication planning, evaluation and learning is illustrated in the figure below.

[12] The UK Government calls them the "Engage Principles"

Engage: the planning process



Source: UK Government Communication Service

There are a number of steps to better communication planning – and better planning means better evaluation.

Follow these steps and you will not only produce a workable plan but you will also produce one that will lead to a realistic and usable evaluation.

1. Intelligence

Before starting your communication planning, gather what you know, what your colleagues know and what's happening out there beyond the Commission. Your planning can only be done from this solid foundation. There are some tools further down this guide to help you, but the essentials are:

- **Who has an interest in this issue**? Who will support; who will criticise; who has influence; who has to end up delivering? Which other DGs have a stake in this? Can you prioritise the stakeholders (internal and external) who can most help? Are there relationships you need to change? Are the roles of others in the Commission defined?
- **What else is going on out there?** What is happening across other European institutions, in Member States, the third sector, the media, society? Can you complement other activities? What is going on in the individual lives of citizens? What (if anything) are people saying about your issue? Does it show up in Eurobarometer – and, if so, what has been the path it has followed?
- **When?** Is there a timescale? Does something need to have happened by a specific date (e.g. people signing up to something before a closing date)? Is there a crucial milestone to aim for?

You might find both a PESTLE and a SWOT analysis useful here. PESTLE stands for Political, Economic, Sociological, Technological, Legal and Environmental and SWOT stands for Strengths, Weaknesses, Opportunities and Threats. They are fairly common tools and the details of how to use them can be found online at many sites[13].

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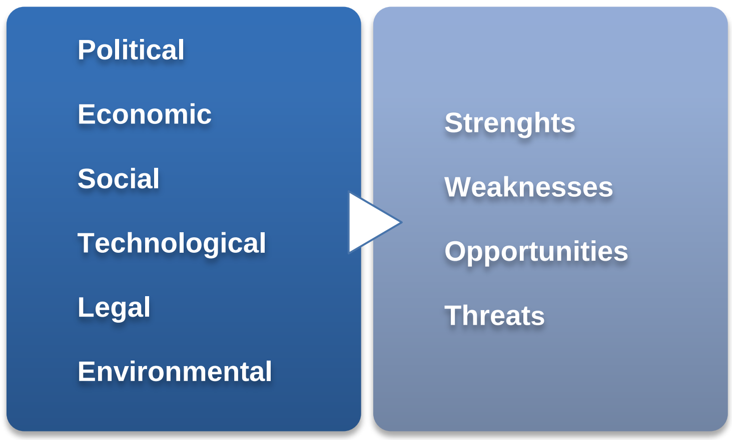
[13] for example: http://www.jiscinfonet.ac.uk/tools/pestle-swot

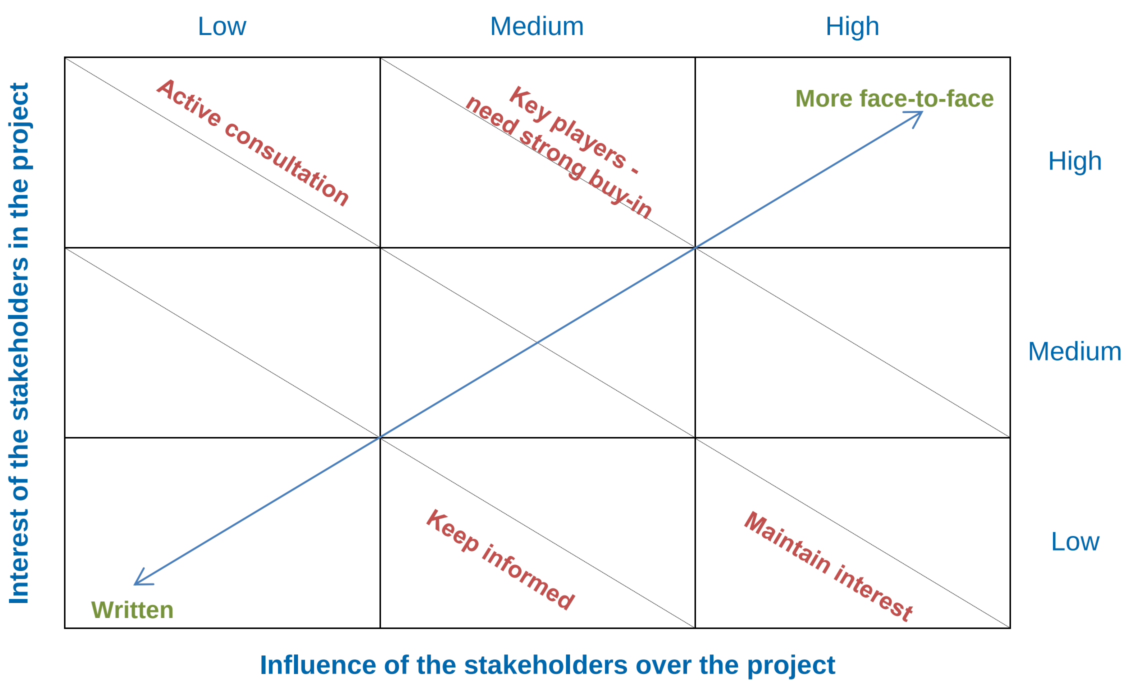
PESTLE and SWOT



Source: Jisc infoNet

You might want to map your stakeholders as well at this point. They are not necessarily your actual audience for the communication intervention but those who can influence the outcome. Stakeholder mapping is often done using a “Power-Influence” grid, such as this one:

“Power-Influence” grid



Or as a pyramid, such as this one:

No one has unlimited time. Make reasonable efforts to find out what you can, but be pragmatic. You can't spend weeks finding out. Do not be afraid to go with what you have got. If your project is complex you may need to use external contractors to help you.

Write down what you now know and think about what you do not know but feel you should know about the policy/issue.

Can you use any of these to learn more about the subject: the results of speeches; polls/surveys; briefing papers; conversations with stakeholders; news releases and media coverage (from available media monitoring and media analysis); from political reporting as provided by the Representations; Google; blogs and chat rooms?

At the same time, start a list of any known hearings, conferences, events, meetings, speeches etc. in the coming weeks and months relating to your issue or your audience. Include anything you know about relevant activities of other European institutions - such as the EP, other DGs and EC agencies - of NGOs and, if appropriate, businesses and trade associations.

Use the following figure to help you sort out this intelligence:

Mapping out the baseline for your communication intervention

Who...

- Who is involved with the policy/issue?
- What do they need from us
- What do they think of us?
- What are the barriers to involvment?
- How important/engaged are they

What...

- Do we need the policy to deliver?
- What has happened before?
- What worked in the past?
- What doesn't work anymore?

Where...

- Where do changes need to be made?
- Where are the key areas?
- Where is the best practice taking place?

When...

- Does this have to be done by?
- When do we have to start?
- When are the milestones we need to be aware of?

Which means?

- What does all this mean for communication?
- What do we have to take account of?
- Who has to approve/agree/support us?

2. Aims

Many communication plans fall at the first hurdle by failing to think through just what you want communication to do and by not setting realistic aims and objectives. A first step is to look at the overall policy and establish the purpose of communication in association with this policy. You need to think through how communication might help – and what it cannot do. This information and analysis will feed into the development of a communication intervention framework where communication objectives will then be established.

Communication can help policy in several ways.

- **Persuade** – get someone or a group to do something that they otherwise would not have done;
- **Inform** – give basic information about a new policy, stance, service, regulation or requirement, without necessarily prompting action;
- **Normalise** – give people the sense that everyone else is doing the same as the activity you suggest (such as taking 'flu precautions), that there is a societal expectation for people to do a

certain thing – or not do something (such as smoking near children). Or, that by not doing it, they are missing out;

- **Inspire** – motivate someone to want to do something new, to continue doing something or to stop doing something. It tends to prompt an emotional response;
- **Engage** – to engage people around an issue and encourage participation in a debate or activity (e.g. encourage contribution to a consultation); a two-way dialogue;

Beware of 'awareness-raising' as an aim of communication. This is a poor basis for planning communication as it is almost never an end-goal – in other words it is usually an intermediary step, not an aim in itself. Think about what you would like your target audience to do with his or her new found awareness – that is your aim.

Can you, or should you, break your aim down into phases, for example: launch followed by consultation followed by decision followed by implementation followed by reaction? By breaking down your overall aim, it will be easier to think about what communication can do to help move through each phase, getting closer to your overall aim.

Now, although you have more to do before preparing a full communication intervention framework, think about the possible role(s) for communication.

Take each of the phases and think what communication can do to help it move the policy/issue along.

3. Audiences

Now you know what you want to achieve. Before writing SMART communication objectives, you need to work out who you want to reach and why. The more clearly you define your audience at this stage, the more effective you should be in reaching them.

One of the least true things ever said (at least to the communicator) was Mark Twain's "The Public is merely a multiplied me." We know better.

Aim for more narrow definitions of the target audience in plain language. Be clear about who you mean and then find out more about them – age, occupation, a characteristic about their family (demographics), their aspirations and thoughts about a topic (attitudes), or by the different ways they currently act and behave (behaviours). It is useful also to know how they consume media: do they rely on TV, Radio or social media?

Be as specific as you possibly can be. For example, instead of targeting "the public" about Enlargement, you should 'drill down' further – are you really targeting a young audience between the ages of 16-24, because they have less of an understanding of the history and benefits of Enlargement and it is important that they do? And, if so, is that true for all socio-economic groups in all MS, or more so in some? The public in Europe is a sizeable group and the remit of the EU institutions to serve all should not be used as an excuse not to target more specifically. "The public" is not a target audience in professional communication terms. "The public" means 'everyone', so by choosing it you have failed actually to target anyone.

Also, the editorial media (i.e. journalists) is not a target audience in this context. The media is an influencer and a channel to reach your audience. Talking to the media about your issue is a means to an end, not an end in itself.

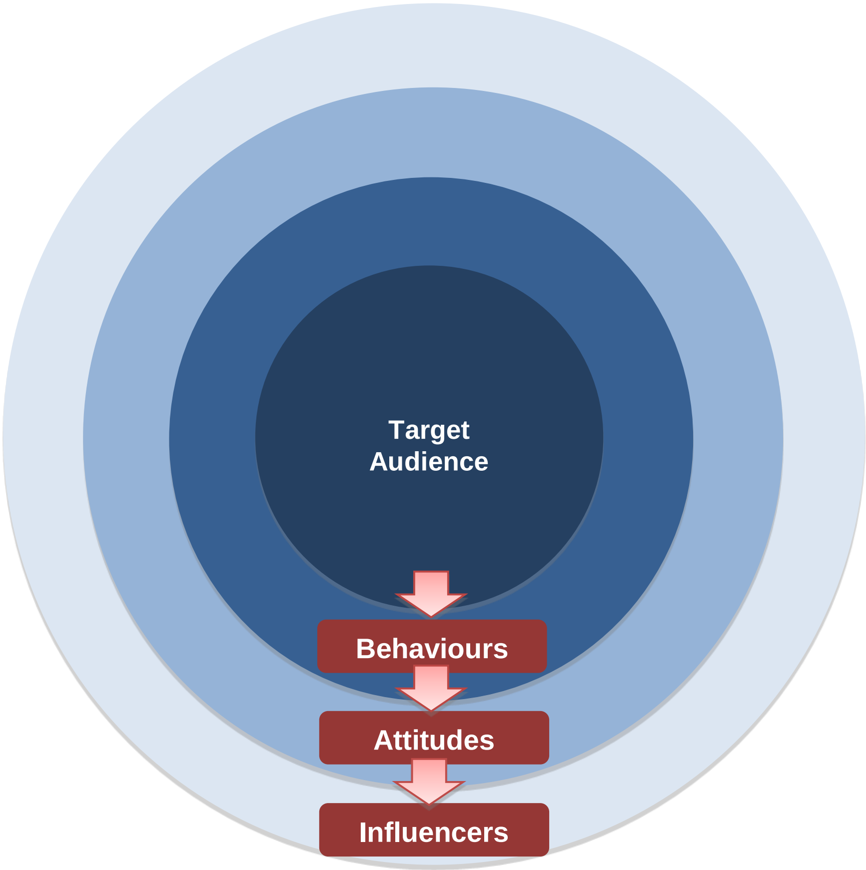
People are influenced by 'people like us' more than they are influenced by voices of authority (such as Commissioners). Social norms are very powerful; more powerful than being told by institutions what is good for you. Discover the relevant behaviours and social norms among your target audience – and who the greatest influencers are. With the growth of social media, for example, 'friends' and even 'friends of friends' (that you have never met but see their posts on Facebook) are more powerful influencers than, say, the editorial media.

Think about who is most influential. A small number of powerful advocates can make big things happen. The trick is identifying that group. The smaller and more well-defined a target group is, the easier it is to develop focussed communication that will really have an effect on them.

Communicators in the EU institutions can get overwhelmed by the potential size and complexity of their audiences. They can also get driven towards not actually selecting the groups from the public that they need to, or can realistically, effect. This should be resisted for two reasons:

- If you try talking to everyone, you will probably end up being so limited in reach and general in message that you will fail altogether
- You will annoy those who you do reach and to whom the message is irrelevant – making them less likely to listen to you next time.

Try using this 'bull's eye' tool (either by yourself or in a workshop) to gather everything you know, or can properly assume from other sources about their status: attitudes, behaviour and those who influence them.



- What is their demographic? (age, gender, social class, income, geographic location)
- What behaviours that they have relating to this that you want to change?
- What are their attitudes to your policy (positive, negative, and why)?
- Who are their influencers (peers, opinion leaders - where they get their information from)?

Here is a figure that will help you record this stage:

A) What are they like now?

Include here:

- Current behaviours and attitudes to the policy
- How do they behave relating to this policy issue?
- What do they need to know?
- What are their barriers to change?

B) Where do you want them to be?
This should be the communication aim you set out in the previous phase**.**

Include here:

- What do you want them to think, say, feel and do?
- What a successful change of behaviour or attitude would look like

Example of a well-targeted EC funded campaign

The EC funded and award winning "Quit smoking with Barça" campaign used the insight that "men have a strong loyalty to their football club and feel they are in the same boat as the others on the programme. In the end they feel they are improving their health for the sake of their club and are proud to be awarded a T-shirt"[14]. This insight led to designing a campaign that emphasised the links to the fans' club, FC Barcelona: at the heart of the campaign was a free on-line tool called FCB iCoach, - a telephone app which offered updated support with the participation of Barça players, coaches and staff.

So, understanding your audience, in depth, can lead to insights that enable you to select better messages that resonate with the real world of your audience.

4. Objectives

Now you know what you are trying to achieve, who you need to reach and have an understanding of what part communication will play in the overall policy plan.

Before you are ready to move further into communication planning you need to understand what the exact role communication will/can play and the reasons why you are using communication rather than any of the other ways (known as 'levers') that the EC could achieve the same aim.

You need to create what is called an **intervention framework** that illustrates the main and secondary roles for communication (and social marketing) in informing or persuading.

Creating an intervention framework is also important for measurement and evaluation. If you know the role for communication, you know what you need to measure in order to see if that role is being fulfilled and to evaluate if it did so.

Once you have your intervention framework, you can move onto creating specific communication objectives that meet that role. Remember, just like deciding "the public" is an audience, if the objective

[14] Dr Cindy Gray, Glasgow University in "A force for good: football can help tackle smoking and obesity", The Guardian 8th April 2013.

is too broad, the decisions made from this point on will be vague and are likely to lead to eventual failure.

Best practice says that you should make your objectives ‘**SMART’**:

This means that you should be ‘specific’ about audience and phase and the role for communication, as well as your aims. You objective should be ‘measurable’ – try doing some quick maths to put the task in context, how many people are you trying to reach and what will success mean in numbers terms?

Think how you can measure success across all the phases.

SMART objectives are:

- *Specific* – target a specific area for improvement
- *Measurable* – quantify or at least suggest an indicator of progress.
- *Achievable* – within budget and resources available
- *Relevant* – Result-based or results-oriented
- *Time-bound* – associated with a target date

Obviously, objectives that are not ‘attainable’ are not really worth your time or public money being spent on them.

You have to be really clear that what someone wishes might happen is not the same as what can happen. Sometimes this means that the communicator has to push back on unrealistic objectives handed down to them – otherwise your efforts will fail and communication will get the blame.

In order to make your objectives ‘relevant’ you need to focus on the priority audiences and only the most important aims for them.

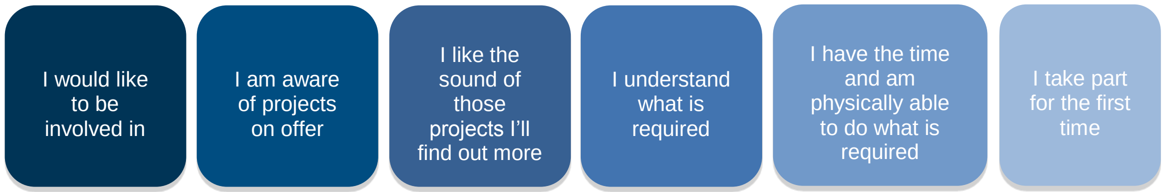
Staying ‘timebound’ means that you should go back to your timetable and work out what you need to achieve in each phase before you move to the next. And, it should take into account any external time issues that you need to work into your objective now.

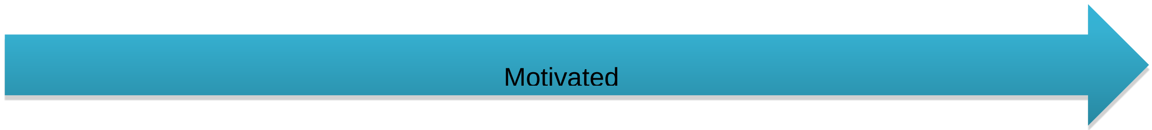
You should in the end have a journey with different steps to help people move from one place to another. This journey shows how people become conservation volunteers.

The steps here are mostly emotional, though there are some practical issues to be solved. They point the way clearly to the objectives for each phase:

Audience engagement level

Audience commitment stage





Setting out the objectives

Since your objectives are based on everything you have learned before, it may help to set them out that way:

Template for setting objectives

Policy / Issue Phase	Audience	Communication Aim	Objectives / Journey
What phase are you at?	*Who is the best audience for this?*	*What is your overall desired communication outcome*	*What are your SMART communication objectives?*

5. Messages/content

Now you know who you want to reach and what you want to achieve.

So, it is time to decide what you need to say that will get your audience to react in the way you would like them to. While you are doing this, remember all the time that it is the audience to who the message/content has to appeal, to give meaning, to resonate, to motivate.

Usually the message/content is not for the institution, the politician, the hierarchy. It is important to remember that, while in small scale communication actions you may be writing all stages of the message/content, in larger campaigns the later stages – known as the creative copy stage – will be done by an agency but will be based on what you produce now. In effect, this becomes your 'brief' to that agency.

The essential outputs of this stage are a 'core script' and 'calls to action'. The core script is your hardest working communication tool and every minute of time spent improving it saves time later on and avoids wastage and reduces the possibility of failure. Your core script should be built around the aims for the communication you set out in the earlier stages – make sure that you refer back to them constantly. What is it you are really trying to say to your audience – in their terms?

A core script may include a maximum of four or five key messages, killer facts and statistics and any explanatory/defensive lines to take on current criticisms.

‘Calls to action’ are slightly different. These are single messages to a single audience. Developing ‘calls to action’ helps you clarify what exactly you want people to do differently and will help improve your communication channel and activity planning.

Remember:

Your “calls to action” should be tied in explicitly to the audience that you have identified and the journey you want them to go on.

For both core scripts and “calls to action”, consider that every word matters: for example

- Do some words upset your audience or bore them? Good communication is about personalising the message and needs to address your aim: what do you need to say to get person
- From where they are now on the journey to the next stage? And the one after that? And to the ultimate goal?

Other questions you need to take into account when drafting your audience centric core script include:

- What information do they need?
- What reassurance do they need?
- What action do they need to take? When?
- Have you said what the benefits are to them?
- If you are asking them to make a significant change, are you presenting a compelling reason for them to change?

Here is a simple template for recording your overall and audience by audience messages/content:

<table>
<tr><td rowspan="3">Key messages for the overall policy
Here
Here
Here
Here</td><td>Audience A key messages and/or call to action
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<tr><td>Audience B key messages and/or call to action
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Here
Here</td></tr>
<tr><td>Audience C key messages and/or call to action
Here
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</table>

6. Actions

Now you have decided what you need to say, to which people, when, and for what reason, it is time to think about the 'how' – the types of communication which will resonate with your audiences, and help bring about the change you seek.

You are now at the action planning stage.

One of your immediate challenges here will probably be budget. Remember, all communication activities are not the same. Each will have its own characteristics which can help or hinder your message reaching your audiences with enough weight and frequency to have the desired effect.

Start by addressing these aspects of the communication channels that you are considering:

Reach

- How many?

Who

- Who uses it, are they all the right people?

Context

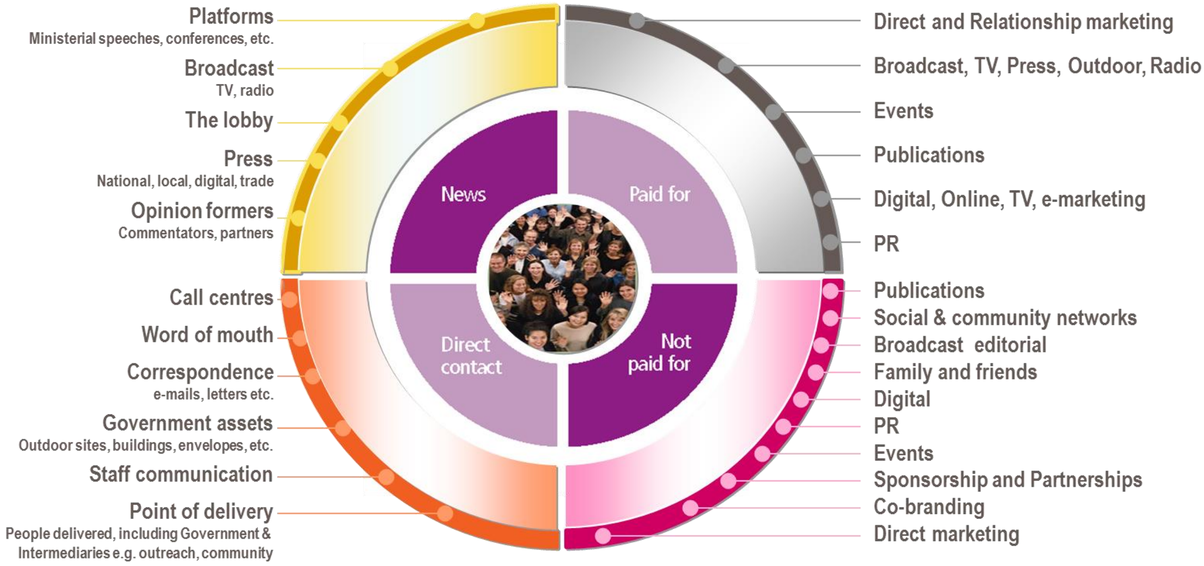
- How is it consumed?

Moment

- When does it reach them?

Above all, your tactics should be realistic. A handful of smart, well planned and executed activities will be more successful than doing a bit of everything.

Think how would your audience best like to be spoken to – what do they use and like? These are some of the options available to you:



Source: Engage

From this, you can build up your matrix of activities against audience, aim, etc.:

Policy Phase	Audience	Communication Aim	Objectives/Journey Message	Activity
What phase are you at?	*Who is the best audience for this?*	*What is your overall desired communication outcome*	*What are your communication objectives?*	*What activity will you undertake to achieve it?*

7. Evaluation

Before you begin to implement your communication plan, you will want to make sure that you can monitor progress and to make sure that the activities you planned are having an impact; and the audiences you identified are beginning to respond to your message.

Agreeing upfront ways of measuring success will help you signal your progress internally and externally (to partner organisations, for example). These should be linked to the:

- Audiences;
- Aims;
- Objectives; and
- Actions that you have set out already.

In order to provide a baseline for measurement, use the matrix on the next page to define which indicators[15] are the right ones.

Use then the PdF **Setting indicators[16] for your communication actions: development of your performance framework to define the specific indicators[17]** which forms part of the guide available online.

You can use the checklist at the end of the document to see if you have remembered everything.

[15] See Code of Conduct (Annex II – Page 11)
[16] See Code of Conduct (Annex II – Page 11)
[17] See Code of Conduct (Annex II – Page 11)

Context	Communication Aim	Audience	Communication Objective	Messages / Content	Steps for action	Activities	What are the signs of success for this activity?	How it can be evaluated
Which policy will your communication support What are desired policy outcomes (what is the policy trying to achieve) **Be specific about these objectives (SMART)**	What is your desired communication outcome	Who is the best audience for this?	What are your communication objectives? (SMART)	What would you like your audience to learn / known / support / do	What are the steps you expect your audience to take?	What activity will you undertake to achieve it? Do they link back sufficiently to the previous steps?	How many people doing/knowing/supporting what? What indicators[18] will best show success?	How will you collect data to inform your indicators[19] How will you analyse data • By whom • When

[18] See Code of Conduct (Annex II – Page 11)
[19] See Code of Conduct (Annex II – Page 11)

Resuming your approach: setting out the intervention logic

To help you set out the right indicators[20] and measurement you can use the following intervention logic model. Consider what would be ideal to measure and then what is practically feasible. Try to set measurement as far as you can. Always ensure measurement beyond inputs.

Communication Objective	**Inputs** **(which activities will you do)**	**Output** **(who and how many will you reach)**	**Outtake** (what will the be the direct effect of your activity)	**Intermediary outcomes**	**Final outcomes**
What are your communication objectives?	What activity will you undertake to achieve it?	Who will you reach and how many	What will the audience learn, be aware of, understand?	What did they those we reached do as a direct result of being aware/having acquired new knowledge?	Did you achieve your overall objectives?
	What activity will you undertake to achieve it?	Who will you reach and how many	What will the audience learn, be aware of, understand?	What did they those we reached do as a direct result of being aware/having acquired new knowledge	
	…..	…	…	…	
	….	…	…	….	
How will you measure	**Inputs**	**Outputs**	**Outtakes**	**Intermediary outcomes**	
Questions for setting indicators	Did we undertake the expected activities? Are the activities of quality? If we partner/fund other organisations, have they done what we anticipated?	Did we reach those expected?	What did they learn, become aware of as a result of our inputs? What indicators will best show success?	Did they take any steps towards the desired final outcome? What indicators will best show success? Think about the type of response that would be desired. Prioritise those that are most important.	What indicators will best show success?
Which methods will you use to measure?	Add the tools you could use to measure – e.g. volume, quality, value-for-money	Add the tools you could use to measure how many were reached and compare with the total audience.	Add the tools you could use to measure. Remember to consider how to calculate attribution and the contribution of communication among other interventions.	Add the tools you could use to measure. These may well be actions such as signing up to a programme or requesting more information.	Add the tools you could use to measure. These can be over the short, medium or long-term.

[20] See Code of Conduct (Annex II – Page 11)

Contextual indicators[21] and assumptions
■ What are the assumptions on which the intervention is build? Which external factors could influence the success of our activity? If these are important you want to consider these in your monitoring framework. Lack of effect may be due to factors outside of your control

[21] See Code of Conduct (Annex II – Page 11)

Checklist for a communication plan

In developing my plan, did I follow the recommended process?	YES	NO
Is my plan based upon a full understanding of the issue that is supposed to address? Have I taken into account as many factors as possible surrounding the issue – including previous communication activity and data from sources such as Eurobarometer, the Representations and media analysis? How will success of the whole EC intervention in this issue be measured?	YES	NO
Have I used PESTLE/SWOT analysis to understand the challenge in detail?	YES	NO
Did I discover and map the stakeholders for power and Influence?	YES	NO
Have I got agreed, clearly defined, expected outcomes that can be both measured and attributed to the communication activity?	YES	NO
Have I defined the specific role of communication? Is it to Persuade, Inform, Normalise, Inspire, Engage or Recruit? Have I completed a communication intervention framework to define its role? Was this agreed with management?	YES	NO
Have I defined the target audience in sufficient detail? Do I know their behaviours, attitudes, who and what influences them and their preferred media?	YES	NO

Have I found out which external organisations could be partners in my communication activity or act as multipliers for my messages? If so, have I taken them into account/negotiated with them before completing my plan?	YES	NO
Have I determined specific objectives for each segment of my target audiences? Are these objectives all SMART? If not, have I clearly noted why not?	YES	NO
Have I created an analysis of my audiences against my objectives that brought insight to what I plan in terms of messages and actions?	YES	NO
Did I create a core narrative of what I wanted to say and took that into my messages and calls to action? Are they audience centric?	YES	NO
Are my proposed communication activities making the best use of available communication tools[22] that are most likely to achieve my objectives? Do they maximise reach and impact? Are they proportional to the size of the audience, the required Reach and Frequency that will be needed to have a measurable effect? If not, have I re-assessed the value of doing the activity at all?	YES	NO

Have I determined the means by which I will measure the effect of my proposed communication activities, their reach and effectiveness? Have I specified success and impact evaluation indicators[23] for each communication measure in order to determine the outcome of the strategy?	YES	NO
Have I included a detailed map of how the activity is to be evaluated in ways that clearly show the causal link between what we do and what impact it has on the desired outcomes of the overall EC aims?	YES	NO
Did the measurement and evaluation plan include value-for-money criteria so that the cost-benefit of the action can be assessed?	YES	NO

[22] See Small-scale Evaluation Tools

[23] See Code of Conduct (Annex II – Page 11)

Document 3: How to develop your indicators and your monitoring system (PDF)

Setting indicators[24] for your communication actions: development of your performance framework

Baseline for development of the performance framework and setting indicators

Before considering which indicators[26] to choose, preparatory work is needed. There are no 'measures' of success that you can apply uniformly.

Use the following checklist to ensure that the baseline is set before developing your performance framework.

Is the baseline defined?	Yes	No	Why is this important for setting indicators[27] and choosing metrics?
Clear objectives are defined for your action – that is the **difference** that your communication action will make (SMART objectives – or SMART as possible)			If the objectives are vaguely defined - or defined in terms of activities only it will not be possible to choose relevant indicators. There is a strong risk of measuring only the activities – or alternatively things which are not relevant (or measuring everything).
The roles that the different communication activities will play are defined (if your communication intervention contain several activities)			If the expectations for the different activities and for how these will contribute to your objectives are not defined, measurement will not be meaningful. Also, measurement in view of expectations for specific activities will help identifying aspects that may explain lack of success.
Your target audience is clearly defined - not just in general terms (general public, stakeholders etc.) but specific audiences that you are actually likely to reach with your intervention.			If the target audience is not clearly defined, it will not be possible to measure if you have successfully reached it.
If your final audience is different from those you are directly reaching out to – **both** are well defined			If your final audience is not well defined it is also not possible to judge on whether you reached the relevant multipliers (specific stakeholders, specific media etc.).
You know **how** your communication intervention is expected to achieve the objectives set. That is – if successful – you know what messages/content your target audience sees – and the effect that it is expected to have.			If your "change model" is not clear it will not be possible to set indicators to measure if the effects are those that you expect. Mapping out the "steps to success" will help you identify the right performance measurement.

[24] See Code of Conduct (Annex II – Page 11)
[25] See Code of Conduct (Annex II – Page 11)
[26] See Code of Conduct (Annex II – Page 11)
[27] See Code of Conduct (Annex II – Page 11)

Need help to set out your objectives, target audiences and the steps to success?

If you are planning a one-off activity (e.g. a conference, a website or a small scale activity) go to:

- "**Planning a single communication activity"** which provides short guidance on how to set SMART objectives, target audiences and steps to success.

If you are planning a larger multi activity communication action/campaign go to:

- **How do set objectives, develop your intervention logic and plan for measurement of your communication action** which provides guidance for "complex communication planning and objective setting.

Both documents can be found in the evaluation resource.

Principles for setting and choosing indicators

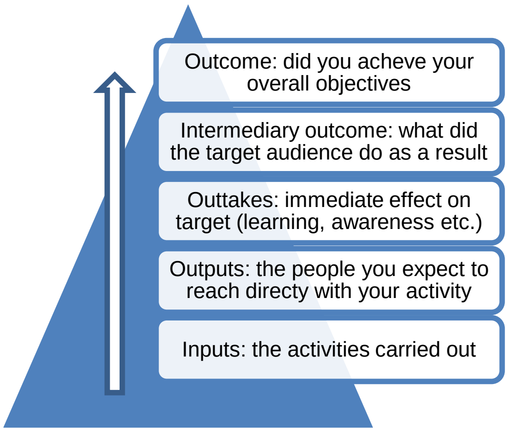
When you set out the indicators[29] for your communication use the following principles:

1. Indicators[30] should be set out when planning the intervention, and before you implement any activity.

This is important because data collection for communication mostly is "in real time". Once you have implemented your activity it will generally be too late to collect data to feed your indicators.

2. The indicators[31]/performance metrics chosen should reflect the different levels of your intervention

That is the inputs, outputs, outtakes and outcomes of your activity – as illustrated in the model.



Irrespective of your communication intervention these levels can be used.

As a general rule the most important indicators (those closest to success) should be measured.

In some cases interventions may go no further than generating outtakes (awareness or understanding)

For some tools it will not be practically feasible (or economic) to measure outtakes – but it may be possible to measure intermediary outcomes.

Consider what would be ideal to measure and then what is practically feasible. However, **pragmatism should not be an excuse for only measuring what is convenient – or for the measurement of activities only. Measurement should always go beyond inputs and should at least inform you of your reach.**

3. The indicators[32] should reflect the communication tools[33] used

The performance framework should cover the different communication tools used. Some communication tools have their own indicators – and some communication tools and indicators require their own data collection tools.

[28] See Code of Conduct (Annex II – Page 11)
[29] See Code of Conduct (Annex II – Page 11)
[30] See Code of Conduct (Annex II – Page 11)
[31] See Code of Conduct (Annex II – Page 11)
[32] See Code of Conduct (Annex II – Page 11)
[33] See Small-scale Evaluation Tools

Measurement at the level of tools is important to identify what worked and what did not work.

4. **The indicators[34] should reflect the type of audience targeted, the size and how they are reached**

The target audience is one of the most important elements of a communication effort.

How you reach an audience is important to measure. Will you reach the target audience through a multiplier – or directly (e.g. though stakeholders and partners)?

Whenever possible, the indicators should reflect on the primary and final target audience when these are different.

5. **Consistency and comparability should be ensured**

The measurement used should allow for comparing effect over time (what is the situation of the target audience before the intervention – and what is it after). Ensure that monitoring allows measurement of progress (especially for regular monitoring of continued activities).

6. **Allow resources for monitoring and measurement**

It is not sufficient to just set indicators.[35] They also need to be fed by data. Consider and decide as part of your planning how data will be collected to inform indicators, which data are needed and who will collect them.

If data are to be provided by a range of sources – consider if the systems in place are appropriate.

Measuring is not resource free. But knowing what works and what does not work will help improving effectiveness.

7. **Always prioritise the indicators[36] which are the closest possible to the key criteria that determine success**

Most communication activities can be measured using a range of metrics. Accept that not all which could be measured should be measured - but always prioritise the indicators that will show effects!

Choosing indicators

The 7 points above should help you to start thinking on the right indicator for your communication action.

This section will provide you with list of indicators[38] which can be used for different activities.

[34] See Code of Conduct (Annex II – Page 11)
[35] See Code of Conduct (Annex II – Page 11)
[36] See Code of Conduct (Annex II – Page 11)
[37] See Code of Conduct (Annex II – Page 11)
[38] See Code of Conduct (Annex II – Page 11)

Before choosing what is right for your activity, be aware that indicators[39] which are suitable for your activity cannot be defined "a priori".

There are no 'measures' of success that you can apply uniformly.

What is suitable will be depending on:

- The objectives
- The scope of your communication intervention
- The type of communication activities
- Where you are in the implementation process

Spend some time to think about how your communication is expected to achieve its objective.

If successful, what messages/content will your target see, what do you expect them to, think, feel or learn – what do you expect them to do as a consequence? It is a reasonable assumption that this can happen as a result of your action?

If, your intervention is unlikely to deliver on the expected effects, revisit your objectives to make them realistic. Objectives should not be "desirable" but "achievable".

Within this framework this section set out suggested indicators[40] for:

- **Press and media**
- **Public and stakeholder engagement**
- **Campaigns and advertising**
- **Online and social media activities**

The performance metric suggested considers potential indicators[41] for inputs, outputs, outtakes, and outcomes[42]

Media relations/Press activity

Media relations (or Press) activity includes proactive publicity (activity which proactively promotes a (activity put in place to respond to a specific issue or event or to rebut inaccurate coverage of this sessions, organised to support policy officials in their work.

All types of press activity have an intermediary audience (e.g. the media or other spokesperson, a minister or senior official) and an end audience (this is generally members of the public, but may be further segmented if there are specific policy messages).

Table 1 presents performance indicators[43] which may be used to measure media relations/press activit

If you do not have a budget to use a contractor to track and analyse media coverage, see section on "H **communication activity**" provides guidance how to undertake media evaluation.

Table 1 - Performance indicators[44] - media relations

Measurement level	Performance metrics
Inputs for the intermediary audience	The number and nature of press or media activities that you carry out. This might include: ■ 'Proactive publicity' – the quantifiable amount of information delivered to the intermediary audience (PR, briefings, press packs, for example)

[39] See Code of Conduct (Annex II – Page 11)
[40] See Code of Conduct (Annex II – Page 11)
[41] See Code of Conduct (Annex II – Page 11)
[42] These are the standard levels of performance indicators set out in the UK Government guide to evaluating Government Communication Activities https://gcn.civilservice.gov.uk/wp-content/uploads/2014/02/GCN-Evaluation-Book_v6.pdf
[43] See Code of Conduct (Annex II – Page 11)
[44] See Code of Conduct (Annex II – Page 11)

Measurement level	Performance metrics
	■ Reactive media handling – this number of reactions to the media outputs which are generated by the intervention (corrections to article, reactive statements and rebuttals, the number of interviews arranged) ■ Media briefing and handling – this number of inputs organised as part of the intervention to brief officials involved (number of media briefings, media handling sessions for the European Commission/officials) ■ Any costs incurred in running the activity, time and internal resources used
Outputs for he intermediary audiences	■ Proactive publicity – the number of media contacts reached (number of contacts, messages passed on ■ Reactive media handling – the number of media contacts that you reach with your reactions (corrections, reactive statements and rebuttals, the number of interviews that take place) ■ Media briefing and handling – the number of briefings and training sessions organised, the information and skills passed on
Out-takes for the intermediary audience	■ Proactive publicity – the attitude of the targeted media towards the message of the communication and its delivery ■ Reactive media handling – the extent to which the reactive media handling is acknowledged by the media contacts ■ Media briefing and handling – the reaction/satisfaction of policy officials to the activities provided? Do they find it useful? Do they intend to put it into practice?
Intermediate outcomes for **intermediary audience**	■ Proactive publicity – the number of media contacts reporting on the issue ■ Reactive media handling – – the attitude of the targeted media towards the (policy) issue that you are working on and your handling of it. Any changes in knowledge and perception? ■ Media briefing and handling – knowledge and skills officials gain as a result of your briefing or training sessions
Final outcomes for intermediary audience/**Inputs for end audience**	The volume and quality of media coverage achieved by your activity. This might include: ■ Proactive publicity – coverage achieved, accuracy of coverage, tone of coverage (positive or negative), key message penetration, quotes and interviews used ■ Reactive media handling – coverage or interviews containing responses, amendments or corrections, overall accuracy of coverage, tone of coverage, prevention of negative coverage. (this would need to be established by measuring over time) ■ Media briefing and handling – the number of times that your “officials” use the knowledge and skills that you have passed on. The volume of coverage generated through media briefing opportunities: accuracy and favourability of coverage, key message penetration
Outputs for end audience	■ The number or percentage of your intended audience reached by the media activity and opportunities to see.
Out-takes for end audience	There are some key questions to ask in order to define the indicators[45] - but these can be derived from the overall messages and intended out takes. The outtakes can be at a number of different levels and could include the following types of indicators[46]: **Absorbing the information and messages:**

[45] See Code of Conduct (Annex II – Page 11)
[46] See Code of Conduct (Annex II – Page 11)

Measurement level	Performance metrics
	No of the target audience who are aware of the content/messages **Understanding the information and messages** ▪ Did the intended audience engage with the content/messages, did they think it was relevant to them? ▪ Did they feel that the content was engaging, did it capture their attention? ▪ Did they understand the content? **Changing views as a consequence of the content** ▪ Did the intended audience take on board the content/key messages? ▪ Has it changed their views? Focus groups can be used to assess the meanings that the audience took from the exposure.
Intermediate outcomes for end audience	Reaction as a consequence of the media exposure - for example: ▪ Seeking information from you ▪ Seeking information from other sources ▪ Registering for a service, product or information ▪ Starting, stopping or continuing a particular behaviour. ▪ Telling friends, family – encouraging others to adopt the behaviour
Final outcomes for end audience	The number of people who display the intended outcome as set out in the original objectives. Often this will be shown in a form of behaviour change.

Public and stakeholder engagement

Public or stakeholder engagement activity is put in place to secure feedback on, or support for, a specific policy area. See also (link to http://ec.europa.eu/smart-regulation/stakeholder-consultation/index_en.htm)

Depending on the activity, a range of channels including events, digital and purchased channels may be used.

Stakeholder engagement will usually involve some sort of direct consultation or engagement activities.

There are no 'measures' of success that you can apply uniformly to stakeholder engagement. But there are some generic indicators[47] that you can consider when reviewing how well your stakeholder engagement plan has worked.

Due to the large variety of indicator types different measurement techniques will be used. You may choose to implement data collection yourself or get assistance from a contractor.

DG COMM holds a central contract for evaluation of larger communication actions and one for small scale evaluation of Communication activities

The section on "**How to evaluate a specific small scale communication activity**" provides guidance on how to undertake measurement of different types of public and stakeholder engagement activities.

[47] See Code of Conduct (Annex II – Page 11)

Table 2 Performance indicators[48] – public and stakeholder engagement activities

Measurement level	Guidance for development of performance metrics
Inputs	The activity that you carry out to promote your initiative. These might include: ■ The number of invitations sent out to engagement event ■ Type and amount of activity carried out to publicise event ■ The website created for consultation ■ The number and nature of contacts that you make with specific stakeholders.
Outputs	These might include: ■ The number of people responding to your requests for involvement ■ The number of people attending the stakeholder event ■ The number of people who visit your online consultation ■ The number of conversations with a specific stakeholder contacted
Out-takes	Outtakes of engagement activities will include the following: recall of the issue, opinion on the issue/initiative.
Intermediate outcomes	There are several categories of the intermediate outcomes related to the "engaged or consulted" stakeholder. There are outcomes that happen during the consultation/engagement process: ■ No or percentage of stakeholders providing feedback/engaged in dialogue ■ The quality/usefulness of the feedback or dialogue ■ The enthusiasm of the stakeholders for the topic ■ The number who considered engagement useful ■ The number who considered their voice was heard ■ The number who think involvement makes a difference ■ Number showing willingness to be involved in subsequent stage (and who) There are outcomes that happen after the consultation/engagement process (or as a consequence) ■ The number of stakeholders or members of the public who pass your message on and discuss your activity or the message that it is promoting with others (through a variety of channels) ■ The number of stakeholders or members of the public who claim to have discussed your message with others (online and offline) ■ Amount of digital coverage on forums, blogs, websites etc. (tracked via buzz monitoring) Amount of positive (and accurate) digital talk ■ The number of event attendees who undertake specific actions or behaviours in line with messages promoted at the event (and who)
Final outcomes	Final outcome measures should assess whether your activity met its overall communication objective, and its effect on the overall policy or reputation objective that you are working to and the effect that this has had. Choose performance indicators that enable you to measure this. For example this may include: The amount of usable feedback incorporated into future policy development or engagement activity.

48 See Code of Conduct (Annex II – Page 11)

Campaigns and advertising

element of advertising which will include purchased media (TV, Radio, outdoor, digital advertising, paid for search and direct marketing have a number of specific metric for input and outputs).

To measure outtakes - Advertising recall studies are generally needed.

To measure intermediary outcomes: a variety of measurements are often needed – depending on the action you expect the audience to take as a consequence of the campaign.

Some indicators[49] can be provided by the contractor implementing the advertising for you. However it is important that you ask for and collect this data. This data will cover input and output indicators - including:

- **Reach** - the number of people who will have at least one opportunity to see an advertisement, publication or programme in a given schedule
- **Coverage** – the proportion (expressed in percentage terms) of a target audience having an opportunity to see/hear the advertising
- **Frequency** - The number of times the target audience has an opportunity to see the campaign, expressed over a period of time
- **Ratings** (gross) - The percentage of audience within a specified demographic group which is reached at a given time

Cost per thousand (CPT) - The cost of reaching 1,000 of the target audience, e.g. 1,000 adults

Table 3 Performance indicators[50] – campaigns and advertising

Measurement level	Guidance for development of performance metrics
Inputs	▪ The number of people you plan to reach with your activity and frequency of exposure. This might include: ▪ Estimated reach, coverage and frequency (TV, press, radio, outdoor) ▪ The number of impressions served (digital advertising) ▪ The number of planned clicks (paid-for search) ▪ The number of inserts produced, the number of leaflets planned to be ▪ Distributed (direct marketing) ▪ The costs (media and production) incurred (by channel).
Outputs	▪ The number of people actually reached by your campaign and the number of times they were exposed to your campaign message
Out-takes	The out-takes relate to the target audience taking on some aspect of the campaign message. There are some key questions to ask in order to define the indicators - but these can be derived from the overall messages and intended out takes. The outtakes can be at a number of different levels and could include the following types of indicators:

49 See Code of Conduct (Annex II – Page 11)
50 See Code of Conduct (Annex II – Page 11)

Measurement level	Guidance for development of performance metrics
	Absorbing the campaign information and messages: ■ No of the intended target audience who are aware of the message being promoted ■ No of the intended target audience who can describe the campaign's approach or where visible **Understanding the campaign** Did the intended audience like the campaign's activity? ■ Did they think it was relevant to them? ■ Was it clear and engaging? ■ Did it capture their attention? ■ Did they understand the key/supporting message that the activity was promoting? **Changing views as a consequence of the campaign** ■ Did the intended audience take on board the message of the campaign? ■ Has it changed their views? ■ Will the campaign change their behaviour? Is there a timescale associated? Audience research can be used to measure "have seen", "I remember" responses. Focus groups can be used to assess the meanings that the audience took from the exposure.
Intermediate outcomes	■ Intermediate outcome indicators measure what actual (external) change has taken place as a consequence of the campaign. ■ Suggested performance indicators for intermediate outcomes of campaigns are given below **1. Looking for additional information (with the campaign promoters/funders) or 2. Looking for additional information (from other sources – relevant stakeholders/partners)** **In either case:** ■ No of contacts made as a consequence of the campaign: ■ Through telephone ■ Through email ■ Through digital advertising ■ Through website social media space ■ Registering for a service ■ Downloading newsletters ■ Additional indicators include: intensity of contact (over time frequency of contacts); ; number of contacts per medium; average length of time spent on associated media space or advertising **3. Quality of contact made as a consequence of the campaign:** ■ No of relevant requests for additional information (segmentation of target audience) ■ Depth of information requested **4. Changes in behaviour** ■ The number of people undertaking a behaviour before the campaign ■ The number of people who take the relevant steps to change their behaviour ■ The number of people who continue with the changed behaviour over time **5. Further dissemination/communication of the campaign - If part of the**

Measurement level	Guidance for development of performance metrics
	campaign's objective is to pass on the message: ■ The number of people who pass your message on or discuss your activity or the message that it is promoting with others ■ The number passing on or sharing your content digitally (e.g. tweets, retweets, sharing link on Facebook, etc.) ■ Amount of talk on digital forums, blogs, websites etc. (tracked via buzz monitoring) ■ Amount of this talk that is positive (and accurate) ■ The number of Facebook fans or friends, the number 'liking' your content – and the number of Facebook fans or friends who are active (i.e. return to the site regularly) ■ The number of people posting content on your site and The number of people commenting on your content (e.g. on your own site, Facebook, YouTube).
Final outcomes	Final outcome measures should assess whether your campaign met its overall communication objective, and its effect on the overall policy objective that you are working to and the effect that this has had. Choose performance indicators that enable you to measure the activity's impact on both.

Digital and social media

When developing web content, integration of performance indicators[51] is important together with wider measures that look at the effect of websites and/or social media activity.

Indicators for websites and social media are standardised.

DG COMM has in place a comprehensive system available for web monitoring – covering the full range of standard metrics.

Consult DG COMM/A/1 for more information on social media monitoring, monitoring of conversation and buzz monitoring

If you do not have an option to use a social media monitoring and analytics tool there are various tools that you can use to monitor social media yourself – notably:

- Tweet deck (twitter)
- Facebook insights
- YouTube Analytics
- Iconosquare (for Instagram)

The section on "How to evaluate a specific small scale communication activity" provides further guidance indicators for digital sources, including social media and how to undertake measurement for online and social media and– using non-cost tools. [52]

Performance measurement for websites and social spaces typically integrate the following performance metrics.

Table 4 Guidance for performance matrices social media and other digital spaces

Measurement level	Guidance for development of performance indicators[53]
Inputs	■ The digital or social media space and the related content created to meet communication objectives;

[51] See Code of Conduct (Annex II – Page 11)
[52] See Small-scale Evaluation Tools
[53] See Code of Conduct (Annex II – Page 11)

Measurement level	Guidance for development of performance indicators[53]
	■ The cost and resource used to create the digital /social media space and content.
Outputs	■ The number of visitors to the website or digital space (this can also be in a certain time period or across the whole of the period in which the space and content is available) ■ The source of visitor referrals There are a number of standard indicators that measure how people interact with digital spaces. These will include: ■ Average length of time spent on site ■ Bounce rate ■ The number watching any videos or embedded content on your site (starting to watch and watching whole clip) ■ The number of pages visited
Out-takes	What people think, feel or recall about the digital space. There are some indicators which can be used for out-takes or for intermediate outcomes: ■ The quantity of the user generated content on the digital space (number of comments) ■ Sentiment: The overall content and tone of the user generated content on the digital space
Intermediate outcomes	Also consider including indicators that look at actions carried out on social media websites, such as: ■ Number of 'likes' /favourites per item ■ Number of retweets or shares per item ■ Number of comments per item ■ Sentiment of comments For Apps the following indicators may be used: ■ Number of downloads on iTunes store/google play/windows phone store ■ Average rating of application ■ Ranking of app in category ■ Number of reviews submitted ■ Sentiment of reviews Standard indicators are useful but need to be tied back to the objectives. (are you expecting people to register, read a particular piece of content, retweet content etc.). This will enable you to interpret the data appropriately.
Final outcomes	Final outcome measures should assess whether your website or digital space met its overall communication objective, and its effect on the overall policy objective that you are working to and the effect that this has had. Choose performance indicators that enable you to measure the activity's impact on both.

2 Documents supporting PART 3 of the toolkit

Document 5: Cost indications of different evaluation tools (PDF)

See next page

What do different methods costs?

It is important to allocate sufficient resources for measurement and evaluation to happen. Better regulation guidelines refer to the proportionality criteria when defining the budget of an intervention can be spent on evaluation.

Below are listed some main methods together with fee ranges. **Note that overall analysis and presentation of results/final report are not included in these costs**.

The list also indicates the main factors which impact on costs:

Method	Cost considerations and factors which impacts on costs (and those that does not)	Costs range – Exclusively for the method – not covering the report or final analysis
Online survey	Online surveys are generally not expensive to undertake and implement, using contractors. Some time is needed to design a quality survey, to make it attractive to potential respondents and for analysis. However, costs may vary significantly depending on the following factors: ■ **Contacts**: do you hold the contacts of those who should be surveyed (e.g. newsletter subscribers, event participants) or is there a place where those you want to survey can be reached (e.g. via your website where the survey can be promoted?). If no, the costs may increase substantially. If you anticipate that evaluators have to identify the participants and contact them the survey will be costly. ■ **Commitment to a certain number of responses**. Related to the point above. If a contractor is responsible for ensuring a number of respondents (identifying respondents and making sure that a number reply) your survey will be costly. The response rate to online surveys is generally low. To get 500 responses 5,000 to 10,000 contacts are generally needed (depending on how interested the target is). Identifying these obviously has cost implications. ■ **Languages**: the more languages a survey operates in the more expensive it becomes (translation, survey set ups & analysis of results , especially open-ended questions) ■ **Number of open-ended questions:** open-ended questions are time consuming to analysis. If your survey is composed only by open ended questions is more complicated to analyse results **and consequently more costly**	Conceptualisation of survey with ~20 questions (and two open-ended questions), testing, putting it online and analysis of results will cost in the range of: ■ EUR 6,000- EUR15,000 More for complex surveys (many routed questions and more complex analysis) Add to this estimate one or more of the following: ■ Time for meetings and presentations (especially if the survey is “stand alone” method) ■ Translation fees (~1500 Euro per language for translation and set up – more if the survey is longer) ■ Fees for identification of participants and promotion of the survey (if you do not promote it yourself/if you do not provide the contractors with email contacts)

Method	Cost considerations and factors which impacts on costs (and those that does not)	Costs range – Exclusively for the method – not covering the report or final analysis
	Factors which does not impact substantially on costs: ▪ **Number of respondents**: if the survey is made up by close ended questions there are no cost differences between 50 and a 1000 responses (unless there is substantial additional analysis to be undertaken including independent variables for example)	
Print survey	Print surveys are generally not expensive to undertake and implement, using contractors. Some time is needed to design a quality survey, to make it attractive to potential respondents and for analysis. The main aspects that impact on costs are **the Number of respondents**. Reponses to printed surveys will need to be mapped manually by the contractor. The more responses and the longer the survey, the more time consuming and the more costly it will be. Other aspects which impact on costs are translation.	Conceptualisation of a “simple” survey with ~10-15 questions (and two open-ended questions), testing, 100 respondents, mapping of results and analysis of results will cost in the range of: ▪ EUR 6,000-7,000 Add to this estimate one or more of the following: ▪ Additional time and fees for more responses ▪ Drafting of a final report and time for meetings and presentations (especially if the survey is “stand alone”) ▪ Translation fees (EUR ~1500 per language for translation and set up – more if the survey is longer)
Telephone survey	Telephone surveys are often expensive when they involve a large number of persons. The key factors which impact on cost are the following ▪ **The number of persons to be surveyed** ▪ **The length of the survey:** does it take 10 minutes to interview – or 30? This will impact on cost ▪ **Access**: if contact details are not already available the contractor will need to identify these. This is time consuming and hence costly. ▪ **The group expected to be surveyed**. A group with a strong stake is likely to agree to an interview – and these will be easy to set up. People with little interest will be difficult to survey and setting up interviews will be time-consuming.	Conceptualisation of a “simple” survey with ~15 questions (and two open-ended questions), testing, 100 respondents (not public but a specific target audience), mapping of results and analysis of results will cost in the range of: ▪ EUR 20,000 to 30,000 Add to this estimate one or more of the following: ▪ Additional time and fees for more responses ▪ Drafting of a final report and time for meetings and presentations (especially if the survey is “stand alone”)

Method	Cost considerations and factors which impacts on costs (and those that does not)	Costs range – Exclusively for the method – not covering the report or final analysis
		■ Fees for translation and for additional briefings if the interview is to be undertaken
Interviews	Interviews are generally expensive if many are to be undertaken. Time is needed to organise the interviews, undertake the interviews and write up the interviews. The main factors which impact on costs are: ■ **Type of interview**: telephone interviews are generally cheaper (not travel involved and hence more interviews can be undertaken per day) – but they also give less good results (compared to face to face) **The contact already available to you**. If you know the prospective interviewees and hold their contact details it will be cheaper. It will be more expensive if the evaluators have to identify the contacts/persons to interview. ■ **The type of interviewee**: interviews of grant holders or stakeholders with a strong stake in your evaluation will be easier to contact and they will usually agree to interviews. If potential interviewees have a low stake in a study, many contacts may be needed to identify persons willing to participate (time consuming). ■ **NB**: analysis of interviews is time-consuming and hence costly!	Conceptualisation of an interview guide (one for all interviewees), 30 interviewees (not public but a specific target audience), mapping of results and analysis of results will cost in the range of: ■ Telephone interviews: EUR 10,000 to 12,000 ■ Face to face interviews: EUR 14,000 to 18,000 **Add to this:** ■ Analysis of the interviews – time consuming as qualitative results ■ Drafting of a final report (and other reports) and time for meetings and presentations (especially if the survey is “stand alone”) ■ More time if many languages (additional translation and briefing time) ■ More time if the groups to be interviewed are “hard to get” ■ More time for face to face if travel is required.
Opinion poll	Public opinion polls are expensive.	For a public opinion poll undertaken in 5 EU countries with 10-15 question units covering a sample of 400 people per country the cost will be approximately ■ EUR 25,000 – € 30,000. This is based on a specialist company undertaking a telephone survey. A Eurobarometer poll, 28 Member States and +1000 people per country: Contact the Eurobarometer team in DG COMM/A/1.The

Method	Cost considerations and factors which impacts on costs (and those that does not)	Costs range – Exclusively for the method – not covering the report or final analysis
		Commission regularly conducts opinion policy – (link to http://ec.europa.eu/public_opinion/cf/index_en.cfm)
Tracking studies	Tracking studies are expensive. What they will cost will be fully dependent on the target and estimates are therefore not possible.	
Focus groups	Focus groups, physical and e-focus groups are generally time consuming to organise and consequently expensive if many are to be organised. Few focus groups are cheap. Beyond moderation, planning and write up costs are associated to: ■ **Identification of participants/recruiting**. For focus groups organised under EC evaluations the target participants are often not easy to recruit. This may be due to the fact that the target is small (hence finding a day with suit a group of 12 may prove time consuming), or that the intended participants may not be so interested (hence many contacts are needed to constitute a group). ■ **Incentives**. Unless the anticipate audience has a strong stake, it is not possible to make these participate unless they are provided with an incentive. An incentive is usually a gift. The gift has to be sufficiently big to make it worthwhile for the participant to spent 2 hours in the group and additional travelling time. What is worthwhile will depend on the groups – for a student a gift card of € 50 may be sufficient, but not for a professional. ■ **Travel costs and location** of the focus group. If you want 5 different groups in 5 countries, costs are higher than 5 groups in one location.	Development of a guide, moderation (2 persons), write up logistics and rewards will for a 12 persons group: - 1 group ■ EUR 5000 - 8000 or higher (for "hard to get" groups) + travel (participants and moderators) Multiple groups with the same guide will have cheaper overall costs. Also two groups at the same location will be cheaper than groups at different places **Add to this:** ■ Thematic analysis of the focus groups – time consuming as qualitative results ■ Drafting of a final report (and other reports) and time for meetings and presentations (especially if the focus groups are "stand alone") ■ More time if many languages (additional translation and briefing time) ■ More time if the groups to are "hard to get"
Diaries	Diaries require careful planning, briefing and analysis of results. The main factors which impact on costs are: ■ **Number of participants** ■ **"Recruiting" and the amount you expect the participants to do and**. Those engaged in diaries will always be persons without an interest/stake in the study. The	Development of a reporting tool for the diaries, briefing of participants, recruiting, and analysis of results – 30 participants/3 hours participation: ■ EUR 13,000-20,000 **Add to this:**

Method	Cost considerations and factors which impacts on costs (and those that does not)	Costs range – Exclusively for the method – not covering the report or final analysis
	more you will ask them to do – the harder is recruiting. Most people will decline participation in time consuming tasks, and diaries are often time consuming. ■ **Incentives**. An incentive will always be needed. The incentive should reflect the participation expected. Usually, people contribute more than 2 hours. Furthermore, as people are expected to write, it is real “work”.	■ Drafting of a final report (and other reports) and time for meetings and presentations (especially if the diaries are “stand alone”) ■ More time if many languages (additional translation and briefing time) ■ More time if the groups are “hard to get” (specific categories of population) ■ More if more time is need (higher incentives)
Media analysis	Media analysis costs depend on the research objectives (see page 122) Media analysis costs depend on: 1. Set-up costs (number of work-days of the experts) 2. Cost of the collection and analysis of a single media item (vary between print, audio visual, online article, blog post) and can be of 2-100 €/item 3. Costs of report production (number of work-days of an expert). The total costs depend of the number and type of the media outlets analysed, number of countries, languages and parameters to be analysed	Contact the Media Analysis Section in DG COMM/A/3
Mystery shopping	Mystery shopping requires careful planning and a structured approach for data collection. The cost of mystery shopping depends on: ■ The complexity of the shopping. What is being tested: a question answer service or more complicated a multi service delivery function. ■ What is being mapped – the more elements the more time consuming and hence the more expensive ■ Ease of access to what is being mapped. Does the mystery shopping require personal/physical contact – or can contacts be made via telephone/mail? ■ The number of enquires to be undertaken in the framework of the mystery shopping exercise.	Based on 100 telephone/email enquiries, to an “easy to contact” (i.e. one that replies without need for several contacts) and simple service, mapping of 10-15 items, and development of a grid and structured analysis of the results – several languages. ■ 11,000 to 20,000 **Add to this:** ■ Drafting of a final report (and other reports) and time for meetings and presentations (especially if the mystery are “stand alone”) ■ More if hard to get services, or complex services where

Method	Cost considerations and factors which impacts on costs (and those that does not)	Costs range – Exclusively for the method – not covering the report or final analysis
	■ The number of languages in which the exercise is to be undertaken.	many aspects are to be mapped. The marginal cost of a shopping deceases with the number of contacts. This is due to the fact that cost for conceptualisation; mapping and analysis are globally the same for 100 and 200 cases (if the shopping is a simple one).
Web analytics	EC websites have tracking enabled when launched so analytics can be done when needed. Most analytics tools allow for set up of scheduled custom reports where the relevant metrics is chosen. This is a one time job and this would typically be done by the EC – or when an external campaign site by the contractors for the campaign. An ex-post analysis of a campaign based on web analytics require more work because it typically consists of an analysis of key metrics' related to the activities of the campaign. If qualitative analysis is undertaken (for example of comments on the website) it is typically more time consuming.	Ex post analysis based on monitoring data (as made available by the EC) ■ ~ EUR 1000 Euro

3 Documents supporting PART 4 of the toolkit

Document 6: Tools[54] and methods for evaluation of communication activities (PDF)

Presentations of tools[55] and methods for evaluation of communication activities

In order to be robust and to draw well founded conclusion on communication activities (and to better define new communication activities), evaluations of communication actions will need to draw on a range of data collection and analysis tools.

Some tools belong to the evaluation trade as a whole, others are more communication specific. Several tools will be relevant for different types of assignments (ex-ante, interim and ex-post evaluations) and for evaluation of different types of communication activities. Evaluation methods can be used in a number of different ways depending on the type of activity, the stage of implementation, the stage of evaluation or, simply, the resources available for evaluation.

Consequently, the methodologies should be seen as a "tool box" that, depending on the scope and object of the study may be helpful for several types of assignments. In some cases, the tools are associated with specific indicators[56] and metrics. *However, most methods can feed several types of indicators.*

The following tables give a non-exhaustive overview of different types of evaluation tools and their potential advantages, as well as indications of cost implications. You can use the overview to:

- Get an understanding of tools which could be used in evaluation;
- Identify which sorts of methods could be used in **your** evaluation;
- Explore some of the requirements and key issues associated with each method; and
- Understand the potential relevance of the tools and methods suggested by your contractors in tenders.

Several of the tools are resource intensive and would be undertaken by a contractor in the framework of a contracted evaluation. If you are looking for tools to evaluate your activity yourself go to "evaluation of individual activities" in the section "quick links"

The following tools are presented (*you can click on each of them to go directly to the description):*

Qualitative research tools	Tools for online media	Surveys	Other tools	Analysis and comparison	Media analysis	Advertising measurement	Tools for cost analysis
Case studies	Social media monitoring	Paper/Print surveys	Content mapping/ Audit	Benchmarking (strict)	Media analysis/ quantitative	Advertising recall	Return on investment (ROI)
Focus groups stakeholders	Web analytics	On-line surveys	Customer journey mapping	Extended benchmarking	Media analysis/ qualitative	Frequency	Cost benefit analysis

54 See Small-scale Evaluation Tools
55 See Small-scale Evaluation Tools
56 See Code of Conduct (Annex II – Page 11)

Qualitative research tools	Tools for online media	Surveys	Other tools	Analysis and comparison	Media analysis	Advertising measurement	Tools for cost analysis
Focus groups experts	Website usability audit	Face to face surveys	Mystery shopping	Analysis of secondary data		Reach & Coverage	Cost effectiveness analysis
Focus groups direct target audiences	Web-visibility mapping	Telephone surveys	Organisation-al review	Analysis of quantitative data		OTS/OTH	Cost efficiency analysis
Electronic focus groups		Pre-post survey design	Technical (IT) audit	Analysis of qualitative data		Ratings (gross)	
Participatory observation		Tracking studies	Data mining	Expert panels		Cost per thousand	
Stakeholder interviews				SWOT analysis		Share of voice	
Diaries				Multi-criteria analysis			

Details on tools [57]

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
Qualitative research tools[58]/primary research						
Case studies[59]	In-depth studies of phenomena in a natural setting, drawing on a multitude of perspectives. These perspectives may come from multiple data collection methods (both qualitative and quantitative), or derive from the accounts of different actors in the setting. Case studies are information rich. They build up a very detailed in-depth understanding of complex real-life interactions and processes.	Particularly useful for evaluation of many small scale communication activities/projects funded, for example, under a funding programme (especially when the activities/projects reach different audiences and are composed of activities of which outputs and outcomes are hard to measure).	Processes, condition for success, implementation mechanisms and reach. Provided resources are adequate, multi-site case studies provide rich opportunities for theoretically informed qualitative evaluation.	Adequate human and linguistic resources are necessary. Case studies are best undertaken face-to-face.	Grants for communication (many small activities).	+++
Focus groups stakeholders[60]	Focus groups usually involve homogenous groups of around 10 to 12 people who meet once. The group interaction is facilitated by the evaluator or researcher using a predefined guide. Would involve managers, operational staff, recipients or beneficiaries of services. Typically, each group would be subject to different focus groups (sequential focus groups). Focus groups would usually cover objectives, requirements, implementation issues and management issues.	Very helpful for evaluation of communication programmes which fund small scale communication projects. Allow the identification of issues of importance – versus secondary issues. Focus groups with direct beneficiaries or management staff are often effective when evaluating sensitive topics.	Help identification of issues which work and do not work. (e.g. relevance and appropriateness of objectives, implementation issues: issues direct beneficiaries may meet in the management of their projects, relevance of EC requirements; and issues related to delivering project outputs).	For stakeholder and experts it may in some cases prove difficult to gather all participants on a single location or date. E-focus groups may be an alternative.	Grants for communication (many small activities)	+ (for one, but several may be needed)

57 See Small-scale Evaluation Tools
58 See Small-scale Evaluation Tools
59 Small-scale evaluation tools: videos (viewers' survey, ex-post survey); printed material (readers' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).
60 Small-scale evaluation tools: videos (viewers' survey, ex-post survey); printed material (readers' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
			May provide indications of effects (potential or actual).			
Focus groups experts[61]	Focus groups usually involve homogenous groups of around 10 to 12 people who meet once. The group interaction is facilitated by the evaluator or researcher using a predefined guide. For communication expert focus groups would involve people having detailed an in depth knowledge of the communication activity – but are not involved in the implementation of it.	Focus groups with experts are particularly helpful when the communication subject to evaluation is composed of multiple activities and where there is a lack of data on the outputs and outcomes of these.	Used as part of ex-post evaluations focus groups with stakeholders may be used to assess outtakes and potential outcomes of a communication campaign, strategy or a set of communication actions.	Expert focus groups for assessment require that the communication activities are very well known to the experts. It is not sufficient that they know the related policy area well. For stakeholders and experts it may in some cases prove difficult to gather all participants on a single location or date. E-focus groups may in some cases be an alternative. Focus groups should not be confused with expert panels.	Campaigns and large scale communication interventions.	+ (for one, but several may be needed).
Focus groups direct target audiences[62]	Focus groups usually involve homogenous groups of around 10 to 12 people who meet once. The group interaction is facilitated by the evaluator or researcher using a predefined guide. The groups are composed of a sample of people: ■ Having the characteristics of the target audience (age, gender, educational	Very effective tool to test potential and actual effects of communication efforts – and to understand barriers to change. A **variant** is the use of focus groups ex-post where the	For **ex-ante** evaluations focus groups are typically used to test communication tools: relevance (are the messages well understood by the target audiences; likeliness to respond/react to	Each group should be composed by actors which clearly have something in common (a "focused group"). Focus groups are information rich. Several groups are usually needed to capture the	Communication campaigns and other large scale communication efforts. Potential	++ (several will usually be needed)

[61] Small-scale evaluation tools: videos (viewers' survey, ex-post survey); printed material (readers' survey); conferences, workshops and stakeholder meetings (feedback form, participants survey)

[62] Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); information centres (visitors' survey - on the spot and ex-post)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	attainment, mobility, opinions regarding a specific topic etc.) ■ For ex- post use also: people having been exposed to the communication activity and have some recall of it. For ex-ante evaluations focus groups are typically used to test communication tools (relevance and potential effectiveness). For ex-post evaluation focus groups are used to measure and assess how the target audience actually reacted to the communication activity. Several focus groups are usually needed.	campaign is tested among a sample of people having the characteristics of the target audience – but who were not exposed to the communication – to measure qualitatively how the target audience could reach to a campaign/communication. This approach is particularly helpful when focus groups with audiences who have actually been reached cannot be undertaken (for example when the reach is very scattered, or when there is little direct recall of the campaign so that actual audiences cannot be identified). In this case the focus group will collect data on "potential" results, and outcomes.	a campaign/activity; likeliness to engage others on the topic – particularly important when a campaign/activity focus on "opinion leaders"). For **ex-post** evaluation focus groups are used to measure outtakes, intermediary outcomes and final outcomes (perceptions and attitudes changes; steps taken as a result of the communication and behavioural change).	diversity of views. A skilled moderator is needed A budget needs to be allocated for gifts or other forms of "payment" to the people participating in the focus groups Focus groups are typically implemented in conjunction with other qualitative and quantitative tools. When focus groups with audiences of an information instrument are undertaken the service delivered needs to be **tangible and easy to explain**.	communication /information tools.	
Electronic focus groups (E-focus group)[63]	E-focus groups are internet platforms where virtual moderated debates and discussions can take place. In essence, they are private internet sessions.	Rich qualitative data. Allows for data collection among actors which are spread geographically.	*As* ■ *Expert focus groups* ■ *Stakeholder focus*	While in principle e-focus groups may be used as standard focus groups, there are in practice differences.	As ■ expert focus groups	+(+) (for one, but several may be needed)

63 Small-scale evaluation tools: websites (pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey); networks (members' survey - ex-post)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	E-focus groups are in many respects similar to standard focus groups for experts and stakeholders. However, participants can be located anywhere, discussion is normally done in a written format and timing is usually longer (may take place over a period of a week). The discussion chat feature can be complemented by other collaborative features such as a whiteboard or a file exchange area.	Allows for data collection among people who have little time – but an interest in contributing to a study. Allows involving people when they have time.	*groups*	Can only be used effectively among stakeholders and experts (require commitment and proactive participation). It is of particular importance that the e—focus group covers a specified topic that all participants may relate to. If this is not the case there is a risk that the discussion may lose focus.	■ Stakeholder focus groups	
Participatory observation[64]	Participatory observation involves observing the implementation and dynamics of events. For best use of the tool, what is to be observed needs to be clarified and specified before using the tool (usually in a set number of observatory questions in an observation file).	Allows capturing the dynamics of an events and identifying issues, which may hamper effectiveness of an event. Captures aspects which are often not reported by participants.	Assessment of implementation mechanisms, interaction and dynamics	Participatory observation need to be done using a structured format (especially to compare results over events).	Events, training and conferences	++ Costly if to be implemented over many events.
Stakeholder interviews[65]	Semi-structured and structured interviews with stakeholders (management staff, contracted staff/staff responsible for the implementation of contracted communication activities, grant managers etc.). Are used in nearly all evaluation	They are used to investigate the object of the evaluation, collect in depth qualitative data on most aspects of evaluations.	Exploratory data collection, for identification of potential improvements, for needs assessments as well as assessments of relevance,	Semi-structured and structured interviews should be undertaken once all monitoring and contextual data available have been	All types of evaluations: scoping of the evaluation	++ (+) Costly if many are

[64] Small-scale evaluation tools: fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey)

[65] Small-scale evaluation tools: printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); information centres (visitors' survey - on the spot and ex-post)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	assignments. Semi structured and structured interviews are qualitative research tools.		management and implementation issues, efficiency and utility.	mapped. The development of the interview guides should be informed by this mapping. It is important to avoid that semi-structured and structured interviews replicate the collection of data which are already available.	All evaluations which include assessment of organisational efficiency and utility.	organised.
Diaries[66]	Diaries are undertaken by a selected group of people who are representative of target audience of the activity who are requested to review the communication action – and to write "diaries" on their feelings and impressions of the communication activity. Compared with focus groups a key difference is that the participant's opinions and views are not influenced by others	Diaries are particularly helpful for evaluate a continued communication activities (weekly editorials, funded TV or radio programmes etc.).	Assessment of the relevance and attractiveness of content to the target audience and utility of communication activities (e.g. did the audience learn something; did it make then change their attitude). It is a reliable qualitative indicator of outtakes (Think and feel indicators).[67] Used in combination with data on reach of a given communication activity it may be used as a reliable indicator of total outtakes and to some extent intermediary outcomes.	Must be undertaken in the language of the participant. A budget needs to be allocated to gift or other form of "payment" to the people participating for their work undertaken. This is especially important when the diary exercise is implemented over a period of time.	Assessment of funded communication activities: weekly editorials, funded TV or radio programmes etc. Also relevant for advertising campaigns	++ Costs largely dependent on scope

[66] Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); Printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); information centres (visitors' survey - on the spot and ex-post);networks (members' survey - ex-post)

[67] See Code of Conduct (Annex II – Page 11)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
Tools[68] for online media						
Social media monitoring[69]	Social media monitoring tracks and monitors the reach and engagement of social media based communication. For simple communication activities, social medias own monitoring tools may prove sufficient (e.g. Facebook's tracking tools). However, for public campaigns and other substantial communication activities involving social media there are clear benefits in using advanced software tools –such a Radian6, engagor and Vocus.	Social media monitoring track engagement Furthermore, through monitoring of audiences reactions to communication, such tools (and Radian6 in particular) enable organisations to become socially engaged with their audience (responding and adapting communication efforts where necessary)	Assessment of the impact of social media based communication (reach and engagement)	The choice of social media monitoring tool will depend on the nature of the evaluation – and what should be measured. They have to be implemented in parallel with the activity which needs to be evaluated. The choice of tracking tools will be dependent on the matrices of interest.	Social media based communication .	If built on free monitoring tools: + More costly if software tools are to be bought in.
Web analytics[70]	Web analysis is used to monitor and evaluate web traffic. For official EC websites, the EC own monitoring tool will be used.	Analysis of website statistics assesses the reach, attractiveness of websites, and topical interest of visitors and informs thereby the overall assessment of web-based communication using websites	Reach. Web analytics statistics provide insights into the number of visitors, the page viewed; times spend on the site, returning visitors and origin of visitors – and development over time.	The quality of web analysis will be dependent on the information that is collected via monitoring. For contracted communication activities, such data will need to be provided by the implementing organisation.	Websites.	+
Website usability	Website usability audits are undertaken to assess the quality and usability of specific	Analysis of quality and	Measurement of inputs/quality of content and	A framework and key matrices for the audit need to	Websites	++

68 See Small-scale Evaluation Tools

69 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); networks (members' survey - ex-post)

70 Small-scale evaluation tools: websites (online pop-up survey); networks (members' survey - ex-post)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
audit[71]	websites. Web usability audits are undertaken though testing of various functions of the site and a mapping of the coherence of information presentation.	attractiveness of websites. In particular helpful for complex websites and portals where a lot of information is available.	organisation. Informs aspects of service delivery which may hamper delivery of intended effects.	be developed and agreed with the client.		
Web-visibility mapping[72]	Web visibility mapping implies the manual mapping of the visibility of a service in the public domain. The mapping collects on the one hand quantitative data on total visibility and on the other identifies where the communication activity is visible (types of sites, prominence, presented in relation to, etc.).	Informs the assessment of the extent to which a service may need to be promoted.	Web visibility mapping is used to collect data on reach and visibility of information of communication action/instruments. The result of the mapping is used as an indicator of visibility and outreach in the public domain.	Is best used when the object of the web-visibility mapping has a clearly identifiable “brand” and when the communication activity is a continued one. Sampling needs to be carefully considered.	EC services and networks: Assessment of visibility online	++
Surveys						
On-line surveys (single measurement in time)[73]	A survey consists of putting a series of standard questions in a structured format to a group of individuals, obtaining then analysing their answers. The groups of individuals are typically selected and sampled (representative of the population under observation). The approach is nearly always quantitative, although there may be open questions in the	Surveys allow collecting information among large groups at relatively low cost. It is possible to generate quantitative results – which may illustrate the scale, effects and issues – as identified though qualitative research. It is possible to interact with	May be used to inform a range of evaluation issues – from assessment of relevance, to implementations and efficiency, over to identification of outputs, and assessment of efficiency and impact of communication. Surveys can also be used to	Contacts needs to be available to the researchers. The objectives and scope of the survey - i.e. what it is intended to measure - needs to be set out carefully. It is important that adequate research is carried out before launching the survey so that possible responses to survey	EC services and networks, events, training, websites and online communication (e.g. newsletters and online	+(+) High if participants are to be identified by the contractor.

[71] Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey);
[72] Small-scale evaluation tools: websites (online pop-up survey); networks (members' survey - ex-post)
[73] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); networks (members' survey - ex-post)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	survey. In evaluation surveys are typically used to collect opinions among large groups of people as well as information on the topic evaluated. The type of information which may be collected falls in the following categories: **Descriptive:** background; what people or organisations do, have done, intend to do or could possibly do. What they know. How they know and what they have used or not used. **Normative:** usefulness; benefits and relevance given needs. **Causal:** What has been the result of X or Y. What would have happened if the intervention had not taken place**?**	people who may have little stake in an evaluation. Also, it is possible to reach those that may not be reachable though other means (e.g. due to data protection) – as the survey can be multiplied though stakeholders or the EC.	identify priorities, collecting the background of groups, quantifying results and testing hypothesis.	questions can be clearly formulated. It is important that the topic/object of survey is well known to the potential respondents and that the questions do not require long time memory. If recall is low, survey results are likely to be unreliable. Surveys however can mostly not stand alone in evaluations. It is important to define which other data tools will be used to assess other aspects – and how the survey will complement these. Attention generally needs to be given to the assessment of the representativeness of the survey results. Monitoring of response rates is important – as is continued promotion of the survey. Survey should be short. Pre-test/pilot must be carried out.	publications), communication strategies (consultation with stakeholders) etc.	
Paper/ Print surveys[74]	*See online survey for general description.* Paper-based surveys are generally used at	Capture direct feedback of participants to conferences. Allow structured data	Measure satisfaction, outtakes and intended action as a result of exposure to an	In order for print surveys to work, it is generally important that all participants are	Events (conferences, large scale	+(+) Highly

[74] Small-scale evaluation tools: fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); information centres (visitors' survey - on the spot and ex-post).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	events (conferences, large scale stakeholder events, or smaller workshops presentations and other events). Paper surveys generally include descriptive and normative questions (see online survey). They are generally not used for causal questions.	collection among a large number of people. If short, provide generally good response rates.	event. It is important to ensure that a survey actually aims at measuring outtakes of the event (understanding of message, extent to which the event provided new insights or changed attitude); direct effects of the event (e.g. extent to which participants met potential partners for future projects) and collect information on the participants.	seated at some stage and that it is possible to disseminate the survey to all participants (typically as part of a conference). Resources needs to be allocated to manual mapping of all the responses. As for the content of the survey it is – as it is the case for online survey important to carefully formulate the survey in order not only to cover operational aspects of the event.	stakeholder events, or smaller workshops presentations and other events).	dependent on the number of respondents. Generally, more costly than online (because responses need to be mapped manually).
Face to face surveys[75]	Face to face surveys are typically used to evaluate events. They are usually one-off, and aim at collecting on-the-spot feedback and impressions from those participating in an event. They may however, also be used for panel surveys (see below). As for paper-based surveys covering events, they generally include descriptive and normative questions.	Particularly helpful for open events with open circulation, with no subscription and where people can walk in and out. Compared with paper and online surveys, face to face surveys are generally more reliable (random selection). Research may be undertaken among non-literate	Measure satisfaction, outtakes and intended action as a result of exposure to the event. Important to ensure that the survey actually aims at measuring outtakes of the event (understanding of message, extent to which the event provided new insights or changed attitude); direct effects of the event (e.g.	Face to face surveys are generally expensive as they require staff on site to collect responses. In order to collect and treat data easily, there are benefits in using tablet computers. As for the content of the survey it is – as it is the case for online survey – important to carefully formulate the survey in order not only to	Large scale events and public outdoor events.	++(+)

[75] Small-scale evaluation tools: printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); information centres (visitors' survey - on the spot and ex-post).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
		respondents.	extent to which participants met potential partners for future projects) and collect information on the participants.	cover operational aspects of the event.		
Telephone surveys[76]	A survey consists of putting a series of standard questions in a structured format. The target audience is contacted by telephone and asked structured questions – with structured answers.	Telephone surveys may globally be used as online surveys – and many of the key issues are similar. However they are much better to: ■ Cover complex topics ■ Ensure reliable and representative results (subject to careful sampling, extrapolation is possible	*See online surveys.*	Contacts need to be available to the researchers. Surveys should be relatively short. It may be difficult to obtain the phone numbers of potential respondents (even more so with the decline of fixed lines).	Telephone surveys may be used for all the type of surveys presented under “on-line surveys”. Studies where reliability and accuracy is important.	+++
Pre-post survey design[77]	A pre-post design (or a before and after study) is a study design where outcomes are measured against the same targets before being exposed to an intervention and after being exposed.	They can be used to follow specific target audiences which have been substantially engaged in the	Measure final outcomes (behavioural change) but may also measure results and	Evaluation planning is important. Data needs to be collected before and after the intervention. This implies that	Communication training programmes, other training	++/+ Expensive if telephone

[76] Small-scale evaluation tools: printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); networks (members' survey - ex-post).

[77] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey);networks (members' survey - ex-post).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	Comparing the two sets of measurements produces an estimate of the effect of the intervention. Online surveys or telephone surveys are usually used.	communication activity (e.g. journalist information events, or other events with substantial engagement of the target audience). When done for large scale campaigns they are referred to as tracing studies (see below).	intermediary outcomes.	the evaluation needs to be planned by the EC at the same time as the communication intervention is planned. The object of a pre-post design needs to be mature (i.e. the intervention logic is set out, key assumptions are realistic and likely to hold true). The ex-post measurement should be undertaken a sufficiently long time after the intervention to ensure that the expected effects actually can take place.	and learning programmes.	surveys are used
Tracking studies [78]	These are studies in which the same market research (surveys/polls) is deployed periodically over time (two or more times). They are used across all forms of communication and social marketing and are regarded as a cornerstone in marketing and strategic communication planning.	They give a dynamic view of the changing information marketplace.	They allow clients to observe the impact of changes in communication tools and campaign weight/coverage, and of policy change or changes in the economic, political and social environment on their communication programmes.	The intervention needs to be significant and targeted. If the reach is limited and/or scattered on various groups tracking studies are not likely to capture impact. Tracking data used to be collected continuously but then typically aggregated over time on a period-by-period basis. Today, data are more often presented as continuous trends, plotted	All long-term themes or campaigns.	++++

[78] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
				against the timing and scale of media events.		
Other tools [79]						
Content mapping (Audit of content)[80]	Manual structured mapping of content of communication activities. The mapping provides assessment per operator or project covered by the content mapping (qualitative mapping across production). Mapping is undertaken using structured formats. Data mapped has to allow aggregation of data. Descriptive templates are used for each operator or project covered by the content mapping.	Unlike media analysis, the objective is not only to map scale and tone, but actually to understand and assess the delivery of communication content under a programme or an action. Allows assessment of quality of services – based on objective criteria. May cover audio-visual, print content or online content.	Content mapping is used to assess qualitatively the content delivered by communication activities (service delivery).	The method is resource intensive. It requires that staff resources are allocated to manually see, listen to, or read the programmes. The sample mapped needs to be sufficiently large to ensure full representativeness. Requires languages skills.	Communication projects funded under call for proposals or Call for Tender – i.e. of activities of which the EC may not have full control or capacity to monitor.	+++
Customer journey mapping[81]	Customer journey mapping is used to identify how a (potential) target audience search for information on a specific topic – and the issues that the eventually encounter when searching for information. The tool uses “real-life” customers. Each customer is requested to find information on a specific topic of direct relevance to the customer. The customer records each of the steps that s/he has taken to collect the requested piece of information.	The purpose is to identify pathways – and to categorise different ways in which potential audiences will look for information. Exploring how potential target audiences acquire/search for information (pathways), to assess if there are information gaps which needs to be addressed and to identify where the information	Allows assessment of the extent to which there are information gaps which need to be addressed and to identify where the information is needed.	The customers need to be carefully selected. It is important that customers only undertake search which actually could be helpful for them in their everyday life. A limited amount of time should be given – it order for the exercise to be realistic. A small budget needs to be allocated for gifts or other form of payment to the	Information and guidance services	++(+)

79 See Small-scale Evaluation Tools

80 Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey).

81 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
		is needed.		people participating.		
Mystery shopping [82]	Mystery shopping is traditionally a market research tool used to measure the quality of a service or to collect specific information about products and services. The tool uses "shoppers" who act as normal customers and request a service. A structured format is typically used for feedback.	Allows assessment of quality of services – based on objective criteria. The tool can be used face-to-face, by phone, as well as online (web chats or emails).	Tool to look at the quality, efficiency and effectiveness of information service.	The method works best when there are clearly identified service requirements (what service should be delivered by when – which amount of detail should be provided). Language skills are needed at mother tongue level.	Information and guidance services.	++(+) (shoppers are usually researchers not citizens).
Organisational review[83]	Organisation reviews covers aspects such as infrastructure in place, organisational strategies, systems and processes; human resources and development strategies. When key performance indicators[84] exist for outputs, compliance typically forms part of the assessment.	Helps identifying appropriate avenues to optimise processes.	Organisational reviews identify and assess organisational processes and procedures. The purpose is to identify if these work satisfactory.	Procedures and processes needs to be clearly identified. Ideally standards and KPIs should be set.	Information and guidance services(e.g. the EDCC, EDICs, and all relevant Commission information and assistance networks)	+(+)
Technical (IT) audit[85]	Technical audits are undertaken on IT systems and/or databases. The audit looks at the requirements set for the project and assesses if	The audit reviews if the database can be optimised for example to increase information efficiency, or	Identification of opportunities to enhance efficiency. Advice on data mining,	Requires significant technical expertise.	Information and guidance services (e.g. EDICs, and all	+

82 Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey); information centres (visitors' survey - on the spot and ex-post).

83 Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); networks (members' survey - ex-post).

84 See Code of Conduct (Annex II – Page 11)

85 Small-scale evaluation tools: websites (online pop-up survey); networks (members' survey - ex-post).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	the requirements of the project are achieved.	alternatively to provide better feedback on the audiences reached and topics of interest (via data mining). A pre-implementation audit can be performed to ensure that the database collects and stores the appropriate information for monitoring or for usage.	security and key performance indicators.[86]		relevant Commission information and assistance networks).	
Data mining[87]	Data mining concerns discovering patterns and meaning in data sets. Data sets can be of a single source, a few sources or of extremely large and complex data sets ("big data") Data mining is an interdisciplinary subfield of computer science.	Allows extraction of information from a data set and transforms data into an understandable structure for further use. It is not an evaluation tool. However, it can be used to improve services. For example data mining can be used to gather systematic insight into frequent questions submitted to the EDCC, which could be used to develop dynamic FAQ uploaded online, which could minimise questions raised to the EDCC and hence optimise cost-efficiency.	Can inform preparatory development of communication. Can provide insight into new patterns and meaning of data sets. Does not inform evaluation.	Highly technical. To get insight into data hypothesis to be tested needs to be defined (not possible to "open data and get insight"). Purpose of use needs to be very clearly defined (what are the insights we looking for?) Data sets need to be available – that is analysis should be done on the EC's own data sets or alternatively on bought or publicly available data sets.	N.A.	+++(+)

[86] See Code of Conduct (Annex II – Page 11)
[87] Small-scale evaluation tools: websites (online pop-up survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
Tools[88] for analysis and comparison						
Benchmarking (strict)[89]	Consists of identifying practices, processes, measures or projects that contribute to high levels of performance and using them as a standard of comparison for evaluating other practices, processes, measures or projects.	Allows comparison with similar services and activities.	Assessing efficiency, assessing the appropriateness of requirements for contractors of communication activities (e.g. key performance indicators).[90] Useful as an indication of performance against absolute criteria – for example compliance with processes, or cost per interaction (Assessment of cost-efficiency).	Reasonably comparable programmes and activities must exist. Standard benchmarking is often very difficult to apply in an EC communication context – as there are often no true comparative benchmarks.	Services and communication activities.	++ (depending on the nature of data to be collected and ease of access).
Extended benchmarking[91]	Whereas "strict benchmarking" is often difficult to apply, benchmarking in a wider sense enables comparison between a given activity and activities which in some respect are similar and in other respects are different.	Rather than comparison, focus on opportunities for learning from activities which have some similar characteristics.	Identifying practices which may be used to maximise the impact of an intervention.	When benchmarking is used for identification of good practice, the requirements for comparability are less important.	Services and communication activities.	++ (depending on the nature of data to be collected and ease of access).
Analysis of	Analysis of secondary data is used to describe	Helpful to contextualise the	Framing assignments.	None.	Preparation of	N.A. will

[88] See Small-scale Evaluation Tools
[89] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey).
[90] See Code of Conduct (Annex II – Page 11)
[91] Small-scale evaluation tools: websites (online pop-up survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
secondary data[92]	the scale and characteristics of the problems and needs and future trends. Studies and evaluation reports on similar interventions in the past can also be useful in providing information for describing and examining trends in problems and needs under consideration.	intervention in question. Helpful for identification of good practice.	Problem definition. Development of options for the future.		complex communication interventions.	depend on the data to be collected and analysed.
Analysis of quantitative monitoring data[93]	The purpose of analysis is to structure and provide overviews of what the communication activity (programme, action, campaign, network, strategy etc.) deliver in terms of inputs (activities and outputs (reach).	Depending on the nature of the communication activity subject to evaluation, analysis may cover a wide range of data including for example production data, web-statistics, data on audiences reached, number of events organised or other activity outputs etc.	Providing information on the scale and nature of outputs/reach. Informing judgement of delivery and outputs – and where available outtakes and intermediary outcomes (in line with targets?)	Quality and scope of monitoring data differ significantly across EC communication activities. Clarification of what is available and not available to the contractor is important already when preparing the call for tender. Analysis of monitoring and other secondary data should be undertaken early in the evaluation – and ideally as part of the inception phase.	All types of interim and ex-post evaluations.	N.A. will depend on the data to be collected and analysed.
Analysis of qualitative monitoring data[94]	Qualitative monitoring data provides information on the nature of activities undertaken, issues encountered, the type of audiences reached, and issues encountered and success of the activities. Analysis and mapping of qualitative monitoring	For some evaluations, mapping and review of qualitative (and quantitative) data activity and output data form a core part of the	Insight into the nature and scope of activities and the relatively weight and importance of different activities. Review and	*As for analysis of quantitative monitoring data.*	All types of interim and ex-post evaluations.	N.A. will depend on the data to be collected and analysed.

92 Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey).

93 Small-scale evaluation tools: fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).

94 Small-scale evaluation tools: printed material (readers' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	data typically cover project and activity reports, evaluative reports undertaken by contractors or project holders, outputs delivered and other available data.	evaluation. This is especially true when the object of the evaluation is a communication strategy or a complex programme – under which a wide range of individual and varied activities take place.	mapping of data provides an important baseline for subsequent research.			
Expert panels[95]	Expert panels are groups that meet for a specific evaluation or impact assessment. Expert panels are usually made up of independent specialists recognised in the field. Expert panels are a means of arriving at a value judgement. An expert panel would be asked to estimate the (potential) impacts of an intervention and to assess the merits of the intervention in terms of potential synergies.	Particularly useful in estimating probable impacts when used in conjunction with available quantitative data. They are good way to judge whether the (potential) effects are sufficient or insufficient. Good for ex-ante evaluation and impact assessments.	Identifying preferred options. Providing a value judgement on complex communication interventions.	A structured approach is necessary. There are benefits in using Delphi surveys when undertaking expert panels.	Complex communication interventions with many small interventions and communication policies.	N.A. will depend on the data to be analysed. Often more than one expert panel is needed.
SWOT analysis[96]	SWOT analysis examines the strengths and weaknesses as well as the opportunities and threats that are involved in the situation to be addressed by the intervention. It incorporates into the evaluation both the intrinsic characteristics of the situation concerned and the determining factors in the environment in which the programme will be implemented.	A well-known and widely used approach that provides a framework for discussion of the merits and demerits of actual and proposed interventions. It can be applied when hard evidence of impacts is in short supply.	Situation assessment. Identifying priorities for intervention.	Requires multiple sources of data.	Ex-ante evaluation and impact assessments, problem definition.	N.A. will depend on the data to be analysed.
Multi-criteria	Multi-criteria analysis is a tool for comparison in	Several criteria can be taken	Particularly useful during the	Requires multiple sources of	All types.	N.A. will

[95] Small-scale evaluation tools: printed material (readers' survey); networks (members' survey - ex-post).

[96] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
analysis[97]	which several points of view are taken into account. The analysis can be used with contradictory judgement criteria or when a choice between the criteria is difficult.	into account simultaneously in a complex situation.	formulation of a judgement on complex problems.	data.		depend on the data to be analysed.
Media analysis tools [98]						
Media analysis/ Quantitative metrics[99]	Media evaluation is a tool used to for assessment of the effect of media activities. It involves structured analysis of media coverage. Today, quantitative media analysis is usually automated.	Assessment of the effect of media activities and for improving future communication efforts.	Typical matrices for quantitative media analysis are: ■ Audiences: Audience reach, readership and share of audience, ■ Share of voice ■ Cost-effectiveness assessment: Return on Investment; and Advertising Value Equivalent ■ PR Value ■ Spokesperson references	Usually provided by media analysis companies. Can be done as part of evaluations – but often issues with data on OTS/OTS and prominence of coverage.	Media activity.	N.A. will depend on the data to be analysed.
Media analysis qualitative metrics[100]	Media evaluation is a tool used to for assessment of the effect of media activities.	Assessment of the effect of media activities and for improving future	Typical matrices for quantitative media analysis are:	Usually provided by media analysis companies.	Media activity.	N.A. will depend on the data to be

[97] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey).
[98] See Small-scale Evaluation Tools
[99] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).
[100] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	It involves structured analysis of media coverage. Qualitative analysis is increasingly based on semantic analysis.	communication efforts.	■ Favourability/Tonality of coverage ■ Type of coverage ■ Key Message Penetration	Manual analysis can provide very good insight but is costly on large numbers.		analysed.
Advertising measurement						
Advertising recall[101]	The recall, by a research interviewee, of advertising. This can be defined in many ways: aided (or prompted) recall is where the respondent's memory is prompted, which can be via a visual aid, or stating the Issuer's name (have you seen any advertising for 'X' recently?). There are different grades of prompting, even showing the ad itself, which is termed 'Recognition'. Spontaneous recall is the ability of the respondent to recall any details of an advertisement without prompting.	Shows the actual impact of advertising on the recipient in terms of recalling the advertisement (or not) and what messages they took out of it.	Whether the creative treatment and/or frequency and reach being used are sufficient to achieve being noticed by the audience.	Involves audience research.	Advertising (purchased).	++++ (research cost).
Frequency[102]	Generally: The number of times the target audience has an opportunity to see the campaign, expressed over a period of time. Frequency distribution: target audience broken out by the number of advertisement exposures. Frequency of insertion: the number of times the advertisement appears. Average frequency is the average number of times a target is exposed to the advertising message over a specified period. Frequency of insertion is the number of times the	Allows comparison with Effective Frequency – the level of coverage and frequency calculated to deliver the optimum awareness/action for a given creative treatment or campaign.	Performance: an evaluation of a schedule's achievements after the event, usually in terms of reach/ coverage and frequency. A pre-campaign planning tool as well as a post campaign reporting tool.	Request when contracting advertising.	Advertising (purchased).	Usually provided by agency at no extra cost.

101 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).

102 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	advertisement appears.					
Reach & Coverage[103]	Reach is the number of people who will have at least one opportunity to see an advertisement, publication or programme in a given schedule, broadcast or publication period. Coverage is the proportion (expressed in percentage terms) of a target audience having an opportunity to see/hear the advertising.	Allows comparison to Effective Reach – the percentage of the target that is exposed to the advertising message a sufficient number of times to produce a positive change in awareness, attitude or behaviour.	Performance evaluation of a campaign's advertising schedule's achievements after the event – usually in terms of reach/ coverage and frequency. A pre-campaign planning tool as well as a post campaign reporting tool.	Request when contracting advertising.	Advertising (purchased).	Usually provided by agency at no extra cost.
OTS/OTH[104]	Opportunity to see (hear) an advertisement by the target audience, e.g. the average issue readership of a magazine would be considered to have had one opportunity to see an advertisement appearing in that particular issue. Normally shown as an average OTS among the audience reached, such as 80% coverage with an average OTS of 4.	See Frequency.	A pre-campaign planning tool as well as a post campaign reporting tool.	Request when contracting advertising.	Advertising (purchased).	Usually provided by agency at no extra cost.
Ratings (gross)[105]	The percentage of an audience within a specified demographic group which is reached at a given time (e.g. one minute, for the duration of a programme). A sequence of these ratings (e.g. in a campaign) can add up to more than 100% and are then called gross rating points (GRPs).	When divided by reach, these gross ratings generate an average OTS. Programme A rating = 10, programme B rating = 20, programme C rating = 5, total GRPs = 35.	Used in media planning to determine the comparative benefits of individual media choices. Reporting on GRPs as campaign is delivered is a measure of whether actual media placement is on track. A pre-campaign planning tool as well as a post campaign	Request when contracting advertising.	Advertising (purchased).	Usually provided by agency at no extra cost.

103 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).
104 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).
105 Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
			reporting tool.			
Cost per thousand (CPT) [106]	The cost of reaching 1,000 of the target audience, e.g. 1,000 adults.	As well as ex post evaluation of efficiency it can be used as a comparison of cost-efficiency between, for example, different titles or TV channels, or for comparing prices for different media.	Cost efficiency – and comparing different channels/tools in efficiency terms. A pre-campaign planning tool as well as a post campaign reporting tool	Request when contracting advertising.	Advertising (purchased).	Usually provided by agency at no extra cost.
Share of voice (SOV)[107]	In Advertising: the campaign's advertising weight expressed as a percentage of a defined total market or market segment in a given time period. The weight is usually defined in terms of expenditure, ratings, pages, poster sites etc. In Public Relations: the weight of editorial media coverage obtained by your release/media exposure on an issue, compared with the coverage obtained by other actors in the same issue.	Gives a market based comparison of your campaign's level of exposure against that of others seeking the same attention. Gives a market based comparison of your campaign's level of exposure against that of others seeking the same attention.	The environment in which your advertising is competing for attention. How successful is your message and your messengers and the effectiveness of your media relations.	Requires whole market data. May require extending media monitoring and analysis.	Advertising (purchased).	May involve additional research costs. Media monitoring and analysis costs to include other actors.
Tools[108] for cost analysis						
Cost benefit analysis (CBA)[109]	CBA is a methodology for assessing the net benefits accruing to society as a whole, as a	If benefits (or potential benefits) can be monetised CBA provides good basis for	This method is appropriate where all the inputs and impacts can be expressed in	Many communication interventions generate benefits that are not easily	Services (which have a financial	++

[106] Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).
[107] Small-scale evaluation tools: websites (online pop-up survey); videos (viewers' survey, ex-post survey); printed material (readers' survey).
[108] See Small-scale Evaluation Tools

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
	result of a project, programme or policy. Shared characteristics with ROI assessment.	merit and worth. Often used in ex-ante studies (and impact assessments).	monetary terms. However, a number of interventions generate benefits that are not easily measurable in monetary terms.	measurable in monetary terms.	benefits to users). Ex-ante studies.	
Cost effectiveness analysis (CEA)[110]	CEA is aimed at determining the cost of achieving a specific outcome. It consists of relating the outcomes or impacts of an intervention to the total amount of inputs (total cost) needed to produce such outcomes/impacts. The main decision criterion is usually identified as the cost per unit of outcome to be achieved e.g. cost (€) per rating point, cost per thousand (Cost of reaching one thousand people in the target market).	The technique can be used when measurement of outcomes and impacts in monetary terms is difficult, or the information required is difficult to access. The objective of the method is to evaluate the effectiveness of an intervention. It is also used as an alternative to a cost-benefit analysis when social benefits and costs are difficult to monetise.	Analysis & judgement of efficiency, effectiveness and value for money. Informing resource allocation decisions across interventions.	The method requires ■ Clarity on how to measure effectiveness i.e. the outcome indicators[111] that will be used for the analysis ■ Availability of benchmarks to draw comparisons CEA can only be used to compare interventions that deliver the same types of outcomes.		++
Return on investment (ROI) and Return on	Analysis to calculate the financial payback of an information campaign. ROI is typically not relevant to other communication types. In these cases other forms	Estimates the financial payback of communication campaign – which, for example may stem from:	■ **Predictive Payback & ROMI:** At the start of a campaign, analysis carried out to determine how Payback and ROMI	Turn on Marketing Investment (ROMI) require forward planning in order that the right metrics are obtained and some basic mathematical	Information campaigns with have anticipated financial benefit	+++

[109] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).
[110] Small-scale evaluation tools: websites (online pop-up survey); printed material (readers' survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).
[111] See Code of Conduct (Annex II – Page 11)

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
marketing investment (ROMI)[112]	of financial assessment are usually used.	■ Generating public revenue ■ Saving public money directly or indirectly ■ Enabling public money to be invested in priority areas	will be measured and to predict the scale of Payback that is expected to be delivered ■ **Projected Payback & ROMI:** During the campaign, examining leading indicators to provide estimates of the campaign's effectiveness and efficiency, feeding back into campaign design or adjustment ■ **Evaluative Payback & ROMI:** The measures calculated as part of a retrospective evaluation of a campaign's success. This calculation may not be possible for several years following the campaign.	skills. Some campaigns will deliver no financial benefit, as they aim to deliver benefits which cannot be quantified in monetary terms. For example, encouraging people to register to vote in elections.	or Payback	
Cost efficiency assessment[113]	Calculates cost per output (e.g. cost per audience reached) or cost per input (e.g. cost per event organised).	Easy to implement (subject to availability of relevant data). Most suitable measurement	Assessment of reasonableness of costs.	Does not provide data on cost effectiveness, but provides an indication of the	Most types	+ (when data is available)

[112] Small-scale evaluation tools: websites (online pop-up survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).

[113] Small-scale evaluation tools: websites (online pop-up survey); fairs and festivals (participants' survey - on the spot and ex-post); citizens' dialogues, fairs, cultural events (participants' survey - on the spot and ex-post, participants' headcount methodology); local events (organisers' feedback form, participants' feedback form, participants' survey); conferences, workshops and stakeholder meetings (feedback form, participants' survey).

Tool	Brief description	Advantages	Helps to inform	Key issues	Relevant for evaluation of:	Cost
		for communication which does not have financial benefits/gains.		extent to which costs of activities and audience reached were reasonable.		

Source: developed in the framework of the study: Measuring of EC communication

4 Documents supporting PART 8 of the toolkit

Document 10: Planning a single communication activity (PDF)

See next page

Guide on how to plan your communication activity as to ensure effective measurement

While your intended communication intervention may be small in scale, it still requires careful planning. This resource is intended to help you plan successful actions that can be measured and evaluated.

1. Set the baseline: What is the EC trying to achieve?

This is the “Big Picture”: you may be organising a conference, an exhibition or an open day but what is the European Commission hoping this will contribute to? Take a moment to consider what the Big Picture is and keep it in mind as you move forward.

2. What do you want to achieve by this action, specifically?

This is where you should be really clear about what you can reasonably expect to happen as a result of your action. As examples:

- Do you want to raise awareness of an issue through media coverage?
- To consult on a policy?
- To increase the number of visitors to a website?
- To start a dialogue?
- To launch an initiative by getting the key stakeholders to endorse it?
- To increase take-up or improve the quality of requests for funding?
- Ensure learning, by making them use an activity (download an App, subscribe to a newsletter etc.)?

Pose the question to yourself: what is the measurable purpose of this action? If there is no real and specific purpose, then there is a strong chance that the action will be: a) of no real benefit to the citizens of Europe; and b) could be wasting taxpayer’s money.

3. Who are you trying to reach?

Again, be specific.

“The public” is not an acceptable target – it means everyone and that is simply not possible. Is it, for example, 16-18 year olds who could be participants in an academic exchange programme? That is a specific audience (for Erasmus for example) that can be measured.

4. What do you want to say to your audience?

What do you want them to take-out as a message? Do you want them to take an action as a result? Not as easy as it may sound. If you are planning a publication, for example, what are the key messages you want to get across – this will also influence the tone that you take in relaying your message? There should not be too many key messages; they should be simple (in their principle at least); they should be easily understandable to this audience; and, most of all, be motivating.

5. How are you going to reach your audience?

Now that you know what your objectives are; who you want to address; what you want to say to them and what you want them to take out from your actions. Make sure that your objectives are "SMART" – i.e.

- *Specific* – target a specific area for improvement
- *Measurable* – quantify or at least suggest an indicator of progress.
- *Achievable* – within budget and resources available
- *Relevant*– result-based or results-oriented
- *Time-bound* – associated with a target date

You now need to consider what are the best activities (within your constraints of budget, time, etc.) to achieve your objectives and contribute to the Big Picture.

It may be satisfying to see your programme in a beautifully designed and printed publication but have you worked out in advance how you are going to distribute it – and to whom? If you are organising a conference or an exhibition, how are you going to make sure that the right people hear about it and subscribe?

If you are dealing with intermediaries (citizens' advisory groups for example), what is the best way to reach them? Here you will need to consider what channels you will need to use to get your messages/content across. Say for example you have chosen to reach 16-18 year olds, consider who influences them the most? Is it their parents, their teachers, their Facebook friends? This will again affect the chosen channels and activities. Do you know enough to have you worked out how your action will create change within your target audience?

6. How will you measure success?

It is important to try to link the measurement to your specific objectives for this action.

You need to think of what success will look like and what would be the best indicator for success.

You should always try to measure the effect of your activity as far as possible towards "what actually happened to your audience?" (what actions did they take as a result, for example).

Measuring your success has to try to isolate the contribution of the activity to the overall objectives (the impact that can be reasonably attributed to the activity) but also has to be realistic in terms of its relative cost and complexity.

You will find guidance on indicator setting in the document found in the online resource:

- **Setting indicators[114] for your communication actions: development of your performance framework**

You will also find guidance in this document under the guide for evaluation of specific activities.

6. Make sure you plan for measurement

Planning your measurement and evaluation in advance is an essential part of any communication plan. Without this step, you may miss the opportunity to measure things such as footfall at an exhibition, numbers of respondents, etc.

[114] See Code of Conduct (Annex II – Page 11)

To help you with your planning, create a simple matrix like the one below. By using it you will remember and record the steps that you have taken to reach the decisions you have made – and you will enable the evaluation to reflect those decisions.

My objective	My audience	My messages/content	My activity	How will I show success	How it can be evaluated
What are your communication objectives?	Who is the best audience for this?	What would you like your audience to learn/known/support	What activity will you undertake to achieve it?	What are the signs of success for this activity? How many people doing/knowing/supporting what? What indicators[115] will best show success?	How will you collect data to inform your indicators[116] How will you analyse data ➔ By whom ➔ When

You can use the following checklist to measure the quality of the planning of your communication activity and its readiness to be evaluated

Checklist for planning	Yes	No
Have I got agreed, clearly defined, expected outcomes that can be both measured and attributed to the communication activity?		
Have I defined the specific role of communication? Is it to Inform, Persuade, Normalise, Inspire or Engage?		
Have I defined the target audience in sufficient detail?		
Have I set specific and measurable objectives for the effect that the communication activity is to bring about? Have I determined specific objectives for each segment of my target audiences? ➔ Are these objectives all SMART? If not, have I clearly noted why not?		
Are my proposed communication activities making the best use of available communication tools that are most likely to achieve my objectives? ■ Is my activity likely to achieve the expected objective? If no have I re-assessed the value of doing the activity at all?		
Have I determined the means by which I will measure the effect of my proposed communication activity, its reach and effectiveness? Have I specified success indicators[117] for each communication measure in order to determine the effect of the intervention?		

115 See Code of Conduct (Annex II – Page 11)
116 See Code of Conduct (Annex II – Page 11)
117 See Code of Conduct (Annex II – Page 11)

Document 11: How to evaluate conferences (PDF)

See next page

Measurement and evaluation of conferences

The guide focuses on measurement and evaluation of conferences which aim to engage stakeholders (or participants) in some form. If your conference has as main objective to ensure media coverage – please refer to the guide on press/media events, which sets out a framework for measuring media coverage.

Suggested tools for measurement: survey

Surveys are a standard tool for measuring and evaluating conferences. Others tools may also be used and they are explained at the end of the guide.

A survey is a quantitative data collection tool that allows you collect feedback from those participating in the conference. Using a survey allows you to collect information on:

- Background - what people know, what they have done
- What they think, their attitudes and opinions
- What they intend to do or have done as a result of participation in a conference
- Their opinions on the conference's organisation

Your survey results should be analysed together with data on attendance (see analysis)

Steps to implement your survey

- Design the survey questions
- Choose your survey tools and design
- Implement the survey, collect the data
- Analyse the data; communicate and use your results

Step 1. Design your survey questions

Designing your survey is about choosing the right questions to ask.

Preparatory planning

- Have objectives been set for the conference? Your objectives should be **SMART**. If you have not yet done this, use the guidance provided in the document "**Planning a single communication activity"** in the evaluation resource.
- Have you identified indicators[118] of success? Look for inspiration in the document "How to develop you **indicators and your monitoring system"** in the evaluation resource.
- Ensure that you allocate **sufficient time** for planning of your activity – and **for its measurement**

Evaluating when implementing many evens with few resources

- Do not try to develop surveys for all your events. Chose those which you consider key for success.
- Use online surveys rather than print surveys as analysis is quicker

Many conference surveys contain standard questions only. These will inform you about logistics or about satisfaction with the conference – but they often fail to capture information on the **effects** of your conference. When you formulate questions, think carefully about what you want to achieve by holding the conference and formulate your questions accordingly.

The table below provides examples of question types that you may consider, depending on your objectives.

In addition to these questions, you may add questions the standard on logistics and catering. You may also add questions about what attracted people to the conference, how they learnt about it and how they were invited.

[118] See Code of Conduct (Annex II – Page 11)

Purpose of the conference	*Type of questions to be considered*
The objective is to share information with interested parties so that they are (more) aware of a policy that is being created	Questions related to knowledge improvements (e.g. Were you provided with adequate information on the policy initiative?) Questions related to information sharing (e.g. Do you intend to share the information with members of your organisation?)
The objective is to capture feedback on a specific issue and incorporate it into policy creation	Questions related to dialogue (e.g. Did the conference give you the opportunity to voice your/your organisations views on the policy? Did you feel you were being listened to?).

How to encourage people to reply: Length of the survey and testing

A conference survey should always aim to be as short as possible (to encourage people to reply). Do not include more than about 10 questions.

Ensure that most are "close ended" questions ("tick box" questions). Do not include more than 2 open-ended questions

When reviewing your draft survey, consider for each question:

- If the information you are asking for is necessary for assessing the conference in terms of efficiency and effectiveness? Consider, for example, whether you actually need information on gender and names of respondents
- Will the information provide useful inputs to the future decision to hold a conference or the organisation of conferences?
- Will the answers provide you with insights that will help your policy colleagues?

Step 2. Choose your survey tool

Basically four types of surveys can be used for a conference:

- Online survey
- Print survey at the event
- Telephone survey
- Face to face/on the spot survey

The different survey approaches each have strengths and weakness, as illustrated below.

Tips:

- Can the questions easily be understood? **It is very important to avoid too long and detailed questions.**
- Does the survey read well? Think also about the organisation of questions
- Check if the close ended questions contain all answer options (ensure neutrality). The option "I do not know" should always be included if there is a chance that the respondent does not know.
- If you use an online or a print survey look and feel is important. Test the look and feel with a colleague.
- Collect the necessary background information (type of organisation etc.) but do not collect more than what you actually need (you may not need gender etc.).
- Always add a comment box at the end of the survey to give the possibility to respondents to provide feedback. This is also an opportunity to collect extra qualitative information.

For most events an online survey could be the most effective tool – as no resources are needed to manually map all the responses. However, only select an online survey if you actually hold the contact details (i.e. email addresses) of all the participants. If this is not the case, choose a print survey (or an on the spot survey – i.e. a survey undertaken face to face with participants at the event).

Survey	Strength	Weakness
Online survey	Allows you to target all participants irrespectively of walk-in/walk-out Cheap and easy to promote. Allows you to tailor your questions to	Only possible if you have the email addresses of the participants Self-selection of respondents (so there is a possibility that the answers received will not be representative)

	different groups of respondents Allows for a considered, post event, response	Lower response rates if administered after an event Not good for complex issues
Print survey at the event	Relatively cheap Provides 'on the spot' feedback	Not good for conferences where there is a lot of walk-in/walk-out (no ideal timing for the print survey) Not good for complex issues Self-selection of respondents (not representative) Time needed to map responses for analysis Requires staffing for handout/collection May get "What I think they want to hear" answers
Telephone survey	Allows you to target all participants irrespective of walk-in/walk-out Good for complex issues Fewer "do not know" answers	Contact details have to be available to you Respondents may decline an interview or be reluctant to provide their telephone numbers Time consuming/costly for larger samples Requires trained interviewers
On the spot survey (by interviewing people at the event)	Good for complex issues Easy to promote Representative Fewer "do not know" answers	Participants may decline participation (e.g. due to interest in networking during breaks). Staffing needs to be intensive if many interviews are to be conducted Cost/HR resources needed May get "What I think they want to hear" answers

Step 3. Implementation of your survey

Irrespective of the survey tool you have chosen, promote your survey. Make sure the participants are made aware that the survey is being undertaken and emphasise how important you regard their contribution.

Explain how the results will be used and that answers (if this is the case) will be used anonymously. Promote it early at the event and keep reminding the audience.

Print surveys may be included in the welcome pack – or it may be better if it is put on all seats during the break before the last session. Never put the survey form on a selection of seats!

Online surveys should be delivered within 48 hours of the event via email. If you can, deliver it in the morning – as experience shows that more people will respond.

If you use an on the spot survey, then it is best to use a tablet with wireless connection to map down the results – using paper will mean you have to map the results a second time.

Step 4. Analysis:

Analysis should be undertaken in two steps:

- Analysis of attendance
- Analysis of your survey data

Analysis of attendance

Analysis of attendance is about assessing the extent to which you reached out to the audiences you aimed at reaching out to. The analysis would usually cover the following issues:

- Did we reach those we wanted to engage?
- How many did we reach? What is the share of those reached with what we actually wanted them to take from the conference?
- Did we reach out to new audiences (especially important if that was an objective)?

In order to analyse attendance it will be important that you collect information on the registered participants. You can use an online registration form to facilitate registration and analysis.

Update your registration data with those actually participating. Delete those that actually did not participate.

Understanding who you actually engaged in your event is important! It is not sufficient that participants were satisfied with the event. If your event did not reach the intended target audience your event was not successful.

Analysis of your survey results

Simple data analysis of survey results can be undertaken: presenting overall results and results per category (i.e. type of participants). If some groups expressed higher levels of dissatisfaction it is important to consider if these were your priority target audience.

Analysing qualitative data from the open-ended questions can be undertaken in a number of ways. For example you may look for key words, you may preset categories or look for emergent categories for the information (identify particular categories of information from a cohort of evaluation forms and then go back and categorise all of the qualitative information accordingly). You may use the qualitative data to generate testimonials.

- Did the EC/EU point of view come out clearly (if this was an objective)
- Did the EC/EU point of view convince the participants (if this was an objective)
- Did we collect useful feed-back

Ask yourself if you can see any trends in the results; are there any unusual findings?

Use: Review your results in the light of the original SMART objectives that you set for the conference. Then ask what went well and what did not? Discuss the results with your colleagues: what can be learned for the future; what to keep and what to change?

Benchmark your results with past events.

Undertaking evaluation in house or with a contractor?

A survey of a conference can be undertaken by the EC 'in-house' or by working with a specialist contractor (usually an evaluator or perhaps your event organiser).

If the contractor designs the survey make sure that the objectives of the event are discussed and that the survey is designed accordingly.

You can use a contractor for all of the steps or only for data collection and/or analysis. If you decide to undertake the survey in-house, then you need to consider the following:

- For a print survey: are resources available to map all respondents manually? Or is a tool available so responses can easily be mapped (usually easier if mapped in a survey tool)?
- Online survey: is a survey tool available and are staff allocated to set up the survey?
- For all surveys: are competent resources available to undertake the analysis of survey responses?

Finally, if a telephone survey is chosen, it is recommended to outsource/contract out the survey – because they are time consuming and because respondents will be more honest in answering questions from an 'independent' interviewer.

Other tools which may be used to evaluate conferences

In addition to surveys, other tools may be used to inform evaluation of conferences.

The most used tools are Focus Groups (especially to prepare and tailor your conference) and “observation at the event”. Observation is used to complement surveys as they can provide qualitative information - especially on interaction at the conference. Such tools are usually implemented by contractors. For a presentation of the tools see ***overview of methods*** in the toolkit.

If your conference reached out to the media you can also do media analysis (see ***guide on press/media events)***

Document 12: How to evaluate Newsletters (PDF)

See next page

Measurement and evaluation of newsletters

Suggested tools for measurement: readership survey and online measurement

For newsletters it is important to ensure that the publication meets the expectations of the intended target audience. Any measurement should also ensure that it is possible to provide specific learning which can feed into any modification of content for the future.

Today, most newsletters are electronic. Compared to printed newsletters, electronic newsletters are cheaper, easy to publish and can achieve a better reach. Electronic newsletters can be delivered as a PDF file but more often take the form of a short emailed newsletter with links to a web-hosted version and/or specific articles online.

Preparatory planning

- Newsletters are about continued information provision to interested audiences. Newsletters will only be successful if they provide value – in the form of relevant, useful information – to the receiver
- Newsletters are designed communication products and a great deal of attention needs to be given to usability and visual impact, as well as editorial content.
- Ensure that you allocate **sufficient time** for planning of your activity – and **for its measurement**

Email newsletters are normally sent out from a newsletter tool[119]. Generally it is preferable if your newsletter is not a PDF. A PDF is not easy to navigate and it requires more effort to the receiver to access. Also, it will provide you with less information on readership,

Before you evaluate

Before you create your newsletter, send it out and then evaluate, it is important to define what you want to accomplish — the desired effect. Do you want to create increased awareness of a submission deadline, get sign-ups to an event, or drive traffic to your site or other effects? This is important to define because it should steer newsletter creation, content, measurement and the evaluation of success.

To measure reach and interest, **online** measurement is the most appropriate tool. To gather feedback on quality, usefulness and avenues of improvements use a readership **survey** is more appropriate. Ideally these tools are used together as they provide complementary data.

In addition, you can:

- Use subscription information to collect some background information on your readers.
- Use the survey to collect background information on your subscribers (such as their media preferences)

Undertake online measurement with regular intervals. It is easy and cheap to do.

Surveys in contrast should only be deployed very occasionally – typically if you consider changes to your newsletter.

The approach to online measurement and the readership survey are presented in turn.

Online measurement

Irrespective of the format of your newsletter (PDF and online) it will be possible to monitor if your newsletter emails are actually opened. You should monitor the ‘open rate’ on a regular basis. The open rate is a measure of how many people on an email list open (or view) a particular email[120].

Email newsletter tools typically contain a statistics section that can deliver both overall, accumulated data and data on individual newsletter publication/broadcast. Evaluating newsletter performance is best done from publication to publication to evaluate performance with the purpose of improving effect.

[119] also known as email marketing campaign tool

[120] Calculated as emails opened divided by (emails sent minus bounce)

The following metrics are associated with emailing of newsletters:

Metric	Explanation	Tips
Subscribers	The number of people subscribed to the newsletter.	How many do we potentially reach?
Unsubscribes	Number of people unsubscribing from the newsletter	An increased number of unsubscribes after a publication is an indicator of dissatisfaction with the newsletter.
Open rate	The percentage of subscribers that open the newsletter	
Forward rate	The percentage of subscribers that forward the newsletter to friends/colleagues	
Bounce rate	The percentage of mails not delivered because of closed email accounts, error in mail address or the like	Quality in subscribers' list.

You should in addition measure the number of opened newsletters/newsletter features. This will be possible if you host the content on a website. Hosting of the content online allows you to measure:

- The number of visits and unique visitors – and consequently the share of subscribers that did not read your newsletter.
- Articles of most interest (most visited) and those of low interest
- Time spent

Standard metrics are:

Metric	Explanation
Click rate	The percentage of clicks that follow at least one link in the newsletter
Conversation rate	The percentage of subscribers that perform the desired action

If your subscription form requests information on the nature of the subscribers you can also use this data. However, this will only inform you on the type of subscribers – not on actual use.

Gathering content feedback: readership survey

A readership survey is a quantitative data collection tool allowing you collect feedback from readers. A survey allows you to collect information on:

- Background, the composition of your readership and target audience
- Content (readability/clarity, tone, length, interest, balance of subjects)
- An assessment of the design (look and feel, use of graphics)
- If an e-publication – most appropriate medium for dissemination (apps, websites, social media)
- Take-out's from the newsletter (What they intend to do or have done as a result of receiving the newsletter)
- Value of the newsletter

There are two options: you can collect detailed information about a single newsletter; or you can collect information on your series of newsletters.

Implementing a survey relates to the following steps.

1. Decide on sample size

Usually you would aim to survey all of the subscribers to you newsletter. However, you may also choose to work only with a sample of your subscribers.

This may apply for printed or e-publications. Samples should consider the type of reader (if available) – it should be representative of the target population and may include considerations such as: Stakeholder type, country of origin and language coverage. If you do not know who subscribes to your newsletter it is preferable that you survey all or at least 20% of all subscribers (chosen at random).

2. Design your survey questions

Designing your survey is about choosing the questions to ask. When formulating your questions you have to think carefully about what you would want to know – and the type and amount of data already available to you. If your newsletter supports policy initiatives (e.g. promoting participation to an EU programme) you would want to know if the readers feel that the right information is being provided – and if they intend to do anything as a result.

The table below provides examples of question types that you may consider, depending on your objectives. Choose only questions for which you really need an answer. It is very important that your survey **is short**. Respondents will not reply (or only reply to some questions) if your survey is too long.

Area of inquiry	Type of questions to be considered
Assessing the content of the newsletter	■ The relevance of the content to the reader ■ The amount of the newsletter they generally read and why (what sections are most interesting to read) ■ The clarity of the articles ■ Accuracy of the articles ■ The level of information provided (general, technical, specialist) ■ Information for follow up of interesting articles ■ Specific questions relating to editorials and features
Assessment of the design	■ The presentation of the newsletter ■ The use of graphics to illustrate the articles ■ The branding of the newsletter
An assessment of the most appropriate form of newsletter (on line, printed)	■ Preferred method of receiving the newsletter (online, downloadable, email, post, etc.) ■ If an e-publication – most appropriate medium for dissemination (apps, websites, social media) ■ Readers habits and practices (access to Internet, smart phones, use of social media)
Take outs from the newsletter	■ Use in working life (and for what: formulate your questions in view of what you wanted to achieve with your newsletter) ■ Use in private life (and for what: formulate your questions in view of what you wanted to achieve with your newsletter) ■ Extent of use ■ Use of information in own agenda setting/policy making (and for what: formulate your questions in view of what you wanted to achieve with your newsletter)

3. Testing

A readership survey should be short and generally involve closed questions. It should take into consideration the length and type of newsletter. A more technical newsletter may need more in depth questions relating to the content and use, a more general newsletter may be more concerned with information dissemination.

When reviewing your draft survey, consider for each question:

- The ability of a reader to be able to answer these questions without needing to go back and re read the newsletter
- Does the question distinctly help with answering the overall evaluation questions (do you need to know about the layout for example or are you only interested in the further dissemination and uptake of the content)?
- Additionally, the medium of the survey is important (see below)

Tips:

- Can the questions easily be understood? It is very important to avoid too long and detailed questions. If your survey is long or contains too many options readers will not reply – and you cannot survey them a second time.
- As a general rule avoid more than 7 options – and never more than 12! Beyond 12 people lose the overview.
- Test the questionnaire with a colleague (and if possible with one of the readers).
- Does the survey read well? Think also about the organisation of questions
- Check if the close ended questions contain all answer options (ensure neutrality). The option "I do not know" should always be included if there is a chance that the respondent does not know.
- Look and feel is important. Test the look and feel with a colleague.
- Collect the necessary background information (type of organisation etc.) but do not collect more than what you actually need
- Always add a comment box at the end of the survey to give the possibility to respondents to provide feedback. This is also an opportunity to collect extra qualitative information. You can work with more than one comment box in different parts of the survey but avoid more than three.

4. Implementation

A readership survey should be undertaken over a time limited period. It should go out at the same time a newsletter is produced and be available for a period of around 2-3 weeks.

Promotion of on an online survey would generally take place via emailing to subscribers. Avoid promoting only in the newsletter (as it will generate lower response rates).

Make sure your email

- Is short
- Highlights that feedback is important to improve the newsletter

Is sent in the morning (gives better responses)

The best method would be to personalise the email to readers. In some cases, a prize or small reward can be used as an incentive for readership surveys.

Analysis of survey data

Analysis of a readership survey involves:

- Overall analysis of the results
- Analysis against relevant variables such as the profile (geographical region or country, gender, position, age, etc.), in order to identify correlations within the data
- Analysis against frequency of readership – or most important subscribers

Survey results can present results overall and results per readership group. When undertaking analysis ask yourself if you can see any trends in the results; are there any unusual findings

Use:

Review your results in the light of any targets that you may have set for reach and for satisfaction. You can also benchmark results against similar results (for example from another Representation).

Discuss the results with your colleagues: what can be learned for the future; what to keep and what to change in the newsletter as to make it more attractive.

Undertaking evaluation in house or with a contractor

A survey of a newsletter can be undertaken by the EC 'in-house' or by working with a specialist contractor (usually an evaluator).

You can use a contractor for all of the steps or only for data collection and/or analysis

If the contractor designs the survey make sure that you have discussed the target audiences – and the type of effect you expect of the newsletter and that the survey is designed accordingly.

If you decide to undertake the survey in-house, then you need to consider the following:

- Is a survey tool available and are staff allocated to set up the survey?
- Are resources available to undertake analysis of survey responses?

Other tools which may be used to evaluate newsletters

In addition to surveys and online monitoring, other tools may be used to inform evaluation of newsletter.

Most used tools are Focus Groups (especially to prepare and develop a newsletter from crash) and paper surveys for paper based newsletters (often inserted into an issue).

Document 13: How to evaluate Websites (PDF)

See next page

Guide on how to evaluate websites

Suggested tools for measurement: online survey and analysis of website statistics

Website analytics and online surveys are the most common tools for website evaluation.

Website analytics is easy to use and you can set it up as to receive regular monitoring reports. Surveys among users should only be undertaken very occasionally,

⚠ Set out the goals for your website so that your can measure the extent to which these have been achieved

Ensure that you allocate time for regular only measurement

Website analytics deliver quantitative data for the performance such as number of visits and page views. Online surveys deliver information aspects such as visitors' satisfaction, missing content and ease of use.

An invitation to participation in an online survey can be displayed to the visitor when landing on the front page.

Before you launch a website

Before you launch a website the single most important thing to define in context of analytics is what you want your users to do when they visit your site — *the goals*. Design, content and information architecture should all point towards these goals.

Examples of goals are:

- Viewing a specific page containing key information to complete a user task
- Sign-up to a newsletter
- Download of a PDF
- Submitting a web form
- Commenting to a blog post
- Submitting an application

All these goals can be measured by tracking visits to individual URLs and they should be set up in your analytics tool.

Remember to add the tracking script to the website *before* launching it to the public but *after* the design and test to make sure that you only track desired traffic.

Website analytics

When evaluating websites, there are MANY metrics available from the website analytics package used. As outlined in the box, choose the ones which reflect the goals you have set out.

There are many analytics tools for measuring performance of websites. It is important to be aware that two different tools will almost always deliver different values for the same measures. This is not an indicator of errors but just that different tools measure in different ways.

Most analytics tools allow for exclusion of traffic from specified IP ranges. ***You should use this to omit traffic from your own organisation (and external contractors).***

The table below provides examples of the key metrics that can be collected to evaluate a website:

Metric	Explanation	Notes/tip
Unique visitors	The number of users requesting pages from the website during a given period, regardless of how often they visit.	
Visits	The number of visits (or sessions) to a website.	
Page Views	Number of pages requested (also called Page Impressions)	
Return Visit Rate	The Return Visit Rate is calculated as the number of visits from returning visitors divided by the total number of visits to the site.	A high Return Visit Rate is a sign of high loyalty of the visitors.
Time spent per visit	The average amount of time spent per visit.	Can serve as an indicator of interest. A high amount of time spent per visit suggests high interest.
Page views per visit	The average number of pages viewed per visit	Can serve as an indicator of interest. A high number of pages viewed per visit suggest high interest.
Bounce rate	Bounce rate is defined as the percentage of visits that only has one page view before exit.	A high bounce rate suggests that the content of the page is not relevant for the user/ the user cannot quickly find the information he/she need quickly enough….
Goal completion rate	The percentage of visitors that complete a defined goal.	Also called conversion rate A goal can be a sign-up to a newsletter or download of a PDF. For examples of goals see the blue text box.

Other interesting metrics that can be obtained from your analytics tool is the distribution of traffic in terms of devices used geographic location and the sources (referrals) to the traffic.

Geography can typically be broken down on country, region and major cities levels. Sources to traffic can typically be broken down to search engine (and relevant keywords used), direct (typing the URL), referred (followed a link from another webpage), paid (banner or other ad), and social (link from a social platform). Understanding where your users come from is important.

Demographic data is not possible to obtain because users are anonymous when visiting your site (except when dealing with users that have previously registered on your website).

Collecting data and reporting

In order to collect data, use the corporate EC's analytics tool available via http://ec.europa.eu/ipg/services/statistics/index_en.htm

All website analytics tools can deliver reports. The EC website analytics tools allow for custom design of reports so that you can design a report that deliver exactly the metrics that you need. Choose the ones which best reflects the purposes of your website.

It also allows you to set up a scheduled report that you will receive as a PDF in mail at specified intervals.

It is important to track and compare traffic over time. Does traffic increase or decrease? What is the trend? Changes to traffic over time suggest changes in interest in your content and/or competing sources of information on the web.

Changes to the traffic should also be evaluated in the context of other communication activities aimed to draw traffic to the website.

Use analytics to determine the impact of EUROPA digital presence and online-campaigns. Using specific URL parameters is an efficient way of measuring which channels deliver the most traffic and/or the traffic with the highest goal completion rate.

Gathering content feedback: online survey

A survey is a data collection tool allowing you collect feedback from the users of your website. Through an online survey you may collect information on:

- Background/ the composition of your users
- Visitors' satisfaction with the content: comprehensiveness, clarity, tone, length, balance of subjects
- Reasons for visiting your website/purpose
- Ease of use (easy to find the right information)
- Missing content
- Content of most interest/relevance to users
- Takeouts from the website (What they intend to do or have done as a result of visiting the website)

Implementing a survey relates to the following steps

1. Preparatory work before designing your survey

Designing your survey is about choosing the questions to ask. When formulating your questions you have to think very carefully about what you would want to know – and the type and amount of data already available to you. You should aim at complementing the data you have collected through the analytics tool, not to duplicate data collection.

Be aware that designing surveys for websites is (very) complicated.

Large complex websites can be very difficult to evaluate. This is due to your respondent group. If your website is aimed at groups with different information needs and groups with different backgrounds (e.g. journalists, NGOs and young people on different pages) your survey **must** reflect this (unless your questions are very basic – but then your analytics may be sufficient).

If your site caters for many different groups - you must have different questions for different groups. Likewise, the survey **must** cater for regular users and users visiting the website the first time. It is very important that survey respondents feel that the survey "talks to them". If you ask the same questions to the same groups, the validity and relevance of the responses is likely to be low – and your "dropout" rate will be high (people starting but not completing).

For these reasons it is much more difficult to design a website survey than a survey for people who are subscribed to a newsletter, or to participants in a conference.

Consequently, before you design your survey consider the following aspects carefully:

- Who is likely to use my website? – Map out the different groups. If you are aiming to collect information on the nature of the users, your options (in the survey) must reflect this group. Avoid using "standard groups"
- How many website users are there? How many are regular, occasional and frequent users (use your analytics)
- Why are they using it? (website analytics can inform you about most visited pages – but think also about likely reasons for using it)
- What type of information are they looking for? (use your website analytics)
- What would you like them to do on the website?

Once you have considered these questions you will have to choose your survey questions.

2. Design your survey questions

When designing your survey, consider carefully what you would like to know – and prioritise this.

The table below provides examples of question types that you may consider, depending on your objectives. Choose only questions for which you really need an answer.

It is very important that your survey **is short**. Respondents will not reply (or only reply to some questions) if your survey is too long.

Area of inquiry	Type of questions to be considered
Assessing the content of the website	■ The quality of the content to the reader ■ The clarity of the content ■ Accuracy of the articles ■ The level of information provided (general, technical, specialist)
Identification of needs	■ Purpose of use/reasons for visiting the site ■ Type of information most searched for ■ Content which is missing
Assessment of the design and organisation	■ The presentation of the webpages ■ The use of graphics to illustrate the articles use of graphics to illustrate the articles ■ Whether the researched information is found easily and quickly
Take outs	■ Use in working life (and for what: formulate your questions in view of what you wanted to achieve with your website) ■ Use in private life (and for what: formulate your questions in view of what you wanted to achieve with your newsletter) ■ Extent of use/frequency of use ■ Use of information in own agenda setting/policy making (and for what: formulate your questions in view of what you wanted to achieve with your website)

You are likely to find that depending on the audience you have different questions. For a tailored survey you must work with a routed survey – i.e. a survey which "opens" different questions in function previous answers.

Finally, as your survey is indirectly a communication tool and an opportunity to "listen" to your target audience, do not forget to ask for feedback and comment at the end of the survey. Allowing people to freely comment is important. They are giving their time, and they should be able to comment on what is important for them. This may also help you to collect information on a wider range of issues.

3. Testing

An online survey should be short and generally involve closed questions (i.e. tick box questions).

It should take into consideration the size and type of website. A more technical website may need more in depth questions relating to the content and use, a more general website may be related to topics of more general interest.

When reviewing your draft survey, consider for each question:

- The ability of a reader to be able to answer these questions without needing to go back and check the content of the website.
- Does the question distinctly help with answering the overall evaluation questions (do you need to know about the layout for example or are you only interested in the further dissemination and uptake of the content)?

Tips:

- Can the questions easily be understood? It is very important to avoid too long and detailed questions. If your survey is long or contains too many options readers will not reply – *and you cannot survey them a second time.*
- Look and feel is important. Does the survey look professional? Does the survey read well? Think also about the organisation of questions
- As a general rule avoid more than 7 options – and never more than 12! Beyond 12 people loose overview.

- Do close ended questions contain all answer options (ensure neutrality)?
- The option “I do not know” should always be included if there is a chance that the respondent does not know.

- Collect the necessary background information (type of organisation etc.) but do not collect more than what you actually need
- Test the questionnaire with a colleague – and ideally a few from your target audience!

4. Implementation

An online survey should be undertaken over a time limited period (two weeks usually).

An invitation to participate in an online survey can be displayed to the visitor when landing on the home page.

5. Analysis of survey data

Analysis of an survey involves:

- Overall analysis of the results
- Analysis against relevant variables such as the profile (type of users, purpose of use, geographical region or country etc.), in order to identify correlations within the data.
- Analysis against frequency of use

Tools

In order to design a good quality survey which “talks” both to your regular website users, users of different pages and to those using the website for the first time a tailored and routed survey will typically be needed.

There are advanced survey tools available allowing fully tailored designs. They are however often more complicated to use than simple survey tools.

When working with routed questions, pay attention to how your analysis is undertaken.

Survey results can present overall results and results per groups.

When undertaking the analysis **ask yourself** if you can see any trends in the results; are there any unusual findings?

Use:

Review your results in the light of any goals that you may have set out. You can also benchmark results against similar results (Past surveys, surveys of other DGs websites, EC Representation surveys etc.).

Discuss the results with your colleagues: what can be learned for the future; what to keep and what to change in the website to make it more attractive.

Undertaking evaluation in house or with a contractor

Website analytics will be undertaken by you.

You can also develop and implement the survey yourself.

However, it will often be beneficial to make a specialist evaluation contractor design you survey. This is due to the difficulties mentioned above (as well as the fact that surveying of users only can take place occasionally – trial and error is not possible).

If the contractor designs the survey make sure that you have discussed all the issues above – and that the contractor has a very good understanding of what you want to know, what your site provides and who the likely users are. There the survey can be designed accordingly.

You can also use a contractor for all of the other steps.

If you decide to undertake the survey in-house, then you need to consider the following:

- Is a suitable survey tool available and are staff allocated to design and set up the survey?
- Are resources available to undertake the analysis of survey responses?

Other tools which may be used to evaluate websites

In addition to surveys and web analytics, other tools may be used to inform evaluation of a websites.

Most used tools are website usability audits and test panels (especially to design and identify potential improvements). The tools are usually contracted to evaluators.

Document 14: How to evaluate PR events (PDF)

See next page

Measurement and evaluation of a PR event

The guide focuses on measurement and evaluation of the reach and effect on those participating in the PR activity – but not the media. If your activity has as objective to ensure media coverage – please refer to the guide on press/media events which sets out a framework for measuring media coverage.

Suggested tools for measurement: On the spot/mobile surveys and monitoring

A PR event involves the planned promotion of, in this case, the image or policies of the European Commission in a way which engenders goodwill in the individuals attending, influences opinion and helps to build relationships and mutual understanding.

The aims will differ from event to event but in all cases there will be a target audience who will be expected to turn up to a physical location and there will be actions or activities to which they will be exposed.

There are a number of key tools for measurement (beyond media analysis):

- A survey of participants on the spot
- Monitoring of engagement (e.g. number of participants participating in a quiz or other "engaging" activity at the event)
- Monitoring of uptakes (e.g. number of publications distributed)
- Measurement of footfall
- Measurement of follow up activity

This guide takes as point of departure that engagement (such as participating in a quiz or a similar activity or number of information requests at stands) is monitored by the contractor or that feedback is provided by those at the stands (make sure that this request is clarified before the event – this is impossible to measure afterwards and estimates are often unreliable). Such data already provide a good basis for measurement.

Preparatory planning

- Is there an understanding of the types of audience who are invited to participate/expected in the PR event? Has any research been done into their needs? Is the target audience segmented by needs?
- Have you specified an opinion/attitude or knowledge level that the PR event should influence?
- Have objectives been set for the event? Your objectives should be **SMART**. If you have not yet done this, use the guidance provided in the document "**Planning a single communication activity"** in the evaluation resource.
- Have you identified indicators[121] of success? Look for inspiration in the document "How to develop you **indicators and your monitoring system"** in the evaluation resource.

Must have:

- No and type of invitees
- No and type of attendees
- List of available material
- List of activities and type of activities taking place

Ensure that you allocate **sufficient time** for planning of your activity – and **for its measurement**

Likewise it is expected that your contractor will provide data on number of publications distributed. Therefore this guide focuses on capturing participants' feedback and measurement of reach.

Although many measurements can take place during or immediately after a PR event, outtakes (learning, awareness raising, knowledge building) are very important as these events will include objectives around issues such as influencing public opinion/attitudes towards a topic.

On the spot survey

Steps to implement an on the spot survey

[121] See Code of Conduct (Annex II – Page 11)

- Determine the purpose and focus of the on the spot survey
- Design the on the spot survey
- Set strategy for the collection of the data - positions, number, type of profile, etc.

1. Determine the purpose and focus of the on the spot survey

The first step in designing this small tool evaluation is to set out the purpose and focus of the on the spot survey. The PR event will most likely be part of a wider campaign or part of the communication strategy from which the overarching communication objectives can be established. The event will be planned in such a way that there will be:

- A venue
- A key message or theme of the event
- Identified sponsors or stakeholders who will have stands or exhibitions
- An identified target audience and size of expected audience
- Promotional material which will have been sent out and media briefing packs (for example).
- Hospitality and logistics
- A budget
- Potentially speakers

This information will help with the derivation of the focus of the on the spot survey.

Key questions to consider are the following:

What is the sample size of the audience that you wish to gather data from during the on the spot survey? Do you need to set overall target numbers for representative samples of the target population (age, gender, nationality etc.)?

What is it that you need to know about the PR event?

- Access to information on the focus of the event?
- Understanding of a particular message?
- Usefulness of the information found?
- Likelihood of using the information?
- Likelihood of passing information on?
- Is feedback on the following important?
  - Logistics and organisation
  - Side events, sessions
  - Exhibition stands
  - Networking opportunities
  - Venue

2. Design the on the spot survey

Designing your survey is about choosing the questions to ask.

The table below provides examples of question types that you may consider, depending on your objectives.

⚠ On the spot surveys must be short. People who are attending an event may not be there because they were specifically targeted or interested (e.g. visit to a tent or a stand at a fair)

Area of inquiry	*Type of questions to be considered*
Reasons for attending	What drove people to attend (was it the focus of the PR event or some other factor)
The overall content of	Questions rating issues such as:

the event	Overall quality of the stands/exhibitions Session topics (if applicable) Information content of prior information (website/publicity)
The outtakes of the event	The information from the sessions/ exhibition are relevant/ useful Most interesting stand/exhibition space (or activity at the event) Any knowledge of outtakes? Potential usefulness of information for work/home
Intention (intention to action)/intermediary outcome	Awareness of sources where more information can be collected Intention to take further action Intention to recommend to friends/colleagues/family to visit other events/search for information Intention to share knowledge/information obtained (colleagues/networks)
Efficiency of the event	Intention to stay (how long) Attractiveness of the event (and what is attractive) Reasons for participating Branding of the event Venue
Background information on the participants	Especially important if the event was not an "invitation only" but everybody who came by could participate (i.e. did you engage with your target audience)

Step 3. Set plan for the collection of the data - positions, number, type of profile etc.

Once the survey has been designed there are two main ways in which data can be collected:

- Mobile/online survey
- Paper survey

The best mechanism is to use an app on a tablet for example which can feed the data straight into a system which can keep those administering the survey up to date with the profiles of those replying and the number who have replied.

A strategy needs to be set in place for collecting the data at the event. This involves:

- Briefing the data collectors
- Setting the time window for data collections
- Allocating positions to the data collectors
- Providing (if electronic) information on the number and profile of the target audience from whom data has already been collected.

Positioning at the event and timing:

Information for the on the spot survey should not be gathered right at the beginning of an event, it is important to give people time to experience a range of stands/speakers and exhibitions.

It is also important to position the data collectors at different points in the venue and that they have training to ensure they are polite, engaging and their appearance reflects the desired image of the event.

One data collector is not sufficient – you will need a few (depending on the size of your event).

Measurement of footfall

There are different methods to calculate footfall – i.e. the number participating. If there is a single point of entry you can count the number of incoming participants. The most reliable is to count all participants. More realistic may be to count two times a day for one hour, and multiply by the number of hours the event is open and then divide by 2. This only works if there is a fairly constant flow. If your event has two entry points or more, one count is needed for each entry – and the total count needs to be divided by 4, 6, etc.

To measure footfall you can also give away something to each incoming participant. This can be a leaflet or a gift of some sort – and then you count the number of items actually given away.

Measurement of follow up activity

It is generally good practice to have some sort of activity that participants can get involved in after the activity. The nature of this activity will depend on your communication objectives and audience, but could involve a website/web-page, a Facebook page, an application or a contact point for further information (e.g. the EDCC or the EDICs).

You should measure engagement on this post event. For this to happen make sure that you plan measurement. If external actors are expected to be contacted (e.g. the EDCC or the EDICs), it is important that they know in advance that they are to provide data on the follow up – and you may need to provide them with reporting requirements or additional information.

Analyse the data; communicate and use your results

Simple data analysis can be undertaken of survey results: presenting overall results and results per profile group. Cross referencing this with the profile types can help to provide a more balanced view of the content versus the needs of the types of audience.

Your footfall data should be analysed together with your survey data and the data on engagement. If your event had 500 participants but most were not from your target audience, and few engaged with any activity (just walked by), your effective reach is much lower indicated by the footfall.

Finally, you should consider any follow up if this was expected (e.g. the number of unique visitors to your website for the event, the number of calls or emails related to the events, the increase in fans on your Facebook page etc.). Did the event trigger further action?

Use: Review your results in the light of the original SMART objectives that you set for the PR event.

Discuss the results with your colleagues: what can be learned for the future; what to keep and what to change?

Undertaking evaluation in house or with a contractor

An on the spot survey can be undertaken by the EC 'in-house' or by working with a specialist contractor such as an evaluator.

You may also use students for implementing the on the spot survey.

If you work with students or internal resources is critical that during the set-up there is someone with the technical capabilities to set up the survey and also that all the data collectors are briefed and trained to use the tablet or collection tool to be used.

Other tools which may be used to evaluate PR events

In addition to surveys (and media analysis), other tools may be used to inform the evaluation of a PR event. This may include interviews with those staffing the stands.

There is also standard data which can be collected from any registration information (if applicable) and from the event organisers if, for example, you have taken one stand in a larger exhibition.

Document 15: How to evaluate Press events (PDF)

See next page

Measurement and evaluation of a press/media event

A press/media event (a general term used here to include all editorial media, including broadcast) can take many forms but exist in order to provide media publicity. Press/media events are characterised by their public reach and concentration on communication to the public in a short space of time.

Forms of press/media events can include: PR event, press conference/media briefings; or even planned events, such as speeches, which have a specific purpose of gaining media coverage

Suggested tools for measurement: Media monitoring and analysis

The main tool for measuring the outcomes and impacts of press/media events is media monitoring as the primary objectives will always include visibility - communicating on policy or programmes or on increasing trust in the European Commission for example.

There are other evaluative techniques which are important in monitoring the media and these will include gauging the reaction of the European Commission to the subsequent media activity (media reactive handling) and also interviews with the press to ensure that the way in which the information is provided is effective and relevant to their needs.

Preparatory planning

- Is there an understanding of the types of press who are invited to participate in the media event?
- Are there channels which are a particular target for the message/communication?
- Have objectives been set for the event? Your objectives should be **SMART**. If you have not yet done this, use the guidance provided in the document "**Planning a single communication activity"** in the evaluation resource.

Must have:

- No and type of journalists invited
- No and types of journalists attending

Ensure that you allocate **sufficient time** for planning of your activity – and **for its measurement**

Steps to implement media monitoring and analysis

- Understanding the key messages to be evaluated
- Setting the overall evaluation questions
- Setting the time period for the media monitoring
- Setting the parameters for the target audience, selection
- Indicators:[122] Setting the requirements for the quantitative analysis
- Indicators: Setting the requirements for the qualitative analysis
- Designing the analysis grid
- Analysis of the data

1. Understanding the key messages of media briefing session

For each press activity or media briefing session clear and relevant information will be made available both through pre event briefing information and the actual event.

Media events are meant to have a direct impact on the press and through them on a particular target group (viewers/listeners/readers of the media). For analysis to be useful, the nature of the expected coverage needs to be clearly defined (what content is expected, which messages are expected to be covered).

2. Setting the overall evaluation questions

Setting out the overall evaluation questions is crucial for setting the requirements of the media analysis.

The table below provides examples of question types that you may consider, depending on your objectives.

[122] See Code of Conduct (Annex II – Page 11)

Area of inquiry	*Type of evaluation questions to be considered (which can be answered through media analysis)*
Relevance of the press targeted for the briefing	Are articles being generated in the right media? (press category)
Exposure to the message	▪ Did the briefing/event generate enough articles to hit the right number of the intended target audience? ▪ Are the media reporting our key messages? Is the key message found in the title of the article (by country/type) ▪ What is the position of the article/coverage in the media? Front page or well back?
Interpretation of the message	▪ What does the content say? ▪ Is the information fair and logical? Is the reporting accurate? ▪ What points are shared in the content, which are left out? ▪ Do the articles/coverage generated provide the right tone of message? ▪ How might the reader interpret the message? ▪ Are there any unstated meanings in the graphics? ▪ What is the tone of the coverage? Which journalists/ publications are reporting us favourably?
The medium of the message	▪ What type of media is used to deliver the message? ▪ What are the strengths and weaknesses of the media format(s) ▪ prominence of media and profile of the media which covered the event (who reads/listen to/hear the media
Timeliness of the message	How long after the event is the article generated?
Persuasiveness of the message	If the message is related to change - how is this being relayed: ▪ Through the use of experts or quotes (who is providing the quotes?) ▪ Through relevant statistics or evidence? ▪ Through fear for the future? (environmental disaster, economic decline etc)
Reaction to the media coverage	Did the coverage generate reaction? ▪ Comments online, ▪ Sharing of articles online, ▪ Comments by readers ▪ Comments by national politicians in the media What is the tone of the engagement – which topics are picked up on? Is there articles/coverage being generated in media from which no journalists were present at the briefing/event or did not receive an invitation? Or follow up articles?
Contact cost	What is the contact cost of the articles? (overall budget of the visit versus the estimated readership levels of the articles)

3. Setting the time period for the media monitoring

Following a media briefing or event, the reaction of the press is most likely to be in the short term. The evaluation planning needs to take place at the same time as the briefing information. The media monitoring should continue for at least two weeks after the event – this gives enough time for follow on articles and commentary to be picked up. It is important to set the timing to ensure:

- Consideration is given to major events happening in the news which may de-prioritise this particular news item
- Consideration is given to similar national or international news and events which may be happening at the same time.

4. Indicators:[123] Setting the requirements for the quantitative analysis

Based on the chosen areas of enquiry there is potential quantitative data which can be produced:

- Article date
- Press category
- Media title
- Article length
- Article position
- Audience
- Readership numbers (accessibility)

5. Setting the requirements for qualitative analysis

These may include:

- Extent to which themes are covered by the article
- Extent to which messages are covered by the article
- Tone: positive, negative, neutral, mixed (depending on message) etc.
- Use of facts/evidence/quotations:
- Types of facts
- Types of evidence (including that provided in press pack)
- Types of quotations
- Assessment of overall credibility of a particular media (scientific journal versus mass media for example) – media weighting
- Context specific information (any other external factors likely to affect reception of message e.g. elections)
- Designing the analysis grid
- Analysis of the data

Tips:

- Determine which content analysis is appropriate
- Ensure scaling of content analysis
- Identify robust indicators
- Set clear coding categories
- Apply equal vigour to coding
- Carefully train the content analysers to produce comparable analysis moderation of results)
- If sampling is involved - chose parameters – time period, page, channel etc

Coding tables are important for media analysis. A coding table for the content and messages can be constructed to include certain aspects you are looking for and then the tone of each area can be categorised.

6. Designing the analysis grid

Collecting and collating the data generated during the media monitoring needs to be done in a way which will facilitate the cross analysis of the qualitative and quantitative data in order to answer the set evaluation questions associated with the intended outcomes of the media event.

This will include the categories set out for the collection data above as well as standard information for cross analysis such as:

- Journalist

[123] See Code of Conduct (Annex II – Page 11)

- Journalist present at event
- Country
- Major papers/media where no articles are generated
- Audience characteristics (if known)

7. Collecting data

You should also follow the type of comments which are made on the coverage generated – including:

- Total comments – and especially
  - Tone of comments
  - Key issues picked up

8. Analysis of the data

Once all of the data has been collected and entered into the media analysis grid – the evaluation questions should be revisited and each question should be answered by using a mixture of the qualitative and quantitative data produced.

Undertaking evaluation in house or with a contractor

The analysis of the media monitoring survey can be undertaken by the EC 'in-house' or by working with a specialist contractor such as an evaluator.

Other tools which may be used to evaluate media events

There are other tools which can be used to improve knowledge and understanding of the success of a media briefing/event (such as surveys and interviews). However these are generally not helpful for a press/media event.

However, if your event relates to the training of journalists, you can use surveys (including follow up surveys).

Annex – media evaluation grid

Date	Country	Media name	Prominence of media	Journalist name	Original headline	Type of article: news/ analysis	Position of the article in the newspaper (edito, front page, minor article/filler …)	Key EC message/content reflected in the media	Spokesperson mention (who)	Weigh of EC content vs. other content/ messages	Overall tone of the article : neutral/ negative/ positive towards EC content/message	Quotes from EC sources (name)	EC quotes (content)	Quotes from external sources (name and quote)	Visual impact (Picture, illustration, caricature) yes/no	Description of the picture/ illustration /caricature used

Document 16: How to evaluate Social Media Activities (PDF)

See next page

Guide on how to evaluate social media activities

The guide covers activities involving Facebook Pages, Facebook Ads, YouTube, Instagram, and Twitter.

Measuring social activities can be done on both campaigns that are launched and on existing, more permanent profiles. In campaigns, it makes sense to measure both during the campaign and after the campaign has ended. Finally, measuring can be done on a channel level (example: a Facebook page) and on an item level (example: a Facebook post).

1. Before you launch a campaign

Before you launch a social media campaign, you need to establish targets for your indicators[124] on the platforms in question.

When you set your targets, it makes sense to compare to similar activities. Is there a previous campaign with data that can be used? Is there another national representation with an account with data we can use?

Measurement should be made:

- Before the campaign if meaningful (for example if you use an existing platform or profile on social media rather than making a new) to compare to a baseline.
- At intervals during the campaign (for example once a week) to evaluate progress continuously and decide if actions are needed (for example additional ad exposure)
- After the campaign to make a concluding evaluation.

As well as these measurements, you should also be constant listening to mentions that are relevant for the campaign.

Mentions could require a response from you or a retweet or share by you.

2. Collect data

The tools for measuring activities on social media are either built into the social media networks (Facebook insights or Twitter analytics for example) — or provided by a third-party social media monitoring tool. The European Commission licenses such a tool to enable coordinated monitoring of the central, DG and REP accounts.

When using the corporate monitoring tool, you get the benefit of more advanced data analysis such as influencer identification, trends and pattern recognition, which can be tailored more specifically to a campaign's measurement needs.

Influence is an important measure because it matters who we reach. If we reach users with a high influence and they engage with the activity, they spread the message to many more people than a user with low influence.

External consultants might work with different social media monitoring tools, which calculate metrics with the same name in different ways. It is thus important to ensure comparability of metrics across different tools.

Metrics are on either channel/account (example: Facebook Page) or on item (example: Facebook Post).

The below listed sources of data constantly evolve and provide new, better or different methods to measure what matters, also new platforms or tools might emerge anytime. A thorough understanding of what these tools measure and in how far measures are comparable over time or across platform are important to draw the right conclusions from the data provided. Oftentimes the right data is available but presented in the wrong or insufficient format which requires downloading and post-processing of the data to extract the insights relevant to you. Social Media Monitoring Tool (Engagor)

Engagor is the current social media monitoring tool of choice for the European Commission. It enables holistic monitoring of all Commission related social media profiles, relevant social media conversations and allows for

[124] See Code of Conduct (Annex II – Page 11)

direct engagement with the digital community. Engagor is very feature rich with many possibilities to export, regroup and visualise data according to current needs.

Relevant (key) metrics

Metric	Explanation	Notes/tip
Number of total mentions	Every Engagor monitoring project finds constantly articles and posts ('mentions') online which are relevant for the project.	Constantly review that the mentions found are really relevant to you. Otherwise review your search query with DG COMM. Look what caused peaks in mentions.
Top Links	Which URLs have been shared most often within your monitoring project.	Useful to identify online content around which there is a discussion.
Influencers	Measured by engagement, an "influence algorithm" or the number of followers, who are the most notable people active on your topics.	In Engagor, sort your identified active users by "influence" and find out who multiplies your message best. Note the bias towards Twitter users.
Geographic distribution	Where do mentions within your monitoring project come from?	Depending on campaign goals and social media usage an evenly dispersed discourse throughout Europe is strived for.
Posts vs Engagement by time of Day	Indicates optimal time of being active on Social Media for your specific target audience.	Ideally, most intense activity from your side coincides with most intense community activity.
Social Profile Metrics	Summarised and compared metrics from various social media accounts and platforms.	The only place where you can find "potential reach" of your social media activity.

Engagor can be highly customised to suit your individual monitoring needs, inter alia via custom dashboards which unite your most important metrics in one place.

Facebook Pages

Use Insights which is part of Facebook to get access to the Facebook Page statistics. All admin roles give access to Insights but if you are working with an agency, you can choose to give access to Insights only (as opposed to posting rights) through the “Analyst” role.

Relevant metrics

Metric	Explanation	Notes/tip
Page Likes	Total (accumulated) Page Likes.	Number of users who like the Facebook Page. The most commonly used metric for the Facebook Page.

Reach	Number of users that have been exposed to a page post (item) or any item related to the page.	Calculated best by exporting data from the insights into a more detailed Excel sheet.
Engagement Rate	The percentage of people who liked, commented, shared or clicked a post after having been exposed to it.	Can only be calculated per post. For example, find the ten posts with the highest Engagement Rate and state the numbers.

Another metric that may be of relevance is the demographic distribution of fans on the Page. This metric is interesting to compare to a predefined target group's demographics to evaluate how well you have done in attracting and engaging the defined target group for the campaign.

Facebook Ads

A Facebook Ad Campaign is often used to get an audience to a campaign involving a Facebook Page. Facebook Ads delivers statistics on campaigns from the Adverts Manager (https://www.facebook.com/ads/manage). When reporting on a Facebook Ad Campaign, include the following information.

Relevant metrics

Metric	Explanation	Notes/tip
Running duration of the ads	Start and end date	Can be gathered directly from Adverts Manager
Ad budget spent	Total amount spent	Can be gathered directly from Adverts Manager
Overall campaign Reach	Number of Facebook users who saw the ad during the campaign	Can be gathered directly from Adverts Manager
Click-through rate	Number of clicks divided by the number of times the ad was displayed	Can be gathered directly from Adverts Manager
Results	Results depend on the purpose the campaign was created to support on Facebook. Most campaigns aim at Page Likes.	Can be gathered directly from Adverts Manager

YouTube

YouTube has its own statistics tool called YouTube Analytics.

By default, there is only one user connected to a YouTube account but by connecting the YouTube account to a Google+ page, you can add multiple users to the account by adding them as manager to the Google+ page (http://gigaom.com/2013/04/11/youtube-just-got-support-for-multiple-admins-per-channel/)

Relevant Metrics

Metric	Explanation	Notes/tip
Total account views	Accumulated views for all videos published from the channel	Views are not unique which means that numbers tend to be higher when used as a measure of Reach.

Unique Cookies	Similar to unique users, indicates how many people (devises) have viewed your video.	Some viewers delete the cookies. For these reasons the actual unique viewers is lower than the Unique Cookies
Estimated minutes watched	Accumulated estimated minutes watched on all videos.	Measure of interest. The more minutes watched, the more interest.
Subscribers	Users subscribing to your YouTube channel	This measures the number of users with a strong interest in the channel.
Playback Locations	Shows YouTube pages and embedding sites where viewers watch videos	
Absolute Retention	Shows which parts of videos people are watching and/or abandoning	A rise in the Absolute Retention graph means viewers are re-watching that part of the video. Significant dips in Absolute Retention within the first 5-10 seconds can indicate unmet audience expectations.
Likes	All likes on all videos from your channel	Measure of interest on videos.
Comments	Shows how many comments are left on the videos	
Sharing	Shows how many times viewers share your videos and where	

There are other metrics from your YouTube channel, but these are the most important.

Instagram

Instagram only allows for one user per account, so you need to share the login details if you are a team working with this platform. Instagram does not include any statistics tools, so a third party tool is needed. Iconosquare (formerly Statigram) is free and easy to use. The following metrics are based on this tool.

Relevant Metrics

Metric	Explanation	Notes/tip
Followers	Number of Instagram users following your account	Comparable to Facebook Page Likes. Can also be gathered directly from your profile without Iconosquare.
Likes received	Number of likes received on all photos	Number can be gathered by manually adding all likes on all photos.
Comments received	Number of likes received on all photos	Number can be gathered by manually adding all comments on all photos.

Twitter

Twitter offers a comprehensive analytics tools via analytics.twitter.com. If you have the login credentials for a Twitter account, you can get insights down to the level of individual tweets.

Relevant Metrics

Metric	Explanation	Notes/tip
Followers	Number of Twitter users following the account	Comparable to Facebook Page Likes. The value can be found directly on the profile.
Retweets	Total number of times tweets has been retweeted by other users.	'RTs' are the most important Twitter metric currently (2015). By retweeting, users share content with all of their followers. RTs are positively correlated to all other relevant metrics.
Favourites	Total number of times tweets has been marked as a favourite by other users.	'Favs' are used mostly as bookmarks and as an expression of appreciation similar to Facebook likes. Many favs mean people consider this tweet important to them but do not deem it suitable to retweet (i.e. share it with their followers).
Impressions	Number of times a tweet was loaded onto a device's screen.	This number can be assumed to be close to the number of unique people reached by a tweet. 'Impressions' are also aggregated and visualised per day.
Engagement Rate	Any actions (including retweets and favourites) taken on a tweet, divided by the number of impressions this tweet received.	Also look at the individual composition of the engagements taken. Tweets vary drastically in what users do with them. Depending on your objectives, different engagements might be more important to you than others.

Google+

Google Plus only offers limited but nevertheless useful build-in insights. They focus on showing how your posting activity correlates with the number of views and engagements you receive.

Relevant Metrics

Metric	Explanation	Notes/tip
Views	How many times your page and its content were viewed. Values are approximate and only significant values may be shown.	See if your posting activity correlates positively with your views.
Actions on posts	Comments, shares and +1s on your posts. Values are approximate and only significant values may be shown.	Try to see if different types of posts, content or topics trigger different kinds of engagement.
New Followers	How many new people follow your page. Values are approximate and only significant values may be shown.	Does your posting activity correlates positively with your follower growth?

LinkedIn

LinkedIn offers conveniently all their insights on one dashboard with information on individual posts and engagements, reach, data on your audience and how you rank compared to similar pages.

Relevant Metrics

Metric	Explanation	Notes/tip
Impressions	How often has your post been seen	
Engagement (Rate)	The number of times users interacted with your post divided by the number of impressions this post received.	You can see different types of Engagement to get even more detailed insights.
Reach	How often your updates have been seen on a daily basis.	Dividable by total number of impressions and unique people reached.
Number of Followers	Your total number of followers	Also look at the professional background of your followers. What sectors do they come from?
How you compare	Your number of followers compared to other companies	Are they growing faster or slower than you? What explains the difference?

3. Analysis of the data

Once the metrics have been collected through the chosen tools the evaluation questions should be revisited to map these data sources and review them against set targets and the scope of your target audience.

Where your social media activity forms part of a wider campaign you should integrate your results of your analysis in this analysis.

Undertaking monitoring and evaluation in house or with a contractor

If you use the abovementioned resources directly, you may want to monitor yourself (or get your contractor to do it, if the social media activity forms a part of a campaign).

Document 17: How to evaluate Smartphone Applications (PDF)

See next page

Guide on how to evaluate smartphone applications

Suggested tool to measure smartphone applications (“apps”): online measurement

This guide focuses on how to measure the reach of applications developed by the EC and the metrics available.

However, evaluation of a smartphone application must go together with an evaluation of the strategy and actions which have been taken to promote the application (for example a campaign).

If you did not undertake targeted promotion of your application to a specific audience it is unlikely that it will be downloaded.

Therefore, before you launch your application make sure that you have designed a targeted strategy for the promotion of your application – and monitor the actual reach of these activities.

Preparatory planning

An application is not a stand-alone tool. Together with the preparation of the app a strategy for promotion of the app must be developed covering:

- Why is an app needed? What is the issue to be addressed by the app?
- Who is targeted?
- How will the target group learn about the app (when and where)?
- What would success look like (number of downloads/target)?

Measurement of apps reflects usually an **intermediary outcome**.

1. Where to collect data

This document focuses on the data that are available from app stores in terms of number of downloads and ratings. The following platforms are included:

- Apple iOS: iTunes App Store
- Google Android: Google Play
- Windows Phone: Windows Phone Store

⚠ Often, app development is outsourced to an app developer. In this case, it is important that the app is published with your organisation as published (preferred) — or you assure that the developer will provide you the data.

Metrics can be gathered from the relevant app store directly when you are publisher For the European Institutions, the Publications Office is the publisher, therefore is the P.O. in charge to collect the data.

2. When to measure

You should measure app performance at fixed intervals — for instance each week. Monitor in relation to the activities you undertook to promote the application. Did the promotional activity engage the target audience to download the application? And how many?

Relevant metrics

iTunes App Store, Google Play and Windows Phone Store all have an interface for app publishers. This is where you can find reports on statistics. An app can be published in several versions, but data should be totalled for all versions when you gather your statistics.

The data can be broken down on individual markets. Again, try to link this data to the activities you undertook to promote the application.

iTunes App Store

Data is accessed from the “iTunes Connect”. The following metrics are available.

Metric	Explanation	Notes
Number of downloads	Number of times the app has been downloaded per country	
Number of ratings	Number of ratings given	
Average rating	1-5 stars	
Number of reviews	The number of written reviews/comments by users.	Qualitative feedback can be gathered here with the purpose of improving the app in the next release

Google Play

Data is accessed from the “Google Play Developer Console”.

Metric	Explanation	Notes/tip
Number of installations	Number of installations from Google Play	Developer Console has both “current” and “total” number of installations. Current installations takes into account the number of uninstalled apps, but for comparison with other platforms, use total number of installations. Installations = downloads for iTunes App Store and Windows Phone Store
Number of ratings	Number of ratings given	
Cumulative average rating	1-5 stars	
Number of reviews	The number of written reviews/comments by users.	Qualitative feedback can be gathered here with the purpose of improving the app in the next release

Windows Phone Store

Data is accessed from the “Windows Store Developer Dashboard”.

Metric	Explanation	Notes/tip
Number of downloads	Number of times the app has been downloaded	
Number of ratings	Number of ratings given	
Average rating	1-5 stars	
Number of reviews	The number of written reviews/comments by users.	Qualitative feedback can be gathered here with the purpose of improving the app in the next release

3. Analysis of the data

In order to analyse the data, all of the metrics can be brought together in a single spreadsheet and categorised, including date/interval time in order to track development. The accumulated data can then be analysed in any number of ways to provide insights into the success of the applications against set targets and the scope of your target audience.

If your application has been developed in relation to a specific activity or a campaign (e.g. the app for the ex-smokers campaign, the open days in Brussels, 9 may etc.), you should measure the cost per download at the end of the event/campaign (taking into account the cost allocated to the development of the application).

It may also be appropriate to benchmark your data with similar apps developed by the EC for other programmes/campaigns.

Undertaking evaluation in house or with a contractor

The monitoring can be undertaken in house or you can ask the contactor who has developed the application to provide the data.

Document 18: How to evaluate Publications (PDF)

See next page

Measurement and evaluation of publications

Suggested tools for measurement: monitoring of distribution, ex-ante consultation and ex-post measurement

Measurement of publications can take several forms. What will be suitable will depend on the nature of the publication.

Monitoring of dissemination

For all publications measurement of reach/indicative reach will be important. This measure will consider number of downloads (for online publications) and number publications disseminated on request (dissemination on request being the standard for EC publications). Depending on where your publication is disseminated (e.g. EC bookshop, EC/Representations website, conference) you can collect monitoring data from the EC bookshop (downloads and number of publications requested) as well as online using the EC web analytics tool at http://ec.europa.eu/ipg/services/statistics/performance_en.htm

and http://ec.europa.eu/ipg/services/statistics/index_en.htm

Likewise, if you have promoted your publication via mailings it will be possible to measure:

- The Open rate - The percentage of users that open the publication from the email
- The forward rate - The percentage of subscribers that forward the publication to friends/colleagues
- Bounce rate - The percentage of mails not delivered because of closed email accounts, error in mail address or the like

Dissemination figures may prove sufficient as yardstick. However, for publications expected to have significant reach you may want to complement evaluation with other measurement.

Ex ante measurement

Before developing a publication you may want to undertake some preparatory research as to make sure that your publication is useful for the intended audience. You may want to consider the following questions:

- What are the goals of the publication? : Setting out the objectives of the publication, understanding the audience and the impression the publication will make you develop a better publication.
- Who would be interested in reading about this subject? What demographics?
- Will the content of the publication be fulfilling an unmet need? If so, how is this best communicated?
- What impression does this publication need to give to the target audience?
- What format will fit the purpose?
- What design is appealing? What length of publication is good for the audience, type face, use of colour etc.
- How best to brand the publication?
- How best to disseminate the publication?

> **Preparatory planning**
>
> Publications are often for specific target audiences and contain more specialised information and messages, in comparison to other printed material.
>
> It is important to understand the target audience of a publication and the purpose of your publication. Use the questions to the left and guidance provided in the document “Planning a single communication activity” in the evaluation resource to develop your publication.

As to inform these questions ex-ante measurement can be undertaken. Ex-ante measurement can be done in different ways:

- Online consultation – if there are appropriate channels (for example you can consult with EDICs, who works extensive with schools if you intend to develop a publication for children)
- Focus group consultation exercise – where you invite a selection of people in order to discuss their needs and derive all of the information you need for creating the publication.

- Expert workshop – where you invite experts in the area to comment on needs for a specific group.

At the end of your consultation, the following information needs assessed and documented:

- Profile of target audience - segmented
- Size of target audience
- Needs of target audience (content, design and style)
- Dissemination channels (online, through intermediaries, at conferences etc.)
- Marketing channels (social media, website, conferences, newsletters)
- Intended impacts (knowledge sharing,
- referencing of publication/citing, increase in proposals for funding etc.)

For the monitoring and evaluation

- What monitoring data can be collected during distribution? (web downloads)
- What user data can be accessed?
- Will an ex post evaluation take place?
- What information do you need to collect in order to assess the impact?

Use the "**Planning a single communication activity**" in the evaluation resource to develop these aspects.

Ex-post evaluation

Ex post evaluation will provide evidence of the relevance, usefulness, and if important, the impact the information has on the knowledge and behaviour of the readers. The ex post evaluation may also focus on learning for future publications in order to improve their content for the target audience.

Measuring effect ex-post is however often difficult as publications are often not distributed to known users (often they have downloaded it). Different options are nevertheless possible for measurement:

- You can include a "pop up" survey on the website where the publication is available – this is nevertheless not ideal (they will not have read the publication).
- You can survey those who have ordered the publication via the bookshop (or you can request people's email addresses before they download the publication. This needs to be considered at the ex-ante stage when the monitoring and evaluation system is set up).
- You can survey a group of participants to a conference in which the publication was disseminated.
- You can organise a focus group with identified profiled people (representative of the target audience) who have been given the publication to review.

The content analysis can also be with an independent communications evaluator with the skills to undertake this analysis.

Implementing a survey – ex post

This section focuses on the use of a readership survey to inform the ex post evaluation of a publication. As outlined, a pre-condition for your survey is that you have an audience to survey. If you do know who have received your publication this will be of little use and you would want to consider other measures.

If you know who your audiences are, implementing an online survey relates to the following steps.

1. Design your survey questions

Designing your survey is about choosing the questions to ask. When formulating your questions you have to think carefully about what you would want to know – and the type and amount of data already available to you.

If your publication is about a particular study which has been undertaken you will need to know that the readers are those who are "enriched" by having had access to the study results and will use them for example.

The table below provides examples of question types that you may consider, depending on your objectives. Choose only questions for which you really need an answer. It is very important that your survey **is short**. Respondents will not reply (or only reply to some questions) if your survey is too long.

Area of inquiry	Type of questions to be considered
Assessing the content of the publication	■ The relevance of the content to the reader ■ The amount of the publication they have read and why (what sections are most interesting to read) ■ The clarity/readability of the text ■ Accuracy of the text ■ The appropriateness of information provided in relation to the intention (general, technical, specialist)
Assessment of the design	■ The presentation of the publication ■ The use of graphics to illustrate the publication ■ The branding of the publication (is the EC considered to be a reliable source of information on this subject?)
An assessment of the most appropriate form of publication (on line, printed)	What is your preferred method of receiving the publication (online, downloadable, email, post etc.) If an e-publication – most appropriate medium for dissemination (apps, websites, social media)
Outtakes and intermediary outcomes from the publication	Use in working life (and for what: formulate your questions in view of what you wanted to achieve with your publication such as citations in research, for use in teaching material, …) Use in private life (and for what: formulate your questions in view of what you wanted to achieve with your publication, learning about something new, helping your children) Extent of use Use of information in own agenda setting/policy making (and for what: formulate your questions in view of what you wanted to achieve with your publication)

2. Testing

A readership survey should be short and generally involve closed questions. It should take into consideration the distribution, length and type of publication. A more technical publication may need more in depth questions relating to the content and use, a more general publication may be more concerned with information dissemination

When reviewing your draft survey, consider for each question:

- The ability of a reader to be able to answer these questions without needing to go back and re read the publication
- Does the question distinctly help with answering the overall evaluation questions (do you need to know about the layout for example or are you only interested in the further dissemination and uptake of the content)?

Tips:

- Can the questions easily be understood? It is very important to avoid too long and detailed questions. If your survey is long or contains too many options readers will not reply.
- As a general rule avoid more than 7 options – and never more than 12! Beyond 12 people lose the overview.
- Test the questionnaire with a colleague

3. Implementation

A readership survey should be undertaken over a time limited period. It should go out after the distribution of the publication has hit a desired level (such as 50% of the target) and be available for a period of around 2-3 weeks.

Promotion of on an online survey would generally take place via emailing to known readers. If this is not possible, advertising it through a related EC website would be another way. As highlighted, these questions may be better dealt with through a focus group method of a segmented target population who are provided copies of the publication, if no information on the actual readership is available.

- If emailing: make sure your email:
- Is short
- Highlights that feedback is important
- Is sent in the morning (gives better responses)

The best method would be to personalise the email to readers. In some cases, a prize or small reward can be used as an incentive for readership surveys.

(and if possible with one of the readers).

- Does the survey read well? Think also about the organisation of questions
- Check if the close ended questions contain all answer options (ensure neutrality). The option "I do not know" should always be included if there is a chance that the respondent does not know.
- Look and feel is important. Test the look and feel with a colleague.
- Collect the necessary background information (type of organisation etc.) but do not collect more than what you actually need
- Always add a comment box at the end of the survey to give the possibility to respondents to provide feedback. This is also an opportunity to collect extra qualitative information

3. Analysis of survey data

Analysis of a readership survey involves:

- Overall analysis of the results
- Analysis against relevant variables such as the profile (geographical region or country, gender, position, age, etc.), in order to identify correlations within the data

Tools:

Surveymonkey.com is an easy-to-use and cheap tool for conducting an online survey.

Survey results can present results overall and results per readership group. When undertaking analysis ask yourself if you can see any trends in the results; are there any unusual findings

Use:

Review your results in the light of any targets that you may have set for reach and for satisfaction. You can also benchmark results against similar results for another publication.

Discuss the results with your colleagues: what can be learned for the future; what to keep and what to change in the publication to make it more attractive.

Implementing a focus group (ex-ante or ex-post)

Focus groups usually involve homogenous groups of around 10 to 12 people who meet once. The group interaction is facilitated by the evaluator or researcher using a predefined guide. You can undertake the focus group yourself. However if you intend to organise a focus group yourself be aware that:

- You will have to design a guide for moderating the group.
- Focus groups are generally time-consuming to organise. You will need to recruit the participants and make sure that they are available at the same time for a meeting
- You will have to foresee a gift/incentive for participation together with funding of travel and accommodation
- A focus group is not simply a discussion group. It requires moderating skills and expertise.

Finally, if you undertake a focus group ex-post it will be important that the person moderating is not the person who initially made decisions on the publication. The moderator must always be highly neutral on the topic and not guide participants towards "desired" answers.

Analysis of focus group data

Analysis of a focus group involves qualitative analysis and writing up of onions expressed in the group. It is important that diversity is expressed in the write ups.

Undertaking evaluation in house or with a contractor

Website analytics will be undertaken by you. You can also develop and implement the survey yourself, as it will be possible to undertake the focus group(s) yourself.

However, it will often be beneficial to make a specialist evaluation contractor design and implement your focus groups.

As outlined it is time consuming to identify the right participants, organise all the logistical aspects and it requires professional moderating skills

If the contractor designs the survey and/or the focus group make sure that you have discussed all the issues above – and that the contractor has a very good understanding of what you want to know, what your publication is intended to do/what you would like a publication to do in the future – so that focus groups/surveys are designed in the best possible way. .

You can also use a contractor for all of the other steps.

If you decide to undertake the survey in-house, then you need to consider the following:

- Is a suitable survey tool available and are staff allocated to design and set up the survey?
- Are resources available to undertake the analysis of survey responses?

If you undertake a focus group in house consider the following:

- Can prospective participants easily be identified?
- Is there an experienced moderator available for moderation?
- Who will be responsible for logistics and recruiting of participants?