Social Marketing Evaluation: A Step-by-Step Planning Guide

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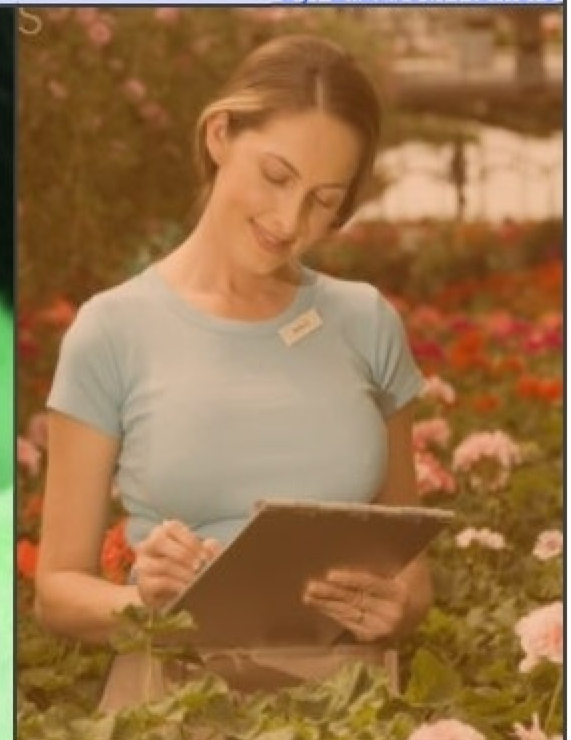

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Introduction

The purpose of this manual is to help you start thinking about evaluation. It is not intended to create an evaluation for you, but instead it will provide you with enough information needed to begin planning your own evaluation. This guide will take you through a series of steps in which you will determine the expected results of the campaign and the appropriate ways to measure these outcomes. The appendices in the manual provide examples of different measuring tools that you may adopt or modify for your own evaluation plan. When going through the manual, please keep in mind that no two evaluations are the same. Therefore, you may need to adjust worksheets to better fit your individual evaluation plan. Let's begin by learning a little bit about social marketing evaluation.

Social marketing evaluation can be separated into two main categories- process evaluation and impact evaluation. Process evaluation focuses on gathering information for the improvement, modification, and management of the campaign. It helps determine if the marketing team and its partner organizations are completing all activities they set out to complete during the planning stages. Process evaluation also helps determine if these activities are being executed as intended. Questions usually asked during process evaluation include: "Was the campaign disseminated to all supermarkets in the targeted community", "Are the partner organizations receiving all the services which were intended to be provided", "Did each member of the campaign team complete their assigned tasks", "Are there mechanisms for accountability", and "Where were campaigns placed". Process evaluation methods are implemented simultaneously with the social marketing intervention.

Impact evaluation, on the other hand, focuses on determining program results and effectiveness. In social marketing effectiveness can be measured in terms of reach, recognition, behavior change, increase in knowledge, and so on. Questions usually asked during impact evaluation include: "How many people saw the campaign", "How many people recognize the campaign", "Did the target population understand the campaign's message", "Have attitudes or beliefs of the target population changed since the implementation of the campaign", and "Has the target population increased their knowledge about alcohol use in the community". Impact evaluation strategies are implemented at the end of the social marketing intervention. (Pretests are the only exception to this rule because they are always administered before the campaign has been disseminated.)

Now that you have read through this quick introduction to social marketing evaluation, it is time to begin planning. In the table of contents, you will find directions for how to use each of the worksheets. Start here to get an overview of the planning process and review the directions before starting each worksheet.

Table of Contents

<u>Evaluation Planning – Remember to reread these instructions when it comes time to start each worksheet.</u>

Worksheet A: Background (page 4)

In this worksheet you will be asked to write down a couple of details about the organization as a whole. When evaluating a social marketing campaign, it is important to consider the context of the organization to better understand the intentions of the campaign.

Worksheet B: Campaign Details (page 5)

In this worksheet, you will be asked detailed questions regarding the campaign that you will be evaluating. It is important to learn about the creation and intended goals of the campaign in order to evaluate its success. The information asked of you in this section will also help you define what success means for this particular campaign.

Worksheet C: Team (page 8)

This worksheet will help you break down tasks and responsibilities among members of the evaluation team. By completing this worksheet, everyone will have a clear understanding of what they need to accomplish throughout the duration of the evaluation. We suggest you look ahead at the other pages in this guide for an idea of what some of the responsibilities that need to be assigned may be and to think about who would best be able to accomplish these. Remember to constantly look back at this worksheet to either edit/review responsibilities and to make sure that everyone is on track.

Worksheet D: Logic Model (page 10)

A logic model is the most important step in creating an evaluation plan. A logic model is a visual representation that illustrates the sequence of related events connecting the need for a planned program with the programs' desired results/outcomes. By completing the logic model, you will be able to determine what the goals, or anticipated outcomes, of the campaign are. These outcomes can in turn be used as a list of results you would like to measure during the evaluation. If you have any trouble filling out the logic model turn to Appendix A for an example of a completed logic model.

Worksheet E: Brainstorming (page 11)

Now that we have established a set of measurable outcomes, we can begin brainstorming possible evaluation activities. Begin by writing down the outcomes (they could be short, medium, or long term) from worksheet C in the first column. Next, think about what types of evaluation methods can be used to measure these outcomes (ie: surveys, interviews, focus groups). Continue filling out the chart until you have filled out the necessary information for each outcome. While completing this information, keep in mind that due to restrictions with time, money, and other resources, it may not be possible to measure every single outcome

Worksheet F: Action Plan (page 13)
The purpose of this worksheet is to help you organize your thoughts from worksheet D. If you look back through the starred items on worksheet D, you will notice that many outcomes can be measured using the same method, such as qualitative interviews. Therefore, we could save time by measuring all these outcomes at once. Begin by writing down all the different methods of measurement from worksheet D in the first column. In the second column, list what outcomes you will be measuring using this method. Finally, determine when you will execute this method.

Worksheet G: Timeline (page 14)
In this worksheet you will be asked to build a timeline for the evaluation. The purpose of the timeline is to get you to think about each step needed for the execution and completion of the evaluation. This is a good time to revisit your Team (Worksheet C) to add other key people or adjust responsibilities. Examples of tasks you may jot down include: Hold Planning meeting, Hold Follow-Up Meeting, Create Surveys, and Implement surveys.

Appendices

Appendix A: Sample Logic Model (page 16)
Use this example of a logic model to help you create your own.

Data Collection Tools

Appendix B: Sample Observation Sheet (page 17)
Observations are usually conducted as a way to measure particular aspects of human behavior. Conducting an observation for a campaign can help the evaluator determine how many people the campaign reaches. It can also help answer questions such as, "How many people a day stop to read the poster?", "Does the campaign stir up discussion?", and "Are females more likely to notice the poster than males?". In this page you will find an example of a typical observation sheet. The observer would spend time watching people as they walk past the campaign poster, jotting down important information about each person s/he observes. At the end of the observing period, the observer would analyze the data by tallying up numbers and/or searching for significant patterns.

Appendix C: Sample Intercept Interview Questions (page 18)
An intercept interview is a type of interview that is conducted in person with respondents who are approached, or intercepted, in high traffic locations. Intercept interviews are often short and simple in order to encourage participation. This type of interviewing technique can help answer questions regarding the reach of the campaign. Questions such as "have you seen the campaign posters?" and "what do you like about the campaign?" are usually asked in an intercept interview. The data collected from the interviews may be very helpful in understanding the true effects of the campaign.

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Appendix D: Sample Focus Group Questions (page 19)
A focus group is a type of qualitative research method in which a group of people are asked questions about the campaign at the same time. Questions are asked in an interactive group setting in which participants are free to talk to one another. The evaluator serves as a facilitator during the interview. S/he will ask the questions (and probes when needed) and helps maintain a continuous discussion throughout the session. Another evaluator can serve as a note taker during the focus group. In a focus group, participants are asked about their attitudes/beliefs about the campaign and whether they have made any changes in their lives because of the campaign. Participants are also asked to make suggestion about how to improve the campaign. Please note that focus groups can also be used to help DEVELOP a campaign message. In our case, we are using a focus group to help us understand the impact a campaign had AFTER it was developed. If you wish to read more about focus groups please visit the Regional Center for Healthy Communities' resource library.

Appendix E: Sample Survey (page 20)
Surveys are used to collect quantitative and qualitative information about items in a population. In social marketing, surveys can be used to test for recognition of the campaign and changes in knowledge, attitudes, or beliefs. Surveys can also be used to quantify the demographics of the population that is getting the most or the least out of the campaign. In this section you will find a sample survey for high school students regarding two posters that were posted at school.

<u>Data Analysis Tools</u>
Appendix F: Qualitative Data Analysis (page 25)
The primary goal of qualitative research in social marketing is to understand the effects of the campaign as seen by your target population. This can be accomplished by searching for themes/patterns in your 1:1 interviews, observation notes, open-ended survey questions, and focus groups. Qualitative research focuses on gathering information through words, whether written or spoken. One of the most widely used methods of qualitative data analysis is coding. In this section, you will learn the basics of coding interviews and focus groups using a step-by-step process.

Appendix G: Quantitative Data Analysis (page 26)
Quantitative data analysis focuses on the identification and analysis of variables that may play a role in answering the evaluation questions. Variables may include participants' sex, grade level, age, after school involvement, education level of parents, and so on. The number of variables that can be identified may be infinite. Therefore, it is up to the evaluator to decide which variables are important, or which variables will help answer the evaluation questions. Unlike qualitative data analysis, quantitative data analysis focuses on numbers and percentages. For example, we may be interested in finding out the number of students who recognize the campaign. After variables have been identified, the evaluator must determine the distribution of each variable. This can be done by using descriptive analysis techniques. In this section, you will learn a little about descriptive analysis. Other more complex analysis approaches may also be used, but one should consider hiring a statistician.

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Worksheet A: Background

This worksheet is intended to help you understand a little more about the organization that is spearheading the campaign you will be evaluating.

Overall mission of the Organization

Main Goals/Objectives of the Organization

Key Components of the Organization

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Worksheet B: Campaign Details

Campaign Title:

____

Overarching Goal of the Campaign:

____

____

Taglines (if applicable):

1.____
2.____
3.____
4.____

Primary Target Population:

____

Secondary Target Population: (If applicable)

____

Medium (Check all that apply)

☐ Video ☐ Audio ☐ Print ☐ Other________________________

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Methods and Location of Dissemination (Fill in all that apply)

Method	Locations
Television	(i.e., Channel 5)
Radio	(i.e., KIIS 102.7)
Posters	(i.e., Charles Drew Middle School or Local parks)
Magazines	(i.e., Teen magazine)
Newspapers	(i.e., Boston Globe)
Internet (i.e., Facebook, YouTube, MySpace)	(i.e., YouTube)
Other (i.e., Photographs)	(i.e., Free Clinic)

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Anticipated Change in Target Population (Check all that apply. Then write out specific anticipated changes for each category in the space provided)

☐ **Change in Campaign Recognition**

☐ **Change in Knowledge**

☐ **Change in Attitudes/Beliefs**

☐ **Change in Behavior**

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Worksheet C: Team

Team Leader: ______________________________

Responsibilities:____
____
____
____

Member:________________________________

Responsibilities:____
____
____
____

Member:________________________________

Responsibilities:____
____
____
____

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Member:______________________________

Responsibilities:____

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Member:______________________________

Responsibilities:____

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Member:______________________________

Responsibilities:____

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Member:______________________________

Responsibilities:____

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____

Worksheet D: Logic Model

Attach logic model for the execution of the campaign here if one has been created already or use the template provided below. (An example of a completed logic model can be found on Appendix A on page 16)

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Reach	Short (Knowledge/Attitudes /Beliefs)	Medium (Action/Behavior)	Long-term (Condition)
→	→	→	We will be successful if… →	We will be successful if… →	We will be successful if…

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Worksheet E: Brainstorming

Use the outcomes listed in your logic model to fill out the chart below.

Outcomes	Method for Measuring the Outcome	Whom are We Testing	Where Will We Conduct the Evaluation	When Will We Conduct the Evaluation
We will be successful if…	(eg: focus group)	(eg: youth ages 13-16)	(eg: Fremont High School)	(eg: 2 weeks after campaign is launched)
We will be successful if…				
We will be successful if…				
We will be successful if…				
We will be successful if…				
We will be successful if…				

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Outcomes	Method for Measuring the Outcome	Whom are We Testing	Where Will We Conduct the Evaluation	When Will We Conduct the Evaluation
We will be successful if…				
We will be successful if…				
We will be successful if…				

Using the information you have just provided in this worksheet, we will now narrow down the long list of outcomes. Due to restrictions with time, money, and other resources, it may not be possible to measure every single outcome. Therefore, you must now take the time to go back and read through your chart. Place a star next to the outcomes you would most want to measure.

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Worksheet F: Action Plan

Using the information from Worksheet D, narrow down the components that will be evaluated. Use the space provided below to simplify and illustrate your evaluation plan

Evaluation Planning

Evaluation Activity	Outcomes it Will Measure	Time of Execution
(eg: Survey)	(eg: attitudes regarding drinking)	(eg: before and after the campaign has been implemented)

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Worksheet G: Timeline

Evaluation Start Date:______________________

Tasks	Person Responsible	Due Date

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Evaluation Completion Date:_______________________

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