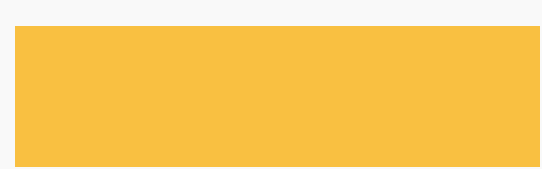




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CAMPAIGN EVALUATION MANUAL



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(EVALUATIVE)



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CAMPAIGN EVALUATION MANUAL OUTLINE

In the context of online campaigns evaluation is the process that enables to observe changes in relevant contexts and estimate the efficiency and effectiveness of the campaigns for all stakeholders, including you. All evaluation has to be purposeful and useful - so it ought to be conducted with the goal of improving various aspects of the conducted project. Evaluation helps improve your message and communication arrangements by helping you direct your efforts and letting you understand your successes and failures through engaging in meaningful reflection, team interaction and analyses.

TechSoup Campaign Evaluation manual consists of two parts - an introduction to the evaluation process and the evaluation framework [SECTION 1] and selection of tools we recommend for the purpose of evaluating the campaigns at different implementation stages.

As part of EX ANTE evaluation stage [SECTION 2] - formative evaluation, we recommend using the following tools:

- [GAMES part 1: Formative evaluation of campaign communication strategy too](#)

This tool is useful to help you evaluate your campaign vision, including key information about your campaign. This tool relates to the one you have used during the initial campaign planning phase, according to the guidelines in the [communication manual](#).

- [Resource mapping and analysis](#)

Use this tool to identify resources that will be available and can be utilized during the campaign - this helps both to keep the scope of the campaign in check and to see the potential of some available, but unutilized resources.

- [Analyzing sources](#)

We recommend to use this tool before the start of your campaign to gather reliable sources within your target area to verify your assumptions and that you can build your campaign message on.





- [Risk map & risk analysis](#)

Risk identification and analysis should be a repetitive activity which is linked to the planning process and is conducted with various stakeholders. This process consists of assessment risk probability, possible impact on the objectives of your campaign, as well as helping you to find ways to mitigate them. In this section of the Manual you will find a risk evaluation chart, which consists of assessment of risk probability and its impact force.

As part of on-going evaluation & monitoring [SECTION 3] - formative evaluation, we recommend using the following tools:

- [GAMES part 2: ongoing evaluation of campaign communication strategy tool](#)

Use this tool to help evaluate if your campaign vision is in alignment with your actions, including key information about your campaign. You will find specific questions to be asked at this stage of evaluation.

- [Analysis of campaign audience discourse](#)

This tool will help you analyze reactions of your target audience that you aimed to provoke by your campaign. When you receive messages or comments on your campaign materials try to understand where they are coming from. And remember that if these are negative ones it is always good to analyze them before you answer.

- [Diagnosing your campaign health](#)

This tool will help you decide which aspects of your campaign are the ones that are problematic or could be improved, and what actions can be taken to fix these issues.

When concluding the campaign, have a look at these tools as part of EX POST Evaluative Stage [SECTION 4]:

- [GAMES part 3: Summative evaluation of campaign communication strategy](#)

Parallel to the previous GAMES tools after the end of the campaign discuss how and to what extent you have managed to meet your objectives. You can find this tool in the campaign manual.

And don't forget about your team members if you have been implementing the campaign in collaboration with each other. Teamwork and collaboration are key ingredients of success; therefore, it is crucial to see if the team worked according to their preferences and plan, and how to adjust the collaboration for future work to reach even better results together with help of reflection session.





SECTION 1: INTRODUCTION

What do we mean by evaluation?

In the context of online campaigns, evaluation is the process enabling you to observe changes in your relevant contexts (the effects of the campaign, but also your team and yourself) and thus estimate the efficiency and effectiveness of the campaigns for all stakeholders, including you. It helps to formulate improvement suggestions and to decide on better ways of working. All evaluation has to be purposeful and useful - so it ought to be conducted with the goal of improving various aspects of the conducted project. Evaluation is not about passing judgment or casting blame. In other words, it ought to be a positive learning experience and a chance to reflect on the projects' strengths, weaknesses, and the way forward. In online campaigns, this goal can be achieved by evaluating the process of change towards expected outcomes, which for online campaigns consists of positive social impact in the form of engagement, stakeholder learning and opinion changes.

Evaluation will help you to improve your message and communication arrangements by helping you direct your efforts and letting you understand your successes and failures through engaging in meaningful reflection, team interaction and analyses. To conduct evaluative activities, one does not need a large team or a dedicated evaluator, as the key to evaluation is honest discovery, where all stakeholders engage in open communication and ponder both their successes and failures from their various perspectives. Another key ingredient is analytical thinking that will help discover ways to counter any discovered shortcomings or boost perceived strengths. These can be achieved thanks to the tools presented in this manual, which will guide you through individual and team self-assessment activities to help structure your thinking and take steps towards improving any aspects of the campaign in which you may be struggling, and to multiply its strengths, focusing on the messages and impacts you are most proud of.





Types and timing of evaluation

Evaluation should start with the first campaign planning steps, and not, as often assumed, after the campaign concludes. This involves steps as early as ideating and making decisions on which challenges to address and which strengths to use. At this point, evaluation is done through the formative research helping devise an appropriate campaign strategy. Such ex-ante evaluation tools, although usually applied at the beginning, can be used at any point of the campaign to analyse its alignment with the initial goals and expected outcomes.

Ongoing or mid-term evaluation is carried out during the lifespan of the campaign, and it includes a strong formative element – the key purpose is to learn from previous campaign phases, to improve the following ones, or to develop innovative approaches and increase the engagement of the campaign team and other stakeholders. The supplementary process to the mid-term or ongoing evaluation is constant monitoring of the current progress of the campaign - to be able to react quickly to any unexpected or unwanted outcomes. Monitoring process serves also as a source of information to the evaluation process (ongoing and ex-post).

Summative evaluations, also called ex post, conducted after the campaign ends, focus on campaign outcomes and impact all of the stakeholders, including the team.

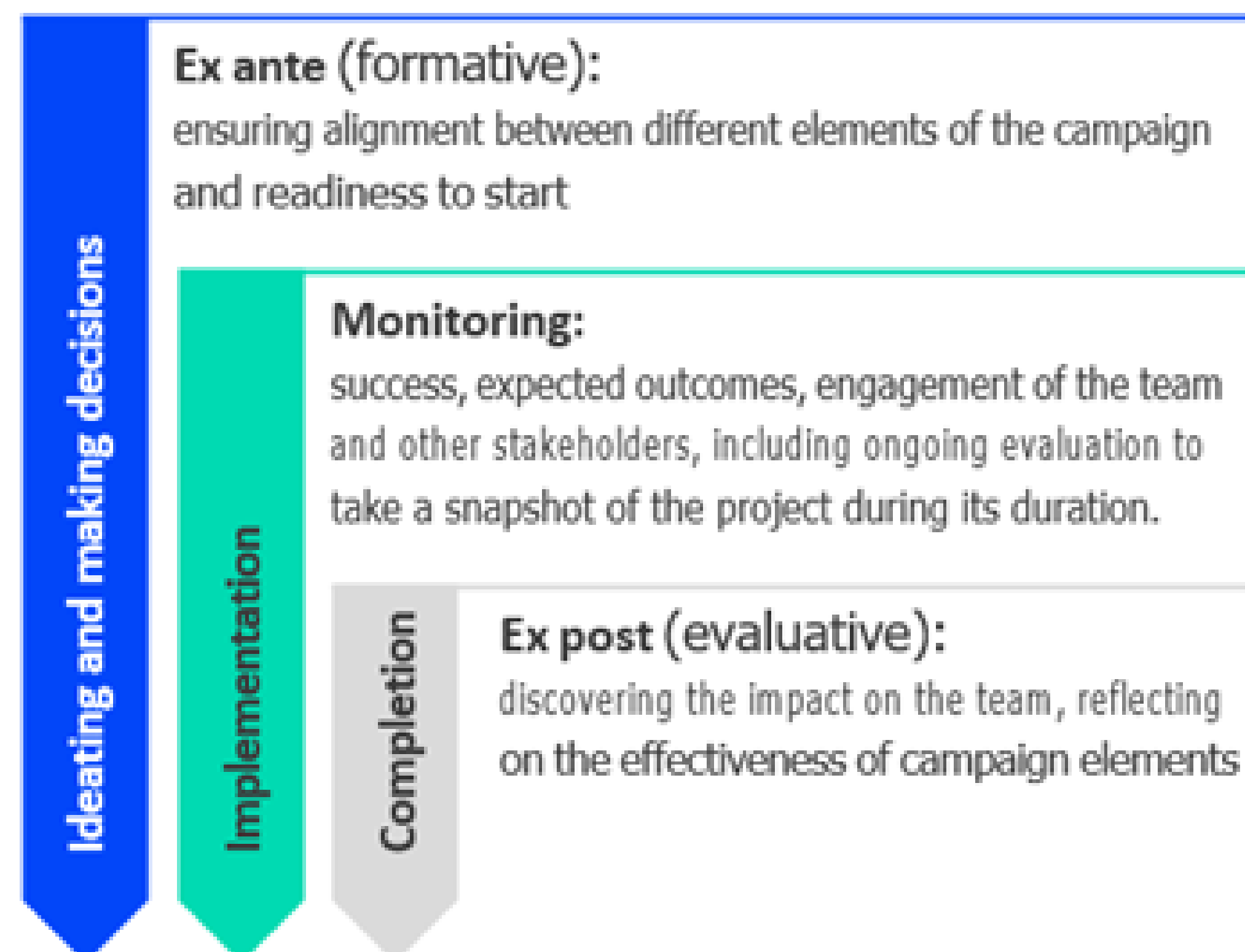


Figure 1: Evaluation Process (own elaboration)





How to think about impact indicators in small social campaigns

Aiming for impact leading to social change

As the main aim of social campaigns is to attempt to change convictions rooted in the society, ones that often are deeply ingrained in individual or group identities, it is very difficult to measure their impact and multiple international institutions and companies struggle to do just that. It is difficult, because such convictions change incrementally, and in the context of the society or community: at a very slow pace - so tangible changes may not be easily observed even until many years later.

So, a more realistic measure of campaign impact is to evaluate which resources the campaign utilised and to what extent, what risks it may have avoided, which areas the campaign addressed, and what stakeholders it had the potential to reach and influence. This will help you hone your toolbox for the future, ensuring that you get acquainted with running online campaigns well and can reflect on their strong and weak points.

While change of attitudes is a desired and very aspirational effect of such campaigns, it makes a poor campaign goal, as such process takes a long time and is incredibly hard to measure. On a smaller scale, a similar change can be achieved by having people take actions or participate in experiences, which then require them to realign their thinking to protect their internal consistency. So, in our case, the engagement in discussions, experiences, and actions is what a campaign you are running ought to aim for, both for you, your team, and other stakeholders.

Moreover, rather than focusing on the achievement of strictly defined campaign objectives, it is important to look at the campaign as a whole and realize what other impact it may have had, both on our stakeholders, and the campaign team, for example in terms of their mobilization, motivation, and gains in experience, which is a better measure of campaign success than measuring the changes in convictions. Any action which is taken as a result of such campaign adds to its impact, and creates potential for greater reach and engagement. Even a small shift in attitude, which is not instant, can cumulatively create greater impact.

Therefore, the first step in measuring impact is the evaluation of the plausibility of reaching the outlined objectives, given the engaged resources and prepared messages and then, realigning them to make them more achievable through defining these goals in terms of engagement, rather than less tangible measures, such as social change, which is a lengthy and resource-intensive process.





Aiming for awareness and engagement on social media

Reaching a large audience (people who receive an impression of your content on their screen) during the campaign in social media requires lots of time, knowledge and budget for paid ads. Multiple online social platforms, such as Meta or Instagram, have the tools that allow the campaign team, using a company page or profile, to view quantitative metrics to “measure” the engagement of their target audience. While these metrics are very often useful in providing some insights about the demographics of the viewers and the way they interact with the content, they require the content makers to spend money on ads to reach a greater number of people. Current social media algorithms have big impact on the reach of posts and it is really difficult and time consuming to work out organic growth and while “going viral” could help with this, it is key to know that most viral videos and campaigns took considerable resources and time to create, and are no longer happy accidents as their creators would like us to believe. Moreover, sometimes going viral may actually be harmful, depending on how virality was achieved and with what audience. For one, content that becomes viral is outside of our control and may be repurposed to carry different meanings we did not intend. Another issue is that audiences enjoy unique content, which is tailored to them, and once it becomes mainstream, it no longer holds the appeal of something only a selected group can enjoy, engage with, and understand.

So, one of the greatest challenges in achieving a larger reach is growing your audience from scratch. Thus, it is much better to have an NGO or another entity, such as a famous blogger or an organization to host your campaign, as they have an existing profile with some devoted followers who may share the new content. However, there is a potential pitfall here, as their following may not match your audiences’ intended profile. Let us say you want to engage a specific group of people, but these are not the people who you can access thanks to collaboration with some larger entity, then you might result in reaching the goals you planned to reach.

If you have to start a new page or profile, you have to adjust your goals and look at the quantitative metrics as more of a guideline in terms of the attractiveness of your campaign to the audience you were able to reach. Hence, it is unlikely that your campaign will gain a following quickly, and even more unlikely that the people who follow your page or profile will belong to your intended audience. It is thus best to treat it like an experiment to find your authentic voice and engage with these media. Then, it can also be a platform where your work will remain and be showcased if you want to create a similar campaign in the future in collaboration with others. Alternatively, it may be something you decide to build on later on.





Useful to measure and evaluate for short online campaigns

- the alignment of campaign goal and its messages
- types of stakeholders the campaign reached
- the utilisation of available resources
- team learning and participation in the campaign

May be measured, but requires resources and it may be difficult to discover a direct causal relationship

- engagement of target audience in discussion, experiences and campaign activities
- types of impact beyond the expected outcomes
- social media indicator

Difficult to measure due to resources, time-span and scope

- direct social impact
- changes in attitudes

In the next sections, you can find a selection of tools we recommend for the purpose of evaluating the campaigns. These tools are especially chosen to be easy to implement for short online campaigns, and they might be adjusted to match the profile of your activities, including the key stakeholders, your goals, available resources as well as the scope of your actions. What is more, they are divided into different phases to help you decide when to introduce them into your action plan, but most of them can be used at any stage, according to your needs. Each tool is preceded by a short chart, which outlines its description including when (for what purpose) and how to use it.





SECTION 2: EX ANTE EVALUATION STAGE (FORMATIVE EVALUATION)

GAMES part 1:

Formative evaluation of campaign communication strategy tool

Why use it?

Use this tool to help you evaluate your campaign vision, including key information about your campaign. This is the same tool that you have used during the initial campaign planning phase, according to the guidelines in the communication manual.

How to use it?

Find your answers from the planning phase and jot them down in the chart below. Then fill out the formative evaluation part and check if these two parts are well-aligned. You can use it individually in a written format one by one, to see if all of your team members share the same vision.





GAMES	FORMATIVE EVALUATION	YOUR ANSWERS
Goal	<ul style="list-style-type: none">• Follow SMART criteria to evaluate your goal. Is your goal:<ul style="list-style-type: none">◦ Specific?◦ Measurable?◦ Achievable?◦ Relevant?◦ Time-Bound? <p>If the answers are not clear, review your goal.</p> <ul style="list-style-type: none">• What is your call to action?• Is it realistic?	
Audience	<ul style="list-style-type: none">• Do you know your audience fully?• Can you estimate the total size of your target audience and define how many of them in numbers or in terms of a percentage that you could reach? Is it realistic?• Do you have 'audience persona', (prototype of the person whom your campaign targets)?• Do you have a member of the audience to help you evaluate your campaign communication plan?	
Messenger	<ul style="list-style-type: none">• Is your messenger a credible voice for your target audience?• Why should your audience trust them? How will they establish their credibility?• Did you check with a relevant number of people from the target audience how they perceive your messenger?	
Environment	<ul style="list-style-type: none">• Have you checked if the message does not interfere with other running campaigns?• Have you checked if the timing of the campaign communications is optimal for its goal? Is it when the audience is active on this media?	
Story	<ul style="list-style-type: none">• Does your message use the vocabulary used by your audience? Did you verify this language with someone from your audience?• Does your message fit with the goal of the campaign?• Does it follow guidelines for non-discriminatory language?• Did you check your intended hashtag and slogan to see if no other campaigns use the same one?	





Resource mapping and analysis

Why use it?

To identify resources that will be available and can be utilized during the campaign - this helps both to keep the scope of the campaign in check and to see the potential of some available, but unutilized resources. Even with few resources it is possible to organise a good campaign if they are used well.

How to use it?

This tool should be used for discussion during team meetings and a designated person ought to take notes about all the practical aspects of the discussion including the availability of the resources, the designated team roles, the rules of using the resources as well as the action plan for caring for them.

RESOURCES	Reflective questions on the needed resources	YOUR ANSWERS
Human resources	<ul style="list-style-type: none">• How many people should be involved in the campaign to conduct it comfortably?• How many people can work on the planned campaign?• What will be the designated roles and responsibilities within the campaign?• Who will take care of<ul style="list-style-type: none">◦ team communication?◦ creating content?◦ social media?◦ recruitment?◦ other team needs?• What is the regular schedule they can commit to?	
Knowledge and skills	<ul style="list-style-type: none">• What is the experience and expertise of the people in your team?• What can each team member contribute to the campaign?• Who will take on each role/responsibility in the campaign?	
Financial resources	<ul style="list-style-type: none">• Do you need any financial resources? What for?• Are any resources available? If not, do you plan on raising funds to cover your needs?	





Institutional assets	<ul style="list-style-type: none">• What are your institutional assets?<ul style="list-style-type: none">◦ Does your school, university or club support you?◦ What about the NGO you collaborate with? Do they have any experts that you could ask for help?• What profile do these institutions have? Do people know them? How can you use their reputation to your advantage?	
Material assets	<ul style="list-style-type: none">• Do you have:<ul style="list-style-type: none">◦ meeting or office space,?◦ electronic equipment?◦ access to the internet?• What is missing?• How can you acquire it?	
Networks	<ul style="list-style-type: none">• What networks do your institutions (school, university, NGO) belong to?• Do these networks offer any useful programs or do they share resources?• Do you or your team members have access to any networks yourself?• What about virtual networks?	





Analysing sources

Why use it?

In order to make sure that all campaign materials and messages are based on credible and unbiased sources. They ought to have no factual errors and bias, so that the audience can feel they are presented with good information from a worthy source.

How to use it?

Use this tool before the start of your campaign to gather reliable sources within your target area that you can build your message on. You can create your source list in a chart online, collaboratively with others and it will be a great resource you can keep for your future campaigns and activities, as well as subsequent steps of your campaign evaluation (mid-term and ex-post) to verify your assumptions.

List the possible sources of information on the topic of your campaign:

SOURCE	Type of information available	In what way can it be useful for your topic?	How reliable and up-to-date is the information?	What is the possible bias?
<u>EUROSTAT</u>	Statistics on different countries in the EU	Provide accurate statistical data on various issues (from many countries, which can be used to back up claims and for comparisons)	Very, this is the official statistical office of the EU, however analyses on some topics may sometimes be old (which is always indicated)	Bias may be due to the population samples used, however the methods of mitigating it are universally accepted





RISK map & analysis

Why use it?

In order to make sure that all the campaign materials and messages are based on credible and unbiased sources. They ought to have no factual errors and bias, so that the audience can feel they are presented with good information from a worthy source.

How to use it?

To ensure campaign success all possible risks that may arise should be taken into account. Each risk should relate to a specific objective or task. Remember that factors that do not affect the achievement of the objective or are a failure to achieve the objective are not your risk.

To evaluate risk, it is important to have a full understanding of the objectives and tasks, as well as the key success factors for success. The following risk evaluation chart consists of assessment of risk probability on a scale of 1-5 (where 1 - very unlikely and 5 - highly likely) and impact force on a scale of 1-5 (where 1 - insignificant 5 - very serious). Planning on how to mitigate these risks is called risk response and may involve: risk avoidance, risk taking, removal of risk source, change of probability, change of risk impact force, sharing of risk, acceptance of risk.

Finally, every risk should have its owner, a team member who is delegated to mitigate it in the course of the campaign.

Example:

OBJECTIVE	RISK	risk probability (1-5 scale)	risk impact force (1-5 scale)	risk matrix score	risk response
<i>reaching a specific audience during the campaign</i>	<i>social media algorithms - impact on the reach of posts</i>	5	4	20	<i>using existing profiles in social media (e.g. NGO profiles), reach analysis based on historical data and setting realistic goals (KPIs) on this basis</i>





Risk classification on the matrix

- Light color - low (not relevant to the objectives)
- Medium color - medium (require specific monitoring)
- Dark color - high (additional actions must be take)

Probability

5	10	15	20	25
4	8	12	16	20
3	6	9	12	15
2	4	6	8	10
1	2	3	4	5



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SECTION 3: ON GOING EVALUATION & MONITORING

GAMES part 2:

Ongoing evaluation of campaign communication strategy tool

Why use it?

This tool was used as a basic tool at the beginning of the evaluation process. Use it again to help evaluate if your campaign vision is in alignment with your actions, including key information about your campaign.

How to use it?

You can use it individually in a written format one by one, to see if your team members share the same vision.

This is the space to include the answers you agreed on previously (with any modifications resulting from the previous evaluation), so that you may compare them to the current reality of your campaign.





GAMES	PLANNING STAGE	ON GOING EVALUATION
Goal		<ul style="list-style-type: none">• Is your goal is still get-at-able?• Is your goal still:<ul style="list-style-type: none">◦ Specific?◦ Measurable?◦ Achievable?◦ Relevant?◦ Time-Bound?• If the answers are not clear, review your goal.
Audience		<ul style="list-style-type: none">• Are people from your target group watching/reading your campaign content?• Check your web and social media and analytics reports
Messenger		<ul style="list-style-type: none">• Is your messenger accepted and believed by your target group?• Analyse reactions in social media (likes and comments).
Environment		<ul style="list-style-type: none">• Is the context different or still the same?• What else is going on?
Story		<ul style="list-style-type: none">• Do your audience understand what you want from them?• Are you getting any action from your audience?• Create Google alerts and hashtags to follow.• Analyse reactions in social media (likes, comments and shares of your content).





ANALYSING campaign audience discourse

Why use it?

When you conduct a campaign, you aim to create engagement, which means shares and comments that can help you understand your audience and better plan your communications in the future and in each specific case, because engagement is a two-way street, if someone responds to your campaign you ought to somehow react to this, it may be as simple as liking their comment, but it can also mean engaging in a discussion or encouraging them to share your content, and for this, you need to understand your audience.

How to use it?

When you receive messages or comments to your campaign materials try to understand where they are coming from. Sometimes, if these are negative it is good to analyse them before you answer.

Matter to analyze	Questions to ask	Your answers
CONTEXT	<ul style="list-style-type: none">• Was it written/created from an open or anonymous account?• Is it formal or informal?	
AUTHOR	<ul style="list-style-type: none">• Who created it?• Did they act alone?• Was it edited?	
AUTHOR - Other	<ul style="list-style-type: none">• What else has the author commented on?	
KEY CODING CATEGORIES	<ul style="list-style-type: none">• What themes appear in the comment/material?	
STRUCTURE - ORDER & MIX	<ul style="list-style-type: none">• What themes appear together?• Are there whole segments on the same topic?• What other topics appear?	
KEY NOUNS & THEIR MODIFIERS	<ul style="list-style-type: none">• What words, especially adjectives are used together with our key terms and• messages?	





CULTURAL REFERENCES	<ul style="list-style-type: none">• What figures of authority, cultural icons, quotes, memes are used?	
LINGUISTIC MECHANISMS	<ul style="list-style-type: none">• What are the tenses used? Past, future, or present?• Are the connotations in general positive or negative?• Are there any rhetorical figures, like questions, metaphors or proverbs? Does the text state opinions or facts? How do you know it?	
SOURCES	<ul style="list-style-type: none">• What sources do they refer to?• Do they have any data to support their views?• Can you ask them to back their views with data?	
INTERPRETATION	<ul style="list-style-type: none">• What is the goal of this text?• Who benefits from it?• Who loses because of it?• What may be the motivation of the person writing it?	
IMPACT	<ul style="list-style-type: none">• Was anything done/said in response or as a result of it? Did it engage other users? What will you do to mitigate negative impact?	

DIAGNOSING your campaign health

Why use it?

Use this tool if you are worried that some of the campaign messages miss their mark or to discuss any other things that you feel could be improved.

How to use it?

Write down things that worry you and things that could be improved and ask the other team members to do the same before your team meeting. During the team meeting collect them all together to see if any of them repeat. If so, try to “diagnose” them first and then propose a cure.



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SYMPTOM	DIAGNOSIS	EXAMPLE CURE
Nobody liked a certain post	<ul style="list-style-type: none">• Did you share it to other places?• Did the post have a picture?• Was the post brief?	After a few posts you can look back at them and see which of them generated more interest, likes and shares, and which of them remained unnoticed.
There is no discussion under a post	<ul style="list-style-type: none">• Did the post invite a discussion?• Is the audience diverse enough to warrant a discussion?	Try to include a clear “call to action” in your post if your intention is to generate a discussion.
Nobody shares the posts	<ul style="list-style-type: none">• What could be the motivation of people to share your posts?• In what way are they interesting?	Can you mobilize your network to help you spread the word?
Other things you are worried about...	<ul style="list-style-type: none">• What may be the reason they happen?• What can you do to make them less common?• What would be their opposite?• How to achieve this opposite state?	Depends on the nature of the challenge





SECTION 4: EX POST EVALUATION STAGE (EVALUATIVE)

GAMES part 3:

Summative evaluation of campaign communication strategy

Why use it?

Parallel to the first tool in this evaluation manual, now discuss how and to what extent you managed to meet your objectives.

How to use it?

Think of the answers individually and then discuss them during a team meeting.

This is the space to include the answers you agreed on previously (with any modifications resulting from the previous evaluation), so that you may compare them to the current reality of your campaign.





GAMES	PLANNING STAGE	ON GOING EVALUATION
Goal		<ul style="list-style-type: none">• Did you achieve your goal?• Did you communicate your message clearly?• Was there a clear call to action that the audience were to respond to?• What was it?• What did your audience do?
Audience		<ul style="list-style-type: none">• Did you reach your target audience?• Which social media you used?• Which were the most relevant to reach the target audience?• Which were the most relevant to engage the target audience?• What kinds of messages were the most engaging?
Messenger		<ul style="list-style-type: none">• Did you choose the right messenger?• Was the messenger engaged?• If not, why not?
Environment		<ul style="list-style-type: none">• How receptive was the environment to your message?• Were there any messages that interfered with your campaign?
Story		<ul style="list-style-type: none">• If you were to create the campaign today would you have chosen the same story to tell? The same slogan? If not, how and why would it be different?• Did the call to action lead your audience to the required action?

