# Communications monitoring, evaluating and learning toolkit

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# 1. INTRODUCTION

This toolkit provides a framework to think about communications monitoring, evaluation and learning (MEL), and provides example questions, indicators and tools to do it.

Communications MEL is, in many ways, straightforward. Yet organisations across the sector still grapple with how to embed it in their work.

MEL is important to ensure that your communications are strategic, helping you to understand and learn from what works, what doesn't, when and for whom. It is also an important tool for accountability, helping you to demonstrate uptake, and that your work is of high quality and useful.

This toolkit is intended for use by communications, research and project implementation staff working in think tanks, universities and NGOs.

It is based on internal guidance that ODI developed to encourage sharing and learning; to improve the quality, reach and use of its communications; and to help with project and programme planning. Communications MEL is still a work in progress at ODI; we are publishing this guide in the hope that it will be useful to others, but also that it will invite discussion and shared learning.

1.1. How to use this toolkit

1.2. Where the approach comes from

# 1.1. How to use this toolkit

The toolkit is not ‘one size fits all’. It suggests ways to incorporate communications monitoring, evaluation and learning into projects and programmes, and can be adapted as needed. The overall framework may be a useful way to plan communications MEL activities for an output, project, programme or organisation. Or you may want to go straight to the output tables to get ideas for specific learning questions, indicators and tools.

## The framework has two key sections:

### 1. Strategy and management

You can’t monitor, evaluate and learn from communications if you don’t know what you were trying to do in the first place. This section outlines how to plan and manage your communications processes to succeed. It provides eight questions to answer when assessing and learning from your communications strategy and management.

### 2. Outputs

This section looks at how to measure the success of your outputs. It goes beyond the usual vanity metrics (downloads and retweets) to address three key dimensions. For each dimension, we provide example questions, indicators and tools to monitor, evaluate and learn.

- Reach: the breadth of your reach and who you are reaching.
- Quality and usefulness: the technical standard of your work and how relevant it is to your audience.
- Uptake and use: if and how your work is used.

At the end of this section, we provide a table of example indicators by channel.

# How to use this toolkit

## Remember:

**Keep it simple**

Communications MEL does not have to be complicated. Only seek to measure what can be measured, and be realistic about how much can be tracked given your resources and time.

**Don't just focus on website statistics**

Think more broadly about MEL to include quality and usefulness, and uptake and use of your outputs, even if you only pick a few indicators.

**Always link back to your objectives**

Be clear about the questions you are asking, why and how you plan to answer them. Then select the indicators that are most relevant.

**Feed into wider efforts to measure outcomes and impact**

Communications MEL can't assess overall project or programme impact – but it should be seen as an integral part of that process, not separate.

# 1.2. Where the approach comes from

The approach builds on previous work done by ODI's Research and Policy in Development (RAPID) programme on monitoring and evaluating policy research. In particular 'Making a difference: M&E of policy research', by Ingie Hovland (2007) and 'How to design a monitoring and evaluation framework for a policy research project', by Tiina Pasanen and Louise Shaxson (2016). In 2007, Ingie developed five 'performance areas' that could be measured and evaluated:

RAPID later added a further performance area

**1 Strategy**

The plan followed in order to reach intended goals

**2 Management**

The systems and processes in place to ensure that the strategy can succeed

**3 Outputs**

The tangible goods and services produced

**4 Uptake**

Direct responses to the work

**5 Outcomes and impact**

The use of communications to make a change to behaviour, knowledge, policy or practice

**6 Context**

The changing political, economic, social and organisational climate, and how that effects your plans

The toolkit focuses specifically on strategy, management, outputs and uptake. It does not focus in detail on outcomes and impact, as this requires a more comprehensive evaluation plan. However, communications MEL should be seen as an integral part of this process, not separate.

# 2. STRATEGY AND MANAGEMENT

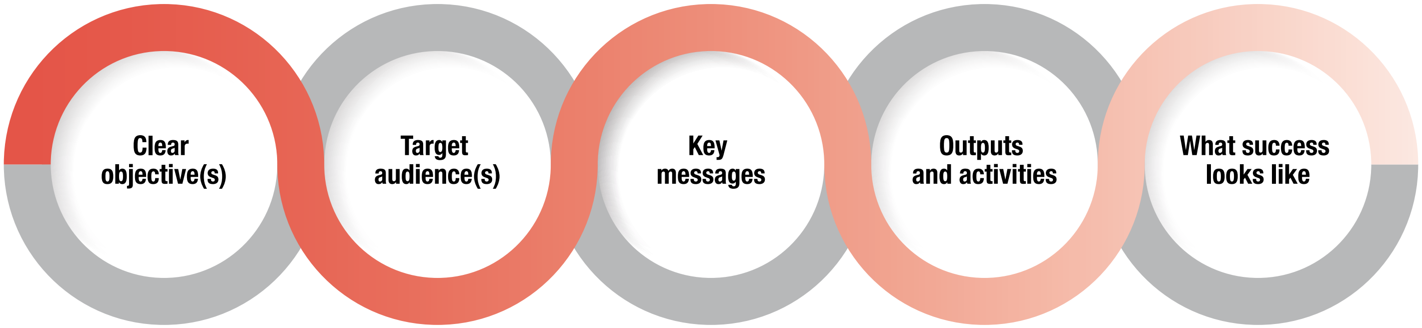
You can't monitor, evaluate and learn from communications if you don't know what you were trying to do in the first place. This section outlines how to plan and manage your communications processes to succeed. It provides eight questions to answer when assessing and learning from your communications strategy and management.

# 2.1. How to plan for quality and usefulness

To achieve impact, communications work needs to be both strategic and high quality.

While a low-quality communications output can still achieve some positive impact, if it is relevant and topical, it can potentially cause longer-term risks to reputation and credibility. Similarly, if you create a dozen high quality communications outputs but don't consider who your audiences are and how you are going to reach them, then you're wasting time and energy.

To ensure that your communications work is strategic and the outputs are of a high quality, you should develop a communications plan. This does not need to be a complicated or long document, but it should include:




For large projects and programmes, it is necessary to have a more sophisticated communications strategy. This will follow the same form as above, but go into more detail.

Once you have your plan, you need to ensure that systems and processes are in place to deliver it. Again, these do not need to be complex. Your organisation will probably already have systems in place for managing project delivery (such as project plans, Gantt charts, routine meetings, and reporting). Just ensuring that communication activities and products are clearly identified, and that they are realistic given your resources, should be enough.

# 2.2. Learning from your communications strategy and management

There are five key questions to address when looking at strategy, what was done and what was learned:

1. Did we identify clear objectives that support wider project, programme or organisational goals?
2. Did we identify target audiences?
3. Did we identify audience-focused key messages?
4. Did we identify a realistic set of outputs and activities?
5. Did we consider what success would look like?

**Key Questions**

There are three key questions to address when looking at management and what was done, as well as what was learned:

1. Did the communications work go out on time and to the right people?
2. What was achieved with what budget and time?
3. What did we learn from the process and what might we do differently next time?

The information above should be backed up by facts and figures, but can be brought together informally through a follow-up meeting or after-action review.

# 3. OUTPUTS

This section is designed to help you measure the success of your outputs. There are three key dimensions to consider:

- reach
- quality and usefulness
- uptake and use

For each dimension, we provide a definition, example tools to gather data, and key questions and indicators. We also explore what this information tells you, as well as what it doesn't tell you.

We then provide a summary table of communications MEL questions and indicators by channel (publications, websites, multimedia, press media and blogs, social media, email/newsletters, and events).

### What do we mean by outputs?

We define outputs broadly as tangible communication products, activities and services. These can include: publications, events (including meetings, workshops, webinars or face-to-face discussions), articles, websites and other digital platforms, infographics, media and social media activities, presentations, videos, podcasts, photography and so on. Outputs can also be a package or larger body of work, not just individual products or activities.

# 3.1. Measuring the reach of your outputs

Outputs are designed to reach a target audience. Measuring reach is the most basic level in communications MEL and particularly useful when thinking about the distribution and breadth of communications. For example, did your output (e.g. a report) reach a wide audience?

However, there are limitations to just looking at reach. For example, you don't necessarily know if the audience has been influenced by your report – or even read it at all. It can be difficult to minimise these limitations, but it is important to be aware of them and highlight them to those using the data.

In addition, communications is not always about quantity or breadth; reach could mean looking at whether a communications output or activity has reached one small key audience, which in some cases could even be an individual.

Most people focus on reach because it is the easiest to track.

> *'The breadth and saturation of an output's communication/dissemination. It describes the extent to which information is distributed, redistributed, and referred to by organisations and individual users' (Sullivan et al., 2007).*

# Measuring the reach of your outputs

**Examples of what this information is for:**

- To track the overall reach of an output (e.g. unique pageviews, downloads, social media engagements, etc.)
- To measure the popularity of different outputs (e.g. which output gets the most downloads, or which page has the highest average time spent on page)
- To monitor where website visitors are based, their gender or age
- To demonstrate external interest in a campaign, or the scale of reach
- To provide internal benchmarking
- To understand what type of output works for different audiences

**Key question to ask:**

- Are we reaching the intended audience(s)?

**Key follow-up questions to ask:**

- What was the reach of the outputs?
- Is your audience growing?
- Where are they based?
- How are they interacting with the output(s)?
- Was your output shared by audiences or reproduced in any way?

**Example tools to gather data:**

- Websites: Google Analytics
- Media: Meltwater, Mention, Cision
- Social media: Twitter analytics, Facebook analytics, Hashtracking
- Events: Eventbrite, Event Smart, Eventzilla
- Newsletters: MailChimp, SendinBlue
- Videos: YouTube analytics, Vimeo analytics

### Search engine optimisation

It is also important to look at search engine optimisation (SEO). Google searches can generate high website traffic, so getting your research higher up in Google is perhaps the most effective way of increasing its reach.

# Measuring the reach of your outputs

## Table 1. Key questions and indicators to measure the reach of your outputs

| Key question: are we reaching our intended audience(s)? | | | |
|---|---|---|---|
| **Key follow-up questions** | **Example indicators you could use** | **What those indicators tell you** | **What those indicators don’t tell you** |
| What was the reach of the output(s)?<br>Is your audience growing? | Publications or blogs:<br>• Number of pageviews in a time period<br>• Number of downloads in a time period<br>• Clicks to download from the page<br>• Compare with another time period to look at audience growth | The most popular outputs<br>An estimate of how many people have accessed an output<br>If downloads, then this increases the chance that the audience read the output and didn’t just look at the web page (a problem with just pageviews or clicks).<br>Tracking clicks to download indicates the success of the landing page | Who exactly you reached<br>Whether the audience interacted with the output |
| | Social media:<br>• Number of shares or clicks to the output | | |
| | Events:<br>• Number of attendees<br>• Number of online viewers<br>• Compare with another time period to look at audience growth<br>• Type of attendee, including job type or sector<br>• Drop-out rate | Popularity of the event<br>Whether you reached your target audience | What the audience thought of the event<br>Whether they really engaged with your event or will have forgotten about it soon after |

# Measuring the reach of your outputs

## Table 1 (cont'd). Key questions and indicators to measure the reach of your outputs

| Key question: are we reaching our intended audience(s)? | | | |
|---|---|---|---|
| **Key follow-up questions** | **Example indicators you could use** | **What those indicators tell you** | **What those indicators don't tell you** |
| Where are they based? | Total web traffic by location<br>Percentage of coverage coming from specific region or demographic (e.g. developing countries)<br>Media hits<br>Location of livestream viewers | The geographical extend of your reach<br>The spread of your media coverage by geographic location<br>Whether you are reaching audiences in target countries | Who exactly they are and whether the audience actually interacted with the output |
| How are they interacting with the output(s)? | Time spent on a webpage<br>Type of channel used to access content (e.g. event, publication, multimedia, social media)<br>Number of times an output was mentioned in digital newspapers, blogs, on social media and/or other media platforms | A high number indicates that users were reading more of a particular publication or blog<br>This is particularly helpful when you have a communications package to assess audience preferences or the success of different components of the package<br>This gives an indication as to the range of the audience type e.g. media coverage might mean a new readership | Detailed indication of who the audience is, or if the output influenced the audience in anyway or propelled them to take action |
| Was your output shared by audiences or reproduced in any way | Number of times an output is cited or referred too<br>Number of social media retweets, shares, comments or other user actions<br>Number of shares to social media via website share buttons<br>Number of requests to reproduce or cite information from the output | Other platforms/forums where your output(s) is available<br>An indication if the output is reaching audiences beyond the initial target audiences (as well as the target audience)<br>Can also be an indicator of quality and authority – the audience perceived the output of high quality and considered if useful for others | Who looked at the citation, mention, or if any action taken as a result |

# 3.2. Measuring the quality and usefulness of your outputs

## Quality

For the purpose of this guide, quality can be defined as the technical standard of work, both the content and presentation. This is closely linked to usefulness and audience reception (as discussed in the next section).

As part of your communications strategy or plan, you will routinely need to assess the quality of outputs. Even for small projects, the team should assess whether the output (e.g. report, brief, video, presentation) does the following:

- Tells a compelling story
- Factually accurate and based on quality evidence
- Well written and grammatically correct
- Contains clear key messages
- Contains clear conclusions, recommendations or a call to action
- Meets editorial and brand guidelines
- Optimsed for online search

# Measuring the quality and usefulness of your outputs

## Usefulness

Usefulness takes communications MEL to the next level and starts to unpick both the quality of your outputs and the user reception. This can be useful both for internal learning, to ensure the quality of outputs (and to adapt them as necessary), but also for assessing if your audience has interacted with your work in some way. By no means an easy feat. Nonetheless, this guide outlines some useful ways to go about trying to acquire this data from audiences and in your project or team. Usefulness can also be viewed as a type of 'initial outcome'.

**Examples of what this information is for:**

- To track quality or user satisfaction for outputs
- To understand what type of outputs work for different audiences in more depth

**Key question to ask:**

- Is the work of high technical quality?

**Key follow-up questions to ask:**

- Did your outputs have a clear strategic objective and plan to ensure quality?
- Did it receive feedback from the audience?
- Do they see the work as credible, reputable, authoritative, and trustworthy?

**Example tools to gather the data:**

- Feedback forms or surveys
- Email
- Google search
- Internal feedback log

*'The quality of information and outputs that is appropriate, applicable, and practical. Usefulness may include such aspects as user satisfaction, quality, innovation, and relevance' (Sullivan et al., 2007).*

# Measuring the quality and usefulness of your outputs

## Table 2. Key questions and indicators to measure the quality and usefulness of your outputs

| Is the work of high technical quality? | | | |
|---|---|---|---|
| **Questions** | **Example indicators you could use** | **What those indicators tell you** | **What those indicators don't tell you** |
| Did your outputs have a clear strategic objective and plan to ensure quality? | Number of outputs that were informed by a communications strategy or plan.<br>Was your publication peer reviewed?<br>Did your publication go through an editorial and production process?<br>Does your output conform to organisational branding guidelines? | The amount of strategic communications and planning to ensure quality | Whether the output was deemed of high quality by the audience, or if it influenced the audience |
| | Publications:<br>• Experience of author<br>Events:<br>• Experience/quality of participant or speaker | Indicator of credibility or potential influence of author/participant/speaker to reach audiences | How the audience received them<br>Whether the output actually had influence or impact |
| | Number of peer reviewed journal articles reviewed or accepted | Indicator of academic quality | Who is reading it<br>Whether it is useful/deemed of high quality by other audience types |

# Measuring the quality and usefulness of your outputs

## Table 2 (cont'd). Key questions and indicators to measure the quality and usefulness of your outputs

| Was the audience satisfied? | | | |
|---|---|---|---|
| **Questions** | **Example indicators you could use** | **What those indicators tell you** | **What those indicators don't tell you** |
| Did it receive feedback from the audience? | Praise of communications output(s) (formal or informal)<br><br>Social media tweets or comments<br><br>Comments received  e.g. on a blog | Audience feedback; whether they thought it was of quality (or not!); a potential indication of an action that may occur as a result of the outputs; potential learning for other outputs or strategy | It is only the opinion of one or several members of your audience and may not be indicative of wider views |
| Do they see the work as credible, reputable, authoritative and trustworthy? | Number or percentage who state the content of the output/activity is useful<br><br>Number or percentage of users who report knowledge gained<br><br>Number or percentage of users who report their views have changed | Provides an indication of how useful the output(s) is<br><br>Audience learning<br><br>Whether the information was internalised by the audience | In what way they found it useful (need qualitative feedback)<br><br>The specific knowledge gained and subsequent impact<br><br>How exactly their views changed and any action as a result |

# 3.3. Measuring the uptake and use of your outputs

The ultimate goal is that your intended audience uses your research in some way, or even better, it has helped to change their behaviour. We all know that this can be one of the hardest areas to assess. Informal feedback from stakeholders is an important place to start.

In order to find out whether an audience is using information from an output, you may need to invest significant time and resources, which in most cases falls beyond simple communications MEL. For example, you might need a perception survey or audience insight research.

However, this guide does explore some indicators that can be used to help build towards this wider goal and towards understanding longer-term outcomes.

> *'The breadth and saturation of an output's communication/dissemination. It describes the extent to which information is distributed, redistributed, and referred to by organisations and individual users' (Sullivan et al., 2007).*

# Measuring the uptake and use of your outputs

**Examples of what this information is for:**

- To demonstrate that research or work is being shared or cited by others
- To help demonstrate uptake or influence of outputs and ideas
- Internal benchmarking
- As an indicator of what types of comms outputs work for different types of content/channels/contexts/audience

**Key question to ask:**

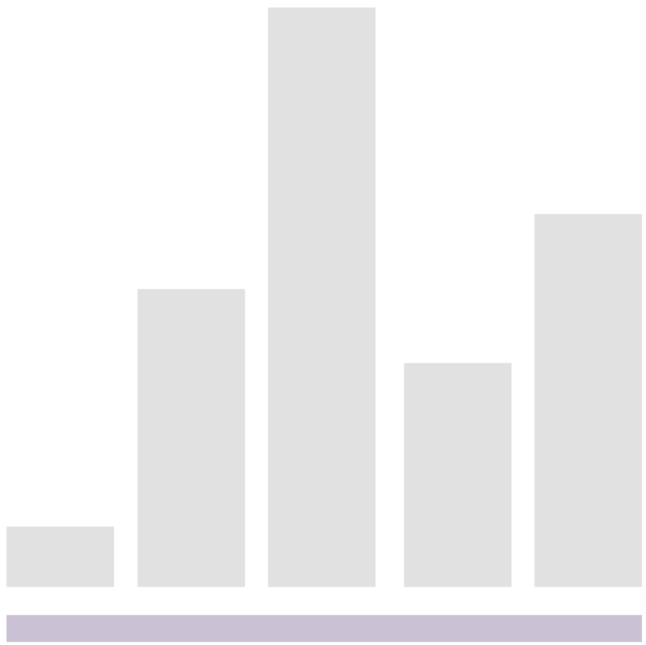
- What is the uptake and use of your outputs?

**Key follow-up questions to ask:**

- Is the work being used?
- How is the work being used?
- Has it changed the way the audience thinks or behaves in some way?

**Example tools to gather data:**

- Emails
- User surveys
- Interviews
- Internal feedback log
- Case studies, stories of change
- Programme evaluations



# Measuring the uptake and use of your outputs

## Table 3. Key questions and indicators to measure the uptake and use of your outputs

| What is the uptake and use of your outputs? | | | |
|---|---|---|---|
| **Questions** | **Example indicators you could use** | **What those indicators tell you** | **What those indicators don't tell you** |
| Is the work being used?<br>How is the work being used? | Number or percentage of users who say that they are using or adapting an output<br>Action taken as a result of the output or event (e.g. new networks developed, follow-up meeting planned, invitation to input further) | Indication of increasing relevance (usefulness) of an output when adapted for another audience or context<br>Potential examples of uptake (and even impact) | How is it being used and any resulting impact<br>It may be tricky to gauge how much an output or activity contributed to change or impact |
| Has it changed the way the audience behaves in some way? | Indications of changes in policy thinking<br>Specific language in policy documents<br>A stakeholder's use of a specific tool<br>Cases of tools used in decision-making<br>Example of research evident in policy decisions | | |

# 3.4. Indicators by channel

When planning your communications MEL, it is important to look across the three dimensions listed in this chapter: reach; quality and usefulness; and uptake and use. The first three sections of this chapter, provide example questions and indicators for each dimension.

In practice, you will often need to search for indicators by channel. The table below organises the example indicators to measure reach, quality and usefulness, and uptake and use of your communications by channel.

### Table 4. Key indicators by channel

| Example channel | Example basic indicators you could use | Example more in-depth indicators you could use |
|---|---|---|
| Publications | • Number of downloads and unique pageviews in a time period<br>• Time spent on page<br>• Bounce rate<br>• Number of soft or hard copies distributed to existing lists<br>• Number of times an output is cited or referred to<br>• Twitter, Facebook or other social media impressions/likes/shares | • Country of downloads or unique pageviews<br>• Demographics of downloads or unique pageviews<br>• Returning vs new users<br>• Referrals<br>• Metrics compared to another output or time period<br>• Number of social media comments/shares with targeted individuals<br>• Qualitative feedback from audiences on quality and use of output |
| Websites | • Total Number of users in a time period<br>• Unique pageviews in a time period<br>• Average time spent on website | • Country of users and pageviews<br>• Demographic of users and pageviews<br>• Metrics compared to another time period<br>• Number of social media comments/shares with targeted individuals<br>• Qualitative feedback from audiences on quality and use of output |
| Multimedia | • Number and type of multimedia outputs produced<br>• Number of views<br>• Percentage of full video watched<br>• Twitter, Facebook or other social media impressions/likes/shares | • Country of viewers<br>• Demographic of viewers<br>• Metrics compared to another output or time period<br>• Number of social media comments/shares with targeted individuals<br>• Qualitative feedback from audiences on quality and use of output |

# Indicators by channel

## Table 4 (cont'd). Key indicators by channel

| Example channel | Example basic indicators you could use | Example more in-depth indicators you could use |
|---|---|---|
| Media and blogs | • Number of media hits<br>• Number of blogs published<br>• Twitter, Facebook or other social media impressions/likes/shares | • Number of blog comments received<br>• Number of media hits in target country/media outlet<br>• Number of social media comments/shares with targeted individuals<br>• Qualitative feedback from audiences on quality and use of output |
| Social media | • Number of followers or subscribers<br>• Number of your organisation's experts with a professional social media presence<br>• Social media engagement (impressions/likes/shares) | |
| Email/newsletter | • Number of subscribers<br>• Open rate<br>• Click rate<br>• Unsubscribe rate | • Country of subscribers<br>• What content is most popular<br>• Metrics compared to another output or time period<br>• Qualitative feedback from audiences on quality and use of output |
| Events | • Number of events and in which countries they are held<br>• Number of event attendees and livestream viewers<br>• Dropout rate | • Type of attendee, including job type or sector<br>• Metrics compared to another output or time period<br>• Qualitative feedback from audiences on quality and use of output |

# 4. REFERENCES AND FURTHER READING

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## Further reading


**Better evaluation.** Online platform. www.betterevaluation.org

**Research to Action: monitoring and evaluation impact.** Online platform. www.researchtoaction.org/category/monitoring-and-evaluation/measuring-success/

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