Evaluation need not be traumatizing...

Evaluating our program is the moment of truth – and although it seems burdensome to many people, and is in fact, a labor-intensive task, it can be designed at least so as to be less daunting.

At this point...

...we need to plan for how we'll monitor our program's performance, ultimately, so we know whether our program has made a difference.

So, what are the relevant evaluation questions?
### Targets of Evaluation

- **Why will you evaluate?**
- **What will you evaluate?**
- **How will you evaluate?**
- **When will you evaluate?**
- **Where will you evaluate?**
- **Who will you evaluate?**

### Some Reasons for Evaluating Social Marketing Programs

**Vested Stakeholders:**
- Group Initiating Campaign
- Program Funding Agency
- Public
- Program Evaluators
- Others

### Some Reasons for Evaluating Social Marketing Programs

- To improve the project’s credibility for consumers and the persons or agencies funding it.
- To determine if a project is making progress and has been implemented as planned (“fidelity of implementation”).
- To use tracking information to make needed mid-course revisions
Some Reasons for Evaluating Social Marketing Programs

1. To determine the appropriateness of the “match” between actual “outcomes” (KAPs) and stated program objectives.

2. To provide evidence that programs are meeting their stated objectives (quality assurance).

3. To see whether programs not only are meeting their terminal objectives, but doing so “efficiently” (i.e., without wasted effort and with optimal cost-effectiveness).

4. To assist decisions about whether one aspect of the marketing mix is more productive than another aspect (e.g., the “right” product but the wrong promotion).

5. To compare all the actual effects of a program (good and bad, intended and unintended “side effects”) with the wants and needs of the target audience so as to improve the program (i.e., the offer) and community relations.

6. To have a program judged by “critics” (program experts) who can meet the public’s demand for fiscal accountability.

7. To have a program judged by “critics” (program experts) who can meet the public’s demand for fiscal accountability.
Some Reasons for Evaluating Social Marketing Programs

- To interpret and explain the context in which programs operate so as to have insight about improving them.
- To use findings to identify new problems and issues that require re-thinking and re-planning.

The WHY of evaluating Scorecard

Major stakeholders included:
- PRC Program Office of CDC (funder)
- Lexington Tweens Nutrition and Fitness Coalition
- Lexington-Fayette County Health Department
- Lexington tweens, their parents, and local action outlets

To measure:
- Program quality and fidelity
- Who was attracted to Scorecard
- If Scorecard participants more likely to have fun and try new things, to be physically active, and to intend to participate again
- How the marketing mix and the intervention could be improved
- Other things (e.g., “side effects”)

Targets of Evaluation

- Why will you evaluate?
- What will you evaluate?
- How will you evaluate?
- When will you evaluate?
- Where will you evaluate?
- Who will you evaluate?
Indicators of Campaign Impact - Making the Needle Move

1 of 3

- Changes in individual behavior, behavioral intention or stage of readiness to adopt the behavior
- Responses to particular campaign elements
- Awareness of the problem of the campaign
- Changes in knowledge and beliefs

Indicators of Campaign Impact - Making the Needle Move

2 of 3

- Changes in participation or utilization rates
- Changes in consumer (i.e., customer) satisfaction
- Modifications to the environment or in policies that facilitate change in the target behavior
- Changes to community infrastructure

The WHAT of evaluating Scorecard

3 of 3

What could reasonably be measured?

- Awareness of the Scorecard intervention
- Activity levels of participating tweens (“doers”) and non-participating tweens (“non-doers”)
- Tweens’ future intentions to be physically active
- Tweens’ responsiveness to specific campaign elements – in this case, the augmented product – the Scorecard itself
- Changes to community infrastructure and social environment
- Parents’ and other adults’ responses to the program as secondary audiences
Impact Evaluation of Scorecard

**Reporting Awareness**
- During the first 4 years of the Scorecard initiative, program awareness in the priority audience (i.e., “tweens”) increased from 35% to 79%.

Impact Evaluation of Scorecard

**Reporting Individual Behavior**
- In 2007 → Participating boys: (at least partially completed a scorecard) 30% more likely to be active 6-7 days/wk.
- Participating girls: 46% more likely to be active 6-7 days/wk (80% more likely to be active ≥ 2 days/week)
- Among tweens receiving a scorecard, partial or full completion of the card increased from 25% in 2004 to between 30% and 37% in 2007.

Impact Evaluation of Scorecard

**Reporting Behavioral Intentions**
- When exposure time is minimal (e.g., new program)
- When objectives, in part, are to move people along a continuum of change (e.g., precontemplation → contemplation)
Impact Evaluation of Scorecard

**Reporting Behavioral Intentions**
- Participating girls were 43% more likely to express intention to participate in next year’s Scorecard initiative.
- Gender aside, trying a new game, sport, or other physical activity made you 59% more likely to intend to participate in next year’s Scorecard initiative.
- Self-monitoring of physical activity, via the Scorecard, was associated with a 4.42 to 7.50 fold greater intention to participate again.
- There was a dose/response effect - the greater the self-monitoring (from partial completion → completion of multiple scorecards) the higher the future intention expressed to participate.
- Positive “side effect” – girls responded well, especially if “thinking about” becoming active (2.60X as likely to report intention to participate in a future Scorecard initiative).

**Impact Evaluation of Scorecard**

**Reporting Changes in the Social Environment of the Community**
- Fourteen businesses and 12 community groups became Scorecard sites, offering free or reduced price activities (e.g. skating, laser tag, tennis, whiffle ball, dance, aerobics, races, and other action games).
- At one event, 18 organizations sponsored tween-centric activities with ~ 950 youth participating.
- All participating vendors vowed to participate again for the next year (infrastructure change).
- To assist parents with transportation, a partnership was established with LexTran, the public transportation system, allowing the scorecard to be a bus pass for tweens traveling with an adult to events (policy change).

**Process Evaluation of Scorecard**

**Reporting Changes in Future Iterations of the Intervention**
- As a result of interviews with parents of participating tweens, several modifications were made for the future:
  - An easy-to-read calendar was developed to prompt parents of Scorecard events and opportunities; The proportion of squares that could be authenticated by parents for home play were increased;
  - Youth were used as program spokespersons; and
  - An Internet-based tracking system was created for tweens not wanting to use paper scorecards.
Other Evaluation Measures that Could Be Employed in the Future

Reporting Changes in Belief Indicators

- Attitudes (e.g., Trying new things is fun for me.)
- Opinions (e.g., Being active with my friends is easy.)
- Values (e.g., I like trying new things.)

Other Evaluation Measures for the Future: Awareness of the Scorecard Campaign

**Awareness** is a low-level evaluation indicator since it is not a true measure of impact or success; however, measuring it offers feedback concerning the extent to which the campaign was noticed and recalled.

(Audience awareness doesn’t necessarily mean audience penetration.)

- **Unaided awareness** (e.g. What have you seen or heard lately about a fun program that encourages youth to try new things with their friends?)
- **Aided awareness** (e.g., What have you seen or heard lately about the Scorecard program?)
- **Proven Awareness** (e.g., Where did you actually see, read, or hear about Scorecard?)

Evaluation Considerations beyond the Present for Scorecard Sustainability

**Policy:** changing laws, regulations, and rules (formal and informal)
What policies changed that affect access to services or products, or encourage/deter adoption of a recommended action?

**Environmental Change:** manipulating the economic, social, and physical environments
Were incentives added? Were social norms nudged? Did the physical environment become more enabling?
Other Process Evaluation Measures for Scorecard in the Future

- Reach (proportion of eligible tweens reached, and proportion of those who participated)
- Frequency of various campaign elements
- Distribution and accessibility of scorecards
- Other materials dissemination

Other Possible Process Evaluation Measures for Scorecard in the Future

- Did we carry out the plan based on a logic model of defined activities and expected results (i.e., fidelity of implementation)?
- Activities linked to objectives?
- To what extend did we engage the priority audience and other stakeholders in planning and conducting the evaluation (i.e., helping us to define measures)?

Other Possible Process Evaluation Measures for Scorecard in the Future

- Was the targeted action (i.e., the product) clear?
- Was access convenient (i.e., place)?
- Did perceived benefits outweigh the costs (i.e., price)?
- Were messages on target and use the right channels (i.e., promotion)?
Targets of Evaluation

- **Why** will you evaluate?
- **What** will you evaluate?
- **How** will you evaluate?
- **When** will you evaluate?
- **Where** will you evaluate?
- **Who** will you evaluate?

How will you evaluate?

- **Quantitative methods and designs** (e.g., random assignment, control groups and quasi-experimental or experimental designs)
  - How much change occurred? How many people adopted the desired practice?

- **Qualitative methods and designs** (e.g., gets at the “why” and the “how” of something that worked or didn’t work)
  - Mixed method designs (can powerfully triangulate measurement)

- **Surveys**: Mail, telephone, Internet
- In-depth, face-to-face interviews
- Informal interviews and anecdotal remarks
- Observation
- Focus Groups (e.g., what was least useful, most helpful?)
- Records
- Other
The **HOW** of evaluating *Scorecard* was a mixed methods approach

- A 39-item survey drawn in part from CDC’s Youth Risk Behavior Survey and Youth Media Campaign Longitudinal Survey
- The Lexington-Fayette County Health Department and the Lexington Tweens Nutrition and Fitness Coalition administered the survey with approval of the school district, yielding 2,623 middle school student responses.
- The survey measured awareness of *Scorecard*, level of participation in *Scorecard*, level of current physical activity (PA), recent involvement in new types of PA, perceived benefits to PA, perceived parental support for PA, barriers to PA, and future intention to participate in *Scorecard*.
- Field notes by youth board members
- Site visits to action outlets by health department personnel
- Interviews with parents and vendors from the action outlets

**Targets of Evaluation**

- **Why** will you evaluate?
- **What** will you evaluate?
- **How** will you evaluate?

**When** will you evaluate?

- Prior to initiating a campaign to capture baseline measures.
- During campaign implementation to check fidelity and to make midcourse corrections if necessary.
- After the campaign to look for evidence of change in the behavior of interest.
- Long after the campaign’s elements have been introduced completely to look for evidence of decay or recidivism.
The WHEN of evaluating Scorecard

- Little a priori evaluation took place.
- During program implementation:
  - youth board members recorded field notes at participating public pools and skating rinks to verify tweens' use of the scorecards and staff awareness;
  - health department personnel visited other action outlets to confirm availability of program materials, verification stamps and signatures, and staff knowledge.
- Shortly after the program:
  - interviews with parents of tweens who had submitted cards identified program elements that should be retained and those that needed revising;
  - interviews with parents of non-participating tweens were conducted to identify barriers to participation.
- Long after the program (~9 months) the 39-item survey was carried out in the schools by the the Lexington-Fayette County Health Department and the Lexington Tweens Nutrition and Fitness Coalition.

Targets of Evaluation

- Why will you evaluate?
- What will you evaluate?
- How will you evaluate?
- When will you evaluate?
- Where will you evaluate?
- Who will you evaluate?

Where will you evaluate?

Generally, the answer to this question is largely determined by the nature of the specific project.

- For instance, in a social marketing campaign targeting prevention of underage drinking, youth could be given questionnaires at school, but also could be observed at their local “hangouts.”
- Evaluators could also collect data in their neighborhoods, at playgrounds, at PTA meetings (secondary audiences of parents, teachers, administrators, and others), at hospitals, or at police departments.
**The WHERE of evaluating Scorecard**

- Action outlets – observations and field notes by youth board members as well as observations and anecdotal interviews by health department personnel
- Telephone and face-to-face interviews with parents wherever parent felt most comfortable
- Telephone and face-to-face interviews with action outlet vendors at their place of business (limited basis)
- Written survey conducted at school by non-school personnel

---

**Targets of Evaluation**

- **Why will you evaluate?**
- **What will you evaluate?**
- **How will you evaluate?**
- **When will you evaluate?**
- **Where will you evaluate?**
- **Who will you evaluate?**

---

**Who will do the evaluating?**

*Internal* (knows the context and organizational culture)

*External* evaluator (has impartiality)

Other considerations:

- What effect will data collectors and interviewers have on the data collected?
- Have persons from the audience segment(s) of interest been involved?
The WHO of evaluating Scorecard

- **Internal** – Scorecard staff performed all of the process evaluation and most of the impact evaluation.

- **External** - Persons not directly affiliated with Scorecard or only peripherally affiliated with Scorecard carried out “sidestream evaluations” to examine certain program effects.

Other Issues in Evaluating Social Marketing Programs

Other issues - what kind of budget is needed for evaluating my social marketing program?

**Budget**

should be 15% to 20% (minimum) of total budget, possibly even a greater proportion so as to be able to include careful baseline measures, control or delayed intervention groups, monitoring of implementation, etc.
Other issues - how are evaluation data used?

- Does the target audience now perceive the product/behavior as:
  - more fun?
  - easier to do?
  - more normative or popular?

- Did we demonstrate that a change in the social "norm" occurred?

- If our program observations are unsatisfactory, how can we modify the offer; i.e., change the marketing mix.

- Select the next generation of audience segments, target behaviors, and social marketing interventions.