How to Measure the Performance of Your Outreach Programs

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About DeHavilland Associates

DeHavilland Associates is a consulting and communications firm that helps its corporate, nonprofit, and association clients understand and connect with the K-12 community. The company designs, manages, and evaluates outreach campaigns and partnership programs for its clients and creates original initiatives to help educators and education stakeholders establish and strengthen dialogue for the benefit of public education.

For more information, visit www.dehavillandassociates.com.

About the Business/Education Partnership Forum

Created and managed by DeHavilland Associates, the Business/Education Partnership Forum is an online clearinghouse for anyone interested in learning how to build effective business/education partnerships. This clearinghouse offers news and announcements, links to resources, a directory of organizations involved in business/education partnerships, and a monthly newsletter.

For more information, visit www.biz4ed.org.

About the Effective Education Partnerships Conference

The Effective Education Partnerships Conference (EEPC) is an annual two-day meeting for the practitioners of business/education partnerships, including chambers, business coalitions, individual businesses, school and district leaders, and others interested in hearing case studies and effective practices from others in the field. EEPC will be held July 10-11, 2008 in Fairfax, VA.

For more information, visit www.eepc2008.com.

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Today’s schools operate in an era of accountability, grappling with the requirements and consequences of tracking and reporting results. Those who manage education outreach initiatives find themselves under similar pressure: they are increasingly being required to demonstrate how effectively they use resources, and how they provide a return to the sponsoring organization.

For education outreach programs, this mandate is a positive step forward. It indicates that education outreach is now being considered to be just as important as any other HR, PR, or corporate relations function and, as a result, is being held to the same performance and accountability standards. This is a key step on the road to an ongoing, if not increasing, investment in such programs. It also means that education outreach programs will create ever-greater impacts on education due to the cycle of continuous improvement that this type of measurement and analysis makes possible.

This paper will provide an introduction to campaign tracking and measurement, help you to identify the metrics appropriate to your program model, and provide formulas and commentary for using them effectively.

**The First Step in Performance Measurement**

The first and most important step in setting up an effective measurement component comes as the overall campaign is being planned. Measurement must be included as an integrated component from the outset: campaign goals should be determined in part by what can be measured in both quantitative and qualitative terms, and measurement requirements should be integrated into each campaign component (such as collecting email addresses from prospective users so they can be surveyed later).

Some principles to consider in designing your measurement strategy:

- Clearly identify each audience you wish to reach. While your education outreach initiative will certainly center on teachers and students, many campaign sponsors also wish to reach other audiences such as parents, customers, the media, legislators and regulators, and employees in order to maximize returns on their efforts.
- Determine your desired outcomes for each audience. How many members of each audience do you wish to reach? What do you want those people to know, think, or do as a result of your campaign?
- Next to each desired outcome for each campaign audience, identify the way(s) in which that outcome can and will be measured. You can use quantitative measurements to determine things like media impressions, inquiry rates, contest entry submissions, or volunteer hours logged. Tools such as audience surveys can be used to capture data such as opinions and perceptions, including perceived value and engagement on the part of participants as well as perceptions of the program and sponsoring company on the part of external audiences.
- Make sure you have systems in place to capture quantitative data, such as number of website visits, inquiries received, or media impressions. Some types of measurements can be impossible to calculate after the fact.
- Build survey tools you’ll use to capture qualitative data such as participants’ perception of the value and experience of the program. To minimize the potential for survey bias, bring in a qualified and independent reviewer to look over and revise your surveys. And, if at all possible, pre-test your surveys with a sample of your audience to make sure they can clearly understand the questions.
- Establish benchmarks for any measurements intended to reflect your program’s impact. If you want to your program’s impact on student knowledge of global warming, for example, you need to determine what they knew before being exposed to the program. Similarly, if you want to measure the effect of your program on your customers’ perception of your company, you’ll need to capture data on their opinions and feelings before your program is launched.
The remaining sections of this paper identify key areas you may wish to consider for tracking and measurement, and provide introductory information and some equations to help you build your systems and tools.

**Acquisition**

Most campaigns involve an acquisition component, whether that involves recruiting teachers to request materials, students to participate in a contest, or employees or community members to participate with volunteer hours. Determining which tools and channels are the most effective and cost-efficient allows you to use your money wisely and to predict future participation rates.

Response rate is a fundamental metric for any mass marketing initiative that requires action on the part of interested audience members. There are several factors that can affect response rate, including list selection, messaging, and creative elements, and by instituting a tracking program and testing various combinations of those elements (a method known as split run testing), you will be able to determine which combination of marketing elements offers you the greatest return.

A campaign’s response rate does not have to be restricted to a single composite measurement: it can be very helpful to measure response rate by channel, which can help you determine the most productive means of reaching your target audience. Channels such as online marketing, advertising, direct mail, telemarketing, and conference exhibitions allow you to communicate with prospective users in different ways, and you may find that some channels are particularly effective in generating response to your campaign.

Of course, response rates only offer a partial picture: the costs associated with each channel, or even with each vehicle within a channel, can vary widely, and those costs must be taken into account when considering the relative value of using a particular channel or vehicle. Determining cost per prospect, particularly when calculated by source, will help you identify the best outreach opportunities for your campaign.

And, while cost per prospect by source offers valuable data, don’t forget that there are few channels or marketing vehicles that offer total access to the market. For example, online marketing may offer you the lowest cost per prospect: however, you shouldn’t necessarily commit your entire outreach budget there, since this channel can only offer you access to a portion of your total audience. A prudent outreach plan takes into account not only response rates and costs, but also the percentage of the market that a channel or vehicle allows you to reach. To fully penetrate the market, you must call on a combination of marketing opportunities.

If your campaign incorporates a two-step acquisition process, whereby prospective users request information and then must take an additional step to register or to participate, calculating that conversion rate is essential to generating a thorough analysis. Online targets, for example, may request information at a very high rate but convert poorly, lessening the true value of this channel despite any perceived cost efficiencies.

**Exposure**

While acquisition focuses on specific actions taken by targeted audience, exposure is a broader measure of understanding and awareness made possible by your campaign. This may be more appropriate for information campaigns targeted at your primary audience, such as a “stay in school” in-school advertising initiative, or it may be used in targeting secondary audiences, such as customers or the public.

You can use reported media numbers, such as impressions, to gauge exposure among targeted audiences. Impressions are simply the number of readers or viewers reported by the media outlet carrying your message, such as the ratings claimed by television programs or readership statistics highlighted by magazines or newspapers. For most media, these are estimates: you won’t be able to definitively state how many people saw your public service announcement during a commercial break. Online media, however, can offer specific data on page views, time spent per page, and more.

**Experience**

As teachers, students, and other relevant audiences (parents, volunteers, etc.) work through your program, you’ll want to know how they interacted with it, what they thought of it, and what they got out of it. You can capture quantitative and/or qualitative data through methods such as:

- Focus Groups—Involves recruiting a small number of representatives of your target audience(s) and
soliciting their thoughts. This is an early-stage tool, best used for exploring market context and understanding which questions to ask in subsequent measurement and evaluation efforts. It should not be used as an evaluation tool in and of itself—the data set is too small, and the dynamics of a focus group work against the gathering of reliable data.

- Observations—Involves live observations of the program being implemented with its target audiences. The observer watches the program in action, taking notes and possibly recording the session, and reports to program managers on what he or she has witnessed. To minimize bias, researchers recommend that an independent observer, not a program representative, conduct and report on the observations.

- Surveys—Surveys are one of the mainstays of program evaluation: they allow evaluators to collect a significant amount of data in a consistent format, and can be administered in print, online, or over the phone.

- Interviews—These can be conducted in person or over the phone and used as a primary data collection tool or as a way to supplement and further explore results obtained through other techniques. Examples of this include interviewing teachers after an observation session or calling a group of survey respondents to ask for clarification on unclear responses.

Note that these techniques are relevant whether you are determining effectiveness and approach during program development (i.e., formative evaluation) or if you are analyzing the experiences and outcomes of program participants (i.e., summative evaluation).

Each of these techniques can also be used to capture both quantitative and qualitative information from program participants, including teachers, students, and others (such as volunteers or parents) involved in the program in some way. Typical measurement and evaluation topics include:

- Demographics—who is participating in the program, and what traits do they have in common, such as grade level, location, technology access, memberships, or interests? What characteristics are shared by their schools or their communities?
- Reach—how many students did each teacher or facilitator engage in the program? Did participants reach parents, community members, or other school attendees with information on the program, by design or through their own initiative?
- Usage—were all of the materials used? If not, why not? Where materials used as intended? If not, how were they used, and what were the results? If they were used as intended, what were the results?
- User Experience—Did teachers find the materials to be clear and easy to use? Where students engaged? Did they have fun? Were volunteers engaged? Did they enjoy their experience? Did all parties find the program relevant to their interests?
- Value—Were the materials valuable to all audiences? Did they help teachers fulfill classroom requirements? Did they help students understand targeted subject matter better than other available materials?
- Promotion—How did participants hear about the program?
- Program Improvement—What suggestions do participants have for improving this program? What would make it more complete, relevant, or engaging?

Before deciding on specific questions to ask, be sure you have a clear understanding as to what information you need from participants, and how that information will be used to analyze or improve your program. Cluttering your data gathering tools with questions that generate unused information will make them unnecessarily long and may reduce participation rates.

Finally, if at all possible, pre-test your questions with members of your audience to make sure there is no confusion over the language or focus of any of your questions.

Outcomes

No measurement/evaluation effort would be complete without an analysis of program outcomes. This can include simple summaries of quantitative outcomes—number of website visits, number of volunteers signing up to participate—as well as changes in both qualitative and quantitative measurements demonstrated by measurements taken before and after program implementation. These numbers will give you a sense of current year accomplishments and can also serve as benchmarks for next year’s program.
The data collected through all of these types of efforts can provide you with incredible value: not only can you use it to justify your program’s continuation, if not expansion, in future budget cycles, but it can also provide you with the information you need to improve future outcomes: reach more teachers, attract more volunteers, change the lives of more students. It is for these reasons that including a measurement and evaluation component within your education outreach efforts may be one of the most important steps you take.

_Brett Pawlowski is President of DeHavilland Associates, a consulting firm specializing in campaign design and communications and evaluation strategy in the education outreach market. He has spent several years working with organizations on their education outreach strategy and is a recognized voice in the industry._