THE COMMUNICATIONS CONSORTIUM
MEDIA CENTER

THE MEDIA EVALUATION PROJECT CONFERENCE

December 15, 2004
11:00 a.m.-3:30 p.m.

Location:	American Association for the Advancement of Science Building 1200 New York Avenue, NW, Second Floor Washington, DC 20005 (202) 326-8700
11:00 a.m.	**Welcome** Phil Sparks, Vice President, Communications Consortium Media Center
11:15 a.m.	**Introductions**
11:45 a.m.	**Challenges Facing Media Evaluation** Panel: Karen Menichelli, Benton Foundation; Holly Minch, SPIN Media; Jean O'Neil, National Crime Prevention Council; Heather Weiss, Harvard Family Research Project
12:45 p.m.	**Lunch**
1:15 p.m.	**Preliminary Guidelines Regarding Media Evaluation** Panel: David Devlin-Foltz, Aspen Institute; Lori Dorfman, Berkeley Media Studies Group; Douglas Gould, Douglas Gould & Co., Inc.; Gwyn Hicks, Spitfire Strategies; Bruce Trachtenberg, Edna McConnell Clark Foundation
2:30 p.m.	**Discussion of Evaluation Toolkit/Working Briefs** Panel: Julia Coffman, Harvard Family Research Project; Douglas Gould, Douglas Gould & Co., Inc.; John Russonello, Belden Russonello & Stewart
3:15 p.m.	**Closing Remarks**

Participants: John Bare, Arthur M. Blank Family Foundation; Lauren Block, Baruch College, Zicklin School of Business; Kathy Bonk, Communications Consortium Media Center; Eric Brown, William and Flora Hewlett Foundation; Susan Brown, Columbia University; Elena Cabatu, Communications Consortium Media Center; Julia Coffman, Harvard Family Research Project; Patrick Corvington, Innovation Network, Inc.; Ketayoun Darvich-Kodjouri, Communications Consortium Media Center; Barbara Delaney, Partnership For a Drug-Free America; David Devlin-Foltz, The Aspen Institute; Lori Dorfman, Berkeley Media Studies Group; Joanne Edgar, Communications Consultant; Jon Funabiki, Ford Foundation; Sharon Gallagher, Sage Communications Partners LLP; Douglas Gould, Douglas Gould & Co., Inc.; Barbara Grob, Communications & Public Affairs; Ed Hatcher, The Hatcher Group; Lucas Held, The Wallace Foundation; Philip Herr, Millward Brown; Gwyn Hicks, Spitfire Strategies; Robin Kane, Innovation Network, Inc.; Micheline Kennedy, Communications Consortium Media Center; Amber Khan, The Communications Network; Ethel Klein, EDK Associates, Inc.; Harold Leibovitz, Foundation for Child Development; Thea Lurie, Ford Foundation; Kris Mejia, Communications Consortium Media Center; Karen Menichelli, Benton Foundation; Holly Minch, The SPIN Project; Steve Montiel, USC Annenberg School for Communication; David Morse, Robert Wood Johnson Foundation; Jean O'Neil, National Crime Prevention Council; George Perlov, The Advertising Council; John Russonello, Belden Russonello & Stewart; Charles Salmon, College of Communication Arts & Sciences, Michigan State University; Phil Sparks, Communications Consortium Media Center; Vikki Spruill, FoundationWorks; Bruce Trachtenberg, Edna McConnell Clark Foundation; Liz Wainger, Liz Wainger Communications, LLC; Heather Weiss, Harvard Family Research Project; Lowell Weiss, Bill & Melinda Gates Foundation.

PHIL SPARKS: I thank you all for joining us this morning. I'm the vice president of Communications Consortium and I'm the project director of the Media Evaluation Project.

Many of you all don't know each other, and in some ways that's purposeful because we brought together at this meeting four different communities. We brought together foundation representatives that are either project people or who are in communications and who want to know more about how to judge their investments in strategic communications. We have some communications practitioners here. In fact, I would say, modestly, some of the best in the field who work with nonprofits and with foundations.

We also have some representatives from the evaluation community that are here today. And we also have some people from the nonprofit community who are sort of best in class, who've run communications campaigns and want to know more about how to judge their particular outcomes in terms of what the communications investments have meant to them and to the foundations that fund them.

I want each of you to introduce yourselves and tell us what one thing you'd like to learn or why you're here today so that we get some ideas to the various perspectives that are embodied here in the room.

And I also want to talk about the evaluation project itself and why we've put this meeting together and where we are in terms of the project. Thanks to funding from the Kellogg Foundation, the Carnegie Corporation and the Packard Foundation, the Consortium -- which is itself a nonprofit media organization based here in Washington that provides strategic media assistance to social marketing campaigns that are undertaken by foundations and use nonprofits as the way in which that is accomplished -- the Consortium realized several years ago that as foundations were beginning to put more resources into social marketing campaigns, that, frankly, the field for evaluation of social marketing campaigns, both from the perspective of nonprofits that we work with and from the perspective of foundations that fund us and fund some of you all here in the room, that it was a nascent field in terms of evaluating what we foundations receive for their dollars. And it was a nascent field in terms of what nonprofits felt they had to put on a piece of paper in order to justify the grant request. So that was the impetus for us putting together, on behalf of the foundation community and the nonprofit community, this particular project.

It has two stages, and from the beginning it was thought to be a multiyear project. The first stage is being completed at this particular meeting. As everybody in the room knows, we have put together a website that has the R&D that we have completed over the past two years.

The first part of the project was basically to find out what we knew and what we didn't know in terms of this field. And then with the paper that we did in April of this year, that I wrote, we summarized some of the other working papers that we'd done over the past two years and suggested some preliminary guidelines that might be used for media evaluations. This Fall we put together some working briefs which were meant as a toolkit for the communities represented in the room on how to actually do some of the various evaluations. These briefs explain how to use some of the evaluation tools that are detailed in the working papers. So that process of R&D is completed with this particular meeting.

The next two years, before we come up with final recommendations to present to the foundation community and to the nonprofit community, are going to be spent getting feedback, which starts with this meeting. Over the next two years we will be writing additional papers and briefs and we'll be doing a lot of workshops. We'll be going out, perhaps, to your colleagues in the various communities that you represent to explain and get feedback on this project and its findings.

In addition, we have made arrangements with a group of foundations that will be doing grants in the communications area to use some of the guidelines that we articulated in working paper Number Five to evaluate ongoing communications campaigns over the next two years. Then, we can have the added feedback of actual practical experience of applying those guidelines before we, then come up with a final set of suggested guidelines based on feedback, workshops and the some practical experience.

We finished the first two years. Now we're basically going to be out in the field looking to find out how these guidelines apply and what works and what doesn't work.

So that's part of the process that we'll go through, and that will be the next working phase of the media evaluation project. And we'll put all of this up on the web. We have three great panels and hopefully some great discussion that will follow each one of them on various aspects of what we're about. The first panel is sort of a general panel from the perspective of the four communities to talk about what the challenges are in terms of media evaluation. Then this afternoon we'll specifically get feedback from another panel representing these same communities on how they view Working Paper Number Five. And then the final panel is a nuts and bolts panel that will explain the three working briefs that were issued in the fall. We will have all three of the authors with us. And after each of the panels we have time for discussion so we can get feedback from the audience.

Then what we'd like to do then is have each of you give your name and organization and give us 15 to 20 seconds on why you're here and what you hope this meeting will accomplish from your perspective. And we'll start with David Devlin-Foltz.

DAVID DEVLIN-FOLTZ: Okay. That's what I get for sitting up front.

I'm David Devlin-Foltz. I run the Global Interdependence Initiative at the Aspen Institute. My interest here is building in one of those collaborative projects that Phil alluded to. We have some funding from the Gates Foundation for an effort to evaluate advocacy efforts, specifically on global issues, on U.S. engagement on global issues. And that's what we work on at our project at the Aspen Institute. And we'd like to help the organizations who are trying to reach out to the

American public on the U.S. role in addressing global issues. We'd like to help those organizations do a better job of assessing their advocacy efforts.

So this paper is really a foundation – Paper Number Five, as we refer to it, is really a foundational document for that evaluation/ learning group effort. So I'm glad to be here to move that forward.

LORI DORFMAN: Good morning. I'm Lori Dorfman from the Berkeley Media Studies Group, very happy to be part of this project, thanks to Phil for inviting us to be part of this core group. We wrote one of the papers for this project that describes a taxonomy of communications campaigns and their evaluation challenges. At the Berkeley Media Studies Group we are engaged in helping advocates do a better job with journalists. We operate in that intersection between public health and journalism, which is an interesting place to be and a very hard place to evaluate.

So I'm here because I'm interested in your reactions to the work of the Evaluation Project so far. I don't think there are any hard and fast answers to the questions we're raising. But I'm interested in what the next questions are.

ERIC BROWN: Good morning. My name is Eric Brown. I'm the communications director at the William and Flora Hewlett Foundation, and my job at the foundation is to help the program staff and everybody else at the foundation incorporate communications into all of their work. And I'd like to be able to give them better and more specific tools on how to do that, because sort of taking the proposal and sniffing it -- giving it to me and sniffing it probably isn't a good enough evaluation method.

DAVID MORSE: I am David Morse from the Robert Wood Johnson Foundation. As many of you know, we both manage directly and support a number of communications campaigns around issues of health insurance coverage, the quality of healthcare, substance abuse and other things. And I'm really interested in learning more about what are appropriate metrics for measuring the effectiveness of those kinds of campaigns.

PHILIP HERR: Thanks, Phil. Philip Herr. I am with Millward Brown. We, as you had indicated earlier, are a commercial company that specializes in evaluating communications advertising and impact on the brands for commercial clients. In addition to working with, you know, several companies, I also work with the Ad Council --and helping the Ad Council to help evaluate their advertising contribution developing a sense of accountability for their advertising, both from a creative as well as from a media standpoint.

From my perspective, I'm hoping to learn much more about how things get done in the nonprofit sphere, because I am becoming more and more aware of the complexities and the challenges on being able to accomplish what it is that you're actually setting out to do when funding is so very limited.

SPARKS: This is Lucas Held who's also joined us, and he's at the Wallace Foundation.

Why don't you introduce yourself, Lucas.

LUCAS HELD: Well, thanks, Phil. And I apologize that I can't be there in person. I'm interested particularly in learning what you guys have learned because we see an increasing internal focus on accountability which requires us to be more precise in describing not only whom we have reached through our communications activities, but what the results of that exposure was, if anything. So I'm eager to hear from the panelists.

GEORGE PERLOV: Hi, good morning. I'm George Perlov with the Ad Council. I know a lot of people here.

I head up our research and evaluation efforts at the Ad Council where we have approximately 50 public service communications campaigns ongoing. And what I'm interested in today is a lot of our focus lately has been on our outcome and impact evaluation and really being able to look at this more holistically. I think we've typically over time we've looked at individual pieces of our campaigns, the media donations, the fulfillment efforts, the public relations efforts, the tracking study efforts, and we're trying now to really put this all into a much more holistic view. And so I'd love to get some insight and ideas on how to better do that today. Thanks.

DOUG GOULD: Hi, my name is Doug Gould. My firm is Douglas Gould & Company, and we are practitioners. We work for nonprofit organizations and foundations conducting communications campaigns. And I'm here to be one of the panelists and also to find out a little bit more about what some of the concerns are of funders.

JOANNE EDGAR: Hi, I'm Joanne Edgar, and I've been a member of the core group where we've been talking about these papers for about a year-and-a-half now, and I've thoroughly enjoyed that. I am an independent consultant right now. I worked for 10 years at the Edna McConnell Clark Foundation before this. And what I'm excited about is to see us getting concrete. And I'll be really, really interested as we sort of identify steps that you can go through to actually put this into practice.

ROBIN KANE: My name is Robin Kane. I'm with Innovation Network, which is a nonprofit evaluation consulting firm here in DC. We work to build the capacity of nonprofits and foundations. But before this, in my role in evaluation, I worked for many years in communications with nonprofits and consulting firms, so I wear several hats here. I love the high level research in the field on causation, but at the end of the day I really want to know low cost methods to help really under-resourced nonprofits know if they're on the right track.

THEA LURIE: Hi, I'm Thea Lurie and I work on strategic communications at the Ford Foundation. Our concerns are very similar to the ones expressed by other people from other foundations here. We're making increasingly large investments in communications projects, some that we have a direct role in, others that we support our grantees to manage. In fact, some grantees are right here in this room. And, you know, I'm here to try to get and hear and discuss the latest wisdom in the field about how to assess impact of communications efforts, the realistic benchmarks to set at the beginning, then ways to determine success or not of these efforts.

But I'd also like to introduce the concept of – well, I don't want to say failure. But we learn as much from what did not work well as we do from what did work well, and I would hope that that would be part of the research as well. How can we work with our consultants, the outside P.R. firms that we fund, to really understand what didn't work well and why, because what didn't work well on one project, it might work wonderfully on another. So I just want us not to be afraid to address that. I think we could learn a lot.

MR. SPARKS: And it's a difficult arrangement between a grantee and funder to acknowledge that we could learn more an area where we had a challenge and to understand that that won't be held against us.

ED HATCHER: Good morning. I'm Ed Hatcher. I'm president of the Hatcher Group. We're a public affairs firm that works with foundations and nonprofits on progressive policy issues. And I am constantly asked, Phil, by my clients, "How will we know if this campaign's been successful?" And I'd like to give them a little bit more sophisticated and nuanced answers. So that's why I'm here.

JON FUNABIKI: I'm the deputy director of Media Arts and Culture at the Ford Foundation. Unlike Thea, who worries about communication strategy and impact, I worry about the media themselves -- plural -- and especially journalism. And I work closely for example with

Steve Montiel at the Institute for Justice and Journalism. I'm interested not only, therefore, in the state of the art of media evaluation, but also understanding better how to evaluate efforts that really are attempting to build the capacity of journalism and other forms of media to cover and be committed to the kinds of concerns that we are interested in.

AMBER KHAN: I serve as the executive director of the Communications Network. It's nice to see many of you who are members of the network here.

We're excited about this meeting and looking forward to hearing about the conversation. In part, there have been a lot of conversations, as Phil and I've talked about, at the network level among many of the funder members who have been increasingly looking at not only communications evaluation inside the foundation, but what kind of guidance to provide to their grantees. And we're looking forward to having this conversation, but also seeing how it connects to some of the other conversations and the research the network is working on.

LIZ WAINGER: Liz Waingers Communications, independent communications consultant. I've worked also in a number of nonprofits. And I'm here because I'm interested in learning how to make communications less squishy. (Laughter.) I find that, you know, as communications people, we have a hard time really communicating well the impact and effectiveness of what we do. And I want to go beyond media impressions, I want to go beyond "we produced a product" and somehow be able to articulate what we all kind of know intuitively, but to find some way to put some hard numbers or some hard way of evaluating what it is that we do every day.

BRUCE TRACHTENBERG: And I'm Bruce Trachtenberg from the Edna McConnell Clark Foundation, and I guess I would probably echo a lot of what Liz said also. From our foundation's perspective, we've spent the last several years just trying to retool ourselves to focus on being an effective organization and trying to align all the pieces of what we do so it adds up to something at the end of the day that creates value. Communications plays a role in it, but not necessarily independent of anything else we do. But what I'd really like to know what works and what doesn't, or how we even know what works, or maybe there's limits on what we can know and we have to just be satisfied with that and work within that frame. But not knowing is what concerns me.

CHARLES SALMON: I'm Chuck Salmon. I'm the acting dean of the College of Communication, Arts & Sciences at Michigan State University. We have 4,500 students, and I'm here partly to find out where they're going to be working over the next five years. But in addition to that, we do a lot of international work at MSU. And I was in Kazakhstan about a year ago designing an HIV/AIDS campaign for them. And, you know, just the issues of international evaluation just add an entire layer of complexity on top of this.

But also the question of what constitutes social change. I mean, how do you know you've made social change? We know how to measure individual level change, but there might be cases in which we've achieved social change and just not even realized it. So getting into some of those types of issues at different levels of analysis.

BARBARA DELANEY: I'm Barbara Delaney, and I'm director of Research at the Partnership For a Drug-Free America. And currently -- well, in January we're going to be launching an intervention and treatment media campaign in test. This is with support from the Robert Wood Johnson Foundation. And I certainly am here to learn how the instruments that we're using and the guidelines that we're using, if there's anything that we can improve or share with all of you.

PHIL SPARKS: Karen Menichelli from the Benton Foundation and I were on a panel somewhat similarly in New York a few months ago in which she perfectly, I thought, summarized some of the main points in terms of media evaluation. So I've asked her to give a reprise performance on behalf of this group today.

Holly Minch is with SPIN Communications. They are also a nonprofit practitioner group in the Bay Area and do very fine work.

Jean O'Neil is with the National Crime Prevention Council, and she'll talk about it from the standpoint of an NGO.

And Heather Weiss director of the Harvard Family Research Project which does evaluations on the media.

KAREN MENICHELLI: Hi. I think I'm here to make you feel more comfortable, frankly. I'm an amateur in evaluation, and I know it's a very intimidating field. And the Benton Foundation, for those who may not be familiar with it, has a focus on demonstrating the value of communications for solving social problems. And we have that focus in order to promote public policies that can encourage, promote an innovative and noncommercial use of media.

The problem is we've done very little systematic evaluation over the 20-some years of our existence, despite that we are in the game of demonstrating. And I think it's because we have a commitment that springs from a belief in the democratic power of diverse expression, the motivational power of film and video, the engaging power of the Internet. We believe it. And therefore we acknowledge that we have not made the case that all of you have said here needs to be made concretely about the value that communications adds to our efforts of social change.

I was fortunate enough a couple of weeks ago by the Foundation to be given a three month sabbatical, and I decided to use it to learn more, to bring, formalize the evaluation function within our institution to strengthen our work around demonstrating the value of communications. And it led me to the formidable literature of evaluation, but also the recent, and I think really pioneering, work that the Communications Consortium has undertaken. And so it's in that kind of context that Phil has asked me, and I humbly agreed, to of provide some background that I picked up in the course of that sabbatical.

And one was just the striking evolution to me of evaluation, the process of evaluation over the last several decades. My own graduate training educated me in the scientific or medical model of evaluation. You have proof of cause and effect, you have control groups, and the relationship between the cause and effect, the message and the impact on behavior was knowable because you were able to eliminate all the extraneous variables. And when I finished graduate school it finally evolved -- and for those of you know Campbell & Stanley -- to quasi experimental design. It was an acknowledgement that real life is messy, and so we can't always have control groups. But they tried in their designs.

And then I think a big breakthrough has been with the federal government investment in evaluation. The comprehensive community interventions that federal dollars in the '60s and '70s were putting into communities for early childhood education, for community development, for workforce training. And because of the big influx of dollars, the federal government really invested in evaluating what impact those dollars had. And those evaluators came to acknowledge the complexity of major, complex interventions in a community, in large communities across the country. There are too many confounding variables. You have to step back and think of new ways of evaluating. Control groups aren't options.

And I think out of that grew a lot of the work on distinguishing the types of evaluation, the format of evaluations about whether you're using the right strategies from the start, how you might adjust them as you continue on your work, is your process, level of effort evaluation, whether you've implemented effectively. Then there's the outcomes, the attitude change, the behavior change, the saliency of the issues, and impact. What real impact, generally, have you had on the community? All of that, I think, has culminated in what we all take for granted, is this logic model of evaluation or a theory of change model where you're building on the experimental model of hypothesis testing, but you're building a chain of cause and effect, a chain that's breakable and, therefore, vulnerable in producing impact, but you're able to identify places along the chain of logic where you can diagnose when you've gone wrong and how to adjust.

So given all, I think what's been a marvelous evolution in the evaluation strategies, there are still particular challenges to communications evaluation because the social science of communications interventions has its limits in a really media rich environment of campaigns and videos and technology applications. And the challenges that I've come across, particularly in the funding community, are no different from the ones that you've posited already. One is cost, a real skepticism about the investment in the high costs of filmmaking or of web development or media campaigns.

The other is the confounding problem, because it's hard to disentangle communications from whatever else – what it's embedded in, the initiative that it's embedded in. And because it's human, it's not only confounding, but the element of change, that all of our interventions in the real world are unpredictable and change with time and other factors. And there are no appropriate controls, especially in a mass media environment where everyone is getting lots of different messages.

I think that it's complicated, too, because we all consider ourselves media experts as consumers, and therefore our expectations are very high for what communications can accomplish. And it's very difficult to change norms, social norms that you're trying to change with a simple intervention. And then the fear, the fear of failure, the fact that a lot of evaluations are seen as an up or down decision. It was good or bad, and you're looking back and something can be labeled a failure as opposed to a learning experience. And then largely until the Communications Consortium project, I don't think there's been any metrics, useful metrics in the field, in the media field that we can pin our hats on.

So the lessons in my review during the sabbatical that I learned, if they're hopefully useful to you, is, one, integrate evaluation into the planning function of your organization. It helps to structure your program focus and project activities from the beginning to yield the results that you want, and then you can anticipate through the planning process, or integration of evaluation early on the points of vulnerability, so that you can be on the lookout for them and adjust.

The other is, I think that we all in the nonprofit and foundation world need to create a culture of learning, an inquiry that is embodied in evaluation. And more and more, thankfully, evaluation is seen as a learning tool and not as an end judgment. And there's a commitment among more and more of us to sharing our lessons, including failures, with the field so that we can help each other avoid the pitfalls that come in our experimentation.

Particularly within the Benton Foundation, and I think it applies more generally, it was important for me to learn about determining the appropriate role of community in your theory of change. And for all of us, we define our community differently, but it's important to ground the evaluation work in the community you're trying to address, to listen to community members, community members, community leaders, and learn where they are before you begin with communications design. It involves the target audience from the outset as partners in your work and in the evaluation and, therefore, I think, can strengthen the message and the norm-setting that you need for social change.

And, lastly, using multiple and flexible approaches is important, not look for one silver bullet, one metric, and the kind of evaluation questions that you know you are going to be using to guide your future work, whether it's affecting future funding, policy or practice. Know what you want to learn and how you're going to use it before you bother asking it. .

MR. SPARKS: Thank you, Karen. I think that's a really nice summation of some of the main points in Working Paper Number Five.

HOLLY MINCH: I think the best job that I can do as a practitioner here today is just give you a brief snapshot of where some of our clients working in the field are operating right now, how they're working now. But before I do that, I really want to compliment and applaud the work of the evaluation project, because for us it's been a very helpful articulation of a lot of things that we and our clients are doing by gut and by instinct, and so it's really helpful to have kind of this articulation of the theory to guide the practice. So thank you very much.

Just to give you a little background about the niche I can kind of speak from. We are a nonprofit organization ourselves, and we work to build the capacity of social change and social justice organizations to use communications and effectively integrate communications into their work. So we're doing not the work of a typical PR firm, but, instead, we're doing a lot of strategy consultations, training, skills development, coaching and working with groups to help them really integrate these skills into their work.

Most of our clients, about 90 percent of our clients have budgets under $2 million annually, and 40 percent of our clients have budgets under $1 million annually. So with that level of funding, you can imagine that the first challenge to evaluation in these groups is the investment. It's hard to convince them to invest in communications thoughtfully and purposefully, let along getting them to invest in evaluating those communications thoughtfully and purposefully. So that's key challenge one, I would say.

In preparation to speak at this panel, I did some rigorous field research of my own. I made a couple of phone calls. And one of the people I spoke to was one of our star client organizations, the Los Angeles Alliance for a New Economy. This is a group that we had been working with since they have no communications director, they were doing organizing, and we've helped them kind of build their communications operation. And they're one of our few clients who actually have a communications department. Most of the groups we work with, if they have communications staff, it's a department of one, or a half-time organizer who also happened to learn something about communications at a conference, so now they do it in their job.

So this organization is pretty sophisticated in their understanding of communications by comparison to a lot of the other folks we work with. And they're coming off of a victory they had earlier this spring in Englewood, California, which is in Los Angeles. They helped defeat Wal-Mart from – there was a ballot initiative. I'm sure many of you heard about it. Wal-Mart was basically trying to do an end-run around the local city council and went directly to voters with the question: should we build a Wal-Mart here in Englewood?

And LAANE and some of their allies was able to actually get voters to defeat this proposal by Wal-Mart, so it was a big victory for them locally. And when I asked him, how did you evaluate this campaign? You know, obviously communications had to play a key role in getting voters to vote your way on this. How did you do it? He said, well, how did we evaluate it? It's more like did we evaluate it. People think when you've got good media coverage, good job.

Now, I want to emphasize that Wal-Mart outspend them seven to one in this campaign, so they were clearly doing something right in the communications department, but they couldn't tell you what it was. They won; they moved on.

And I think that's another little key challenge to evaluation in these organizations. There's a cultural question, right? The predominant culture in these organizations is one of constant motion, constant activity. You know, it's important for us to move on to the next campaign more so than it is for us to look back and see what worked in the last one. So I think that's another key challenge to note.

That said, I do think there are some bootstraps evaluation methodologies in play in many of our client organizations. People are doing some of the formative types of evaluations: baseline polling, communications audits, those kinds of questions. We are seeing people do that, and we are seeing more people really look at those questions in their campaigns.

We're seeing a lot of process evaluation. You know, how are we doing? Sort of, let's-test-the-waters-as-we-go kinds of questions. A lot of people are tracking hits or placements. I'm sure many of you at foundations see those come in with the proposals. There's a heavy emphasis among our clients in what Julia called in her paper the social change paradigm on evaluation. People are interested in looking for information and feeding it back into campaigns that are in motion to help improve the quality of the work that's happening on the ground.

So clients are doing some evaluation, but the key is they don't think they are. They wouldn't recognize a communication audit as a form of evaluation if you asked our clients that, so I think there's just an interesting education process or a conversation that needs to be started about what exactly is evaluation.

And, you know, as has been acknowledged, and I'm sure this is a shock for all of you in the foundation world, there is a perception of, you know, evaluation is something we do because the foundations tell us we have to. And so things that actually guide the campaign wouldn't necessarily be considered an evaluation. So that's just another education process to go through with these folks.

I'll just close with there considerations. You know, I would bridge between the folks working in the field and the folks in this room. I think there's three things to really think about. And the first is that – and this is something Amber has talked about in some of the network conversations -- is that communications, strategic communications is really a vehicle for leadership development, and we need to look at those questions and evaluation as well. The investments we make now in training communicators and developing spokespeople are going to pay off over the course of someone's career in the field, and we need to think about how we quantify those investments over time.

The second thing I would say is that, for me, thinking about evaluation is a little bit like thinking about the difference between chaos theory and Newtonian systems. Right? Because political change is not a Newtonian system, right? It is fundamentally a somewhat chaotic process. You know, when we're talking about making political change, we're actually looking at how the process of strategic communications and the process of community organizing and the process of policy advocacy interlock.

And as Barbara said earlier, there's an art to making those things work together, and so whether you're looking and considering that art in the evaluation process and acknowledging that when you are evaluating a political change campaign, you're evaluating not just the strategic communications function, but how well it has worked in connection with all of the other functions of the campaign, and, that, you know, is chaos theory indeed.

And then third, I would just say that for our clients, political outcome is always going to be the highest form of impact evaluation. And so really looking at how we can link communications evaluation to the question of political strategy and political outcome – I mean, as social justice advocacy organizations, that's their highest goal, and so really looking at how we're helping them achieve that by improving their communications functions is certainly the interest of the SPIN project and, I suspect, for many of you in the room.

So I'll close there. Thank you.

JEAN O'NEIL: I think just a way to take you through some of where we found evaluation, however basic, to be helpful in places where there're gaping holes and I'd like you guys to find me a truck to drive into them and plug them.

First of all, getting to the plate at the beginning and making sure that you've got the right bat on your shoulder. As odd as it sounds, we have found that the best investment we have made in a number of campaigns has been to push hard on exactly who we're talking to. We get this lovely "We want everyone to understand." Well, if you talk to everybody, you talk to nobody, and we all know that, but how many times have we let it slide? The more that we push – and George and his staff at the Ad Council have been great in working with us on pushing, you know, making sure those pushes are there to nail down the prime person, the prime target group. The better job we do it will spill over to reach the other ones that are related.

We had found really well structured focus group work in which you strip yourself of all pretention, all presumption, and all assumption to be critical there. The problem with focus group work is we all go in knowing what everybody thinks and we just want them to tell us what we thought was right anyhow, and that, especially for the local nonprofits that don't have the staff capacity that even we do – I mean, it's me and half of another person for everything we evaluate in the organization, and other duties as assigned. That's critical.

We've used some of the computer-based focus group models wonderfully and effectively because you don't have to wait for the transcripts and there's immediate feedback. You always have the problem that – and in our case, we get most of our money from the federal government for the communications work we do – somebody else up there knows better what everybody thinks than what you found everybody thought. That's – if I could figure out a way to put that one through an evaluation wringer and make the proof and close it, I'd be real happy. Just give me 10 sentences and I'll go home thrilled.

We also have found that figuring out what we really want the audience to do, and this sounds really elementary, but when you think about what you're assessing in the field – every time we don't do this, we kick ourselves and go back and do it. What do you actually want these people to do? If you had two of them in a room and you played the PSA and it really worked and they jumped out of the room, what would they do? Other than run to nearest rest room. But it's – I push with our staff to get that kind of imaging; to get really vivid – somebody's grandmother, somebody's aunt, somebody's uncle, somebody that is not in the middle of our work. And it pays when we do it and it doesn't – and we pay the price when we don't.

How exactly we measure it, I don't know, except to keep a rigor about what we do. And I think that part of what we learn -- and Karen was talking eloquently about the changes in evaluation. We have learned that qualitative evaluation has legitimacy if it is done with rigor, and that's a huge lesson for us because it does demand discipline, it does demand cracking the whip on yourself, the most painful of all, but it pays when you do it. And there are methods out there. Michael Scriven and a bunch of other folks have done wonderful work, even if he is a little irascible on certain days.

The other thing is you need to scout the other teams in the league. If you're going to stand up and pretend to win the game, or, you know, score the political decision or turn people's minds around, if you don't know what other people are doing, you're liable to run over it, around it, beside it, or duplicate it, and that's really annoying because then you're never going to untangle. We've run into it numerous times and, again, every time we don't do it, it hurts. And that, to me, is a core of evaluation. It's one of the things that as analytic people evaluators bring to the table. We have that sense of rigor. We have that sense of challenging risk assessments.

I just went through this with some folks on a communications project with Hispanic families in which as I made them write out the assumptions of how this particular piece of work, a very targeted piece of work, was going to wind up in the hands of the target audience. Do you all remember your probabilities – independent probabilities? Well, we were down somewhere around the .0002500 – you know, I'm like, guys, do you understand that that means one piece of paper out of every like 250,000 might get to where you wanted it to go? Oh. What do we do about that? And I'm like, we figured it out, but the point is that's – that is a responsibility we have and we've all alluded to that.

Another thing that is absolutely critical is to remember that you have got to be at the plate long enough to make change, and I think from the point of view of the foundation communities, I know that there is pressure from boards. They want to move on. They want to see growth. They want to see different subjects. But if you're putting somebody out there and expecting them to change the public with no other foundation on the particular subject in six months, the odds are it's not going to happen. And that longevity is a critical piece of fairly assessing whether the work's worth it.

Swinging for the fences. And everybody's – you know, if you watched my St. Louis Cardinals in the World Series, you understand what swinging for the fences means. You miss the ball by at least this much in any given direction possible to miss the ball. One of the problems that we see constantly in working with local campaigns in the states is people wanted to, you know, stop people from leaving their keys in cars. Okay, that's lovely, but you're talking about everybody everywhere stopping something a whole bunch of us are doing right now, and how long did you plan to take? You know, we – I think one of the chores for foundations for those of us who work with people in the field is to make sure that the goal is real and attainable. It's just suicide for all of us to keep swinging – you know, those stars are there; we have an idea we're going to get there, but you have to go a step at a time.

The other problem is the preaching/lecturing syndrome. How many of us have either worked with clients or with bosses who, you know, Billy Sunday would be very happy with their performances? I will tell you what you need to understand. And we know that doesn't work, and yet as evaluators we don't challenge it up front.

Taking perfectly good research and applying your own biases to it – but as I spoke up as vociferously as I could, Richmond, Project Exile did a whole bunch of public service ads which I – I'll say it in public, what the heck. I get shot by Justice Department every day anyhow. It was, you know, really great ads to scare the heck out of white men in dark blue suits. We found out that a lot of the people who were in the issue of whether or not they ought to be carrying a gun legally don't watch TV. What happened was word of mouth was getting to them and one of the problems with not nailing all this stuff up front and letting kind of the popular interpretation rule is that you wind up with work that's not effective as it could be, and that's a waste of resources all the way around.

I mean, I will say this, that what we wound up doing with the TV ads – if we were going to get to these folks, this is the one ad that might have gotten to a lot of them, but I also found out three other people in doing similar research locally had found out the same exact things. That was kind of frustrating.

The other problem with scorekeeping is what really did win the game? Is it the single that drove in the run that put them ahead for good? Is it the one homerun before that that rattled the pitcher so he gave up? You can analyze this to death, but you need to decide what it is you're counting. We've seen – in evaluations, we took one campaign earlier in my career of 20 years with NCPC and we didn't have a way to go out and hit the viewers definitively at that time. George had not – I don't think he'd even been – if you were there, you were just new. We didn't have George around, so we were stuck.

We pulled up a random sample of the people that had requested a booklet we prepared and got astonishing results about if they did order that booklet, and we knew roughly how many had ordered it, we could say that they had absolutely taken action and we had – in addition, we had delicious quotes about what that action was.

One woman we talked to about her son taking the booklet and going to school and presenting it to his whole social studies class and leading a discussion. Another one said they'd taken it to their church adult group. You know, this is – this sells, and we all know that. The gut reaction is it sells. But we – you know, what's the hit? We've been extremely fortunate to work with a lot of the work that Phil Herr and George and others at the Ad Council who helped to put together in terms of pre-post polling, but when you're trying to move a needle that weighs somewhere around, you know, the atomic nucleus, it's kind of hard to catch it in a 1,000-person sample and one of the big challenges is where – on the national level even, where is the measurement that shows us that the needle's bumping?

And we've also done a couple of other strategies that have been just fabulous, which entail going into groups post hoc and asking them informally even what it's done.

But for the – probably the best one and the one that actually showed astonishing movement, we had campaigned on safe gun storage. The ads were absolutely breathtaking and in two years we actually made significant changes in the way that people viewed what was a safe way to store their weapons. They moved toward a much stronger, more secure form of storage and we found that out not by doing a general, you know, let's go fishing in the great ocean. We just found ourselves a nice hefty pond of people who happened to own firearms and had kids under 18 in the home. And Phil and George both played a key role in making it happen, but we had to go at it very intentionally. We all worked at structuring it so that we got exactly what we wanted.

Now, how did we do that? We get $5 million from the feds, about $1.5 million of it goes to the campaign. My time doesn't come out of that chunk. It comes out of another chunk. So we have some money to spend on this, but we don't have enough. We never do. The biggest problem we have is – and I'll – just so you know it's not all roses, we had a senior administration official who is not our key funder announce to us that public service advertising didn't work and he knew it. And we trotted out probably 20 case studies, detailed memos, synopses, one-liners, six-liners, you know, 20 pages, and he just said, well, I know it doesn't work. Well, why do you think it doesn't work, sir? What tells you that it doesn't work? I mean, very politely. Well, because people don't stay up that late. And we're like, oh, God. So you run against that and other than putting low-IQ next to the report, I'm not quite sure how you evaluate it.

But the problem is you're – you know, this is a challenge for both the local nonprofits, the national nonprofits, and the folks who fund them. When you have an intervention like that that is totally personal, it can throw a monkey wrench into the very best design and that frustrates those staff working in the campaign, it frustrates the person doing the evaluation, and eventually frustrates the funder. So if you all have a magic bullet for defective IQs and warped personalities, I'd really like to take that one home too.

Obviously, you know, we always run into the problem of cost. We always run into the problem of who is going to pay. We have had a couple of lucky breaks. When our campaign first started, since it was one of the first ones the feds had done, back in 1978, '79, they decided they would fund a full-scale evaluation and I have not converted it into constant dollars because I don't even want to know, but it was sizable and we came out with flying colors. The icon McGruff the Crime Dog, the slogan "take a bite out of crime," and the idea that prevention was not solely the job of cops seemed to start penetrating early. They did another evaluation 10 years later and I keep hoping someone's going to come up with money for another one.

And much to our delight, we found that we demonstrably had changed the public's attitude about who was responsible for public safety, because I can tell you, none of us are going to want to pay the bills for having a cop every 10 feet. We have a lot better uses for that money and if we don't get people on the side of saying, hey, it is my job – that's the goal we're looking at.

PHIL: That reminds me as we go to Heather for the last presentation, as some of you all know, I was the director of communications in the Mid-1990s for the Census Bureau and I undertook and put together a $110 million campaign that rolled out in 2000 to encourage participation in the census. And what Jean said about resources reminded me about that – so I had $110 million budget. In about 1997, I told the Census Bureau and the powers that be in the Commerce Department that I felt I would need at least $1 million for evaluation to find out whether the $109 million actually worked.

And I want to tell you that the hardest part of the entire campaign was to get the $1 million for the evaluation, not the $109 million to roll out the campaign. There is – it's cultural. We'll talk about this, but there's a lot – it's just – for a lot of things, it's thought of as unnecessary expenses or we don't want to know the results.

Heather Weiss is with the Harvard Family Research Group and she's going to articulate her thoughts from the standpoint of an evaluator.

HEATHER WEISS: Thank you, Phil.

You asked us to start out by talking a little bit about why we're here and sort of what intrigues us about the topic at hand, and I guess Julia and I and some of our other colleagues five or six years ago were asked to evaluate a strategic communication initiative that was embedded as a key part of our broader strategy for social change. And being intrepid evaluators, we thought, okay, we'll give it a shot, but if we're going to do that we better figure out how people are evaluating these kinds of things quickly, so we can bring that knowledge to bear as we design out own efforts.

And I have to say that started us on a journey that's been one of the most intriguing things in my professional life for several reasons. One is we quickly got into the practicalities, some of which you all know well, as well as the complexities of evaluation of trying to use communication to build public will for social change. And I found it and continue to find it fascinating, intriguing, because I think it's a way to support efforts to create social change and social justice.

At the same time, but from the point of view of an evaluator, it's got some of the thorniest, most complex issues around evaluation, so as an evaluation person it's also intriguing. So you get when you get into this work a package of things that really keep you going and intrigued and interested and feeling that maybe there are ways to actually have evaluation add value in terms of increasing understanding of how to do this work better and building the learning that will support sort of continuous improvement in the use of communication strategies for a variety of purposes, not the least of which is public (will building ?) for, you know, I think important social change.

So when Phil put together the group whose papers are in this binder and in which we participated, it was yet another terrific opportunity to do a broader scan, look at our work in relation to what other people had done, learn some things we could have done better in our work that we are trying to apply as we continue to look at how you evaluate strategic communication campaigns.

So I thought in this panel one of the ways that I could add value would be to raise some questions about what to do next. I want to push on some questions for you to think about in the course of today and after today.

I think the challenge is to figure out how to engage and keep a key and diverse group of folks like you, leaders and stakeholders, across the nonprofit, philanthropic, and evaluation communities engaged in developing a system for continuous learning that's going to inform communication moving forward. I think this is a real issue. I know from work I do with foundations that they are investing more and more in strategic communication. They're becoming a key part of a lot of the strategies that foundations are employing across a variety of arenas. We're spending a lot of money. There are high hopes for it and I think we have to be able to show that we can deliver on those high hopes and learn about how to deliver better.

I think it's a huge challenge, obviously, to evaluate these. If you think of nothing else as a result of my remarks, I hope you will think always about the question: why do you evaluate? What are the purposes and audiences for evaluation? And in answering it, you better be able to say it's useful and it's going to enable you to do your work better because if it doesn't, evaluation can be a costly thing whether it's in terms of money or time, both of which are scarce, and you want to make sure that the approach you take is going to yield you things that are useful to you in improving your practice and understanding whether your practice is getting the effects that you wanted to have.

I think people out there in introducing yourselves have alluded to this; that right now communication is at a key point. There are demands for accountability in all investments and I think communication is not off the table in that regard. So being able to talk about the value added of communication I think is on the table right now and we don't have clear answers with respect to how to do that, which is I think why we're all here.

My response to this is to say that – and it's embedded in the concluding paper that the group that Phyllis put together did, and that's – really the question is, where are we going to set the bar with respect to what we expect from evaluation of communication and from communication itself? And really think through where are we going to set the bar and I think we need to set it at a level that says we're going to challenge ourselves, but also we're going to emphasize learning and continuous improvement so we can do it better.

And any field that's viable now I think needs to have a learning system, needs to challenge itself, and needs to set the bar on its own capacity and think about its own capacity to learn, which is where my remarks are going to be directed.

I think given this it's critically important moving forward for groups like this one and folks that interconnect with this group to develop an intentional plan to move ahead to build the knowledge base across the field. And for me this means evaluating an array of different kinds of campaigns using different strategies and techniques and methodologies and metrics and then using these evaluations to build the knowledge base for the field more generally. For me, this is two-track learning.

Investments in communication and also in the evaluation of communication are costly. We need to get double duty from them in terms of understanding in a particular campaign are we getting where we want to go, but we also need to use these as cases from which we can build the learning for the field, including cases of failure as well as of success. And nothing I do doesn't include some failure, so most of these cases are going to include at least a little.

I think with that comes a commitment to share and learn from this, and people in the audience alluded to that. I think we are getting better at doing that within our silos. and I think things like this Communications Consortium effort and today are moving us in that direction.

Then, I think we need to think through intentionally what's the plan to infuse the lessons across the nonprofit, philanthropic, and communication arenas? Who are the audiences and how are we going to reach them with this knowledge that we're gathering and from which we hope we will all collectively learn?

I think another key piece of this is crafting literally an evaluation agenda that deals with the existing challenges and surfaces some new ones, so I would urge you all as you go back on the plane or the train – not your car, but a place where you can sit and write and think – to say, what do you think ought to be on that evaluation agenda if we're going to move this field forward? What do you think the next investments in evaluating public communication ought to be to build the field more broadly?

In terms of some of the challenges that I see that I'd like you to think about, one of the ones – and people have alluded to it from your introductions and on this panel – is how do we get a broader understanding and commitment to evaluation as an important component of public communication efforts? People are afraid of it. They don't know what it is. They don't have an understanding of how it can be of value, and I think it behooves us as evaluators to talk about that and to begin to build a culture that supports learning and evaluation.

With that, I think there's a question: can and does evaluation of communication efforts fit within and support larger and broader efforts within most of your organizations to create learning organizations and a culture of learning. No evaluation is going to be worth very much unless people are willing to look at it, think about it, examine what it says, learn the lessons from it. And there has to be a broader culture within an organization that supports learning and reflection for that to happen – and that forgives failure and that encourages risk-taking.

So I think part of the challenge as we move forward is to think, whether it's in philanthropy or nonprofits or within the evaluation community itself in shops like mine about how we build that kind of learning culture within the organization that helps us reflect on our practice, learn the lessons from it, and commit to continuous improvement, continued risk-taking, et cetera, et cetera. So I think that's a huge piece of this.

Another piece of that is developing a glossary and the concepts and the language so that we can talk with each other across these cultures; something that Lori is going to talk about later today. We've learned a lot in putting together the papers in this binder about the crosstalk. Phyllis has at the table and we as evaluators have had to write things that folks that are not evaluators could understand. They've had to communicate things to us that I never understood till I talked to them, so I think this kind of continued crosstalk glossary interchange is going to be a critical part, also, of building this learning culture so that we can effectively talk with one another.

I think a second and critical thing, and it runs through the remarks and it runs through the recommendations in the binder, is to have realistic expectations about what evaluation can do. We are early on in evaluating these kinds of efforts, as the papers all point out, and we have a ways to go to make evaluation pay off in greater understanding of how we can develop more effective communication strategies.

From the point of view of impact, and I think we ought to be – have a portfolio of evaluation investments, some of which include efforts to look at the impact, variously defined, of these communication strategies, it's particularly difficult to look at the impact of complex efforts to change public understanding and behavior that then in turn lead to policy change. We all know that. There are huge attribution issues, methodological challenges, but I think we need to face them, try different approaches, learn from them, and move that part of the evaluation agenda as part of out broader portfolio of investments.

Similarly, everybody thinks process evaluation is easier. It's not necessarily the case, and actually getting a process evaluation and data that is useful in improving practice and helping to do the course corrections and the rest of it is wickedly hard to do, so raising the bar in terms of our expectations for process evaluation as being useful leading to meaningful, continuous improvement – I think it needs to be another part of our learning portfolio, if you will, from our investments in evaluation of communication.

I think it's also a challenge – it's part of this notion I've been laying out about creating a learning culture in an organization – to get people that commit, whether it's a foundation or a nonprofit and others that commit to an ongoing process evaluation with a commitment to continuous improvement to really commit the organizational resources to do that. And it's not just money, it's the time and reflection space of the people in the organization to engage the information, do the problem solving, do those course corrections, et cetera. And I think we need to learn a lot more about that.

I think an additional thing we need to be thinking about are minimum standards for investments in evaluation and push ourselves on what is the value added of evaluation. And I think my answer to that is it better provide you clarity on your theory of change and what you're trying to achieve; the capacity to track and assess your progress and examine your expected outputs and maybe examine your outcomes.

So if you can't meet that standard, then I don't think you should be investing in evaluation, and then so we ought to be thinking about – that's my definition of the minimums. I think you guys should add to that, talk about it, think about it, and then I think we need examples from ongoing work of people that have met that minimum standard and we can begin to develop some understanding of how you do it as a result of that.

I think Phil's project, or our collective project, has benefited an enormous amount from cases of existing practice, so we need to build or continue to build our case understanding and rigorously reflect on that as well. So I think the challenges are to really develop in intentional plan to move ahead and build the knowledge base across the field and think in concrete terms about what should be in our evaluation investment portfolio. If we're going to put scarce dollars into investing in strategic communication, what should be in our broader fields portfolio of investments so that five years from now we won't be hard pressed to talk about our value added, our best practices, some of our methodological advances, et cetera.

I think a second thing is to map current investment, so if we're going to build a portfolio, map the current investments and what are we likely to learn from them? Let's take advantage of some current things, identify the gaps, and then relook at our research agenda – our research and evaluation agenda in light of that.

I think we also need to develop mechanisms, and several of you – the Aspen group, Phil's group, other people, are developing mechanisms that increase the commitment and capacity to share lessons learned across the broader field.

Finally, I think we ought to be developing and sharing tools as a byproduct of investment in evaluation, and thinking about what are the necessary tools that are going to help practice at a variety of levels and using our investments to help develop some of those kinds of tools. So the challenge, really, is to create a loosely coupled learning system to implement – to develop and implement a research and evaluation agenda that supports continuous learning in the strategic communications area, that continues to build on strategically, I think the investments that are already made and that many of you are involved in, so this ratchets up this conversation to say moving forward I think these are some of the challenges that we ought to be thinking about and that follow form the work in this binder and that I think the work many of you in this room are doing.

MR. SPARKS: Thank you, Heather.

One thing Heather said I think is certainly one of the goals of this project, which is perhaps ambitious – we'll see whether it's overly ambitious – which is to set minimum standards of communication evaluations at various levels of different campaigns. Several people have talked about, and Holly mentioned it in her presentation, the microcampaigns that might only have a budget of $5,000 or $10,000 as opposed to some of the campaigns that Jean runs that are $5 million campaigns. What can you expect as minimum standards, at least as tools that you would use in order to evaluate that kind of campaign and be realistic about what can and can't be done.

Some of the things that I heard here, not in any particular order, are: you've got to think about what your target audience is, you have to think about what your resources are, you have to think about what the purpose of evaluation is. Is it to report something in terms of what you've done as an investment? Is it a learning process or not? When you're evaluating the campaign, what is the scope of the campaign? What is the timeline of the campaign?

Jean said that things don't happen overnight and sometimes they don't happen unless you have decades to work on things if they are tough issues. Karen talked about the limits of quasi-experimental evaluations. That's the model that's used in other disciplines, but its unlikely except in some circumstances that it has an application here.

You have to talk about the relationship to other parts of the campaign and how to disentangle that, if you can. In the campaigns that we work on here at the Consortium, there's usually a grassroots component, a policy component, a sort of a think-tank, white paper component, perhaps a lobbying component, et cetera. And from our standpoint as we're looking at campaigns, unless it has all those other things in addition to communications, it probably won't be a very good campaign in terms of moving public policy. So a number of our speakers have basically said you have to look at these things and see how they relate to the communications campaign.

And then, of course, what we want to do in the next two years, as I said in the beginning, is we want to map out what people know about this even more carefully than we have over the last two years because there certainly must be – in our joint fields there must be more information out there on the table and we've got to learn about that information and we've got to – a number of people have said this – we've got to think about not only concentrating on our successes, but some of the challenges that we face. This will be the hardest part.

Even in the papers that we put together even promising anonymity or confidentiality, it was very hard, if not impossible, to get either foundations or nonprofit organizations to pull out of their files information about campaigns that accomplished less than they expected. And so if we are to learn from those potholes in the road, we need to know where they are and we need people to be a little more forthright about that.

But those are just some of my comments and, as I said, this first session is meant to basically stimulate discussion about the challenges that we have before we talk about specifically some of the proposals we have for judging evaluation, and I would encourage comments or feedback from the audience at this point.

MS. EDGAR: It seems to me, both from my own experience and what you've said, that the more rigorous the communication plan and strategy is from the very beginning, the more likely we will be able to evaluate what we do, and I know Julia talks about – in her paper on communication audits she has this sort of continuum of when you do nothing to when you do a few ad hoc things and the Spin Project talks about that too and how you can progress up to a much more strategic, comprehensive sense of communication.

And as someone who sort of has been at various levels of that continuum in my career, is – what is there that you can do if you really have the capacity only to do ad hoc communication? It seems to me that there are still things you can evaluate and that you can still learn from it, but where would you fit that? And where, as we sort of put together this framework for thinking about communication with foundation grantees, who are not always very large, who have small budgets and with foundations themselves in terms of how they think about it – where would you sort of fit the thinking around evaluation at the lower end of that continuum?

MR. SPARKS: And I'm going to start the response to that with Holly, but I encourage anybody in the audience or the panel to join in, but Holly's organization obviously deals with a lot of small campaigns.

MS. MINCH: Yeah, I mean, the piece of advice that we give all of our organizations, and frankly the reason that people are so fearful of evaluations is because they think that, oh my gosh, the foundation wants us to have the Cadillac communications program.

A lot of the organizations we're talking about are riding tricycles, and so if we can get them to graduate from a tricycle to a two-wheeler then we've made progress. And so one of the things we really try and look at is what does that jump from the tricycle to the two-wheeler look like? And we'll talk about, okay, did your media lists improve? Did they go from Post-Its stuck to your computer into a database or into an Excel spreadsheet? That's a data point for us to look at. That's communications infrastructure improvement.

So just using that by way of example, what are the really small things that are hindering progress that actually through the course of the communications effort get improved – where capacity is built, where – you know, did a spokesperson do a little better in developing the spokesperson's – in delivering the organization's message this time around? That's a data point for us to look at as an evaluative mechanism. So I'll just use that example.

MR. SPARKS: All right. Anybody on the panel want to – Jean?

MS. O'NEIL: I was going to say, I go up to police departments, community groups and do workshops on basic evaluation and the first fight is the E-word. The longest four-letter word in the English language. There's going to always that reaction, but I think part of the trick is what Holly said, is helping them understand that they can pick what's most important to learn about and that deciding what they want to learn – you or somebody else can provide some help in figuring out best how to learn it without breaking the bank.

And usually they're very – I mean, I just did this in my own organization and it struck me as, like, wow, you know. I've got all these little communities I'm serving now and I said to the person who is teaching a training course on a particular aspect of crime prevention, well, you know, you keep saying to me you wish you knew. Let's sit down and talk about this and she and my assistant, we sat down and kicked it around and we were like, well, but okay, how would you know that? Tell us how you'd see that? And all we basically did was write questions to change her evaluation and now she's gone on and she's designing a down-the-road post-evaluation asking them if they would fill in where their skills are now.

But it's forcing them to understand that doing one thing well is better than trying to do everything dismally. It seems to me breakthrough because once they get a taste of it, they like it. They'll keep finding ways and they'll become internal advocates.

MR. SPARKS: Let me ask, and we'll take some questions, I want to continue this for a bit.

Bruce, at your foundation when you give out grants that include communications activities, is there – and to the extent that you're looking for impact people to tell you what happened with the investment, is there a recognition of the gradations of resources that you're providing vis-à-vis the evaluation or are you not that far into the process yet?

MR. TRACHTENBERG: No, we have an entirely different approach to funding, which is that we are investing in the entire organization. We're building the capacity of the organization to deliver a better service.

We – usually it starts by investing in the creation of a business plan that the organization commits to, and there may be communications components to that plan, but they're going to be judged on their – on the benchmarks of delivering their – ultimately delivering better services to more kids because they're funding youth development.

If they are convinced that part of their success is based on communications, which in a large degree it is because part of what we're doing, unfortunately, is pushing these organizations – I mean, really fulfilling their own desire to grow, and one of the big, immediate challenges is to continue to pay for the growth, so the communications that they've identified as being most important is how to convince other funders to support them, so – but we're not going to go back and necessarily evaluate the pieces of their work. We're going to evaluate their overall – we're looking for indicators of showing they're delivering a better services and a stronger organizations is their –

MR. SPARKS: Which is yet another challenge because you're looking at a more holistic level–

MR. TRACHTENBERG: Exactly, and if they have made an identification of their own that communication is a part of that – their success. Clearly, that's important, but we're not going to extract it and hold that as an individual element of success. It's part of what they've identified.

I mean, it's all what the organization wants to accomplish, and clearly if those elements emerge from one organization to another, we're going to work like hell to share it, as everybody knows.

MR. SPARKS: Liz, you had a comment?

LIZ WAINGER: Actually my question is sort of along the lines of what Bruce was just saying, which is I was going to ask if in the course of this looking at evaluation you've taken a look at what is being done in the corporate world on the for-profit side because there are mechanisms. Maybe they're not terribly effective, or maybe they're not applicable, but there are – systems people are grappling with that and I have a couple of for-profit clients that are constantly asking me to tie what I do to business objectives to prove that the communication somehow moves forward the business objectives.

So I'm just curious if in the course of looking at this that we look at how do people, you know, on the corporate side do this? How do they evaluate? What can we take from that? How can we – you know, what can we learn from that? A lot of it is not going to be applicable.

MS. DORFMAN: I'll just add one comment to that, which is that I agree we could probably learn a lot of things from the commercial world, but we should remember that the standards are different. So in the commercial world if Pepsi steals 1 percent from Coke, that's a huge success, but none of us in this room would be satisfied with a 1 percent shift of anything we're trying to do. Our standards are higher which makes our job a lot harder.

MR. SPARKS: Yeah, and I think there was a hand raised over here?

MR. PERLOV: Yeah, I just wanted to say, I mean, the guy came from the commercial advertising world and I do have to say that I think in certain areas, especially the packaged goods category, I mean, is that something where there is – you know, you really can see a very strong correlation? You put more, you know, advertising out there, you're going to get more results. We just – one of our board members is on Cingular and he says – went to his board room and said, it's just amazing. We just put more out there and we get more sales. It's a very direct correlation.

We look to sometimes often other kinds of categories; things like the pharmaceuticals that are trying to sell without selling, or industry organizations, you know, and I think we get some more learnings from that that can be applied to what we're trying to do in general.

MR. SPARKS: And David I think has a comment on the same subject.

MR. DEVLIN-FOLTZ: Yes. Philip Herr was kind enough to make a presentation to this evaluation learning group that we put together about a month ago and I think what he said more precisely is that we can only say that advertising contributes about 20 percent to the decision for an established brand, so in other words the other 80 percent might include things like reputation and so on, but similarly we have all these complicating factors for the brand choice that we're asking people to make on much more complex social issues, so I think the analogy still holds.

There's a great deal out there that we just can't account for and we're just going to do our best with the bit that we do have something to say about.

MR. SPARKS: On this topic any other comments or – yes, Jean?

MS. O'NEIL: I think I might. I know from some work we've done with a couple outside firms that the idea that George mentioned, industry-wide approaches might actually offer something – Werthlin, with whom we've done some of this work, has done some excellent work with plastics and with steel in terms of the reputation of the product that has moved the needle. And I think it may be a lot easier to look at somebody – and the good thing about being in DC is there's a lot of them right here. They may be a source of a lot of interesting approaches, but I also know they're having struggles too.

MR. SPARKS: Right, and although it's a bit of a diversion, I'll throw another caveat out here. Companies often are trying to get you to be interested – for-profit companies – in the brand and there's a lot of talk for and – it's a controversial subject in terms of the nonprofit community and social marketing – the question of branding, so that's another caveat to this particular conversation.

Anybody else want to add to this conversation before we move to other – Thea?

MS. LURIE: Ford doesn't have a formal in-house evaluation function for our normal grants, non-communication grants, but I know other foundations do. And since most of our or many of our communications projects have the same goals as our other grant projects, I'm wondering if those of you who have in-house evaluation functions can share something with us about how other grants are evaluated, because we could perhaps learn something about evaluating – at least in our foundation our communications projects share the same – usually the same goals as the other grants we make, so there's something to learn there.

MR. SPARKS: And the response that I'm going to bounce back to Amber – Amber, why don't you explain what your group is for people who don't know, and have you all ever attempted, because you work with communications people at foundations, have you ever attempted to see what the matrices are and whether foundations are willing to share that kind of information on communications evaluation?

MS. KHAN: The Communications Network is a nonprofit that was established by grantmakers – some of the founders like Joanne are sitting in the room – that is dedicated to advancing the practice of strategic communications, and I think Heather was intimating that there's been a growing support for that integration of communications and advancing the program and the mission of the foundation, so the Network works to support that, promote that, but also to provide resources and networking opportunities for those who are engaged in that business to share strategies and to share learning; quite specifically, to share ideas and practices both the good, the bad, the ugly.

And one of the things we did in 2003 for the first time is try to gauge the depth of practice and also to better understand the perceptions because we were also hearing, as Heather, you know, indicated, lots of buzz about communications, but one of the big questions that we had within the organization is what's the – you know, where is the buzz and the practice? Is there a disconnect? And we asked a variety of questions and evaluation, not surprising, was the number one issue of interest in terms of training, desire, and need for more information from the survey, but we asked several questions about wether or not and how foundations are actually evaluating and 40 percent of the respondents – and we had 370 foundations participate – 40 percent indicated that they are evaluating communications.

And we then asked subsequent questions about how they're actually doing that, and the bulk of the respondents indicated that it was through survey research and focus groups – that, you know, number three was looking at those clips and different types of existing metrics, so that was – there's definitely an indication that there is some evaluation or capping.

We've also conducted some additional surveys – more qualitative, in-depth interviews with foundations of varying sizes to better understand how they're actually doing it. There – I think the reality is that many foundations are struggling with this for a variety of reasons and trying to integrate their communication evaluation into their overarching program evaluation.

The question about whether or not there's a willingness to share – there's a lot of resistance right now for a variety of reasons that many of you in the room will understand given the accountability focus and the scrutiny on how foundations are making their investments, but there is a strong interest in learning and sharing and one of the things that we're hoping to do, and we've been doing it at our annual conferences and at our spring gatherings at the council meeting, is to convene for sharing of case studies, but in terms of being able to see an in-depth link between are the program evaluation and the communication evaluation connected, we see that there is a growing trend towards that, but it's, again, the number one interest area that we identified.

MR. SPARKS: And as Amber said in the beginning when she introduced herself this morning, our project – the Media Evaluation Project – and the Network actually hope to work on this topic .

So as we did in the first panel, we'll have a series of presentations and then hopefully we'll have ample time after the presentations to take comments and ask questions too.

David Devlin-Foltz from the Aspen Institute is going to begin this conversation and you note that we put out on each of chairs some information that he will also explain.

David, one thing you might do is just talk a little bit, again, about what your project is in relationship to that paper. I'll cede you an extra one minute for that.

MR. DEVLIN-FOLTZ: Thank you.

Karen started by saying she would make you feel comfortable by revealing that she was an amateur evaluator, and I'll make you feel, if anything, even more comfortable by saying I'm an amateur evaluator and amateur communicator. So I read this paper, really, as a layperson. And quite honestly as a layperson what can I get out of this as somebody that cares? I've been working for 20-odd years on how to communicate more effectively to American publics about global issues, so what can I learn from this about how I would do that work better? And I also read it – as Phil suggested, I read it particularly with attention to the work that we're doing with some funds from the Gates Foundation – I see Lowell Weiss here – to help a group of organizations who work to engage the American public on U.S. foreign policy, the U.S. response to global issues, how we can help those organizations evaluate the impact of their advocacy work, so I read this with a particular interest drawn from that.

And in that project we had some funds to commission some research and some case studies to help see what are the current practices among groups who are working on foreign policy issues in particular. What are they doing? What do they seem to be doing well and what can we help them do better in terms of their advocacy work?

That advocacy work includes, of course, communications work, and one of the first points I wanted to make about the paper is, again, as a layperson reading it I have a little trouble sorting out the difference between communications strategies and broader advocacy strategies, even as the book is – I do in real life and I do as the paper is written as well, so that – but it's very important and the paper's very clear about this in talking about the challenges of evaluation that it is difficult to disaggregate the impact of communications efforts from other social change strategies. This is on page four.

But for me, distinguishing between communications or media from local organizing or lobbying or other social change strategies is difficult, and so understanding what exactly are we talking about in this paper that's distinct from those other things that I lump together as part of the advocacy work that colleague organizations do. It would help me to be a little clearer about that.

A second sort of definitional point that's related – relates to the distinction between behavior change and public will campaign that this paper very carefully makes, but in my mind, well, isn't changing my vote or calling my member of Congress – that's a desired behavior, right? So is it that we get – we do the public will stuff, the stuff that's described in the chart on page eight as being part of a public will campaign; we run through all those steps and then we get to the action step at the very end: engage and mobilize constituencies to action. Well, at that point the action is a specific behavior, right? I mean, it's something that we want that person to do, so – person or persons to do, like calling a member of Congress, writing the letter to the editor, or whatever it might be.

So, again, I'm not so clear about the distinction between behavior change and public will campaign in that particular context, and that's critical for our – this evaluation learning group project that we're organizing as part of our work at the Aspen Institute. Do these guidelines help us assess advocacy campaigns, which is what we've said we're going to be doing? Does it help us assess advocacy campaigns in general that might include tools and tactics that don't rely on the media? So again going back to that point of what exactly are we being helped – guide to evaluate better in this context?

But I particularly appreciate the papers call, and we've heard this echoed again and again this morning and it's nice, again, for me as a layperson to hear all of you who do a lot more of this work echo this sense of realism about keeping our expectations reasonable – our expectations and those of our donors – about impact.

So point number – sort of guideline number eight in the kind of summary right up front, Phil, where you talk about that the key points that you've learned from the process, number eight is a call for realism about impact. I would even strengthen that using the cautionary note that appears on page 13 that's really the heart of the matter, and I'm not going to read it now, but there's a very strongly stated cautionary note about the complicating factors that make us – make it difficult for us to say what exactly was the impact of the communications portion of a campaign? What might be all the mitigating, complicating outside factors that might make a difference? That statement I would actually move up and make that part almost of your cautionary note number eight.

A couple of other things that I really like about the – I'm sorry, one more point. The chart on page 15 that plots outcomes versus methods, and that we've talked about at times in the context of our evaluation learning group as here's the fundamental take-away from paper number five is the chart that breaks down outcomes versus methods. For me, it isn't quite as specific as I would like it to be about the evaluation methods that would correspond to particular tactics, so if I'm really breaking this down and I'm working with an organization that says, well, I want to do more radio ads. I want to do more radio actualities, let's say. Are there some particular techniques that you can – that we can lay out even in this paper that would help us know what might be the evaluation methods that would work well for that particular thing? So I would take that to an even more specific level.

Now, having started with all of this – with this litany of suggestions, a couple of things that I really like very, very much about the paper, in addition to that sort of top-ten list at the beginning, which I think is very clearly laid out, is your emphasis on the distinction between values versus information. It's point number 10 on your top-ten about the fact that an audience coming to an issue from a different values standpoint may not absorb the information that you're offering and for lots of people in this room who have worked, as I have a lot, with Susan Bales (ph) you'll recognize her mantra: if the facts don't fit the frame, it's the facts that are rejected, not the frame. And I think that's an important point to note here, and an important note for folks who are thinking about the communications elements of their campaigns.

That said, on page five where we talk about the communicators versus evaluators, when we talk about the place, it doesn't suffice to talk about the placement of ads as an evaluation method, but there I would say talk about their framing as well. And that particular point, I think you do very well elsewhere in the book on page 12 when you discuss media content analysis as an evaluation technique, and very appropriately we want always to say it's one thing to measure placement or frequency; it's another to make sure that whatever is being placed or whatever is placed in the stories or recurs in the stories is evaluated in terms of its content as well because, you know, if it's going to conflict with the values frame it's probably not going to get through.

And finally that I'm particularly fond of that values versus information point because it leads me to a little plug for this, so the thing that's on your chairs – that little red, green, and white flyer is an advertisement for this, which is a guide called U.S. and the World: Talking Global Issues with Americans, which we produced in collaboration with the Rockefeller Brothers Fund, and it really derives from that notion of getting the values statement right before you start the communication speech, so I just wanted to (fly ?) that around a little bit.

Talk to me if you want to know more about that book. Thank you.

MR. SPARKS: Thank you very much, David.

We're now going to go to Lori Dorfman. Lori is with the Berkeley Media Studies Group. She's done a paper for this project also and will continue this conversation.

MS. DORFMAN: I think that David's first question about where does individual behavior stop and social change begin is the central question for me. How the two ends of that continuum fit together has been a central question in my work and there have been important arguments over the years about how different communications strategies have been defined regarding that continuum: what's social marketing really about? What's media advocacy really about? All the different labels have, at times, been contentious. The arguments about the labels have been useful and have been important in helping people clarify what they want to do.

But for the paper that we did for the Evaluation Project, we tried to set that aside and just say, if we strip away the labels and just look at a bunch of different campaigns, what would that tell us? That's why we ended up with a paper called a taxonomy. We were making a categorization of the kinds of communication campaigns that exist. What we found is that when you strip away the labels, what became clear is that, at the core, it was the purpose of a campaign that mattered most, and influenced the purpose of the communications. The purpose is the key factor, which is why I think that Heather's idea of a glossary is very important and would prove very useful.

In the most recent paper -- and maybe one nice outcome of the project overall -- is that we have now a compendium of vocabularies both from communications and from evaluation that can help practitioners from the two worlds talk with each other. Sometimes these worlds speak to each other and sometimes they don't, but now we are starting to construct a language where we can maybe have some multicultural communication, as Heather put it to me earlier, which I thought was great.

I think that's going to be very useful, so I'm interested in all the critiques and feedback this group can provide, because the central issues, including questions of behavior change and social change, haven't been solved in the paper. They've just been raised, so I think the rubric we used when we developed the taxonomy -- purpose, scope, and maturity -- is one way of characterizing campaigns that might be useful as an entry point for an evaluator who doesn't necessarily want to engage in what all these internal communications debates have been.

That said, I still think the current set of papers remains a very inside conversation and that ultimately needs more clarification and translation. When I think back on the process and read the early papers, I think the whole set is really nice, but it's for a very select audience and you see how small we are. So I think that there is some communicating that we need to do abut the issues that we've raised. It's a little ironic coming from somebody who is a communicator perhaps by trade. We don't talk about ourselves very often, and that's part of the problem here: we haven't explained what it is that we do, why it's important, how it could be done better and as it gets challenged in the context of evaluation, we're obviously forced to do that. At the same time, evaluators have to become more forthcoming with what the limitations are that they have as well in evaluating. All these issues are now on the table, and I'm glad that we're engaging in them.

And so I'm just going to name a couple that I think are the meaty ones for me. The first one goes back to what David started with, and that is that it is excruciatingly difficult to disengage media and policy. This is because from our perspective in media advocacy the communications aspect in the social change efforts is always secondary to the policy change. It's the policy or social change effort that should be driving the communication.

So given that communications always secondary, yet we think it's enormously important, it becomes a terrific evaluation challenge. And of course the purpose of the policy change and the communications campaign will be the directive for determining how to assess the campaign.

It goes back to one of the first questions that I think Joanne raised this morning: which techniques can I use? Can you give me a list? David says, give me a list. And I think that we could all probably manufacture a pretty good list of things that people could do at different cost levels, but the real question is: who needs to know what and why? And that – the purpose of use for the evaluation -- always has to drive which of those methodologies from the list you select. Those two things, method and purpose, have to be reconnected.

Another thing is that, of course, real change takes time. We all know this. And so the question then is: can we spend more dollars over longer periods of time so that we can really do some experimenting and find out something here – some answers to our questions? That is pie in the sky at this point in history, so the next question is: what kinds of indicators can we choose? And that's really what you're asking for, I think, when you say what techniques can we use. You want to know: what different evaluation techniques will get us what kind of information? And how much will they cost?

And I think that just needs to be hashed out. We don't really know what's going to indicate what and a lot of it is going to be intelligent guesswork and gut feelings that comes from a lot of experience that is also embodied in this small group that we need to get better about cataloging and articulating with other groups.

Another problem related to this messy indistinction between the social change or policy change and the communications change, and that is: sometimes there are secrets that can't be told. In the real work that goes on, people gather in rooms, their names aren't listed, their work isn't described, and yet they're crucial. We've been engaged in campaigns where that has been extremely important and if that kind of strategizing and negotiating got out, people's jobs would be at stake.

When people are really at it -- really making big change -- that's going to be an issue. Perhaps we can tell the story maybe five or 10 years down the line, stripping away the names. But it gets kind of generic at that point and it's not really what happened. So I don't know that we'll ever get to account for that part of the advocacy process in evaluation, or how we grapple with that. In the big deal social change, that's a component that's going to be very hard to wrap ourselves around.

And then putting all this together, working through these problems, figuring out how you disengage the communications and the meat of the matter – the policy – how you communicate all of it -- perhaps in this case take a lesson from the corporate world and use the Nike strategy and "just do it" because we just have to try a few things and see how they work. Fortunately, we are now better positioned to learn from these little experiments because we want to learn from them, both in terms of the evaluation and the communication strategy. We want to learn from them because nobody wants to be wasting their time. People don't want to waste their money in investments that don't work and communicators don't want to waste their time if their techniques aren't getting results. We're all too busy, the change is too important, and now there's a readiness now to learn from this that there wasn't in the past and so I'm really excited and encouraged by that.

MR. SPARKS: Thank you very much, Lori.

Our next presenter is Doug Gould. Doug mentioned this morning that he's a practitioner, as is his firm. His firm wrote one of the working briefs .

MR. GOULD: Thank you. Barbara reminded me this morning of some of the ad campaigns that we worked on many, many years ago, and I used to have a very simple and straightforward way of evaluating whether or not the ads worked. This is back in the late 1970s. It had to do with cocktails and controversy.

Cocktails – if one of my board members came in from a cocktail party and said, you know, everybody was talking about that full-page ad that you ran in the New York Times. I knew that I had scored a success, you know, because there was a little bit of buzz out there in a little rarified target audience of upper East Side, well heeled, Manhattanites, you know, who cared about these issues.

The second was controversy. And controversy – I remember running an ad where we – a full-page ad where we pictured a United States senator in bed with a very nice, you know, sort of middle-class couple and Jesse Helms got up on the floor of the United States Senate and waved this ad and railed about it and then I knew I'd scored a home run.

Well, so that was a simple way of evaluating success and it worked for me, so sometimes I – you know, I don't think we need to belabor it when we don't have the resources. I think it's an absolutely terrific paper. I think it's a great guide and it's going to be very, very useful.

My experience in working as a professional communicator has led me to the conviction that the biggest set of mistakes have to do with the planning part. They happen at the very beginning and they have to do with people coming up with really crazy ideas about what communication should do sometimes, and that sometimes – like that problem gets compounded by really bad planning, people making bad assumptions about what can happen, and then planning campaigns to do things that just don't work out or could never possibly work out.

False assumptions have to do with the public's perceptions or not really apprehending what people really think, and they have to do with a certain amount of fluidity. You know, I think Holly talked about this this morning. In these nonprofit organizations, a goal is a fluid thing and, I must say, in a lot of foundations as well. The goal today gets changed over and over and over again by every person that starts to pass over it, and that's a problem. That's a big problem for people who are trying to evaluate it.

The other thing has to do with disconnected actions, you know, and David alluded to this. You know, we don't often know that an action we ask people to take will actually be connected to the problem in some meaningful way, and that's something that needs to be tested at the beginning of any campaign or any planning process. You know, we used to laugh about asking people to write a letter to a member of Congress about solving family planning in developing countries. I mean, I could just see people thinking, how is this lady in this village going to be helped by my congressman. You know, it just doesn't make sense to most people, and so the actions – you know, we need to do a lot more work on that as well.

The formative evaluation piece outlined in the paper is really great and I think it will be very helpful. We try to do a lot of this in the beginning of any campaign -- the use of focus groups and polls and subjecting a lot of the goals and the assumptions to really rigorous analysis. My problem is that I don't want evaluators doing this work. I want to do that work because that's part of the creative process; that's part of what we as professional communicators do to try to disentangle a problem. I do want it to be transparent, however, and I think that's where I would love to see more outside input I don't believe in "while you're up, go get me a communications strategy," you know. That's not the way it really should work. It should be transparent and it should be something that everybody can weigh in on and evaluate and critique and discuss, but it shouldn't be the province of the people who are doing the evaluation at the end. It should be the province of the people who are – in my opinion, of the people who are actually doing the creative part and we should kind of force them to do it.

The projects that I've worked on that have worked best in this area have been what I would call field-building projects and they've enabled lots of people within a field to get involved in this formative evaluation piece to help really develop this strategy and to do all this. And, you know, we can talk about this later if you're interested, but there are lots of them the foundations have funded that have entailed work with lots of folks whether from the environmental movement or from advocates for low-wage working families or people in the learning disabilities arena. All different sorts of fields have been strengthened by funding this sort of formative work and so that's a model that I think really works and also helps to build the field. So that's my first point.

The second one is, the second most common reason for failure, I would say, is that things just don't work out. All of the assumptions that get built in at the beginning, even when they're tested and subjected to a lot of analysis, sometimes things just don't work out. You know, you have major global events take place. Scandals emerge which tend to capture lots and lots of media attention. Those of us who are in this business remember what it was like trying to get anything into the paper during the Clinton impeachment, from Monica Lewinsky on day one to the very end of it. You could just forget it, you know.

Now, if you had funded a big initiative during that time, it just wouldn't have worked out. So whatever evaluation you do has to be open enough so that you can kind of look at these different things that happen along the way so that at the end of the day the people who have done the campaign or who have been funded to do it and have really tried, don't get creamed.

I would say you need a little bit of an “if, then” kind of approach in all of this so that, yes, if these following things do work out and if the funders actually come along with resources and if the president doesn’t get indicted or whatever, we’ll be able to do the following things. So it needs to be fluid in that way. It’s not a controlled experiment. There needs to be – you know, there needs to be this kind of flexibility and openness in the process.

Finally, there needs to be a subjective analysis to this as well in terms of the evaluation. A lot of what really works in communications is this sort of “ah-ha!”; oh, I get it; it’s like a brilliant idea and we see them all the time and we recognize them. And, yeah, you can question whether it’s strategic or not and so forth, but there’s a creative part of this, there’s an inspirational part of this that you have to take account of. Otherwise, this just becomes a very cold kind of clinical exercise. There are a lot of brilliant ideas out there and you have to find a way to recognize those and take account of them in this work.

So thank you.

MR. SPARKS: We go to our next presenter, and that’s Gwyn Hicks, who along with her colleague Christian Wolf works at Spitfire Communications, another very established and very effective practitioner group, to continue the conversation.

GWYN HICKS: Hi. Gwyn Hicks with Spitfire Strategies which is a communications firm that specializes in working with nonprofits and foundations, including some of the folks in this room, to create positive social change, and we do that by making sure groups are really smart about their communications.

We created a tool called the Spitfire Strategy smart chart, and before we let clients do anything remotely close to calling media or any of the tactics that really are the fun part of communications, we first say to them, why? Why do you want to do that? And that’s where we start.

And you’d be surprised at the number of folks who – well, why do we want to do that? Well, because my funder told me to. Or why do you want to do that? Well, my board thinks it’s a good idea. And that’s where we come in and we say, all right, let’s really sit down here and let’s figure out your goal. Let’s figure out who it is that you need to talk to to move that goal and let’s just keep breaking it down. And that’s one thing I thought was really great in the paper was the idea of this theory of change because that – really, as much as possible, communications on the front end as far as setting goals needs to be broken down into little pieces that they can really bite off and do.

So it’s not about saving the children, it’s about actually putting legislation in place to put qualified teachers in the classroom, or it’s about making sure that every child has access to quality healthcare. And when you start breaking it down, then you can get to the point where you can set some measurable goals. And it’s also at that point, as was discussed in the first panel, that I really think evaluation also starts to come in, so evaluation is right there with the planning process.

You know, as you set your goal, it has to be a measurable goal, and as you set your goal – when we go through the smart chart with folks, we also say to them, what are your benchmarks? How are you going to know that you’re meeting that goal? It just doesn’t work as well to get to the end of the day and say, oh, we missed it. It’s really much better off to be taking advantage of opportunities as you’re going through your campaign, knowing when things are getting a little bit off-track, and then figuring out how you’re going to get those back on track, so you really have your eye on the prize and you can keep your eye on the goal.

Groups that work with us find that we’re big on why. Why do you want to do that? Why? Why? Why? We’re kind of a pain. We just kind of keep coming back, but that’s because we really want to make sure they've thought through these ideas. Nobody has resources to burn and we really want to make sure that they're being smart about things.

And media seems to be one place where we get tripped up a little bit. We've said to more than one client on more than one occasion, but I think it bears repeating here as well, if all you want is a new doorstop, then great. Lots of media clips are wonderful. But if those media clips are collecting dust and they're not moving you anywhere near where you want to go, it's probably not the best use of your resources.

Putting an evaluation plan in place as part of the planning process is really important because it can help groups stay on track as long as they have these little benchmarks. And again as I stated earlier, I think it's really a great opportunity to use evaluation for these groups, and this is, again, about selling to the groups. You want the groups to use evaluation? They ought to know what's in it for them. And one of the most important things that's in it for them is it's going to tell them when they're off track. I mean, it's going to tell them how to get themselves back on track.

I think a classic example is the million mom march on Washington that happened a couple years ago. It was a great effort to try and get moms to turn out and try to raise policies – try and get more policies passed on gun control. Somewhere along the line, though, it seems like the effort really became focused on getting these moms down to the mall. How are we going to get more and more turnout? How are we going to get more media coverage? Get more moms, more moms, more moms on the mall.

Unfortunately, at the end of the day they didn't succeed in getting any new laws put on the books, so really did this succeed? You might have a million moms on the mall, but you don't have any more gun laws and you really haven't moved that dial. So you might suggest, instead, there should have been some benchmarks put in place there that said, are my constituents going in and meeting with their members of Congress? Do you have people like my mother in law there that are really just a (needle ?) in the member of Congress' ear until they're starting to move that a little bit. You know, are there floor statements being made that have our messages in there? Are you starting to hear our messages repeated?

So I would argue that you could also have some small little things that you can be doing making sure these are happening and being able to evaluate yourself as your communications plan goes forward.

A couple of thoughts on the paper itself and some ways we might be able to make it even stronger. I think it was great. Again, just a really big advocate for the theory of change approach and the idea that you can make little tiny benchmarks and little tiny goals and just keep moving it a little bit at a time.

I was pleased to see in the paper the idea of, as someone mentioned earlier, values versus information. In any outreach effort, it's important to remember that it's not so much about how much information you can get out there – and again this is where we get in trouble with media sometimes – it's really about what people can hear. And it's easier to talk to people about things that they're interested and listening to.

You know, I was joking with Eric. He gave me a heart attack at 11:30 last night when Kristin called and said, you know, you're really talking about reproductive rights tomorrow? And I said, I am?   You're all here because you want to talk about evaluation and if I suddenly start up and started talking about something else, you'd be like, why are you talking about that?

It's the same thing with communications and it's really important to think about values and I think that's a key piece we can be thinking about with evaluation, too. So if I'm trying to move an issue and the only way I can get any media coverage is on the environmental pages and it's not going anywhere, I've got to stop and say it's not moving. But maybe I can turn this into a public health issue and maybe suddenly more people would start listening to me because they care more about public health right now. So tapping into values, figuring out what those values are, and then being able to evaluate how you're tapping them I think is a very critical step.

Another important piece of the planning part that also comes into play with the evaluation, and again why it's so critical that they all go together, is the idea of the internal/external scan, which always makes me laugh because when we talk to people about communications we caution them on not using the my-eyes-glaze-over phrases. Internal/external scan is right up there, but you've got to know your playing field. You've got to know where you're at. We always say to people, you know, what else is happening out there?

You know, the same group that wanted to do the obesity stuff came to us and said, we are going to be the group that makes obesity a national epidemic. I said, that's great. There were 3,000 media hits last week that called obesity a national epidemic, so as you go out to do communication – – yeah, you're done. But you're on there.

Knowing where you're at, knowing what else is out there, knowing what's already happening on your issue is really important and that's also where you can start to set the evaluation. You know where your policymakers are on the issue. You know which policymakers are going to have to move. You know where the public stands on your issue. So it's just interesting to me how much evaluation really comes into that important communications planning framework.

I did want to caution in the paper – I kind of took away from it that you were talking about the process of evaluation or outputs and how those can maybe be separate from outcomes, and I really think it's important that outputs and outcomes go together, so an output, again, might be a media clip, but then what was the outcome of that clip? Did a member of Congress stand up and talk about it? Did more people turn out for an event? And so really making sure that the outputs and the outcomes go together.

One evaluation mechanism I didn't see in this paper, but I think is really becoming more and more interesting measurement is this idea of cooption, and that might be a word Kristin made up, but it's a good one and so we contest that. Cooption is the idea that you can start using a phrase that no one's used before as part of your outreach campaign and suddenly you're testing your media clips and all of a sudden you're seeing your phrase come up over and over again and you know it's resonating, or you know maybe it's not if it's not being used the way you intended it to use.

I think the smart growth folks when they first came on the scene were a really great example of that. They needed to come up with a new way to talk about environmental issues in a way that was going to get them some resonance and get people to pay attention, so they started talking about smart growth and suddenly you see mart growth everywhere and there's smart growth campaigns and there's smart growth organizations. Again, it's important to do that scan first to make sure the phrase isn't already out there, but it's a great way to start using some buzz words or start using some messages and then use media as an evaluation tool to figure out if these phrases are being picked up.

Finally, I just think it's really important as we start looking at ways for nonprofits to use these, and this has been said already, but I'll just reiterate, there's got to be some little things they can do. They can start doing their own media clips and their own tracking of media. You know, if there are little ways that organizations themselves can see what they can be doing to make sure that they're evaluating themselves in real time and improving their campaigns and they're doing it because they want to do it because they know it makes their activity stronger, I think is really important.

MR. SPARKS: Thank you, Gwyn.

Our last panelist before we move on to the discussion, Bruce will continue this discussion from the standpoint of the foundation perspective.

MR. TRACHTENBERG: Thank you very much. I've probably reconsidered at least a dozen times the various things I wanted to say today based on what I've heard other people say, so I guess I'm almost evaluating my own thinking as we go along about this.

But I am going to try to speak from a funder's bias about this and probably not dip into the mechanics of the paper itself, but try to offer some observations of why the funder I think it might – it's really an incredibly useful exercise wherever this ends up.

From our view as a funder, evaluation is incredibly important to us because we only want to fund organizations or activities that have an evidence base that they work. I mean, that's a bias that's built into our grantmaking. We're not looking to create a new, new thing that our funding will prove. We want to find things that there's already evidence to suggest that this program operated this way over and over again produces results, so we're already on the side of believing – of having viable, validated evidence to guide our grantmaking choices.

That does not – when I was asked earlier, that does not mean that we're funding communications per se, but communications may get swept up into the activities that the organizations we're supporting are doing. So what I – my overall reaction to this approach to creating a methodology and some improved practice about evaluating communications is extremely important because if the guidelines provide a framework and an understanding of what constitutes rigorous or even a respectable approach to evaluation of communications, then we're off to an excellent start.

I mean, and then the challenge is through the various comments and advice we've heard about getting it right, but then you have to test it because we're not – the papers only are so good until you get out there and try it and begin developing some evidence about whether this approach works or not – evaluating the evaluation I think is key.

And then when we get to the point where you feel you have something to work with, the challenge to ensure this approach is implemented with fidelity over and over again so that we can develop a consistent, useful evidence base that can guide all of us in our work. I'm sitting here thinking I've been in this business more or less on various sides of the fence, corporate, nonprofit, foundations for over 30 years and I don't think anybody's really asked me what my work has accomplished. They've asked me what I've done. They've asked me to show the outputs of my activities, but no one's ever held me accountable for what I can say my work has achieved, and so I guess I'm pretty lucky because I'm not sure I could answer that question.

But I would really love us to see it get to the point where we can amass evidence about the success of various communications approaches. I mean, people have been talking a lot about failure today. That's fine too, because you don't want to repeat somebody else's mistake if you don't have to. You don't want to invest precious resources in something you just suggest doesn't work. A better knowledge base about what works in communications would be enormously useful to funders, like ours, for example, would want to ask the question – if we were in a situation where we were trying to fund a program that had a heavy communications base, the question we would ask is what gives you confidence this is going to work?

Being the funder we are, we couldn't say I don't know, that's why we want you to fund us to find out. We're not the right one for that. There are other funders, and I'm not criticizing those who do that. I'm just bringing my own bias about why this work is so important.

Again, from our point of view, we look at every investment and try to gauge what we consider to be a responsible social return from putting money into something, and that would be the same – some equivalent set of metrics would have to exist in communications, whether it's happening absolutely or in conjunction with another program.

I mean, we heard Heather earlier say that we're spending more and more on communications, but do we have any evidence that this is working? And that's why I think we're here today.

And again, I don't think funders have any less responsibility to know whether they – when they do fund communications, whether it's having the same impacts, the same outcomes that any other program they're supporting. If they don't ask those same questions, then they're being irresponsible. And thus, as I keep saying, having this credible knowledge base will help us, again as funders and as practitioners, to make more informed choices about how we spend our money because when we make a choice to spend on communications, obviously we're making a choice not to spend it on something else, and if you have to choose among equal opportunities, what is it that gives you more confidence that this is a better way to get to your goal than some other way?

And the only thing that really, really intrigues me and maybe scares me a little about this: what if at the end of the day we learn things that tell us we've been doing everything wrong all these years? Are we prepared to change our practice? But we have to. I mean, that's why we do these things. Again, I can only relate to analogs – we work in certain fields that involve – one field involves youth development and if we are funding programs for which there's no – where there's only a scant evidence base or scant evaluation findings that says this works, we can't be – we would not be a responsible funder if the evidence was suggested to us over a period of time this program really, really doesn't work. It does not make a difference.

So the option for that organization is to stop – is to keep going, but without our support, or change the way it operates and make the judgment this doesn't work. So I think the same thing may apply to communications. We may be doing a lot of things that we're very proud, of that seem meaningful to us, that make us feel good, but at the end of the day if it's not producing results, then you're doing it just because it feels good.

This is a trade-off. Do you want to just feel good about what you're doing, or do you want to have success? But that's where the evidence helps guide you?

I think that just anything that will – as I was looking at the paper, one of the things that I worry about is maybe we're putting too much on what we think evaluation can tell us at this stage. Again, it's part of my suggestion that we start slowly and be realistic about what we can do at each stage of the way and learn and build from that. Don't – you know, maybe there are pieces there that just – maybe the whole thing doesn't work as laid out yet, but we won't know until we try it.

So I mean, I think you've got to start with what you know, apply it, takes the lessons back, and keep working it till you get to a point where you have some confidence.

MR. SPARKS: Thank you, Bruce. And in no particular order I would again like to make some points about the discussion. I think I want to start with that last comment that Bruce just made, which is what will be the limitations of communications evaluation and the other question that he raised which is what happens if we get to the end of this process and basically it calls for a substantial change in practice? Are we willing to make those changes in practice as evaluators, as practitioners, as foundations, and as NGOs? It's clearly just a question at this point.

Other things it seems to me that I found interesting were David said that he'd like to see more definition in terms of where is the line if there is one, and I would already say there isn't sometimes between campaigns that work on behavioral change and policy change and as Lori knows, and she wrote some about this in her paper, sometimes you start with a behavioral-change campaign that morphs into a policy-change campaign, but for purposes of this project anyway we're talking about social marketing, but we need to acknowledge that there's a relationship between those two things.

Doug said something I think is important too – a couple things that I want to reiterate for those of you all that are practitioners in the room, you'll remember this from almost any campaign almost that you worked on: changing goals. I have hardly ever as a practitioner worked on a campaign that was of any length, and by that I mean at least a few months, where the goals didn't change somewhat between the beginning and the end in terms of communications, and if it was a multiyear program and you went back and looked at your original goals, sometimes you said to yourself-- what were we thinking about in the beginning? And usually it's for good reasons because you're making mid-course corrections, but it's definitely an important thing to remember.

And also Doug reminds me, too, we would I think already recommend and we do in the working briefs and the working papers, that formative research is important and Doug reminds us that there will be a tension unless we acknowledge in the beginning that formative research, let's say in the terms of benchmark polling, is the purview of both the evaluator and the practitioner .It can be done. It can be accommodated. Our next – one of our next panelists and speakers is working with us on a project where the poll's main purpose was what they call a positioning poll to understand where people were on the issue and to try out new ideas and see where people might be, but we embedded in that poll knowing that we were going to be doing an evaluation, seven or eight benchmark questions so that we could come back to those exact questions in a couple years, so there's a tension, but it still can be done.

Heather and her colleagues sometimes are called into projects where the train has already left the barn and then both the foundation and the NGO wants them to run up to the side of the train, jump in, and figure out where it's going and why it got there as opposed to examining the problem at the station before the train got underway. So that's definitely something that all of us should think about.

And the theory of change. I'll be honest. When the Communications Consortium began this project, I thought I would just kind of be locked into about a four-page paper that's embodied on page 15 on the kinds of guidelines and I didn't myself realize subconsciously what things went into the campaign before it even got to the evaluation, including theory of change. And it's a very important point. It was brought up and it certainly has to be part of any communications evaluation.

But with that, let's just open this up for questions and again for comment on any part of what the panel discussed and on the paper itself in terms of your own comments if you've done your homework and at least read parts of the paper.

MR. BROWN: On a theory of change is great if the theory makes sense. And if you identify a theory of change and you say, here's our goals, here's our audience, here are our messages, and here are the execution points, so therefore it's a sound theory and I would suggest that the theory of change on page nine requires deeper scrutiny.

Generally speaking, I am highly suspect of public will of this theory of change, which is that media advocacy will yield media coverage which will engage grassroots awareness that will put pressure on policymakers that will lead to policy change. And one of the outputs that sometimes we measure which is the member of Congress gets in the well of the House and says something, that that leads to anything. I used to work for a member of Congress and we did that every day and we never got anything done.

Missing here are – needless to say are key decision-makers, whether it's business leaders, whether it's other plugged-in influential folks. Communications campaigns sometimes never go to the public. Sometimes they're a well0placed phone call and so I just think that there are many levels that could be added to this to make for a much more robust approach to communications and if we think – either if we limit ourselves to the notion that communications are about public will campaigns, which sometimes serve to fortify an insider strategy about connecting with key decision-makers, then we are missing the boat.

And so it is very important for us to scrutinize rigorously these kinds of things and not just accept and feel good about ourselves for having identified a theory of change. We have to identify a good theory of change. And so that's just sort of a general push back into how we approach our own evaluations mechanisms. And I would sort of, you know, now I'm going to duck.

MS. DORFMAN: I don't' think you have to duck, Eric. I think that's the question. It's the question that Gwyn's asking when she's asking her people why, why, why? So it's the core of the matter, I think. And the problem is in a paper like this one, it will always sound generic and because there are so many nuances, it's going to change from situation to situation. The danger is that the theory might get so big it's not useful – then the map of the theory changes to a map of nothing then because it's a map of everything. That's why key piece of advice for evaluating the particulars of the communication campaign is that you have to know what that theory of change is for that campaign and you do have to question it. As Doug says, you have to question it way up front just with as simple a mechanism as Gwyn supposes: why?

MR. SPARKS: But there were some comments to that and people raised their hands.

Q: I'm going to change the subject a little bit on – I know this is guidelines heavy and so it's a lot of first why and then how, but to me I thought it lacked a little bit of who. Not who should be – you know, who should be evaluated, but coming from a foundation and then working with nonprofits and having worked with communications firms way – you know, in my earlier life, it's really – and I think Doug hit on this – we were always struck in the foundation on who they picked to be the evaluators, and I know I'm going to hurt some people's feelings here because they're evaluators, but the people who actually did the work and informed and helped write the communications strategies, frame the messages, target audiences. It never looped back to those people.

You know, some evaluations do, of course, but I think nonprofits are especially – and this is where that fear comes in – who is evaluating me? Do they really know? And in the first panel they said they get to ask the questions. What do you want to be evaluated? I don't think a lot of nonprofits would agree with that, that when the person evaluates, sometimes the funder decides what's going to be evaluated and the nonprofit isn't necessarily involved in that because there's a reason why they're going to evaluate it, and so if I'm reading this paper and I'm a nonprofit especially, there's no who in here about kind of when evaluators come in, who are they and what is their background as far as are they academics? Have they done this work and do they – have they ever done a media advocacy campaign and where are they getting those – you know, the criteria for evaluating.

And even though they're looking at the goal, I always – and I just am curious to see if there's other foundations that feel this way – is that sometimes the people who did the work or even wrote the grant and the strategy weren't really involved in the evaluation. I always think that – you know, so this doesn't really talk about the who does the evaluation. It gives the what you ask and how you ask it and what your measurement and some of the elements are.

So I was just curious and I wanted to ask, you know, how other foundations find their evaluators, what the criteria are, and if there are nonprofits that are actually part of that process.

MR. SPARKS: I'm going to go to the back of the room where we're going to get a response – at least one – to that question that you raise.

Q: Yeah, this is a little preaching to the converted, because Sharon and I have been in the same situation, but one of the greatest tensions within the foundation world is agreeing on the questions about which to evaluate on how to evaluate the program, and that's not necessarily a disagreement between the grantee and the foundation; that's sometimes a disagreement within the foundation between the communications folks or the program folks and the evaluators.

And when you can't agree on the questions up front, you've got a big problem because then the evaluators come in and say, well, these are the things on which you should have been basing the evaluation. And the program people say, we never even thought of those questions. That's not the way we designed the program. And so I think one of the key things that I would recommend in this report, and I think it's stated, but I couldn't emphasize it more, is to get agreement up front as to what those questions are.

Otherwise – and let me take a little bit more time on the soapbox to give you an example. We had a program at Robert Wood Johnson that has been in existence that's just winding down now called fighting back and it's a substance abuse reduction program in about 10 communities around the country. We spent over $60 million on the program. We spent $15 million on the evaluation. The evaluation only took place after the program was already designed and actually evaluated the program on questions other than those that the program itself was going to address. Money down the rat hole – a huge disagreement about the outcomes and the expected outcomes of the program, and what one sees in the paper now when you look at evaluations of this particular program is, well, you spent $60 million and there were actually increases in drug use in those communities, so –

MR. SPARKS: Anybody amongst our panel want to take on this question in terms of their experience, especially maybe Gwyn or Doug in terms of practitioners? What's been your experience of when your campaigns are evaluated? Do people get in in the beginning? Does the foundation have a clear view of what they want – you're shaking your head. You can go first.

MR. GOULD: Well, I think some of the foundations we've worked with have had very clear objectives. I remember a learning disabilities campaign that we worked on for almost 10 years. It was very clear what we were trying to accomplish with that. We did benchmark polling at the beginning, the middle, and the end and you could see real changes in that and everybody was pretty satisfied, and there were other indicators as well.

But I think it's more typical that this sort of raging debate goes on the whole time the campaign is happening. Well, you know, is that really what we want? And people come in and start second guessing and they get nervous or a board member calls up and screams. I mean, there are all these things that happen along the way that just undermine that whole process.

MR. SPARKS: And, Gwyn, I'm sure this has never happened to you – what Doug's described.

MS. HICKS: I think in defense of Julia sitting here, actually I can tell you a great experience that we've been having working with Julia. We run a program called the Communications Leadership Institute where we bring in nonprofit executives and we work with them to help them really understand communications and be smarter about it, and we have been fortunate this year to have the Packard Foundation fund Julia to come in and take a look at what we're doing with their funding and make sure that this is really actually making these people smarter about communications and how that – so we pitched the program, as it's really an investment in the field because by making these people stronger communicators, they're also then helping to grow the field.

But what's been a really great experience in working with Julia on this is she takes it, she says what do you want these people to learn? I tell her what I want them to learn. She comes back and she gives me numbers and says here's where they're going up and here's where they're going down.

So one of the interesting things was after the last session their comments, their feedback on some of the speakers had started to go down and it had been positive all along. Speakers, great, great, great. And all of a sudden the arrows started going down and a lot of them were the same speakers and I thought, well, how can this be happening? These were, you know, Christian Woolf (sp). She's a fantastic speaker. How did this happen?

But then I started reading the comments. Well, the comments were that they didn't like some of the things in the presentations because they'd actually learned how to give good presentations. They were critiquing their PowerPoint – (laughter) – because in the PowerPoint class they took they learned you weren't supposed to have a lot of text on slides and guess what? That speaker had some text.

So if you look at the comments you start to see that actually the fact that their comments on presenters went down because they had learned how to give a good presentation. Would Julia have known to look for that? I don't know, but looking at it together we were able to see how she can give you the numbers, she can give you what you ask, but as the program person you have to know what you're looking for, you have to know what your goals were so that you know how to take that information and really know whether or not you're succeeding.

MR. SPARKS: And on that same point that Gwyn made, another way is sort of sustainability. I've worked on some campaigns where they've done benchmark polling and one of the key criteria was then support for a particular program that might be implemented and we moved it from 50 to 70-some percent, but it stayed at 70. There was no other way for it to go any further. In fact, it went down a little bit and the funder was saying, are we slipping here? And I'm saying, good lord, you know, practically three out of four Americans think we ought to do something about this issue, but so there's got to be some realism about that too.

Chuck?

CHARLES SALMON: When a pharmaceutical or a physician designs an intervention, the critical part of the evaluation is looking at side effects, and Steve talked about unintended consequences, and we are doing interventions and we know our interventions have side effects on it. Sometimes they contribute to stereotyping, to stigmatizing groups. You put a face on a disease like AIDS to appeal to a target audience, but in so doing you stereotype about that disease. We know that there are backlash effects, there are boomerang effects and things like that, so I think that there's not only a need to do evaluations for intended effect, but there's an ethical mandate to do evaluation for unintended effects and for side effects because we are putting interventions out there that are having adverse effects on people.

Sometimes we're happy to find any effects. In this case, this is the type of effect we really don't want to have.

MR. SPARKS: Up here, yes. Go there first.

BARBARA GROB: Actually, I was starting to comment about 10 minutes ago, so I'm a bit scattered.

MR. SPARKS: Okay, go back in the loop.

MS. GROB: A couple of reactions. To underscore something Doug mentioned earlier, there – I worry that we're splitting so many hairs we're going to get to nothing in the sense that I think both in terms of the evaluation process that you're in and in the communications stuff there's a mix of tactical and inspirational considerations. That's – I just take that as a given. And that different ways of talking about this are going to appeal to different funders, different evaluators – that piece of it.

I also have a sense of in the same way that you wouldn't necessarily attempt to convince somebody who is completely on your opposition, when I hear people who are deeply skeptical about the relationship between communications and social change, my feeling is forget about it. Some of the people who already understand and take as a valuable thing communications are the people that, yes, there should be some specifics and some metrics applied to this, but I'm not sure that people that are deeply, deeply skeptical about communications are – that we could spend a lot of time and money trying to please these people. I'll just put that out there.

And the tactical and inspirational business – I think that on the one hand you were talking earlier – it's not about saving children, it's about more preschool. I think it needs to be both. I think that if we were looking for large investments over the long term that part of the conversation has got to be about the broad values that we're talking about. That's just what it's going to take to sustain the investment that's needed to get some real work done that can be measured.

MR. SPARKS: I think you're right. Let's go forward; a comment over here and then over to Heather.

Q: One thing, I would want us to look at ways to evaluate whether we lost less badly than we would have if we did nothing. I mean, we talked a little bit about failure and – people have some experience in that. I have worked in gay organizations during gays in the military. Obviously, marriage is going very interestingly right now, so – but sometimes doing nothing isn't an option and sometimes you're even failing, so how do you evaluate whether you did less badly?

MR. SPARKS: I don't know. Anyone want to take that one on before we – Heather? We're going to go to you next anyway.

MS. WEISS: I don't think – I mean, I don't know how you do that, but I think your point's well taken. But I wanted to say something different and that's the importance of the intersection between planning and evaluation and I think of it because of Doug's point of, hey, I want to do that. I want to be the one that collects that information, not the evaluator. It's part of my design and creative process.

And then Gwyn's point – what you describe is what we try to do as evaluators. Your whole theory of change thing – why, why, why? I mean, when we in our group do evaluation, we often use theory of change and we're doing exactly what you say to then help people work out their logic. Is this going to get you where you want to go? You know, 25 years ago they called it a valuability assessment. It's basically that kind of thing and then you attach a variety of kinds of benchmarks and measures and all the rest of it.

So you're thinking of it in a certain way. You're talking about I want to collect the data. I think this says we need to be thinking about who is doing what in this partnership amongst people that are trying to intervene and plan a solid intervention and the evaluation people. And isn't the information we all want is going to help us all get to the place that we want to go. So that would be point one.

Point two is, and it came up here about the theory of change, we ought to be getting better theories of change out of this process so that the value of the evaluation is not just that you showed that you could get something, but we should be testing the assumptions about how these things work and building across them so that we collectively have a better understanding of how to do this work, and if we aren't getting that value out of it, I question whether we should be investing very much in it at all.

And then it's – I think you were saying, Lori, we could end up with this Christmas tree of theory of change when we have all the things we know really matter.

Right, and well, pathways through it – that this campaign is going to focus on this pathway through this theory of change so that over time we'd get better at selecting the key places where we're going to place our bets, and have some backup from past experience about whether that makes sense or not, so I'm pushing on this notion of what's the intersection of planning and how do we – you know, and how do we accumulate knowledge? Because lot of what I'm hearing you guys talk about are things evaluators do. So how are we going to get at the table making sure we're adding value to each other, making max use of evaluation for all the – of information for all the reasons we need it and then accumulate knowledge.

MR. DEVLIN-FOLTZ: Can I just jump – I just want to – in support of that and in support actually of Eric's before he got down in the foxhole question, it's a very legitimate question and that's part of what informs my confusion about, well, what's media and what's communications and what's advocacy is exactly that – is that it's perfectly legitimate, and one of the reasons that we wanted to test out some of these guidelines on foreign policy issues is the foreign policy issues, as Eric was saying earlier over lunch, you know there are maybe three people that are really going to make the difference on this, that really care about it enough to make a difference, and they're over there on Capitol Hill. So do you really need a broad campaign on that? Maybe not, but in order to sustain that change in policy over time, well, maybe you do.

So there are different theories for how you get to the change and then how you sustain the change and different pathways through, so I think that's great to bring that up and legitimate that.

MR. GOULD: I just wanted to come back to a point in answer to a question that Bruce raised earlier about whether or not people will actually change. I think they do actually change. It takes a long time, but when you're able to show someone that a certain message doesn't work or bounces or just sends people off in the wrong direction, over time you can convince them to change strategies. Not all people, because some people are just closed-minded and they're into communications for the emotional gratification. They don't really want to win. But there are a lot of people who want to win and they will change.

I remember not too long ago when nobody did polls. Nobody in this field did focus groups, and that was in the late 1970s. It wasn't that long ago. So there's been this whole sweeping change, you know, in that little span of time where people have just become much more systematic and much more sort of data-driven in the way they approach communications and I think that's really good.

MR. SPARKS: -- We've had a number of calls from foundations – and even from nonprofits saying, when you talked about benchmark funding or you talked about media evaluations, what was that? It reminded me right from the beginning what Julia said and Heather said in one of our advisory meetings that we had a year and a half ago, which was that this whole project was going to involve field building – and that there were lots of people who would be interested in this project but who had a very cursory knowledge of how to go about implementing an evaluation program, and that we were going to have to not only recommend how to do something but we were going to have to build a toolkit to do that. And actually in the Kellogg grant they saw this earlier than I did, two years ago, and in fact provided grant money to do a toolkit once the working papers were over -- hence the three toolkit papers that are posted.

So I've asked the three authors of the working group to give us a summary of the three papers that are in there, and we're going to begin with Julia Coffman from the Harvard Family Research Project.

JULIA COFFMAN: I think that it's important that as we move forward and build the field that we're also creating tools that help organizations think through what Lori said earlier about what do we need to know and why and who needs to know it? And then you pick the message based on that. And that's really, for me, a gap. The tool that I wrote is on undertaking communications audits, and many of you I'm sure are familiar with communications audits – it involves somebody coming into an organization -- or an organization can do it itself -- assessing the communications function within that organization. And I'm not sure the extent to which in this field it's thought of as an evaluation method. I'm throwing it out as a good possibility for one. I think especially in the last five or six years it has been used as a communications evaluation tool that has really gained ground in the nonprofit and foundation community.

In an evaluative sense – using the communications audit as an evaluations tool means that you'd probably do this at the beginning and at the end of whatever your process looks like, so if you do it twice it becomes sort of way to track progress over time in terms of capacity.

And I guess the last thing that I want to say about the tool is that, again, it's not often thought of as an evaluation method. For a lot of organizations that I talk to and work with who have to come up with an evaluation plan for their communications work, this is something I suggest because it's a two-for, right? -- you get to use evaluation dollars to get technical assistance on the communications function. So it's just something that we don't always think of for evaluations.

MR. SPARKS: Thank you, Julia.

The next toolkit that's going to be described is by Doug Gould. His company put together a media assessment format. I think is the most commonly understood assessment tool that we have, but it's more than what it was 10 years ago. Ten years ago when Doug and I first began doing these things -- or maybe more – I'll be honest; it was bean counting. How many papers, let's say, how many articles, how many of our spokespersons were quoted, et cetera? It's much more sophisticated now. I have to say that Doug's firm is one of the leading practitioners -- and that's why we chose him for this paper.

DOUG GOULD: Thank you, Phil. We do analysis of media coverage almost always at the beginning of a campaign. It's much more useful than a communications audit from the standpoint of a -- a communications audit to me is more organization-specific, if you will, and this is more issue specific. This is more useful for sort of figuring out what the media landscape is – how the media is covering or addressing a specific issue.

Basically what it is is kind of a little slice that you take out of the media coverage in any particular time period. We sometimes do these where we'll take four months out of a year this year and then we'll go back three or four years before and take a look at how the media covered the exact same issue in previous times. Or we do them at the beginning of the campaign and sometimes at the middle and at the end, and we us them to guide strategy and to figure out whether or not we're getting anywhere.

It's really a very simple thing to do today because of the electronic databases that are available, and it was not the case years ago when you – I remember when we first started doing this we literally sent people to libraries and they would be going through, you know, like digging out articles, and now it can be all done electronically, which is great. We used Lexus Nexus or Dow Jones Factiva as our primary sources. We start at the very beginning of the process in developing a list of search terms that we think will produce an array of stories. And these are usually pretty broad terms because we're trying to figure out how the media is covering a broad issue. But we might come up with five or six terms that we think will yield the kinds of stories we want. We then figure out what news outlets we want to look at. It's almost always the top 10 daily newspapers of record in the United States, then the leading newspapers that are national publications, the news magazines, the major broadcast outlets, and some of the online services as well. And I think we should talk a little bit more about more online analysis when we get a chance because there's a lot more than can be done there that we're only now just beginning to do.

At any rate, we then gather all this big pile of stories that get produced and then we start sifting through them. We do sort of an initial look at the stories to see which ones are relevant. For example, an analysis like this produces lots of obituaries, Little League announcements, little social notices of all different kinds because, you know, words like "education," for example, might get mentioned in all kinds of stories that have nothing to do with education. So we then cast out all the ones that aren't even kind of remotely on point and we're left with a big bunch of stories still. So then we kind of either use a sampling technique or we'll revise our search terms to kind of get us down anywhere from 100 to 200 stories. That's what we really want.

Now, the next thing we do is we classify the coverage to get a sense of balance: how much of the coverage is editorial, how much of it is feature or like news-driven, and we look at some of those ratios, and sometimes it's really amazing: we'll find, as we did when we did some work on poverty and low-wage work that Ford funded, that there was tons of editorial coverage about the needs of low-wage working families and almost no news coverage. Or you'll find that news coverage only is appearing in certain cities; it's not sort of across the board, and it kind of tells you that you have potential for placing more stories or more editorials in certain publications because there seems to be more interest.

At any rate, so we do that and then we look at spokespeople: who are the people who are actually getting quoted and what kinds of people are being quoted? Are they politicians, are they advocates, are they scientific experts? And that is also revealing. We did one of these for a group of funders in New York on public education, for example, and we found that none of the quotes were attributable to parents. The only people that were getting quoted were politicians. The only people getting quoted on public education were politicians, not teachers, not principals; nobody who was actually involved in education, just politicians. So this is useful material that you can use then for figuring out how you might change the way a story is getting covered.

Then we look at where the story is appearing in the paper: is it in business, is it on the front page? Where is it, because that'll tell you how it's getting packaged. And probably most importantly – because this relates directly to what John is going to talk about – we look at how the story is framed. And what you see by reading these stories is that usually what you see is that certain story frames are used over and over and over again, and it could be anywhere from three or four to six or seven. In the work we did looking at coverage of poverty and low-wage work, I think there were seven story frames that were repeated over and over again. In one we did on public education there were four dominant media frames that appeared over and over again. And what we know when we compare that with the public opinion data is that some of the story frames don't support the kinds of changes or reforms that we're trying to get across.

So this becomes diagnostic and also tells us we have to change the story, and here's how: we have to move it, let's say, from a story about sympathy for the poor to a story that's about how we can systemically change the U.S. economy to support better jobs and opportunities for low-income people. Or we have to move it from a story about education being framed as market based accountability to a story about education and the role it played in forming strong communities, let's say.

So that in a nutshell is sort of how we do it and what we get out of this. And on a number of these we've found big deficiencies that we've been able to correct strategically. We've talked about learning disabilities and then we go and we do a media – Phil actually did this media analysis years ago of how the news media was covering the field of learning disabilities, and we found out that mainly what they were writing about were criminals who were learning disabled, people who were abusing the public education system so they could get their kids free services and tutoring, and that sort of thing. And it's sort of like this kind of oddball story that was appearing over and over again, and the story that people wanted or needed, based on what we learned in the poll, was they needed stories about, you know – or what we call news we can use: stories about what to do if we think the kid has a learning disability.

So that then set us up for a long period of actually injecting those kinds of stories into the media marketplace and we were able to change the way that, you know, the issue was covered carried over a long period of time.

MR. SPARKS: And to put the dot to the "i," obviously in terms of evaluation, taking that same project on learning disability, we did another media evaluation eight to 10 years later, knowing then what the goals of the campaign were, compared how the media was covering learning disabilities on this specific topic and others that we'd identified as goals, and looked at where the media had been when we began the campaign, so it had this, again, dual role of providing a learning and a strategy for the campaign but also it was a very essential evaluation tool for the foundation.

As we hear our last presenter, John Russonello, who is a pollster, you remember during the last panel I said, in response to what Doug had said about polling, that you want to make sure that when you're doing benchmark polling that both the evaluator and the media strategists are involved in the process, and I gave an example of a project that we were doing where benchmark polling was embedded into a prepositioning poll for a particular project and then in another couple of years we're going to come back to this particular benchmark poll and redo the questions again. It was John was the contractor for that particular project and who embedded those questions into the poll that was taken on this particular subject.

John's done a lot of work for foundations and for nonprofits, both prepositioning and in some cases benchmark polling, and he was the author of the third paper, and I want him to share his lessons in learning from that particular paper.

MR. RUSSONELLO: Thank you, Phil. Since polling is always described as expensive I'll address it in that light. We talked about approach. Approach is something that I read in the paper and then it occurred to me that it sounds like something Yogi Berra would say: when you're doing evaluations, start before you begin. Before you are into the campaign you've got to figure out how you're going to evaluate the campaign. So after you've done – as Julia says, after you've done your goals you have to have the evaluation – especially for the polling – decided exactly what you're going to do beforehand and decide the methodology. So how do you decide?

Well, first off the approach should be: think small, not big. You always tell people, in your goals think big. When you're thinking evaluating, think small; think, let's take a piece of this and evaluate it. The bigger you get, the more muddled the evaluation will be. And I'll put a sharper point on that as we go. So don't think big, think small, and ask three questions: is your audience definable, is it measurable, and is it proportional to how much money you're going to spend on communications and how much effort you're to spend on communications.

What do I mean, by that? Well, what is it is not the final – that's the easiest question. You can clearly define certain audiences – donors of an organization, membership. If you want to do a communications campaign targeted toward parents of school age children, you can define that. So that's definable. Tell me how to change minds about the environment. Tell me how to change public opinion about this or that. Is it measurable? What I mean by measurable is do we have a definite time period in which you are going to communicate? Because to measure something it's got to have a beginning and an end that's very definite. And third, is it proportional to your resources? It should really – your resources should be in inverse proportion to your audience. Rather than spending a little bit of money on a big audience you should spend a lot of money on a little audience, so consider it in terms of inverse proportion. And if you do that, there's a better chance of having the evaluation come out right.

So there's definable, measurable proportion here in communications. Once you've satisfied these three criteria there are evaluations of three methodologies to evaluate. One is benchmark polls, which can serve as your message development device as well as your pre-poll – your pre- and post-poll before communications and directly after communications, and thirdly your tracking poll – your daily poll. These are polls that you take a sample every day for a particular amount of time for a number of days and you usually try and keep the sample the same number every day so you can track not just where your audience is at the beginning and at the end but how they – when they move, and oftentimes you can determine why they move, why is this useful, rather than just we moved public opinion or our audience from A to B, from the beginning to the end. Because if you're getting multiple messages you can see which are the messages worked at which time, depending on where the tracking goes. You can determine what that – depending on how long you do it and how long you're in the field, you can determine when the actual change takes place, according to what you're putting out.

Another example as to why it's good to be in the field consistently sometimes is standards. It's very interesting. About eight years ago if you said "standards" to people about education, they'd say huh – before Clinton. With Clinton, standards became really important. You started to do polls or focus groups and you put standards in a question and standards made everybody approve, almost no matter what it was, because standards meant improved learning for my child. I've been doing focus groups now for the last three or four weeks on different educational issues. If they even get a whiff of standards, whether it's parents, teachers, teachers in urban districts – poor urban districts – parent in suburban districts, standards is a bad word. It means standardization. So it tipped at some point.

Anyway, let me wind up by saying what would be some good examples of polling and evaluation? Well, one would be one we did for a client this summer where they put ads on television but they defined specifically the time that they were going to put it on there. They were going to put it on for six weeks and they were only going to put it on CNN, Fox and MSNBC. So we did a survey but we made sure the survey was only those people who watched CNN, Fox News and MSNBC. And we tracked it for all the days that it was on, and we could tell that client how many people saw the ad, what they thought about the issue that the ad was about, what they though of the organization that was mentioned in the ad. The pitfalls in these studies are when you try and ask for too much. When the clients have asked us, tell us that people are going to change their mind after three months of TV, well, they're not going to change their mind after three months of TV. I can tell you about awareness. The three things you all deal with on campaigns are on awareness, saliency and behavior, and polling is best done on just awareness and sometimes saliency, at some point, but it's not on behavior.

So there's more to say but I'll stop there. And just remember, start before you begin and think small.

MR. SPARKS: Thank you very much, John.

Questions or comments about that, or experiences that anybody's had – want to add something to the pot? Yes, Doug?

MR. GOULD: The only thing I wanted to add is more work needs to be done on looking at websites as a medium because some of them are really terrible; they're very bad at providing accurate information. Some are really good at engaging people, and so you just need to really look at websites as part of any one of these analytical adventures.

Q. I just wanted to ask Doug, with the webs – you just mentioned websites. Do you put that in your media analysis? Not looking at news on websites, but where people are – you know, how news is posted on other websites where you've placed stories – hope to place stories.

MR. GOULD: We have done that and then the other thing we've done is we've taken like the – a group of websites within a field, like all of the websites of major education reform organizations in the United States and taken them all together and looked at them in terms of accessibility – whether you could actually find them, whether the domain names were even remotely close to what they did or whether they were this long. You know, what was their – whether they were approachable and useful and so on and so forth.

So there are a lot of different ways to do it, but it's such a huge part of communications today, you just – you can do it as part of the audit, too, for an organization, but you can do it as part of the whole field analysis as well.

Q. Yeah, Phil, I just wanted to comment on your last point about polling because I think you can really also reduce the cost fairly substantially if you sort of go as an add-on to an omnibus poll that somebody else is doing so that rather than doing it – you know, getting the start-up costs and bearing them yourself, to do five or six questions at the end of an omnibus that somebody else is doing. It typically works pretty well.

MR. RUSSONELLO: This is – I had three things – there are several things that I wanted to say and I forgot them. One is things to look out for – things not to do. And one is when you're doing pre and post surveys, don't change firms because methodologies matter and it may sound esoteric, but that matters. And to the extent that you can avoid – I realize it's the biggest temptation in the world of nonprofits is to do omnibuses, but to the extent that you can avoid omnibuses, you'll be – you'll get more accurate because I guarantee you you'll screw yourselves and say, wow, we jumped 10 points. How'd we do that? Well, it's because the first time they put you with the soap questions. The next time they put you with the death penalty questions. Oh, I didn't know that. You know, you're at the mercy when you do –

MR. SPARKS: So buyer beware.

MR. RUSSONELLO: Oh, one time? I meant as an evaluation pre and post. But one time you can – yeah. Anyway, that's –

MS. COFFMAN: Can I add one thing to the list? The myth – I asked you this question about what not to do, which is I think many organizations have pushed me to say, okay, if we're going to do a pre and post poll, what percentage point can we expect to gain in terms of awareness from one time to another? And I always resist that, but I'm not an expert on polling, so I ask John.

MR. RUSSONELLO: Change in the opinions about an issue is – you're barking up the wrong tree. It's too difficult. It's too difficult to predict people are going to change their opinions about an issue. You can talk a little bit about increasing awareness, but tying yourself to a percentage is always dangerous. I completely agree with that.

MR. SPARKS: Especially over short periods of time.

MR. PERLOV: Just on that point, and one of the advantages at the Ad Council of having 50 campaigns is that we now are starting to develop some benchmarks and the kinds of campaigns that we can really focus – one area that we've been focusing on is sort of the – is whether this campaign is highly targeted, less targeted, et cetera, et cetera. And so I think there are some norms that are slowly beginning to emerge from our learning, but again it is a case-by-case situation.

I was just curious, John, to your point too about – I understand the issue about the question of awareness and understanding of issues as being something you can do fairly well in polls, but not about attitudes and behavior and I was just curious on that end because we do use polling to ask on those issues. We try to be pretty discreet about the specific attitude or specific behavior, and I'm just curious what your hesitancy is there.

MR. RUSSONELLO: Well, first if you were to do a poll on the death penalty and you were to do some advertising at the Ad Council for, say, six months on the death penalty, I dare say that you wouldn't find much of any change in opinion on the death penalty. It depends on the issue. Things that are so strongly held on issues and these are – many of the issues on family planning. We found that out. You know, the foundation wanted to do lots of TV. They wanted to change – you know, the ad firm told them they were going to change public opinion on family planning. They weren't going to change public opinion on family planning. They could maybe raise the saliency of some things. They could raise some awareness of some things. That's what I mean.

On so many issues I talk my clients out of polling. They hate me –

They do. My partners, they say why'd you do that again? Because I tell them, at the beginning of your campaign when you're starting, think of how many people can go – the Great Lakes is a good one. Joyce is doing another poll that we did a poll for them two years ago – nine states, Great Lakes. Now they want to do another one.

Well, we're going to do another one, but I'm going to urge them not to have it be a tracking or pre and post evaluating poll. I'm going to urge them for it to be another good snapshot of what's going on and not to expect it as evaluating because what they've done is they've done some good studies in the last three years. They've done some brochures, some websites, some things that have told people to go buy this product, go to this store or that store.

Create other types of evaluations. How many people signed up for your program? How many people signed the thing at the beaches? How many people bought t-shirts? How many people went to your website? Be creative. Think of other contacts – ways to measure whether or not you're reaching people.

Polling isn't always the answer because in fact they're not going to show their efforts, although they've been successful – on their little scale, they have been successful. They haven't been crummy. They've been well done, but they're not going to show in three years changed public opinion about the Great Lakes in nine states. It's not going to happen.

MS. MINCH: I just wanted to sort of loop back to a point Lori made earlier when she was speaking, which is this is a pretty small conversation. When you look at the number of folks in this room, and this is – you know, this is a pretty limited and I think she even used the word elite conversation, and in my mind and from the perspective of the practitioner, the working papers are actually some of the best tools that we have to open this conversation, and I really want to say that I'm excited that we have this as a way to kind of open the door and give folks something to do in the meantime.

You know, I sort of feel like this group is really engaged in the work of advancing the field and figuring out the hard questions on evaluation, but the briefs that were presented actually represent a way for us to bring other folks in and to allow them to participate in some of the tools that have been invented to date.

And so my question is really what's next? What are some of the other pieces that we see and you – Phil – see as needing to be documented and shared in much the same way these three have?

MR. SPARKS: For my part, as my mother used to say, put a pin there because that's my closing remark. But also, if people have ideas it will also be part of my closing remarks, I'm going to explain a way in which I'd like to get a formalized feedback mechanism going of today's conversation.

Joanne, did you have a question or a comment?

MS. EDGAR: Yeah, a comment and a question – a quick one though.

Julia, I thought that your box on essential strategic communication practices was so important that I think pieces of it should probably be in the working paper number five because it seems to me that it includes guidelines for everything that we need to think about before we even really get into the details of coming up with an evaluation plan. And particularly the part about support within your institution and support from your management and from your colleagues because if you don't have that, it doesn't quite seem worth doing it.

And then a question, Doug, for you. Are there ways now with the new technology to track coverage in community media and community radio?

MR. GOULD: Well, my sense is that more and more, yes, that there – more and more of these publications are online or they have online components which carry some of the same stories that appear.

MS. EDGAR: But do you have to go after each of them individually, or can you go to the search engines and find them?

MR. GOULD: No, a lot of them are in the search engines and you can get them that way.

MS. EDGAR: Radio too – community radio too?

MR. GOULD: No, I don't know about that.

MR. SPARKS: Radio is, as you know, the hardest medium to track in any case.

Any other closing comments or questions? Thank you.

Following up on exactly what Holly just said, and doubling back to where we were in the morning, the next two years are going to be spent information gathering and in information dissemination. By that I mean on the last point what else do we need to do? As you all have looked at this project and its work so far, the five working papers and the three working briefs, and I'll articulate this in an e-mail to you in the next couple days and before the holidays, what's missing here? If we were to do some additional research over the next couple of years to continue to produce information that might be shared with the broader community, what else do we need to do?

And in terms of information-sharing and workshops and things, within your own communities, and you represent a broad range of community, I'll be asking you in an e-mail, who should I be getting to, but more importantly can you help me get to them? If there are particular communities or organizations or audiences that you think would benefit from a summary of the information that we have presented here, who are they and how can we get to them, because those will be two of the main components that we talk about over the next couple years.

To you foundations, as I said in the beginning, we have three foundations that have funded on their own with their own grantees a way in which to use portions of the guidelines that we've already prepared for small, medium, and large campaigns and in each case these media evaluations are going to be done by sometime in '06, so are there other opportunities with other foundations where you might be willing to advance some resources to use whatever evaluator you want and whichever pieces of the evaluation guidelines that are suggested to help us road test the findings in paper number five?

So the end of this story is certainly that we haven't come to any kind of final conclusions today. We've only begun a dialogue. As Holly said, as Lori said, and as other people have said, I think we are an elite audience and so we're going to try to find ways in which to expand out the message, not the least of which will always be the internet.

I hope everybody has found today's session useful and at least we've answered some of the opening questions from this morning. Why did you come and what did you get out of it? Acknowledging that this is a conversation that will continue at least under the Consortium's aegis over the next two years and we hope we're providing, frankly, a very useful service to both nonprofits and foundations in this process and that we can help come up with some guidelines that will be useful for those who invest money in the area and those who spend the money in the area.

Thank you very much.