

# **CLOSING IN ON CHANGE**

MEASURING THE EFFECTIVENESS OF YOUR CAMPAIGN

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# INTRODUCTION

Most charities measure their impact in some way, and for an increasing number it has become integral to their work. This is driven in part by funding requirements<sup>1</sup>, including a move towards payment-by-results commissioning.

However, this overall trend is not evident across all parts of the charity sector. Our conversations with campaigning charities have made us aware that many do not measure the impact of their campaigns because they lack the time and expertise, or doubt it would add value to their work. Some monitor selected results, but focus mainly on outputs rather than outcomes—therefore telling the story only of their activities and not their achievements.

Evaluating the impact of your campaign is essential if you want to demonstrate what you are achieving and learn how to improve. In this short guide, we highlight a number of readily available evaluation resources and explain how [NPC's four pillar approach](#)<sup>2</sup> can help you integrate measurement as part of your campaigning work.

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<sup>1</sup> Pritchard, D., Ni Ogain, E., Lumley, T. (2012): [Making an impact](#). New Philanthropy Capital.

<sup>2</sup> Kazimirski, A.; Prichard, D. (2014): [Building your measurement framework: NPC's four pillar approach](#). New Philanthropy Capital.

# WHAT IS CAMPAIGNING?

Campaigning aims to achieve high-level change; it targets decision-makers, as well as behaviours and attitudes across a wider section of the public. Campaigning is defined by NCVO<sup>3</sup> as:

*'organised actions around a specific issue seeking to bring about changes in the policy and behaviours of institutions and/or specific public groups, (...)the mobilising of forces by organisations and individuals to influence others in order to effect an identified and desired social, economic, environmental or political change.'*

The relationship between service delivery and campaigning is often described as one between symptoms and causes. A service can help relieve the symptoms of an individual's problem, but it will not affect the circumstances that gave rise to that problem in the first place. Campaigning strategies, therefore, seek to address the fundamental causes of an issue—such as the structural factors affecting homelessness, or more concrete concerns like a planned hospital closure. Charities approach a social problem in different ways depending on how they plan to achieve their objectives. Take food poverty, for example: the [Trussell Trust](#) runs food banks to support individuals in times of crisis, while the [Matthew Tree Project](#) campaigns on policies to tackle the underlying causes.

Campaigning activities and objectives are very diverse. In this paper, we distinguish between two main types of objectives: **policy influence** and **behaviour change**.

The first is mainly concerned with changing or protecting policies, while the second is about changing the behaviour of 'the public' or specific groups—their attitudes, opinions or actions.

1. Policy influencing campaigns employ an array of different tactics—from advocacy and lobbying work to research, advice and recommendations for policy content or processes, and direct action/activism, including demonstrations or mail petitions. Box one gives an overview of the most common tactics used in this work, and examples of organisations employing them.
2. Behaviour change tactics can overlap with policy influencing methods if they target policymakers or civil servants, for example. Box two discusses this in further detail and provides examples.

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<sup>3</sup> Lamb, B. (2011): [The Good Guide to Campaigning and Influencing](#). NCVO.  
Brian Lamb is an NPC associate.

**Box one: Policy influencing**

There are two main tracks for influencing policy: the **'inside', cooperative, track**; and the **'outside', confrontational, track**. The 'inside' track describes lobbying, negotiation or advisory activities that aim to influence policymakers or other central stakeholders by engaging with them directly. The 'outside' track seeks to appeal to decision-makers indirectly by mobilising public support.

**Examples.** The Overseas Development Institute, a UK think tank on international development, works mainly within the inside track to provide policy briefings and technical advice on a number of issues. Others using inside track tactics will commonly have meetings with politicians or sit as members of political committees or all-party parliamentary groups. Notable champions of outside track tactics include Amnesty International and Greenpeace. Amnesty advocates for the abolition of the death penalty or the closure of the Guantánamo Bay detention camp through petitions; whereas Greenpeace uses direct action to achieve its goals, such as climbing The Shard in London to protest against the oil company, Shell, drilling in the Arctic. Here you can see how campaigns do not always focus on influencing the policy of elected officials or civil servants—sometimes other decision-makers, such as chief executives, are the most important stakeholders.

*Adapted from: Jones, H. (2011): A guide to monitoring and evaluating policy influence. Overseas Development Institute (ODI).*

**Box two: Behaviour change**

Behaviour change campaigns seek to alter the way people behave. This could be to promote better health (including smoking cessation, limiting alcohol consumption, and encouraging exercise or first aid courses), to change behaviour towards certain groups (such as immigrants or people with disabilities), or to prevent certain behaviour (eg, domestic violence, FGM or other crimes).

**Example.** Rethink Mental Illness and Mind launched the Time to Change campaign in 2007 to end mental health stigma and discrimination. The campaign targets several groups; it aims to change the attitudes and behaviour of employers, for example, by providing practical support and advice to help them support employees through periods of mental ill-health and ultimately reduce discrimination in the workplace. We present an evaluation of Time to Change on page 17.

*Read more about the campaign at [www.time-to-change.org.uk](http://www.time-to-change.org.uk).*

# MEASURING THE IMPACT OF CAMPAIGNING

Campaigning is a powerful tool for bringing about social change, but it is a risky pursuit for many charities, involving as it does the spending of often scarce time and money on activities for which success is far from guaranteed. Measuring the impact of your campaigning will raise your confidence in pursuing this course, as well as fulfilling your responsibility to assess whether—and how well—your strategy works. Furthermore, charity trustees are legally bound to spend resources in the most effective way possible to achieve the charity's objectives. A good evaluation framework will allow you to monitor whether or not your campaign lives up to this promise, bringing advantages that include:

- **Learning on the job.** Campaigns are often complex and long term. They can involve a range of 'tactics' running in parallel—a social media campaign, public campaigning stunts, meetings with politicians—and understanding which of these are most effective is subject to changes in the external environment, especially pronounced over the longer term. Continual assessment will bring clarity, and placing this within an evaluation framework will help you proceed in a more structured and evidence-based way, relying less on instinct and anecdotal information. Ultimately, discovering what does and does not work will give you scope to review and revise your campaigning strategy as you progress.
- **Accountability to stakeholders.** One of the risks of campaigning is to your charity's reputation—the potential loss of confidence in your organisation, which may result in a decline in donor and volunteer support. A membership-based charity, for example, will need to communicate very clearly to its members how they are supporting 'the cause' through the charity's campaigning. If you can explain the causal links between your tactics and the social change you hope to bring about—and report on your progress—members, funders and beneficiaries (those you are campaigning on behalf of) will find it easier to understand the bigger picture. The same applies to your internal stakeholders, such as staff and volunteers, who you will need to keep engaged.
- **Appealing to funders.** Funders increasingly want to see evidence of impact as a growing number become more strategic in their approach. Demonstrating how your campaigning work has contributed to change will help you attract funding and will also make it easier for funders to monitor their own impact.

## Challenges

Evaluation of service delivery is by no means simple, and measuring the effectiveness of campaigning activities is almost always more complex. The main challenges include:

- **Outputs versus outcomes.** It is often easier to focus on outputs rather than outcomes. Outputs are usually something you have control over and can count—the number of events held or leaflets handed out, for example—and given how difficult it is to measure campaigning outcomes, it can sometimes be helpful to use outputs as proxy indicators. However, you can only show that your campaigning has an effect if you can evidence the link between those events or leaflets and your desired intermediate or final outcomes.
- **Causality, consistency and predictability.** Linking campaigning and outcomes is complex; you may plan exactly the same activities for two different campaigns and get two completely different outcomes. What worked before might not work again because the external environment has changed—in fact, it will often change during the course of your campaign.
- **Time frame.** The pace with which outcomes are achieved is similarly hard to predict, further challenging the flexibility of the measurement framework. Many campaigns run over a number of years, and change will

happen suddenly in some cases and incrementally in others. This can make it hard to judge whether, after a certain period, the effects of the campaign are still forthcoming. Developing a measurement framework with intermediate outcomes can help you track whether you are still making progress.

- **Contribution and attribution.** In campaigning, a variety of external factors are beyond your organisation's control, you will often have no counterfactuals ('what would have happened if we had *not* run this campaign?'), and a number of other organisations may be running campaigns in a similar area. This makes it difficult to be certain you were entirely responsible for the change (attribution). In most campaigning work, it is therefore more important to demonstrate that you made a *contribution* to the change.
- **Data collection.** In some campaigns, it can be difficult to collect data from the people you want to influence. If you are targeting top-level decision makers, it can be hard to get an interview and even more challenging to get an answer from them about why they did (or did not) change their mind on a particular issue. Indeed, there are those in government who say they are not influenced by campaigns.

We believe our approach can help you address these challenges by breaking down the measurement of a campaign into four steps so you can apply them a flexible way to suit your particular context.

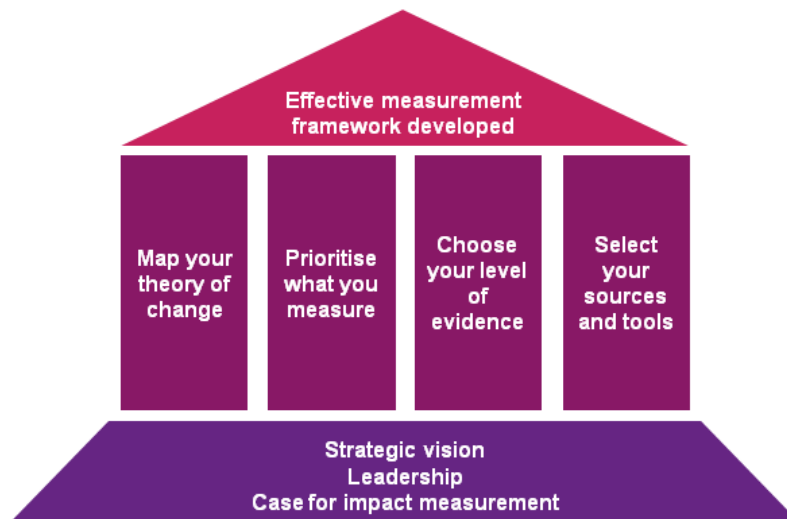


# THE FOUR PILLAR APPROACH

In June 2014 we published our [four pillar approach to measurement](#)<sup>4</sup>—guidance for developing and implementing an impact measurement framework. The approach aims to help organisations understand and improve their activities as well as report on their progress. We have developed it through our work with a number of charities, taking into consideration that there is no one-size-fits all solution. Our approach offers flexibility, so that with careful thought and decisions at each stage it can be implemented to fit your organisation. See appendix one for the key terms used in this guidance.

A solid foundation of good leadership and buy-in from senior staff and trustees, a strong commitment to the value of impact measurement, and resources to invest are essential before you get started. Once this basis has been established, you can then start working through the four key steps illustrated in figure one.

Figure one: NPC's four pillar approach



## Step one: Map your theory of change

It can be hard to know where to start when measuring the impact of a campaign. Creating a [theory of change](#) provides clarity and helps you prioritise what and how to measure in a systematic way. With a theory of change you can track the progress you make towards your final goal; if the causal links between intermediate and final outcomes are well evidenced and you can show improvements to intermediate outcomes then it is reasonable to expect the final outcomes will occur. This way you can work out what you can attribute to your work.

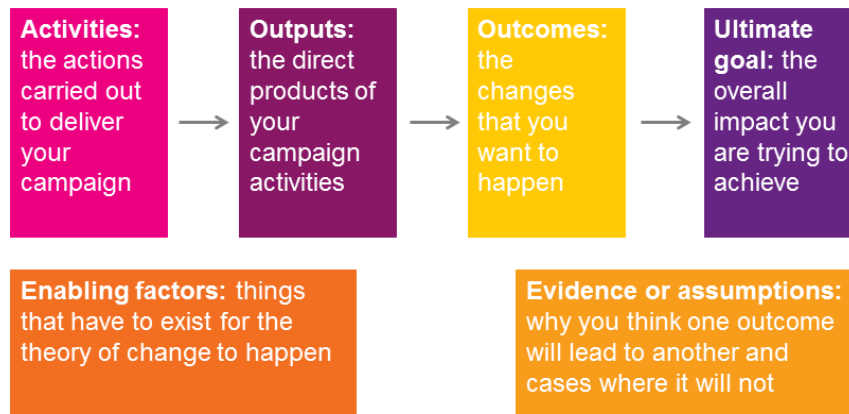
A theory of change is usually a diagram of the causal links between a charity's activities and its goals. It captures the key aspects of what you want to achieve and how you plan to do it in as few steps as possible. [Campaigning for change: Learning from the United States](#)<sup>5</sup> draws on a variety of literature on the subject and describes in detail how to develop a theory of change for campaigning work.

<sup>4</sup> Kazimirski, A.; Prichard, D. (2014): [Building your measurement framework: NPC's four pillar approach](#). New Philanthropy Capital.

<sup>5</sup> Lamb, B. (2011) [Campaigning for change: Learning from the United States](#). NCVO.

Figure two illustrates the components of a theory of change, but the real-life diagrams for your campaign will look much more complex and will vary depending on whether you are campaigning for behaviour change or policy influence.

Figure two: Theory of change components



A theory of change maps backwards from the end goal, linking activities with outputs and outcomes by asking if it is possible to say ‘so that...’.<sup>6</sup> For instance, if looking at an outcome such as ‘shift in social values’, you need to ask which of your activities and/or outputs need to happen *so that* the social values shift (*so that* policies change, *so that* certain conditions for people change). These causal chains vary in complexity depending on the context, but they should always be as simple as possible without missing out any key links. This model prompts you to:

- Set a **clear and testable hypothesis** about how change will occur and establish the success criteria for your campaign. This will help you to communicate to your stakeholders that you are making progress during the campaign, and will allow you to adapt your strategy to changes in the external environment without changing your final goal. Sometimes it can be useful to have multiple hypotheses, or theories of change, so that you can test which is the most accurate as your evidence grows.
- Systematically **test the underlying assumptions to your strategy**, such as what political, social and economic factors could influence the outcome. For example, do you expect policy change to happen in a linear process or in large leaps? How do you assume the behaviour change you hope to see will happen? Which decision-makers are you targeting and why?
- **Find any gaps** in the stages of the process. Charities often discover that ‘so that’ links are missing and are needed to complete the chain.
- Allow you to **combine a focus on interim outcomes with tracking of long-term impact**. What has and has not worked is an integral part of influencing and learning. With a theory of change you can be flexible and adjust your measurement as the external environment changes and you adapt to it.

A theory of change will help you to provide coherent evidence that your activities caused, or contributed to, the change. If you are interested in more information about this model, our [guidance for the Youth Justice Board](#)<sup>7</sup> provides a comprehensive step-by-step approach to creating a theory of change.

### Sector theory of change—mapping your sector’s collective impact

As part of developing your theory of change, it can often be useful to think about your role in the sector. Mapping out where, for instance, policy influence is important in addressing causes for the social problems you work with, and clarifying what your sector’s collective impact is, helps you understand where your campaigning fits in. This can often be a sector-wide activity that you do in partnership or consortium.

<sup>6</sup> Lamb, B. (2011): [Campaigning for change: Learning from the United States](#). NCVO.

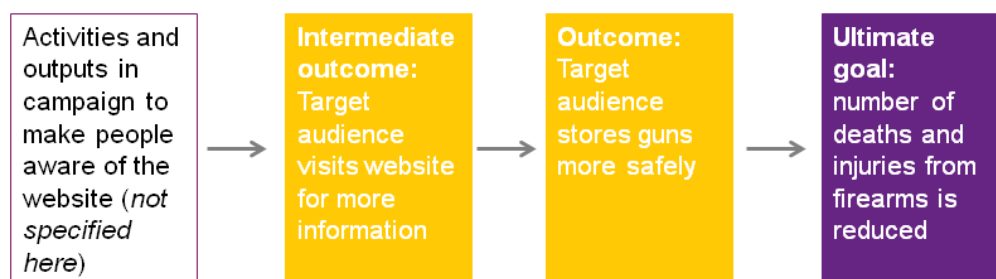
<sup>7</sup> Noble, J.; Hodgson, L. (2014): [Theory of Change Guidance](#). New Philanthropy Capital and Youth Justice Board.

## Step two: Prioritise what you measure

In any campaign, resources are finite and collecting data in an ad-hoc, opportunist way may seem the most convenient option. However, collecting the right amount of quality data is key to a good evaluation, and your theory of change will help you decide where to focus your measurement efforts. You might also consider collecting data on possible negative unintended consequences of your campaign, as being aware of these will help you improve your work. To decide which outcomes to measure, ask yourself two questions:

- **Has anyone already proved the causal link between outcomes in your theory of change?** Desk research saves time and money in comparison to collecting your own data. Look for existing research to support your causal links first, and then focus your data collection efforts on the parts of the chain that lack evidence.

*Campaigning for Change*<sup>8</sup> features an example theory of change for an American charity seeking to reduce the number of deaths and injuries from firearms by providing information about the safe storage of firearms. There are three key links in its theory of change:



1. Importantly, the charity must single out the causal mechanism(s) it is able to influence. The causal link from the intermediate outcome ‘*target audience stores guns more safely*’ to the final outcome (‘so that...’) *the number of deaths and injuries is reduced* is **well evidenced**—research has established that when groups, such as children, have less easy access to firearms, there are fewer accidents.<sup>9</sup> The number of homicides, however, is less likely to be influenced by safer gun storage, and so the charity must be clear it is indeed through a reduction in accidents (not in gun violence) that it aims to achieve its objective.
  2. Moving backwards through the theory of change diagram, another outcome—‘*Target audience visits website for more information*’ is **not yet evidenced**, but is easy to measure using Google Analytics or a similar tool to track a website’s traffic and traffic sources.
  3. Now, the crucial **link to establish** for the charity is whether people who visit the website do in fact store guns more safely. If this is the case, then the charity is building strong evidence that its website has contributed to the decrease in deaths and injuries from guns.
- **Is it really important for you to have data on this outcome?** An important part of developing a measurement framework is to decide how extensive your data collection needs to be. It does not need to be highly complex and should be proportionate to the activities you are undertaking. Irrespective of whether your campaign is large or small, you need to ask yourself which outcomes are the most essential and meaningful. The number of Twitter followers is easy to measure and can act as a good indicator or intermediate outcome, but measuring this in isolation gives a false sense of achievement. What you need to know is whether and how the number of followers moves you closer to your goal—*who* follows you and whether important stakeholders re-tweet what you say might act as indicators of this.

<sup>8</sup> Lamb, B. (2011): *Campaigning for change: Learning from the United States*. NCVO.

<sup>9</sup> For instance: Cummings, P., C. Grossman, D., P. Rivara, F., D. Koepsell, T., (2014) *State Gun Safe Storage Laws and Child Mortality Due to Firearms*. JAMA. 1997;278(13):1084-1086

The outcomes you choose to measure should include those that you directly influence, and those that are most important to your mission, and they should enable you to produce credible data without being too costly to measure. Box three lists the main types of outcomes for campaigning work. There are a number of good frameworks that can help you understand and be specific about what kind of outcomes you hope to achieve from your policy influence or behaviour change campaign, some of which are listed on page 16.

### Box three: Types of outcomes

When measuring changes in policy, you have a choice of:

- **Subjective, intrinsic, or soft outcomes.** For policy/influencing work these could include views of policymakers and practitioners on your influence, while for behaviour change campaigns they could include social values or attitudes of the public towards a certain issue or group of people.
- **Observable, extrinsic, or hard outcomes.** For policy/influencing work these could include changes in legislation or policy content, or improvement in policy processes, while for behaviour change campaigns they could include people's actions or lack of actions.

Both soft and hard outcomes can be intermediate outcomes or the final goal itself.

## Step three: Choose your level of evidence

Before you decide *how* to collect data, you must first determine how rigorous and credible your evidence needs to be. This should suit the needs of your different stakeholders, as well as your own resources and capabilities—remembering the importance of focusing on the quality of measurement before quantity. As the results of campaigning activities can be harder to pin down than those of service delivery, funders often push less for solid evidence of impact in campaigning than in other areas (or, if they want solid evidence, they stay away from campaigning). This does not mean that you should not provide solid evidence—if you are able to measure the impact on people's lives of your campaign you will be able to help your beneficiaries more effectively. You need to choose a level of evidence that is proportionate to the size of your campaign and for which you can realistically collect data.

### The simplest approaches

#### Tracking *how* the change happened.

Qualitative methods can help you explain why your campaign is or is not successful. Outcomes of campaigning work are influenced by a variety of complex external factors, so exploring the *why* and *how* through qualitative approaches is key to understanding the links between campaigning work and outcomes. Many charities already collect this kind of data, some without realising its value for evaluation. Qualitative approaches will typically involve interviewing people, looking at key documents, and creating a narrative of how your work contributed to the change you are seeing. This can be through comparing cases (eg, individuals, groups of people, or places) within or across one or more campaign, and using the similarities and differences to draw conclusions about causes and impact. You can also do it through theory-based approaches where you almost create a 'timeline' for your influence using observations by staff, evaluators, beneficiaries, and other stakeholders to describe in detail how a campaign influences different people at different times and places. This helps you identify the mechanisms that generate the cause and link them to contextual factors. Common methods for this include process tracing, which is a tool for analysing key documents in a systematic way to link an idea—a policy idea, for example—to influences both from your campaign and from external factors to understand how it has developed.<sup>10</sup>

<sup>10</sup> Tsui, J.; Hearn, S.; Young, J. (2014). *Monitoring and evaluation of policy influence and advocacy*. Overseas Development Institute (ODI).

### Tracking *the extent* to which the change has happened.

Quantitative methods can help you test and demonstrate that your campaign is successful. **Statistical approaches** enable you to find patterns in quantitative data to see if the expected outcomes frequently follow the 'cause' (the campaign). It is important to remember that both numbers and words can be analysed in this way. Approaches include polls, 'before and after' comparisons, correlation, regression analysis, and other statistical models. Statistical content analysis is used by many charities that campaign for policy changes; for example, they look at how uptake of certain language (eg, 'female genital mutilation' instead of 'female circumcision') has progressed in the media and political speeches.

#### Tools to measure change: Policy change indexes

If you aim to change policy, it might be useful to use a *policy change index* in your evaluation approach. Two common indexes are:

- **The Migrant Integration Policy Index.** This online resource provides a comprehensive tool which can be used to assess, compare and improve integration policy in 31 countries across a broad range of differing environments.
- **The Environmental Policy Index.** This index ranks how well countries perform on high-priority environmental issues in two broad policy areas: protection of human health from environmental harm and protection of ecosystems.

Indexes such as the two above can help you answer the most important question—to what extent is the change really happening—as well as compare across cases and time to understand causes for the changes you are (or are not) seeing.

Sources: [www.mipex.eu](http://www.mipex.eu) and [www.epi.yale.edu](http://www.epi.yale.edu).

### More complex approaches

If you have enough resources and it is relevant to your campaign, you can collect very strong evidence of what works through **experimental approaches**. These allow you to compare differences in outcomes between people who experience your intervention and people who do not. If people are randomly assigned to the two groups, such measurement provides the highest levels of evidence. This kind of measurement may seem inapplicable to some campaigning work, but experimental approaches do in fact have large potential to evaluate and inform campaigning. For some policy work—to influence a number of local authorities or change the behaviour of selected groups of people, for example—methods such as AB testing, where you test different versions of your activity, can be helpful. Drawing again on the weapons safety example, AB testing could help test the most effective way of telling people to store guns safely. The charity could easily develop two slightly different versions of their website, marketing each in two separate but similar areas, and then test how the message is received.

The UK Governmental Behavioural Insights Team (the Nudge Unit) is a good resource for examples of experimental approaches to measuring the effect of behaviour change campaigns. In a recent study using randomised controlled trials, for example, it measured the success of different approaches in getting people to join the Organ Donor Register.<sup>11</sup>

<sup>11</sup> Behavioural Insights Team (2013). [\*Applying Behavioural Insights to Organ Donation: preliminary results from a randomised controlled trial\*](#). Cabinet Office.

## A combined approach

Measuring the impact of campaigning work can be complex, and **combining different approaches will strengthen your evidence**. Supporting quantitative with qualitative measurement (or vice versa) will at the same time help you understand which of your activities have been important and which have been less helpful.

### Step three applied: End letting fees

**What:** Campaign to abolish the estate agent letting fees for tenants and improve letting agent practice

**Who:** Shelter [www.shelter.org.uk](http://www.shelter.org.uk)

**When:** Started in 2012

**Outcomes:** There has been significant change since Shelter began its campaign. The law now allows tenants to complain about letting agencies to an independent ombudsman, and letting agents are required to disclose all fees prior to contract signing and payments of any kind. Furthermore, the Labour opposition has pledged to ban letting fees as part of the housing bill they will introduce if they are elected to government.

**Evaluation:** Shelter runs a small number of campaigns in 'waves' over a few weeks or months each year. It evaluates each wave separately, as well as cumulatively once a campaign has finished.

Shelter used an **experimental** and **statistical approach** to evaluate the first phase of the campaign to learn which framing of its message was most effective, and how it could engage the largest possible audience. It tested three different ways of arguing against letting fees, and through **quantitative analysis** looked at how different groups of stakeholders responded to each version. Shelter learned that far more people and organisations responded positively to a message of letting agents 'charging twice (ie, both landlords and tenants) for the same piece of work' than the alternatives. With the 'double charging' message Shelter was able to mobilise both landlords' and tenants' interests and hence leverage more power in pressuring politicians.

Through **qualitative analysis** of the way campaigns have or have not achieved impact, the charity is able to compare across campaigns and build their intelligence about what works, taking into account the political context. For instance, Shelter's campaigners find it helpful to refer back to past legislative campaigns to see if they provide lessons for the present, looking at similarities like which stage in the parliamentary cycle the proposed policy is in.

*Source: Antonia Bance, Shelter*

## Step four: Select your sources and tools

Once you have decided your level of evidence, you need to think about what data to collect, and then select or develop measurement tools or data sources to capture it. Again, your theory of change will guide you. Some of the causal links towards your end goal will be supported by existing evidence—whether your own work or produced by other organisations or academics. Crucially, your measurement tools need to be fit-for-purpose and capture the change you want to bring about. There are four key questions to answer:

- **Which types of data do you need?** You should decide which types of qualitative and/or quantitative data you need to collect in order to apply your chosen method of analysis. For some types of campaigning, your choices might be limited, and you may therefore want to first map what data you have access to and then see which options this gives you for analytical approaches.

- **When will you collect the data?** You should consider at which points to measure in order to evidence that you have contributed to the change (ie, when do you expect the change to happen?). It can be helpful to have a baseline study capturing the situation before you start your campaign, so that you have a point of comparison for assessing your programme's impact. However, the pace with which campaigning activities can start—as a reaction to specific events, for example—sometimes makes it impossible to collect baseline data. You also need to consider the frequency, duration, and timing with which you measure during and after the campaign activities. For instance, do you think it is likely that success will come quickly, or will it take years? Will you do a follow-up study to determine whether the change has been sustainable? These decisions might need to be revisited at various points during the campaign.
- **How will you collect the data?** To save resources, you should map how much data you already have from your own or somebody else's collection, and how much you need to collect yourself. You will always have to carry out one important part of data collection yourself: the logging of your day-to-day activities and the progress you are making. This might be recording meetings with decision-makers, writing down verbal feedback on your campaign, or noting down small changes in the opinions of people you are trying to influence. Individual activities, and even your overall strategy, will change along the way as you learn what works or does not work, or you respond to changes in the external environment. When you evaluate, it is crucial to be able to look back at your exact activities at certain points to hold them against other events happening around the issue at the time.
- **From which sources will you get the data?** Irrespective of whether you collect data yourself or use data collected by others, you need to understand the strengths and weaknesses of the way it is collected, so that you know how to interpret the information. When assessing *secondary data* (collected by someone else), it can be helpful to use NESTA's [standards of evidence](#) in order to understand the strength of the evidence it provides.<sup>12</sup> This can also help you assess the strength of evidence for your own data sources (*primary data*). Alternatively, if you cannot get information from the individuals you have a direct impact on, consider collecting it from an *informant*—someone who is well-placed to comment on the change. For instance, for a behaviour change campaign to stop a specific group of parents hitting their children, you might not be able to get parents and children to talk to you about whether the abuse has ended, but you could interview the children's teachers or social workers. Collecting informant data is also particularly relevant when you are trying to influence politicians; they may not tell you if or why they changed their mind, but you might get a good idea of this from talking to experts or commentators.

Once you have decided on the above questions, you can choose or develop appropriate tools. There are a large number of methods for data collection and analysis in campaigning work, and ODI's [Monitoring and evaluation of policy influence and advocacy](#) provides an excellent guide.<sup>13</sup> The table on the following page shows commonly used tools and methods for campaigning.

<sup>12</sup> Puttick, R.; Ludlow, J. (2013): [Standards of evidence: An approach that balances the need for evidence with innovation](#). Nesta.

<sup>13</sup> Tsui, J.; Hearn, S.; Young, J. (2014). [Monitoring and evaluation of policy influence and advocacy](#). Overseas Development Institute (ODI).



## Common quantitative methods and tools

- **Surveys/questionnaires:** Surveys and questionnaires are a common form of measurement tool because they can be targeted to the right population and customised around the outcomes you want to measure. We recommend using existing surveys that have been created by researchers, but if you need to develop your own question (or questionnaire), it is best practice to develop questions/questionnaires from existing material—selecting questions that are most appropriate to what you need to ask.
- **Psychometric scales:** Psychometric scales are a particular type of short questionnaire. They are designed by psychologists and sociologists to measure subjective feelings, beliefs and attitudes, such as self-esteem or empathy. If you run, for instance, a behaviour change campaign which aims to improve young women's body images, you could use a psychometric scale to test their self-esteem and perception of how they look.
- **Quantitative content analysis:** Analysing the extent of linguistic changes within selected channels such as media, speeches or policy documents can often form an important part of measuring your impact. If you can show that policymakers or the media has adopted a certain language after you started your campaign to push for this language, you have built a cornerstone for your impact evidence.

## Common qualitative methods and tools

- **Interviews:** Conducting interviews is central to many of the most common qualitative methods. Interviewing key stakeholders, influencers or informants helps you understand the complexities of how and why change has occurred.
- **Observation/ethnography:** Observation involves the systematic observation and recording of behaviours and interactions of people in their environment. Observation can be useful in recording information, including on behaviour, that is otherwise difficult to obtain with other research methods.
- **Focus groups:** With this method you ask a group of people about their thoughts, attitudes and beliefs towards a topic of interest. Questions are posed to the entire group and people share their thoughts in an interactive manner. Focus groups can be very useful to explore why a campaign is or is not leading to change.
- **Anecdotes and feedback:** For any campaigning work, it is useful to keep an impact or evidence log in which you register both formal and informal feedback on your work and results. This will help you capture the nuances of your impact. You can be flexible about how to keep the log—NPC recommends using an Excel spreadsheet.
- **Social network analysis:** This is an analytical tool for studying relationships between stakeholders. It is particularly helpful for policy influence work, as it can help you understand how formal and informal relationships work and monitor the changes in these along with structures of networks.
- **Process-tracing:** This analytical method applies mainly to policy influence work and uses interviews along with qualitative analysis of documents to trace (policy) ideas—for instance, from inception to political salience and all the way to implementation. The method is helpful when exploring new causal hypotheses about how the change happened.

Sources: Kazimirski, A.; Pritchard, D. (2014). Lamb, B. (2011). Tsui, J.; Hearn, S.; Young, J. (2014). Halperin, S.; Heath, O. (2006).



## Test the tools

If you have the time and resources, it can be extremely helpful to **pilot the tools** before using them to evaluate your work. Test them with a sample of people similar to those you will target in the campaign, and check for mistakes and glitches in the tools, the time it takes you to use them, how easy the tools are to work with, and the response they get from your sample population. This will give you an idea of how demanding it will be to analyse the data you expect to get, and will help you limit the extent of the data collection so that it is proportionate to the resources you plan to spend on the analysis.

### Step four applied: Time to Change

**What:** A behaviour change campaign to address the stigma associated with mental health

**Who:** Mind and Rethink Mental Illness [www.time-to-change.org.uk](http://www.time-to-change.org.uk)

**When:** Started in 2007 (but main activities started in 2009) and is still running

**Evaluation:** Time to Change is an example of a campaign for which tools have been specifically developed, and funders have invested in extensive data collection to enable frequent evaluation. The UK Department of Health started collecting **survey data** in 2008, providing **baseline and follow-up indicators** of mental health-related knowledge, attitudes and behaviour among a nationally representative sample of adults in England. The surveys test people's knowledge and attitudes through their reaction to statements such as 'medication can be an effective treatment for people with mental health problems,' and 'mental illness is an illness like any other'. The large datasets of **quantitative data** have enabled **statistical analysis** with very robust results. One study has indicated a significant impact in terms of improvements in intended behaviour and attitudes between 2009-2012, but no improvement in knowledge and behaviour. As there is no control group, the study cannot attribute the changes to Time to Change. However, a study evaluating the social marketing part of Time to Change specifically has suggested a significant relationship between higher campaign awareness and better knowledge, attitude and behaviour outcomes.

*Sources: Evans-Lacko, S., Henderson, C., Thornicroft, G. (2013): Public knowledge, attitudes and behaviour regarding people with mental illness in England 2009-2011. The British Journal of Psychiatry.*

## NEXT STEPS AND IMPLEMENTATION

Once you put your measurement framework to use and start analysing the data you collect, you can test whether your theory of change works in practice.

Questions to ask include:

- **Does your quantitative and qualitative data support your theory of change?** Do the causal links work as you expected them to, and how much difference do you make—what is the scale of your impact?
- **How do your results compare with similar campaigns or organisations?** Although there are rarely two completely identical campaigns, you might be able to find some that have used broadly the same strategy, worked towards the same goal, been run by a similar organisation, or have other characteristics in common with your campaign. The more comparisons you are able to make, the better you can understand whether your results provide strong evidence.
- **Are your results improving over time?** This is the most important question to answer because you will want to show funders and stakeholders that you are learning and improving. Your theory of change is crucial here: you may not have achieved your end goal after a few years of campaigning, but if you can show that you are improving at achieving the intermediate outcomes and your data is supporting your theory of change, you have come a long way.

There are a number of common barriers to successful implementation of the measurement framework, the most significant of which is often lack of buy-in from staff and senior management. Many of the challenges are similar to those of service delivery evaluation and will therefore not be repeated here—please see NPC's four pillar approach for a further description.

# CONCLUSIONS

This paper has been developed partly in response to the complexity of the current campaigning environment, as this calls for increased clarity from charity campaigners around strategies, achievements and goals. We have outlined how NPC's four pillar approach to measurement can be applied to campaigning work, drawing additionally on the useful tools and guidance developed by organisations such as NCVO and ODI. Measuring the impact of influencing, advocacy, or behaviour change work can seem endlessly complex, but with the right step-by-step approach it can be achieved even while you carry out your campaign—with huge benefits for your organisation's learning and effectiveness.

## Tell us what you think

NPC's mission is to help charities and funders improve the lives of their beneficiaries. We seek to help them become more effective and efficient, through a range of services, advice and research. As we are on the journey to improve, we would very much like to hear your views on what is helpful and not so helpful about this approach to measuring the impact of your campaign.

As a response to some early feedback, we are collecting a number of case studies of campaigning evaluations. If you would like to showcase the successes and lessons learned through your campaign, or have any comments or suggestions about what might be missing from this paper, please get in touch with us via [npc@thinkNPC.org](mailto:npc@thinkNPC.org).

### Acknowledgements

NPC's approach to helping charities develop measurement and evaluation frameworks to assess their impact draws on the work and ideas of many organisations and individuals, the experience of our clients, and numerous evaluation and monitoring methods and models developed by others. We would like to thank all our clients and partners, as they have been key to developing our approach.

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## APPENDIX ONE: KEY TERMS

**Impact:** Usually the broad and/or long-term effects of a project's or organisation's activities, outputs and outcomes, after taking into consideration an estimate of what would likely have happened anyway (ie, the outcomes that can be reasonably attributed to a project or organisation).

**Outcomes:** The changes, benefits, learning or other effects that result from what the project or organisation makes, offers or provides.

**Outputs:** Products, services or facilities that result from an organisation's or project's activities.

**Causality:** The relation between an event or events (cause or causes) and a second event or events (effect or effects), where it is understood the second is a consequence of the first.

**Counterfactual:** An estimate of what would have happened in the absence of the intervention, service, or organisation.

**Impact measurement:** The set of practices through which an organisation establishes what difference its work makes. We use the term to define a broad set of practices that includes measuring both outputs and outcomes. This does not mean we equate measuring outputs with measuring impact—it is just part of the overall process.

**Monitoring:** A systematic way to collect and record information to check progress against plans and enable evaluation.

**Evaluation:** The use of information from monitoring and elsewhere to judge and understand the performance of an organisation or project.

*A good source of definitions of evaluation terms used by charities can be found at [www.jargonbusters.org.uk](http://www.jargonbusters.org.uk)*

## TRANSFORMING THE CHARITY SECTOR

NPC is a charity think tank and consultancy which occupies a unique position at the nexus between charities and funders, helping them achieve the greatest impact. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success.

**Increasing the impact of charities:** NPC exists to make charities and social enterprises more successful in achieving their missions. Through rigorous analysis, practical advice and innovative thinking, we make charities' money and energy go further, and help them to achieve the greatest impact.

**Increasing the impact of funders:** NPC's role is to make funders more successful too. We share the passion funders have for helping charities and changing people's lives. We understand their motivations and their objectives, and we know that giving is more rewarding if it achieves the greatest impact it can.

**Strengthening the partnership between charities and funders:** NPC's mission is also to bring the two sides of the funding equation together, improving understanding and enhancing their combined impact. We can help funders and those they fund to connect and transform the way they work together to achieve their vision.

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