How effective communication can help evaluation achieve influence

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Overview

1. **Rationale**
   - The problem
   - Why marketing?
   - Why communications?

2. **What can we learn from other disciplines and apply to evaluation?**
   - Marketing
   - Communications
   - Making ideas stick

3. **Bringing it all together**
   - Key principles
   - Conclusions

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The problem

- Research and evaluation is under-utilised because of
  - the nature of the research
    - academic style (inaccessible language, lengthy commentary and poor presentation)
    - lack of relevance to priorities and needs
  - personal factors
    - users (pre-conceived attitudes to research, ability to interpret findings for everyday work)
    - researchers (ability to engage in use activities, credibility).
  - links between researchers and users
  - context
    - political
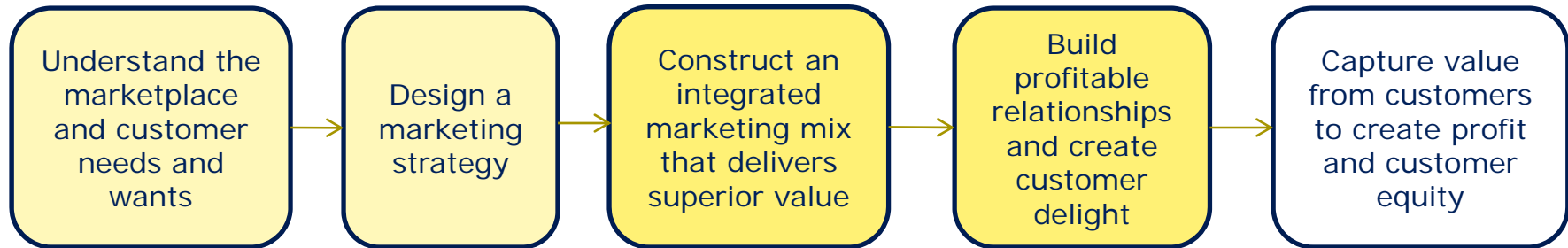   - organisational.

Why marketing?

- Under-utilisation = a marketing issue.

- Marketing puts the client at the centre and aims to meet their needs.

- Evaluations must compete for attention: marketing strategies can help us cut through the clamour.

A marketing problem

Marketing concepts

- Marketing is not just about selling, its about creating customer value.

- The marketing process: 5 step model.

| Understand the marketplace and customer needs and wants | → | Design a marketing strategy | → | Construct an integrated marketing mix that delivers superior value | → | Build profitable relationships and create customer delight | → | Capture value from customers to create profit and customer equity |

- Integrated marketing mix: product, price, place promotion.

Not this kind of marketing

Marketing in evaluation

Principle	Applied to evaluation...

Understand the marketplace and customer needs and wants
 	
Design a marketing strategy
	• <u>Consider the macro-environment</u>: economic, political, and cultural. How will this impact on how our 'product' is received?
	• <u>Who is your 'market</u>?
	   • Immediate client? Decision-maker/s in the organisation? Practitioners who have to act on findings? Other 'need to know' stakeholders?
	• <u>Are we targeting multiple market segments</u>?
	   • Marketers segment by: geographic, demographic, psychographic and behavioural factors. Should we segment by management level, practitioner vs policy maker, region—in a large-scale multi-site evaluation?
	• <u>What do you know about your market</u>?
	   • Some signs of organisational culture are observable: values, basic assumptions, decision-making style, communications patterns.
	   • Generalisations are possible: Client needs differ by stage of the policy cycle; the political context will affect action on recommendations.
	   • Customer behaviour: Psychological, personal & external influences affect take up. Decision-making isn't always rational.
	• <u>What does your market need?</u>
	   • What questions do they most need to answer?
	• <u>Customer value?</u>
	   • What's very important differs between clients. What is most important to this client/ audience and how will this shape your 'product'?

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Marketing in evaluation

Principle	Applied to evaluation…

Construct an integrated marketing mix	• <u>Product</u>
	   • How can we best 'package' findings and recommendations as a product that meets our client's needs?
	   • What communication medium best suits the audience?
	   • What reporting structure will be consistent with client expectations?
	   • Do we need to differentiate 'product' forms for different market segments?
	• <u>Promotion</u>
	   • 'Advertising': what media will grab target audience attention? What message structure will be most influential? What format?
	   • 'Personal selling': understand the client, build a trusting relationship, present findings, deal with objections, follow-up.
	   • 'Marketing intermediaries': are there internal 'champions' you can use?
	   • Consider <u>factors that influence adoption</u> in presenting recommendations: relative advantage, compatibility, complexity, trialability, observability.

Example: Differentiated products

Principle	Details
Context	• Housing • New model of service delivery
Purpose	• Summary evaluation
Audience	• Managers • Frontline staff
Needs of audience	• <u>Managers</u>: Did it work? Should we roll it out on a larger scale? What refinements do we need to make? • <u>Frontline staff</u>: How do the policies affect my daily work? Why should we do it differently to how we've always done it?
Solution	• <u>Evaluation report</u> to client (detailed findings and implications) • <u>Communications paper</u> to frontline staff (headline findings, brief literature review about evidence for the model)

Why communications?

- Communication is complex. Meaning is not simply transferred from one person to another.

- Ineffective communication inhibits use.

- Communication is important to our clients. Many tenders now ask us to demonstrate we have effective communication skills.

- Our experience tells us communication makes a difference. It's too late to communicate at the end of project.

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A communications problem

"Good report, Callahan, but next time skip the calligraphy."

Communications concepts

- Communication is the 'process by which people interactively create, sustain, and manage meaning'
- Communication concepts
  - Sender: of the message
  - Encoding: putting thought into symbolic form
  - Message: the symbols transmitted
  - Media: communication channel
  - Decoding: receiver assigns meaning to symbols
  - Receiver: of the message
  - Response: reaction
  - Feedback: response communicated to sender
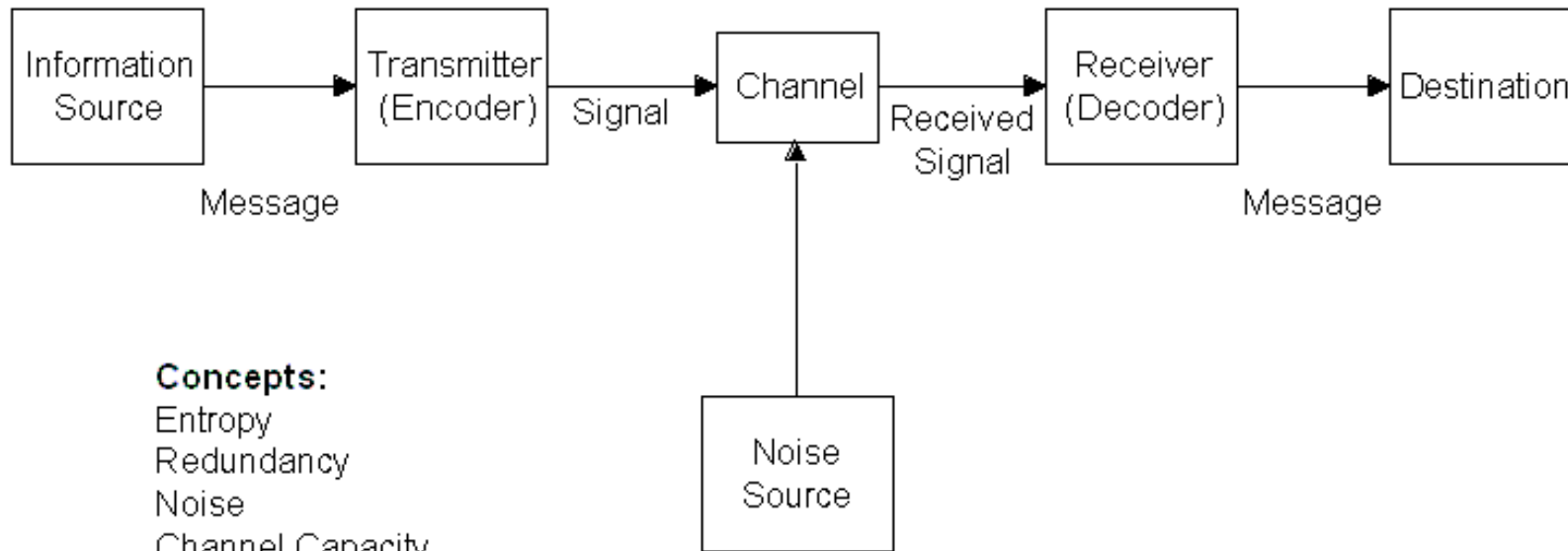 - Noise: unplanned static or distortion = receiver gets unintended message

Communications concepts

- Different perspectives about interpretation/ construction of meaning, and motivation for action.

  - Fish's reader-response theory: Meaning lies in the reader. But meaning isn't arbitrary, readers share meaning with an interpretive community.

  - Burke's theory of identification: Language can bring people together or divide them. The more people identify with the communication source, the more shared meaning and understanding increases, and the higher potential for persuasion.

  - Gadamer's philosophical hermeneutics: a person's experience, history and traditions affect their ways of understanding things i.e. their interpretive frames

  - Social Judgement Theory: Internal anchors based on previous experience and our 'ego involvement' affect our reaction to messages. Knowing a person's attitude on a subject can provide clues about how to approach a persuasive effort.

  - Elaboration Likelihood Theory: If a person processes information centrally it's more likely to create enduring attitude change and affect behaviour. But central processing depends on motivation and ability.

  - Rational Argumentation Theory: rational argument justifies conviction and spurs people to action as we make decisions.

Communications concepts

- Persuasive transactions
  - Three factors: Cognitive understanding, interpersonal sensitivity, communication skills
  - Variables potentially related to persuasion
    - Source: credibility (competence, integrity, good will), attraction to source (association, support or personal qualities)
    - Message: comprehension, repetition, two sided vs one sided messages, evidence
    - Message structure: mix logical and emotional appeals supported by evidence; place strong arguments first, weak ones in the middle; use counter arguments; use stylistic devises (metaphors, analogies, similes and humour); use climax order
    - Channel: distraction (noise) and medium
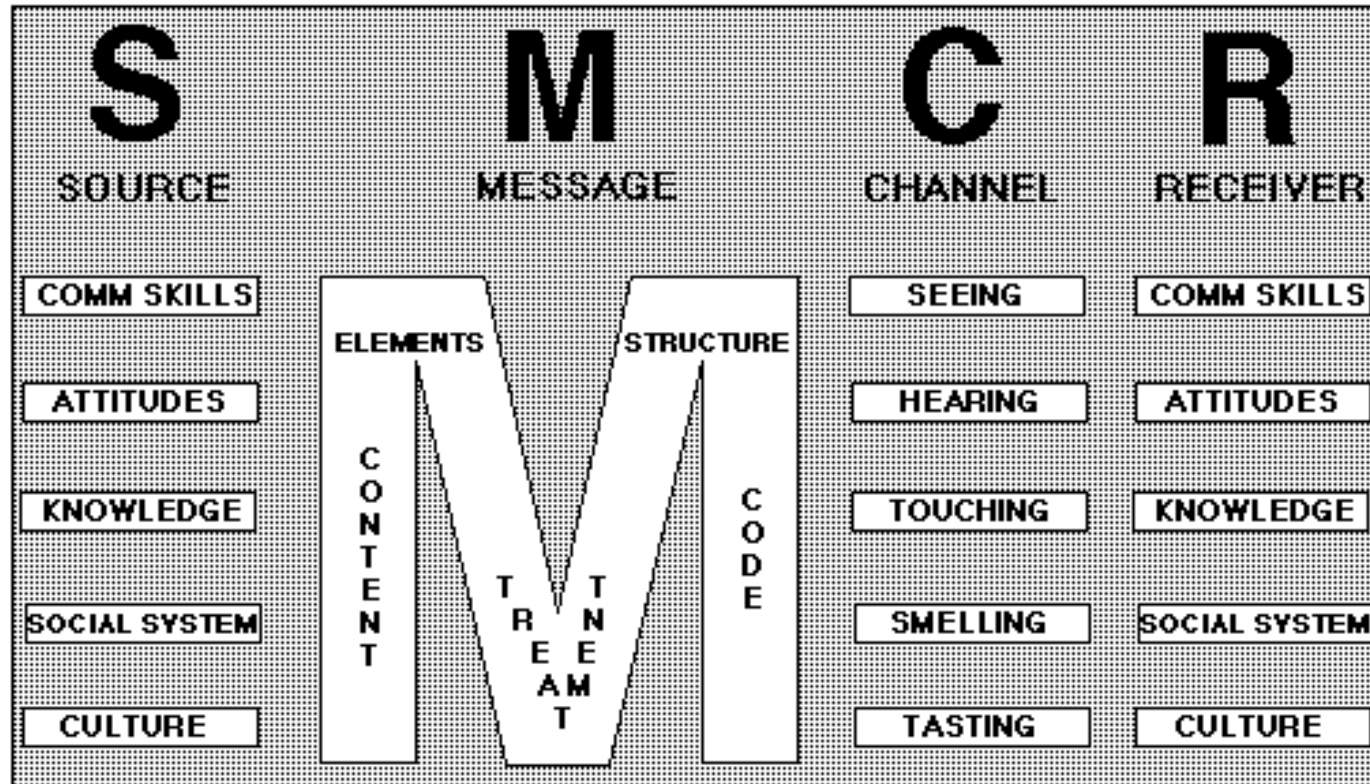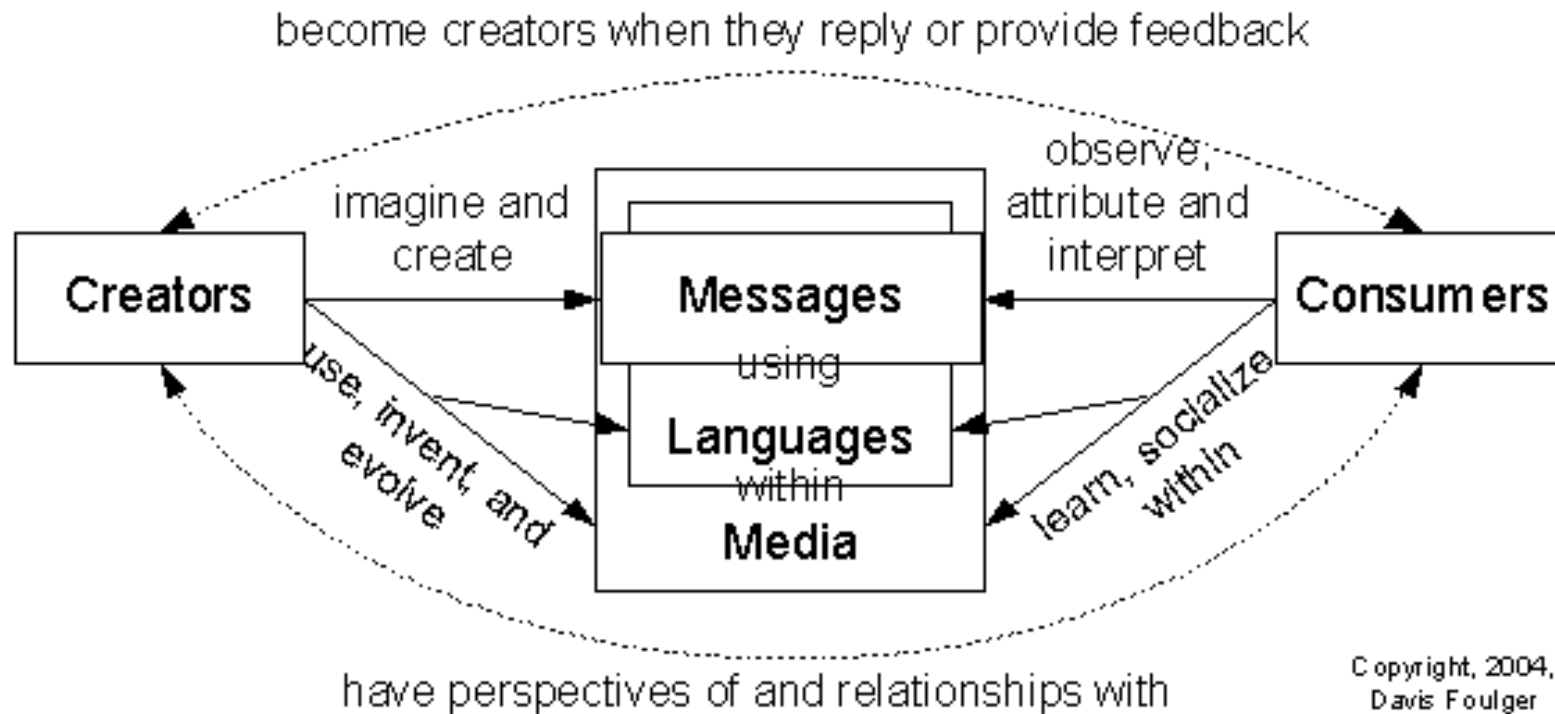   - Receiver: personal characteristics

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Communications models

Communications models

Communications models

become creators when they reply or provide feedback

Creators — imagine and create → Messages using Languages within Media ← observe, attribute and interpret — Consumers

use, invent, and evolve

learn, socialize within

have perspectives of and relationships with

Copyright, 2004, Davis Foulger

Communications in evaluation

Theory	Applied to evaluation...

Perspectives about interpretation/ construction of meaning, and motivation for action	• What opportunities are there to co-construct meaning?
	    • Findings and recommendations workshops?
	    • Pre-findings discussions?
	• What can you do to ensure appropriate interpretation/ construction of meaning?
	    • Careful language and word choice:
	        • Words have different meanings in different contexts: what does the word mean to this audience?
	        • The words communities use differ: Use their language to generate identification and show them you understand their context.
	• What are the audience's pre-conceived attitudes?
	    • How should this inform the way you present findings and recommendations?
	• How can you engage the client in critically processing the information?
	    • Is a findings and recommendations workshop appropriate?
	    • Would presenting alternative options engage the client in assessing recommendations and enhance likelihood of action?
	    • Can you supply information over time to enhance persuasion?

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Communications in evaluation

Theory	application
Persuasion	**Source** •Credibility: how can we enhance our credibility? •Identification: Use language and words appropriate to context, understand the organisational goals values and how your recommendations fit with those. **Message** •Find the simplest way to say it without oversimplifying: Can you headings that tell the story? •Is the client likely to be already convinced of the findings or will they be sceptical? Choose the right level of detail and how to present the argument accordingly? **Message structure** •Use case stories to illustrate the emotional aspect of a logical argument. •Are there metaphors or analogies that could help you communicate your ideas? •Keep it to the key arguments and put additional data in appendices. **Channel** •Can multiple communications media be used to engage the senses? **Receiver** •What organisational and client characteristics will affect how your findings and recommendations are communicated, and interpreted? •What control do you/ client have over flow and timing of information? •How much information does the client already have to process? Adjust level of detail in reporting, or provide summaries, accordingly.

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Example: Include your clients

	Details
Context	• A national, evolving program in the disabilities sector • Continuously changing program managers • Evolving program model
Purpose	• Formative and summative evaluations over three years
Audience	• Program managers, policy makers • Program staff and practitioners across Australia • Clients (families)
Needs of audience	• Regular updates, accessible to staff who do not know history
Solution	• Regular communication meetings with client to understand interests, values and changing needs • Pre-reporting meeting to discuss findings and potential recommendations • Evaluation reports that present the accumulation of evidence—the yearly findings in summary format alongside each other

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The concept of the 'sticky' idea

- Six traits of 'ideas that stick'
  - <u>Simple</u>: not dumbing down, but getting to the core.
  - <u>Unexpected</u>: get attention (through surprise) and keep it (by generating interest).
  - <u>Credible</u>: convince people you have the right idea.
  - <u>Concrete</u>: use concrete language to make the abstract clear and memorable.
  - <u>Emotional</u>: harness the right emotion to make people care
  - <u>Stories</u>: provide stimulation and inspiration for action.

- You don't need all of them to make an idea stick, but most 'sticky' ideas display some of these traits.

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Sticky ideas in the evaluation

Trait	Applied to evaluation...
Simple	Prioritise • What is the key idea you want to get across? Effective communication • Can you use analogies, metaphors, schemas to make the explanation clearer?
Concrete	Translate the abstract • Evaluation findings and terminology can be complex • Is there a simpler way to say what you're saying? • Can you ground what you're saying in human action?
Unexpected	Creating curiosity • Keep people's attention by opening and closing knowledge gaps. • Don't just tell them the facts, make them realise they want to hear what you have to say. • Making people commit to a prediction is one way of engaging their interest in an answer

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Sticky ideas in evaluation

Trait	Applied to evaluation…
Credible	• <u>Understand your audience</u>: What will convince this client? • <u>Statistics</u> humanising statistics can help them have more impact. • <u>Concrete details</u> also lend credibility—use examples to make things more tangible and real. Sometimes a single powerful story can overcome scepticism
Emotional	• Take people out of analytic mode. • Use case studies and vignettes.
Stories	• <u>Findings</u>: use stories to illustrate particular findings? • <u>Make recommendations seem more feasible</u>: tell a **springboard story** about how services are working on the ground to show how a problem can change and therefore the plausibility of your recommendations? • <u>Where the recommendations to solve an issue aren't clear</u>: use a story that demonstrates barriers to achieving program goals to focus people on problem solving and generating recommendations?

Example: Using visuals

	Details
Context	• Two large, longstanding programs combined into one • Both programs poorly defined, and description of combined program unwieldy • Communities sector
Purpose	• Develop program logic for combined program
Audience	• Multiple stakeholders from each of the existing programs • Strong ownership of each part of the programs
Needs of audience	• To maintain some ownership, explain the importance of their role
Solution	• Initial consultation with the client to explore context • Concise summary of what the program does from viewpoint of evaluator (external perspective) • Summary developed into multiple logics at different levels • Internal report for key stakeholders • External communications document

Key concepts

1. What do know about your audience/s? Priorities, values, language, pre-conceived attitudes, constraints?
2. What information does your audience/s need? What do they need it for?
3. Are differentiated 'products' needed for different audiences?
4. What communications media will be most appropriate—any creative alternatives?
5. What opportunities are there to co-construct meaning?
6. What message structure will be most convincing and meet the client expectations?
7. What is the main point you want to get across?
8. Can you use any other 'sticky' traits—emotion, stories?
9. What language and words are appropriate to use?

Conclusions

- Good communication can put us in a better position for our findings to be listened to even in difficult contexts.

- Sometimes good communication is not enough—politics or organisational context might inhibit action. But good communication is always a necessary first step—the user can't act if they can't understand you or you haven't given them information they need.

- If evaluation isn't useful, eventually organisations will stop asking for it.

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