

Getting the Right Ingredients: A Framework for Enhancing ME&O Evaluation

We often consider Marketing, Education and Outreach (ME&O) to be critical to the success of statewide and utility programs, but we don't always know exactly how much it contributes to program goals. Further, data tracking practices across program administrators is often inconsistent, lacking a standard framework for setting goals and tracking results. This data limitation can make it challenging for evaluation teams to fully understand the theory of change behind marketing efforts and, as a result, makes it difficult to effectively assess how ME&O strategies contribute to program goals. In this paper, the authors will propose data tracking practices could enable evaluation teams to provide enhanced, rapid insights into the effectiveness of marketing strategies, especially when evaluation is done concurrently with marketing implementation.

We will showcase findings from several 2013-2016 ME&O evaluations that demonstrate common data limitations. These issues occur along the entire ME&O implementation timeline, including planning, tracking progress, and recording results. The paper will argue that clearly documenting marketing goals, tracking common marketing metrics (i.e., click-through-rate), and establishing success criteria for those metrics will enable marketing teams to better gauge the success of their efforts. Further, the authors will show how improved data tracking and establishing short-term (i.e., quarterly instead of just annual) goals can allow evaluation teams to study campaigns in real-time and suggest course corrections mid-campaign. These improvement will help pave the way for higher standards for data tracking and a better understanding of effective marketing strategies across the industry.