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Program Title
METRIC Model: Measuring Engagement and TRacking Influencer Communications

Client/Company
Strategies to Overcome and Prevent (STOP) Obesity Alliance

Agency/Consultant
Determinus, a Chandler Chicco company

Contact Person
Marianne Eisenmann, Head of Determinus
212.229.8473
MEisenmann@chandlerchiccocompanies.com

METRIC Model: Measuring Engagement and TRacking Influencer Communications

SUMMARY

Measuring success and demonstrating value of relationship building with stakeholders and influencers has been challenging for PR practitioners. There is a critical need for a method of evaluating these results, particularly for PR programs in the public affairs and issues management area, where relationships determine success in achieving program objectives.

This research sought to develop a model to systematically document and measure the outcome of a PR campaign designed to establish and cultivate relationships. Such relationships would then result in stakeholder engagement and meaningful response to a call to action. The resulting model:

- Includes a detailed profile of desired actions by each target stakeholder
- Weights each action based on how significant it is to moving toward the desired outcome
- Analyzes each stakeholder's total level of engagement against the criteria
- Illustrates the engagement in appropriate metrics
- Compares engagement level among stakeholders
- Sets benchmarks for establishing and measuring future goals and targets
- Provides flexibility to document and measure additional stakeholder/influencer activities as the program evolves

This entry documents the development of the model and its application by the Strategies to Overcome and Prevent (STOP) Obesity Alliance, a collaboration of consumer, provider, government, labor, business, health insurers and quality-of-care organizations united to combat obesity.

The research successfully applies the METRIC Model, which moves beyond media coverage and event management, to track and measure progress in effective coalition- and relationship-building as a critical factor in achieving overall organizational objectives.

FULL DESCRIPTION

Introduction

Public relations programs are increasingly focused on building relationships with stakeholders and influencers, particularly in the public affairs and issues management environment. Measuring these softer, less tangible aspects of public relations has been a challenge for PR practitioners. An example of the need for measurement of progress in relationship building is an organization working on the issue of obesity prevention and treatment. The Strategies to Overcome and Prevent (STOP) Obesity Alliance, is working to change society's perceptions of and approaches to preventing and treating obesity. Their methods use practical strategies and develop innovative means of combating obesity to prevent the further spread of obesity-related chronic diseases in America.

The Alliance is a collaboration of consumer, provider, government, labor, business, health insurers and quality-of-care organizations united to combat obesity. The Alliance operates out the Department of Health Policy at The George Washington University School of Public Health and Health Services and is funded by industry.

When it was founded in 2009, the Alliance established a Steering Committee to support its mission. As the work of the Alliance evolved, the organization created categories of membership that included Associate Member and Government Liaison classifications.

Measurement and Evaluation Objectives

The Alliance felt it would be valuable to measure its success in engaging the Steering Committee and Associate Members in activities that furthered its mission. They wanted to understand the depth of the relationships they had forged, provide a benchmark to measure against in the future and demonstrate progress toward their goals.

The team at Determinus worked with the Alliance to create a customized solution - the METRIC (Measuring Engagement and TRacking Influencer Communications) Model to measure engagement and track the outcomes of influencer communications. The objectives of the model were to:

- Go beyond media results and event management metrics to provide a more complete view of relationships with Alliance members
- Provide baseline metrics for engagement which will be used to set future goals and targets
- Compare engagement levels among member organizations
- Provide a baseline for future comparisons as a means of illustrating success or modifying approaches
- Provide information to enhance flexibility in amending the parameters of future activities

Applying the METRIC Model to Internal Relationships

Core to the METRIC Model is the identification of a customized list of the desired actions of each influencer. Each potential action is assigned a weighted score based on its significance in moving toward the overall desired outcomes. Determinus worked together with the STOP Obesity Alliance to identify a range of potential activities and assigned point values and classification as follows:

Limited (1 point)

- Touching base periodically with Alliance staff and/or providing feedback on initiatives
- Providing organizational information for Member page on Alliance Web site

Basic (2 points)

- Participating in internal Alliance meetings and calls
- Submitting featured news items to STOP Obesity Alliance E-Newsletter
- Using Alliance listserv to distribute member organization news and announcements

Intermediate (3 points)

- Contributing as guest bloggers on STOP Obesity Alliance "Weighing In" blog
- Attending Alliance public events (in person, via webcast or teleconference)
- Asking Alliance to support and sign position statements or letters

Advanced (4 points)

- Requesting content from STOP Obesity Alliance or featuring Alliance materials on communications channels (e.g., website, Member publications and internal newsletters)
- Recruiting/suggesting potential members and/or funders for the Alliance
- Including Alliance news on social networking sites (e.g., Twitter, Facebook)
- Following the Alliance on social networking sites (e.g., Twitter, Facebook)
- Participating in Alliance projects, discussions or task forces
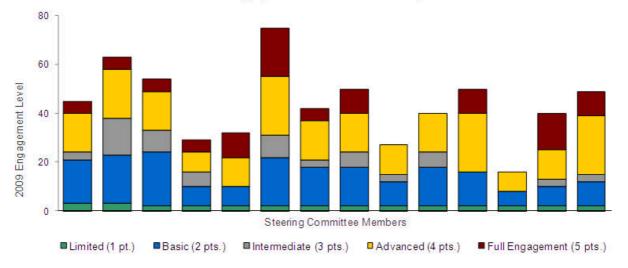
Full Engagement (5 points)

- Participating in media outreach — quotes in press materials, media interviews, etc.
- Participating in speaking events/conferences on behalf of the STOP Obesity Alliance or where the Alliance has a presence/role
- Leveraging public affairs/policy relationships to further STOP Obesity Alliance policymaker efforts (includes STOP messaging and materials in outreach)
- Referencing the Alliance or its body of work (e.g., Obesity GPS, surveys, recommendations, research)
- Inviting Alliance leadership to attend, speak, co-sponsor or participate in a non-Alliance event
- Collaborating with the Alliance to guide or inform programs executed by Member organizations
- Suggesting or creating synergies between the Alliance and other third-party partners
- Referring media or other organizations to the Alliance for comment/expertise

The requisite points are assigned for each relevant activity throughout the year and the accumulated points for each classification results in the total engagement level for each Member.
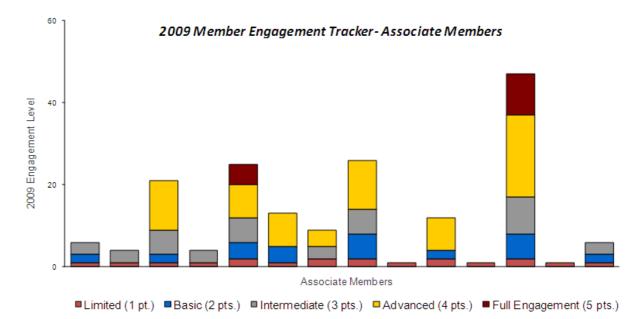

Outcomes for Internal Relationships

At the end of 2009, each member's overall level of engagement was measured and illustrated against the criteria in the graphic format shown below. The data indicated that the Steering Committee engagement and commitment was well-established during the founding year. Nearly 80% had interacted at some level of Full Engagement and more than 65% had participated in some activity at every level.

2009 Member Engagement Tracker – Steering Committee

Legend: Limited (1 pt.), Basic (2 pts.), Intermediate (3 pts.), Advanced (4 pts.), Full Engagement (5 pts.)

The addition of Associate Members later in 2009 brought Alliance activities, research and outreach to broader audiences. Nearly 80 percent of Associate Members had engaged at or above the Intermediate level. Two Associate Members out of 17 had engaged at every level. The high engagement level of Associate Members demonstrates their commitment to the Alliance and the relevance of the Alliance's mission to Member organization's own goals.

2009 Member Engagement Tracker - Associate Members

Legend: Limited (1 pt.), Basic (2 pts.), Intermediate (3 pts.), Advanced (4 pts.), Full Engagement (5 pts.)

Tracking Internal Relationship Change Year-on-Year

In 2010, the Alliance continued to use the METRIC Model for measuring engagement among members. A few additional activities were added to the engagement criteria to reflect the evolving and broadening role of the Alliance. For example, "asking the Alliance to support and sign position statements or letters" was added to the 3 point level activities.

2010 Outcomes Engagement with Stakeholders and Influencers Intensifies in 2010		
	Increase in 2010 Compared to 2009	
Overall Membership	40%	
Steering Committee Membership	13%	
Associate Membership	47%	
	2009	**2010**
Steering Committee		
Participate in a Full Engagement Activity	80%	90%
Participate at or above the Intermediate Level	100%	96%*
Participate in an Activity at Every Level	65%	65%
Associate Membership		
Participate in a Full Engagement Activity	80%	40%*
Participate at or above the Intermediate Level	53%	75%
Participate in an Activity at Every Level	12%	16%

*Decreases are attributed to the positive development of increased membership.
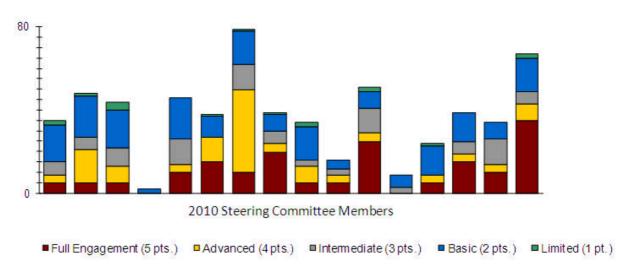
SNAPSHOT OF SUCCESSFUL OUTCOMES

Alliance Member engagement and alignment flourishes in 2010

- The Alliance established the STOP Obesity Alliance Task Force on Women and nearly 20 members joined

- Alliance co-hosted an advocacy forum with several Member organizations which focused on breaking down the barriers between policy and research and ways to engage researchers in the important work to enable obesity policy change

- Obesity was included as a focus area in one Member's 2010 "Guidelines for the Practice of Diabetes Education" following participation in the Task Force on Women

- Several Members distributed Alliance materials on obesity and related health conditions in meetings on Capitol Hill, including state-by-state charts and the Primary Care white paper
- A Member hosted national webinar on weight and health and the disconnect in treatment

Results for 2010 (below) showed a greater level of commitment in 2010. Nearly 90 percent of Steering Committee members have interacted on the Full Engagement level, up from 80 percent in 2009. As in 2009, nearly 65 percent of members participated in activities at all levels at some point throughout the year. Steering Committee Membership increased by 15 percent in 2010.
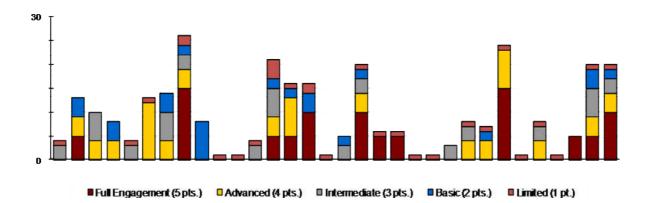
2010 Member Engagement Tracker – Steering Committee

2010 Steering Committee Members

■ Full Engagement (5 pts.)   ▣ Advanced (4 pts.)   ▣ Intermediate (3 pts.)   ■ Basic (2 pts.)   ▣ Limited (1 pt.)

The Associate Member engagement also improved from 2009 (see chart below), most notably membership nearly doubled from 17 to 32. Of note, several Associate Members came to the Alliance through referrals from existing members — a new level of engagement that has benefitted growth and demonstrates member commitment to the coalition.

Highlights of the engagement among Associate Members in 2010 include nearly 40 percent of Members interacting on the Full Engagement level, down from 2009 due to the positive development of a 47% increase in Associate Membership. Seventy-five percent of Members have interacted at or above the Intermediate level, up from 53% in 2009.

2010 Member Engagement Tracker – Associate Members

Full Engagement (5 pts.) ■ Advanced (4 pts.) □ Intermediate (3 pts.) ■ Basic (2 pts.) ■ Limited (1 pt.)

Results of the METRIC Model allowed the Alliance to demonstrate to its industry sponsors the dedication and passion of each Member organization in supporting the work of the Alliance. The data helped the Alliance to think strategically about Member recruitment plans, resulting in the creation of a Task Force on Women to target a specific need identified by the Alliance leading to the recruitment of several advocacy groups for women.

Applying the METRIC Model to External Relationships

Beyond their own membership, the Alliance monitors traction with external audiences who play an important role in changing public- and private-sector policy as it relates to overweight, obesity and weight-related conditions. The Alliance identified four categories of external stakeholders for tracking: communications/media, policymakers, businesses/business groups and advocacy organizations. The Alliance used the METRIC Model to evaluate these external relationships as well. Based on the desired outcomes of these relationships, customized engagement criteria was developed, categorized and weighted through the assignment of a point value ranging from one to five, as follows:

Awareness (1 point)

- Requests a meeting with the Alliance
- Ran a story on the Alliance as a result of proactive media outreach by CCA

Collaboration (2 points)

- Asks to partner or volunteer with the Alliance on specific projects
- Extends invitation to attend unrelated obesity event or conference

Partnership (3 points)

- Expresses interest in sponsoring the Alliance
- Invites Alliance to sign onto coalition position statement or letter

Adoption (4 points)

- Invites Alliance leadership to attend, speak or participate in non-STOP event
- References the Alliance or its body of work (e.g., Obesity GPS, surveys, recommendations, research)
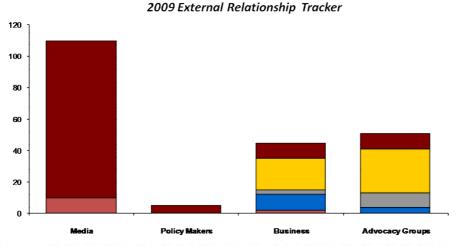- Refers media or other organizations to the Alliance for comment/expertise

Full Engagement (5 points)

- Requests to become an Alliance member
- Asks for input/interview from the Alliance that results in a media article (reactive)
- Adopts Alliance recommendations and/or policies
- Use of Alliance materials for education, awareness, training and reference purposes

As with the internal stakeholders, the requisite points are assigned for each relevant activity throughout the year and the accumulated points for each classification results in the total engagement level.

Outcomes for External Relationships

The chart below demonstrates levels of external stakeholder engagement with the Alliance in 2009 based on the 5-point ranking system. All groups of external stakeholders had interacted with the Alliance on the Full Engagement level. The media demonstrated Full Engagement in Alliance activities nearly 10 times more than any other group.

2009 External Relationship Tracker

Awareness (1 pt.) ■ Collaboration (2 pts.) ■ Partnership (3 pts.) ■ Adoption (4 pts.) ■ Full Engagement (5 pts.)

Tracking External Relationship Change Year-on-Year

The rating criteria for external stakeholders were revised slightly in 2010 to reflect a shift in the way the Alliance engaged with these stakeholders and the policy environment. Revisions included additional criteria with assigned weightings such as "meeting with the Alliance to discuss potential partnerships and synergies" (1 point) and "journalist reaches out to the Alliance or attends an event that results in coverage" (5 points).

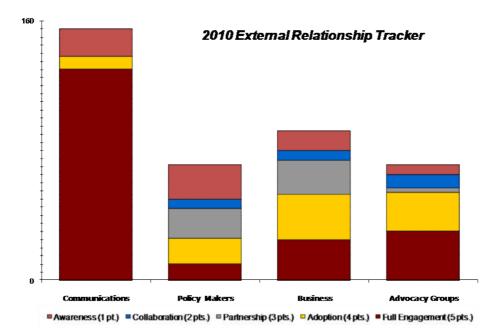| 2010 Outcomes External Relationships Strengthen in 2010		
	Increase in 2010 Compared to 2009	
Communications/Media Engagement	41%	
Policy Maker Engagement	1300%	
Business Engagement	77%	
Advocacy Group Engagement (non-members)	1320%	
	2009	**2010**
Participate in a Full Engagement Activity	100%	100%
Participate in an Activity at Every Level	25%	75%
Participate at the Adoption Level	50%	100%

SNAPSHOT OF SUCCESSFUL OUTCOMES

External Stakeholder Engagement

- *WLS Lifestyles Magazine* created a monthly column entitled "Wisdom and Direction from the STOP Obesity Alliance," in which the Alliance Director pens articles on current issues in obesity and weight-related diseases

- Alliance served as a resource for Sen. Mark Warner on a bill to raise funds for the President's Council on Fitness, Sports and Nutrition—the bill was passed and the Alliance was recognized as a key resource and supporter

- Alliance was tapped by Reps. Fudge and Granger to support legislation to designate September 2010 as the first National Childhood Obesity Awareness Month—legislation was passed and the Alliance was listed as a supporter and participated in the planning Council around the month

- U.S. Conference of Mayors included the Obesity GPS among its "tools you can use" in its monthly newsletter

- Focus of Alliance media coverage shifted from general obesity news to a deeper look at health and the need for supportive environments that encourage weight loss success

- Alliance developed relationships with top-tier health reporters resulting in repeat placements in The New York Times, The Washington Post and USA Today

- Alliance Director was invited by The Huffington Post, *WLS Lifestyles Magazine* and HealthNewsDigest.com to be a regular contributor on obesity issues

The 2010 external relationship tracker below indicates the Policymaker engagement had increased 14-fold in one year (since 2009) and that they are engaged on all five levels. All external audiences have engaged on the "Awareness," "Adoption" and "Full Engagement" levels. Communications/news media has shown the highest level of engagement, consistent with 2010. This engagement goes beyond merely producing a story to include attending Alliance events, participating on discussion panels and engaging in dialog with Alliance members.

2010 External Relationship Tracker

Awareness (1 pt.) ■ Collaboration (2 pts.) ■ Partnership (3 pts.) □ Adoption (4 pts.) ■ Full Engagement (5 pts.)

Non-member advocacy organizations referred to Alliance materials and invited Alliance leaders to participate in events throughout the year, signaling the Alliance's standing as a trustworthy resource and presence in the field. Other external opportunities have included meetings with government agencies and potential funders.

Keys to Success

Planning is critical to success in implementing the Model. By getting it right from the start, all relevant interactions can be documented in a timely manner. It is not realistic to ask the team to go back at the end of six or twelve months and try to recall the path of engagement for each member or stakeholder, results cannot be accurate. A template should be set-up in Microsoft Excel or a similar tool, accessible through Sharepoint or similar platform, to record activities in

real time for each Member or stakeholder and assign appropriate staff members to regularly document interactions.

The data is impressive and when coupled with some of the specific achievements, clearly demonstrates the value that members bring to the Alliance. Hence, it is still important to include anecdotal feedback and highlights of activities in the reporting to bring the results alive and illustrate what lies behind the numbers, especially when presenting to those outside the inner management circle.

The METRIC Model provides the fundamental data for measuring success of the STOP Obesity Alliance year-on-year. However, annual reporting also includes some of the standard PR measurement metrics to provide a more fulsome picture. For example, annual reporting also includes message penetration in media coverage, type of media in which the coverage appeared, open rates for the Alliance e-newsletter, click-throughs from the e-newsletter and e-newsletter subscribers by sector (e.g. .com, .edu, .org, .gov/.us and .com/.net).

Applications for the METRIC Model

Throughout our practice we regularly develop customized measurement metrics and scorecards focused not just on media results, but on building relationships with stakeholders and measuring outcomes. The METRIC Model served as a core framework which has proven to be very adaptable.

In some applications, especially when the relationships are long-standing, fewer granularities are needed for the engagement criteria. In other applications of the model, a simpler "high," "medium" or "low" classification will suffice [or green, yellow and red] instead of a weighted score. This streamlined view is often appropriate for C-suite executives who make decisions quickly and need information and analysis that is clear, concise and easy-to-digest. In these situations, the point is to demonstrate that engagement increased with only the most salient details.

Overall, the consistent feedback is that the METRIC Model is simple and transparent, can be executed fairly easily and understood quickly. There is no secret sauce or black box to negotiate. Also, the Model measures to clearly stated objectives, which provides the additional advantage of requiring the management team to align on desired outcomes right from the start.

In summary, our positive experience with the METRIC Model is based on several features: it is fully transparent, can be customized for specific PR campaigns, it can track progress over time and can be adjusted as programs change and it is easy to interpret. The model is increasingly in demand from clients who need to understand progress in engaging stakeholders, make adaptations to leverage what works best and demonstrate success to external audiences.