

THE CHALLENGE OF QUANTIFYING SOCIAL CHANGE

INPUTS

OUTPUTS

OUTCOMES

IMPACT

What we put in What we create What results What difference it makes



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ACKNOWLEDGMENTS

We salute our clients for their commitment to measuring the inputs, outputs, outcomes and impact of their efforts to create a just and sustainable world. We'd especially like to thank the organizations that are mentioned in this article, including the King County Library System, Illinois Children's Mental Health Partnership, the Illinois Department of Human Services' Division of Mental Health, National Council of the Lewis & Clark Bicentennial, Healthy Birth Initiative (a program of Multnomah County Health Department and the Oregon Department of Human Services), NYAC (National Youth Advocacy Coalition) and the National Council of La Raza. We appreciate the opportunity to collaborate in their work and to share a few of their stories.



INTRODUCTION

IF YOU'VE WORKED FOR A SOCIAL PURPOSE ORGANIZATION for any length of time particularly if you've attended a conference or two—you've probably heard the story of the old man and the starfish.

The story goes something like this. A wise old man is walking with a young boy along a beach covered with starfish sweltering in the hot sun. The old man picks up one of the starfish and flings it far out into the water. The boy asks why, since he knows the old man can't possibly rescue enough starfish to really make a difference to the countless others strewn on the beach. "Yes," the old man replies, "but it made a difference to that one."

So it goes for social purpose organizations. Not always sure how to quantify the change we create, and emotionally drawn to success stories that connect with our mission, we often boil our measurement strategies down to capturing anecdotal evidence of a success here, a success there. "It made a difference to that one."

There is power in such stories, and an important place for them in considering and communicating the results of our efforts to create sustainable social change. But it can't and shouldn't end there. Just as the wise old man clearly understood the scope of the impact he was creating, social purpose organizations need to understand—and measure — the scope of the impact they're creating on people, their communities and our world.

For many reasons—including increasing scrutiny from the public and private funders of social purpose initiatives—the question of quantifying social change has become more important over the last two decades. In 2003, the Rockefeller Foundation and the Goldman Sachs Foundation pulled together 51 participants from 31 institutions as part of its Double Bottom Line Project. The resulting report issued by the foundations concluded that:

While the field has evolved, funders and social purpose investors still wrestle with the most fundamental of questions: How do they know that their grants and investments are achieving desired results? The field has yet to establish a common understanding of "social impact"—what it is or how to measure it. Currently, measures of impact vary from funder to funder, and organization to organization. The more sophisticated measurement tools integrate organizational and process metrics with quantifiable outcome data, but in the absence of a common measure...investors and grantmakers are making it up as they go along.¹

Beyond the needs of funders to quantify change, it's also a necessity if the social purpose sector is to better align our human, financial and political capital to create lasting change. Ultimately, more effective measurement can build significant community capital through development of more effective strategies and implementation of powerful social initiatives. After all, measuring social change allows us to determine what's working and what's not, and to make whatever modifications might be required along the way to our strategic or creative approach.

Metropolitan Group (MG) has worked for more than 20 years crafting strategic and creative services to help social purpose organizations build a just and sustainable world. We've had the opportunity to design and implement a wide variety of strategies designed to measure how, when and why social purpose organizations are moving the needle in creating social change.

And we've seen first-hand how the subject of evaluation can be paralyzing for many social purpose organizers who find themselves increasingly squeezed between "the rock" of transferring all available resources into program delivery at the expense of evaluation and "the hard place" of not being able to generate sustainable funding for programs that haven't documented their effectiveness.

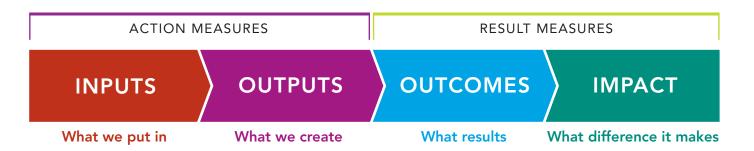
Over the years, we've formulated our own thoughts about how social purpose organizations can approach the challenge of *Measuring What Matters*. Collectively, they constitute not so much a model for action as a new way of thinking about the subject.

We present our approach to clarifying, conducting and communicating measurement here in the hope that it will help inform the discussion on social change metrics and methodologies, and perhaps generate other ideas that help move the discussion forward still further.

I "Social Impact Assessment: A Discussion Among Grantmakers" (New York: The Rockefeller Foundation and the Goldman Sachs Foundation, March 26, 2003), p. 4.

From Action to Result

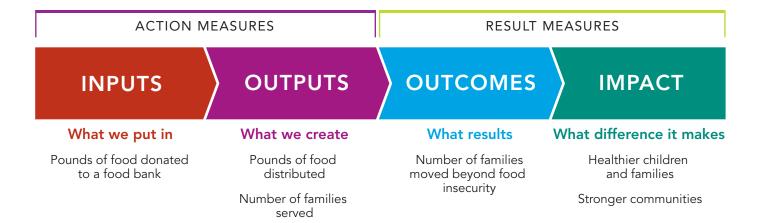
At MG, we divide change measures between those that measure *action* and those that measure *result*. Action measures are those that seek to quantify *inputs* ("what we put in") and *outputs* ("what we create"), while result measures quantify the *outcomes* ("what results") and ultimately *impact* ("what difference it makes"), as reflected in the illustration below:



All four measures (*inputs*, *outputs*, *outcomes* and *impact*) tell you something important. Measurement of action—as reflected in *input* and *output* measures—is by far the most common form of measurement. Action measures include quantification of the *input* associated with pursuit of social impact (e.g., time and/or resources invested) or the activities undertaken in this pursuit. Action measures also include the *output* of such activities, such as the collaborations that are created, the community outreach that's conducted, the value of donated ad space or time, the number of direct mail pieces or news releases distributed, or the "gross impressions" associated with potential exposure to a news story or advertisement. Such measures are generally acknowledged as "basics" that should be part of any project evaluation.

As opposed to *action* measures, *result* measures are harder to obtain, but arguably are more directly related to mission advancement. The most common forms of result measures are those associated with quantification of *outcomes* and *impact*. In general, *outcomes* are defined as the direct and intended result of having engaged in social change creation (e.g., the number of people who responded to a "call to action"), while *impact* is generally used to connect outcomes to the mission of the sponsoring organization (e.g., those who responded to the call to action engaged in a behavior that benefited them or their community).

The Measuring What Matters approach can be applied to any social purpose challenge, as in the example shown below of a local food bank whose mission is to eradicate food insecurity in its community:



As shown above, the total quantity of food collected and distributed, and the number of families served, are examples of action measures and the means of measuring them should be relatively straightforward.

Result measures focus on the number of families moved beyond food insecurity (*outcomes*) and the difference it makes in promoting healthier children and families or building a stronger community (*impact*).

As you would expect, gathering data to support each measurement category becomes more of a challenge as you move across the continuum from left to right. The question of how many families were moved beyond food insecurity, let alone the impact this movement has had on these families and their communities, requires deeper exploration. And while not an easy task, this an important conversation to undertake—one likely contributing to the food bank's strategic approach in any number of ways, from what food they seek and how they distribute food to what other factors the bank and its partners need to address for families to achieve food security and improved health.

In addition to looking broadly at the impact of a social purpose organization in creating social change, *Measuring What Matters* can also be used in measuring change resulting from specific programs or initiatives, including communication initiatives (e.g., social marketing and public will building campaigns), as shown below:

ACTION MEASURES

RESULT MEASURES

INPUTS

OUTPUTS

OUTCOMES

IMPACT

What we put in

Amount of time or money spent/invested

Formative research, pre-testing and benchmarking

Activities (e.g., media relations, grassroots outreach, etc.)

People or organizations engaged

What we create

Deliverables completed (e.g., new website, ads placed, etc.)

Collaborations/ partnerships created

Earned media achieved

People potentially reached (e.g., gross impressions)

What results

People actually reached

Message recall or retention

Changes in awareness, attitudes or understanding

Behavior change (e.g., call to action response)

Policy or systems change

What difference it makes

Improvements in people's lives or in our communities

Changes in cultural norms or expectations

Direct or indirect benefit to others from attitude or behavior change

As reflected in the illustration above, the change resulting from strategic communication interventions can be easily measured in terms of *action* measures (e.g., what resources were invested? How many people were potentially reached by the campaign?). Again, as you move from left to right, quantification becomes both more challenging and more closely related to actual, rather than potential, results.

While it is increasingly recognized (especially by donors and foundations) that *action* does not always translate into *result* in advancing an organization's mission, such measures can still be meaningful. On the *Say it out loud* campaign in Illinois to promote good mental health, which was co-sponsored by the Illinois Department of Human Services' Division of Mental Health and the Illinois Children's Mental Health Partnership, a targeted ad buy of \$40,000 (an *input* measure) leveraged another \$600,000 in donated ad space and time (an *output* measure). Every ad dollar we invested on the state's behalf generated \$15 in advertising value, which is an impressive return on the original investment.

To cite another example of powerful action measures, our strategic work on the Lewis and Clark Bicentennial Commemoration project involved the collaboration of 38 American Indian tribes, 23 federal agencies and 17 states. Such unprecedented collaboration constituted an *output* measure that was critical to the project's success, and therefore well worth capturing and celebrating.

For very logical reasons, social purpose organizations often start with action measures as a way of tracking whether the human and resource investments they are making are generating something tangible. After all, if nothing is being created with the investments you're making, you're unlikely to generate any results.

The key, of course, is to translate *action* measures into *result* measures.

One good example of this effective translation took place during our work for the King County Library System in Washington State, which involved promoting a ballot issue to support the library system. *Outputs* from the campaign included more than one million pieces of collateral materials, hundreds of stories in the local and regional news media outlets, and more than 200 speakers bureau presentations. As a result, 40 endorsements of the ballot issue from community organizations were among the outcomes from the campaign, contributing mightily to passage of the bond measure with 63 percent of the vote and solidifying the political will that ultimately ensured sustainable funding for the library system.

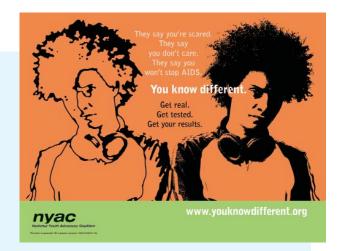
Another good example of being able translate outputs into outcomes can be seen in the Say it out loud mental health promotion campaign in Illinois. Post-launch surveys showed that exposure to the campaign's advertisements (outputs) resulted in several significant outcomes, including: a 5.7 percent increase in the audience's willingness to help someone they cared about who seemed worried or sad; an 8.7 percent increase in willingness to ask for help from someone they trust if they felt worried or sad themselves; and an 11.7 percent increase in willingness to visit a website for information to support their own mental health.

While translating outputs into outcomes is an accomplishment to be celebrated, the "Holy Grail" in Measuring What Matters is translating outcomes into impact.

Outcomes from our Healthy Mom, Healthy Baby campaign for the Healthy Birth Initiative sponsored by Multnomah County and the Oregon Department of Human Services included lower rates of infant mortality and low-birthweight babies among at-risk women. Similarly, in the aftermath of the *Lee y serás* campaign we helped develop and implement for the National Council of La Raza and Scholastic, Latino parents reported higher ongoing and regular rates of reading and other early literacy activities with their children.

You Know Different Campaign: A Case Study

Since 2005 we have been pleased to be the strategic and creative partner with the National Youth Advocacy Coalition (NYAC) in launching the "You Know Different" campaign. The campaign was designed to increase the rates of HIV testing



and test retrieval among African American youth, with the intention of impacting the spread of HIV. Since the program was funded by the Centers for Disease Control and Prevention, it was prepared and equipped to measure both action and result.

Inputs

Investment of resources (including staff time, agency consulting fees, design and production costs, etc.).

Outputs

Successful engagement with, and activation of, more than 30 community partners in six urban areas.

Development and distribution of outreach tools for community partners (posters, club cards, stickers distributed through peer counselors at targeted events, including street parties, clubs, etc.).

Outcomes

A 300 percent increase in the number of young people contacting testing organizations, and a 120 percent increase in testing and test retrieval.

More than half of the youth being tested during the pilot reported seeing the campaign materials prior to being tested.

When the program was expanded beyond the pilot phase to four other urban areas, HIV testing rates among the target populations increased even more, by 153 percent.

Impact

Four youth during the pilot phase discovered they were HIV-positive, giving them the opportunity not just to pursue appropriate medical treatment, but to modify their behavior in such a way as to reduce the spread of the disease.

It would be reasonable to expect that outcomes from both the *Healthy Mom, Healthy Baby* and *Lee y serás* campaigns would accrue benefits not just to the audiences they directly reached, but to their families and communities, as well. A reduction in the number of low-birthweight babies, for example, would mean lower health care costs associated with the medical challenges often confronting such children. And while the priority audience for the *Lee y serás* campaign consisted of parents and child care providers, resulting increases in early literacy would over time help close the achievement gap, reduce high school drop-out rates, and increase college attendance and graduation among Latinos.

Of course, true *impact* often takes a long time to produce and even longer to conclusively measure, as reflected in the chart on the following page.

This chart shows how you can apply the *Measuring What Matters* approach across the spectrum of social change measurement from *action* to *result*. For purposes of illustration, we are using a fictional scenario involving a campaign to improve early literacy by motivating parents to read more frequently to their children. As you'll see, the measures become more challenging as you move from left to right. And the achievement of meaningful impact measures would undoubtedly require a sustained campaign over a period of years.



INPUT Measures

leasures Mea

Public investment of \$250,000 in the campaign

Philanthropic support from foundations and/ or corporate partners generates an additional \$75,000 for the campaign

In-kind donations from a local printer are valued at \$30,000

A community outreach strategy is developed

A new website is developed

Grassroots outreach

Campaign organizers involve 30 community-based organizations, 55 local experts in early childhood development and education, and 25 parents in the strategic and creative development of the initiative

OUTPUT Measures

Launched a public education and community engagement campaign

Formalized a new collaborative partnership between 20 communitybased organizations

Achieved media coverage in major news outlets ("column inches" is a traditional quantitative measure)

An ad buy of \$50,000 was leveraged against donated ad placements worth an additional \$200,000 million, resulting in a 3:1 return on investment

1.5 million people were potentially reached (commonly referred to as "gross impressions") by media coverage and/ or advertising

OUTCOME Measures

Workshops held by community-based partners were attended by 1,250 parents

Post-workshop surveys showed that 75 percent intended to spend more time reading with their children

Telephone surveys indicate a 10 percent rate of recall on the campaign's messaging, suggesting message retention by 150,000 people (based on 1.5 million gross impressions)

Of those who attended the workshops or retained the campaign's public service messaging, 50 percent respond affirmatively to a survey question asking whether they now felt it was more important to read to their children on a regular basis

10,000 parents sign on to a pledge on the campaign's website to spend one hour a day reading with their child

15,000 parents downloaded a read-to-me kit from the campaign's website

20 community-based organizations have adopted the campaign in their outreach to the 50,000 people they collectively serve

IMPACT Measures

When compared to a control group of children whose parents were not exposed to the campaign, children whose parents did participate in the campaign and read to their children on a more regular basis scored higher on ready-to-learn evaluations upon entering kindergarten

A longitudinal study shows the children whose parents participated in the campaign have higher literacy test scores at the end of third grade than a control group of children whose parents did not participate in the campaign

Follow-up surveys show that parents who read more to their children as a result of the campaign reported higher levels of satisfaction with their parenting skill and stronger emotional attachment to their children

Seven Practical Tips for Measuring What Matters

Whether you use or adapt the *Measuring What Matters* approach, or employ one of your own in measuring social change, MG offers the following suggestions:

1. Go for quality over quantity.

Impact measurement models tend to recognize that the number of people potentially reached by a campaign (e.g., the "gross impressions" resulting from media coverage or ad placement) is undoubtedly much larger than the number of people who actually saw or attended to the campaign's message. And smaller still is the number of people who are likely to have retained the message and taken some prescribed action associated with it. In short, the deeper you drill down in measuring actual impact, the smaller the numbers tend to become (as shown in the illustration below).



NOTE: The number of people shown in each category above is purely for illustrative purposes and not based on a formula or intended to illustrate an actual ratio.

This is not to suggest that the numbers generated at any of these levels should be "worth" more than the others regardless of their comparative size. While an organization devoted to early childhood development might place a higher value on a measurable improvement in literacy rates for 1,000 kids than on data showing the campaign reached 100,000 people with its read-to-your-kids message, both are important indicators. After all, you need a certain breadth of reach to compensate for the fact that not everyone you reach will be motivated, or able, to take action. The key is to understand what you're measuring, what it means and why it matters.

2. Walk before you run.

It should go without saying that setting a goal to measure everything for an organization that has previously measured very little is probably not the wisest course of action. In the same way that many social change campaigns begin with trying to identify and win over the "low-hanging fruit" before moving on to more complex challenges, social purpose organizations are encouraged to pick a few areas in which they can more easily quantify the change they are creating. For example, start with action measures and get comfortable with them before trying to move onto result measures.

3. Remember, "garbage in" often results in "garbage out."

Regardless of the benefits associated with it, an impact measurement process will only succeed if there is an imperative to routinely and accurately gather the data necessary. It is generally accepted that "garbage in" (i.e., inaccurate or incomplete data) produces "garbage out" (i.e., inaccurate or mistaken conclusions), and it's certainly true with measuring social change. The conclusions you form are only as good as the data gathered to inform them. For social purpose organizations, collection and analysis of social change measurement data should be a specifically assigned responsibility that is supported by everyone in the organization and enabled by necessary procedures, tools and technologies.

And the earlier you can get started the better. If at all possible, start with benchmarking the attitudes, behaviors or policies you want to impact so you have data against which you can measure changes over time. Thinking about evaluation from the beginning will, at the very least, give you the opportunity to develop the methodology and tools to monitor progress during the campaign so you're not stuck at the end trying to go back and identify (or worse, recreate!) data that was not gathered (or worse, was lost!) along the way.

4. Don't assume that measurement has to be expensive.

You can, if you wish, invest significant time, energy and resources in evaluation, but you don't necessarily *have* to. Not surprisingly, measuring inputs and outputs tends to be easier and cheaper than measuring outcomes or impact, particularly when you're talking about evaluation over the long term.

Tracking inputs and outputs is something that should be relatively easy for social purpose organizations of almost any size. For example, the costs associated with tracking web visits and calls to a toll-free hotline are minimal, but there's no need to stop there. A pop-up survey on your website that asks visitors a few questions about what brought them to the site, what they valued most about their visit to the site, and what they intend to do with the information presented to them on the site, can be extremely cost effective.

Getting volunteers to do mall intercept interviews might not cost much more than the staff time to train the volunteers and the cost of food to feed them. And for the minimal investment of time and money required to do these things, you've just moved from *action* to *result* measurement!

In looking for other creative ways to measure results, social purpose organizations might approach a local university to see if a professor is willing to take on a measurement challenge to be explored by his or her graduate students. Explore opportunities to engage direct service partners, research institutes and others to provide measurement capacity you might not have in-house.

5. But remember, you get what you pay for.

If you're truly committed to measuring the change you're creating, you have to be willing and able to invest the resources required. If a social purpose organization is investing \$2.5 million in a social marketing campaign and hasn't set aside about 10 percent of the campaign budget for formative research, testing, benchmarking, tracking and evaluation reporting, then the organization might want to think again. Better to scale back the scope of the campaign and focus on getting results—freeing up the resources to generate, evaluate and act on measurement data—than to implement a broader campaign that might not be able to create (let alone measure) the desired change.

6. Don't oversell.

Due to resource constraints, many social purpose organizations still trail behind their for-profit counterparts in measuring both action and result. Many of the people sitting on the other side of the table at a meeting with a funder or potential corporate partner are more familiar with measurement than the social purpose organization might be. So don't try to pass off action measures (e.g., the number of brochures distributed or column inches of newspaper articles generated) as if they were evidence of a seismic shift in individual or collective behavior.

Provide clarity of what you seek to measure, what you can measure, and how the information will be used to establish shared expectations and to create a clear context for the investment level required for measurement.

7. Stay focused.

Prioritizing is a critical component of all social purpose campaigns, and for good reason.

The resources available for social purpose campaigns generally pale in comparison to the budgets of sustained private sector product or lifestyle campaigns. And so it becomes even more critical to maximize the limited resources (financial, human and institutional) that a social purpose organization has available to invest in pursuit of its mission. For example, few grants for social purpose campaigns go very far in implementing campaigns intended to reach or influence "the general public."

In our experience, campaigns trying to prioritize everyone inevitably end up prioritizing no one, which makes outcomes and impact not only harder to measure, but harder to achieve in the first place.

Our bias is generally in favor of doing a more focused intervention that has a greater likelihood of creating positive, sustainable change than doing a more broadly scattered intervention that spreads the available resources too thin to truly make a difference.

That's as true for social purpose campaigns with ample budgets as it is for campaigns operating on a shoestring. Whether resources are tight or not, we think the lesson is to do the right thing with the resources you've got.

CONCLUSION

Do What You Can and Measure What You Do

In taking on the challenge of Measuring What Matters, we hope social purpose organizations find value in the framework, the examples and the tips presented in this paper. We recognize that the exploration of this issue will likely continue (and should continue), particularly as social purpose organizations strive for financial sustainability in an increasingly competitive environment. And we look forward to sharing our approach with other social purpose practitioners, and to learning from their own efforts and experiences.

In continuing this exploration, we know that anecdotal evidence in the form of "stories" will always inspire and give sustenance to those of us who dedicate our lives and livelihoods to creating a just and sustainable world. Recognizing these stories for what they are, and labeling them as such, can serve a valuable purpose.

At the same time, they are only one piece of the puzzle in Measuring What Matters. Our ability to measure social change—quantitatively and qualitatively—is a continuing challenge for social purpose organizations.

Fortunately, the story of the wise old man and the starfish gives us an important clue about how to meet this particular challenge. Yes, the story teaches us that there is nobility and power in doing what we can to make a difference in people's lives, in their communities and in our world. But it also tells us we should measure what we do, no matter how small the increment.

While saving one starfish at a time might not necessarily translate into dramatic bottom line data, it's exactly the kind of focused intervention that lends itself to effective outcome and impact evaluation.

Please feel free to share this material with others, to model this approach, and to share feedback with us about your experiences measuring social change.

More information is available at www.metgroup.com

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The head of MG's Chicago office and a leader in our strategic communication practice, Kevin brings 25 years of experience in social marketing, public will building, issue framing, strategic planning, and public policy advocacy to help clients achieve measurable, sustainable social change. Kevin has been committed to measuring both action and results from strategic

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Metropolitan Group

Metropolitan Group is a full-service social change agency that crafts and integrates strategic communication, resource development and creative services that empower social purpose organizations to build a just and sustainable world.

Metropolitan Group was founded in 1989 and has offices in Chicago; Portland, Oregon; San Francisco; and Washington, D.C.

We work exclusively on behalf of social purpose organizations—nonprofits, foundations, socially responsible businesses and government/public agencies. We work as a team with our clients to create results, including sustainable attitudinal and behavioral change, increased product and program use, and expanded revenues and capacity.

Our four practice areas are:

Multicultural Communication

Resource Development

Strategic Communication

Organizational Development

Additional Resources for You from Metropolitan Group

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The social purpose work of nonprofits, socially and environmentally responsible businesses, and public agencies transforms lives every day. Metropolitan Group's capacity- and skill-building services empower leaders, learners, facilitators, organizers, advocates and volunteers to strategically and creatively achieve short- and long-term goals and advance mission.

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Building capacity for the world's change agents.



Download our article on **The Public Will Framework**, a process that creates lasting impact by connecting issues with closely held values and leveraging grassroots and traditional media strategies.

Available at **www.metgroup.com**

The PublicWill Framework

PHASE 1

BUILDING AWARENESS

BECOMING (NOWLEDGEABLE) TRANSMITTING INFORMATION

CREATING A
PERSONAL
CONVICTION

EVALUATING WHILE REINFORCING

PHASE 2 PHASE 3 PHASE 4 PHASE 5

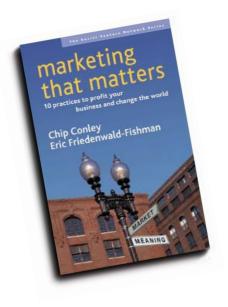
Additional Resources for You from Metropolitan Group

INCREASING Relevance | Relationships and Results:

PRINCIPLES & PRACTICES FOR EFFECTIVE MULTICULTURAL COMMUNICATION

Effectively engaging diverse audiences unlocks new resources and brings additional perspectives and talents to the table to develop innovative and sustainable solutions to our most challenging social, environmental and economic issues. Visit www.metgroup.com to download our article.

PRINCIPLE 1:	Check Your Assumptions at the Door: Begin with yourself
PRINCIPLE 2:	Understand the Cultural Context(s) of Your Audience: Do your homework
PRINCIPLE 3:	Invest Before You Request: Create community-centered partnerships
PRINCIPLE 4:	Develop Authentic Relationships: Maintain a long-term perspective
PRINCIPLE 5:	Build Shared Ownership: Engage, don't just involve
PRINCIPLE 6:	Walk Your Talk: Lead by example
PRINCIPLE 7:	Relate, Don't Translate: Place communication into cultural context
PRINCIPLE 8:	Anticipate Change: Be prepared to succeed



Marketing That Matters: 10 Practices to Profit Your Business and Change the World

The book on socially responsible marketing.

Metropolitan Group's Creative Director/President,
Eric Friedenwald-Fishman, co-authored
Marketing That Matters with Chip Conley, founder and
CEO of Joie de Vivre Hospitality (www.jdvhospitality.com).
Marketing That Matters is a practical guide to strategic
marketing that helps large and small organizations
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Metropolitan Group crafts strategic and creative services that empower social purpose organizations to build a just and sustainable world.