



Using social media in CBP - Chapter 11

Monitoring, Evaluation and Learning

Introduction

This chapter focuses on how to use Social Media to monitor protection activities and identify learning opportunities. It shows you how to link Social Media performance indicators with protection outcome indicators.

Monitoring and Evaluation (M&E) are management tools that ensure a protection program is running efficiently and stakeholders are accountable for their activities. They assist in correcting aspects of programs so they can better meet their objectives. Having a well formulated Theory of Change that can be tested by indicators or evaluations is the best way to proceed.¹³⁰

Although they are often combined as “M&E”, monitoring and evaluation are distinct activities with different purposes.

- Monitoring is a continuous process that provides early indications of progress in implementation so a programme, intervention or response can be corrected in a timely and responsive manner. It is the ongoing and coordinated review of the response to measure whether planned activities deliver the expected results. On Social Media this process is faster and can happen in real time.¹³¹
- Evaluation, on the other hand, occurs less frequently and is usually more comprehensive. Periodic and targeted, it complements monitoring by measuring outcomes (the short and medium-term effects of the intervention) and impact (the positive and negative, primary and secondary longer-term effects produced by an intervention, directly or indirectly, intended or unintended)¹³².

A variety of indicators are used to monitor and evaluate a protection strategy. When applying M&E to Social Media, you will have to work with a paired set of indicators. On the one hand, there are indicators to measure the outputs and/or outcomes of the overall protection response; on the other, there are indicators to measure the performance of the Social Media project that supports the protection.¹³³ This chapter focuses on the second, i.e. the performance of the Social Media strategy/project itself.

¹³⁰ [UNHCR, Handbook for the Protection of Internally Displaced Persons, Chapter 3, Monitoring and Evaluating the Strategy, 2007](#)

¹³¹ We still have specific performance indicators to monitor programs. Social Media is one among various sources of data for the indicators. Social Media may be generating real-time data but that does not mean it is all relevant to monitoring, or linked to indicators that are monitored continuously in real time.

¹³² [UNHCR, Handbook for the Protection of Internally Displaced Persons, Chapter 3, Monitoring and Evaluating the Strategy, 2007](#)

¹³³ See more about this in Section 4 of this chapter below.



Resources

- [UNHCR's Result Areas and Core Indicators, 2020](#)
- [UNHCR, Practical Guide to the Systematic Use of standards & Indicators in UNHCR Operations, 2006](#)

Monitoring provides the first opportunity to measure the activities and outputs of a protection strategy. It is particularly important in operations that require frequent revisions of a plan to respond to a rapidly changing environment, as in an emergency or politically volatile situation.

How a protection strategy is monitored depends on what you are monitoring, and how you articulated your Theory of Change.¹³⁴ UNHCR and its partners have various standards and indicators to enhance monitoring, planning, reporting and evaluation capacity.

UNHCR defines an indicator as “a variable scale on which it is possible to objectively measure different points and that corresponds to, or correlates closely with, variations in the conditions of the Refugees and Persons of Concern.”¹³⁵



Factsheet

See [Factsheet 5](#) for a list of goals and impact indicators and their related Social Media activities and performance indicators.

Monitoring and related indicators can be divided into three categories:¹³⁶

- **Situation monitoring:** Measures change in a condition or set of conditions of PoCs in a given operation. Baseline data provides the initial information against which changes can be measured. Baseline and subsequent data can be drawn from online Participatory Assessments, discussions with stakeholders and your Situation Analysis.

¹³⁴ See more about what is a Theory of Change [here](#).

¹³⁵ [UNHCR, Practical Guide to the Systematic Use of Standards & Indicators in UNHCR Operations, 2006](#)

¹³⁶ Whether we are talking about impact or performance indicators, data collected needs to be AGD-disaggregated as much as possible to enable AGD-sensitive program decisions and adjustments

- **Performance monitoring:** Measures progress towards specific results in relation to a plan. This kind of monitoring includes:
 1. Input monitoring, which determines whether human, financial and material resources are deployed and mobilized as planned;
 2. Output monitoring, which establishes whether products or services are being delivered as planned;
 3. Process monitoring, which reviews the processes by which an operation is managed.

Performance monitoring indicators measure performance towards the achievement of a plan. They are set at the activity level.¹³⁷

An example would be an online campaign to decrease xenophobic conversations and improve peaceful coexistence. The input monitoring would look at the time and staff used to moderate conversations online, and the costs of ads targeting specific groups. Output monitoring would examine the messages sent, conversations managed and posts published to see how effectively our message was delivered. Process monitoring would look at the full workflow, from the admin of the Social Media accounts and their connection with protection officers on the ground to the extent information flowed to inform decisions.

Here are examples of activities that can be quantified and/or assessed for quality and timeliness for the purposes of performance monitoring:

- Short videos promoting girls' school attendance are published weekly from April to September. They reach 70% of the target audience, with over 50% re-shares;
 - New legal clinics in major cities receive 200 IDPs and other Persons of Concern each month, of whom 30% have learnt about the service via Social Media;
 - Information campaigns on access to services reach 80% of the targeted population online. The number of questions related to access to services drops by 50%.
- **Impact monitoring:** Is a program having the desired effect and if not, what changes should be made? Impact monitoring also aims to determine whether any aspect of the Social Media strategy has had a negative or harmful effect for the community writ-large and/or particular.¹³⁸ Impact indicators are signs of change in conditions or practice that affect the Population of Concern and its welfare¹³⁹ They are set at the objective level. For instance:
 - Seventy percent of PoCs using Social Media know and understand data privacy and security on the channels they use;

¹³⁷ [UNHCR, Practical Guide to the Systematic Use of Standards & Indicators in UNHCR Operations, 2006](#)

¹³⁸ Impact monitoring can only track change over time. Understanding how change is happening i.e. the extent to which a program is contributing to or causing change would come from a review or evaluation.

¹³⁹ [UNHCR, Handbook for the Protection of Internally Displaced Persons, Chapter 3, Monitoring and Evaluating the Strategy, 2007](#)

- The number of online scams targeting refugees and asylum seekers has reduced by at least 50%;
- More than 80% of PoCs hosted in a settlement say they know where and how to access services, thanks to information on Social Media.

When we look at Social Media indicators and performance monitoring, there are some nuances:

- If you are tracking a certain demographic of followers, the absence of some community members can be as telling as the presence of those who interact with you. What can you deduce about the success of your strategy, based on who is not using your Social Media platform?
- How will you know you are moving the needle, especially if you are trying to influence social attitudes? You may have to combine and layer indicators to describe the picture.
- Social Media can be a proxy for users' attitudes and a way of measuring them, as well as a tool to engage and influence behaviors. Use the indicators to understand community attitudes and how and why they change. What can you learn, and what might be more effective in future?



Resource

If your protection goal is community engagement and you want to measure it consistently over time, the [UNICEF Minimum Quality Standards and Indicators for Community Engagement](#) can be a good place to start. These indicators are intended for government leaders, policymakers, funders, researchers and development and humanitarian practitioners. Specific areas where the suggested standard and indicators might apply include proposal writing, budgeting, budgetary review, M&E systems, SOPs, requests for proposals, scopes of work and job descriptions. They can also be used to evaluate the quality of programs, projects or initiatives; to structure community engagement actions; and to support training and capacity development.



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1. Steps to an Effective Monitoring Plan

The following steps can help you create an effective monitoring plan for your Social Media strategy/project. Remember, this plan will be just one part of the overall monitoring plan for the CBP strategy/program.



Step 1: Identify the purpose of your monitoring strategy

Our Social Media activities should be guided by clearly defined goals related to our overall CBP strategy. A goal is a broad statement of purpose that describes the expected long-term effects of a program or campaign. Goals should address the audience and the change we want to see.

Defining your goals:

1. Goals should be SMART.¹⁴⁰ They should follow the time-tested formula: specific, relevant, achievable, measurable and time-bound.
2. Goals should be audience-centered. Social Media is for humans. Translate your population's journey into protection-specific goals:
 - Awareness = capturing your community's attention;
 - Conversions = driving your community's actions;
 - Advocacy = earning your community's respect.
3. Goals should be tied to organizational impact. A good goal is an outcome, not an activity. What needs to happen/change in the next year? While top-priority goals are important, what impacts the bottom line? Pick a Social Media goal for an area where you can make a difference.
4. Goals should start big. Then think what Key Performance Indicators (KPIs) you need to track implementation and results. Establish goals that are not only applicable to the needs of POCs and the priorities of the protection response but also achievable. Break them down into monthly and quarterly KPIs.

We recommend identifying two types of goals in your planning:

- Primary goals that describe your top-priority protection outcome, as it relates to your overall Social Media strategy/project;
- Secondary goals, that describe your specific objectives for each Social Media channel.

140 [UNHCR, Practical Guide to the Systematic Use of Standards & Indicators in UNHCR Operations, 2006](#)

Important

Criteria for a SMART Social Media objective:

- What are you doing specifically?
- How will you quantify success or measure a change in results?
- What is the time frame for measuring the activity?
- Is this change achievable within the time frame, and with your available resources?
- How is this activity relevant to your overall goal?

Strategies are general approaches to achieve an objective. Tools are the specific Social Media platforms or technologies that implement the strategy, achieve objectives and attain goals.

Examples of objective strategies and tools to support protection goals:

Goal	To realize the potential for voluntary return
Objective	By [date X] increase the number of People of Concern who access verified information about return via Social Media from 5 to 15%
Activities	User-generated photos and videos illustrating the free choice people have to return, with returnees sharing their experience. Details of support available from UNHCR and partners. Daily AMA (Ask Me Anything) sessions on Social Media to answer questions people may have on voluntary return.
Tools	TikTok, Facebook and Instagram

Keep your objectives realistic by comparing your activity to similar activities offline. Look at what other organizations/actors are doing. Set small initial goals and revise your monitoring plan as you achieve your benchmark. For example, your objective may be to increase engagement with your Facebook posts to five comments per post. As the audience grows, you may aim for 15 comments (assuming you can respond to all of them).

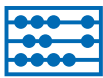


Step 2: Decide who and what to monitor and who will do the monitoring

If you have SMART objectives, then you need SMART indicators to measure them. You can measure the performance of your Social Media strategy by using two types of indicators:

- **Qualitative metrics**, where non-numerical values measure opinions about a given situation, e.g. comments expressing positive/negative attitudes towards Refugees;
- **Quantitative metrics**, where numerical values measure things like the percentage of Refugees reached via your Social Media account or the number of times they engaged.

For a comprehensive understanding, it is best to combine both types. Remember, as with objectives, so with indicators: they must be SMART if they are to be usable and useful. A good monitoring plan will use SMART metrics to measure SMART objectives, and ensure that collect and analyze only the data needed to report on those metrics is collected and analyzed.¹⁴¹



Quantitative Metrics for Social Media

Quantitative metrics can be tracked and analyzed with free built-in tools on a number of Social Media platforms, including Facebook, Twitter, YouTube and Google Analytics. In addition to measurement tools, you may also need a spreadsheet to track your data.



Resource

See [Chapter 9](#) for more information on how to use Social Media Analytics.

Quantitative metrics help you measure the success of your execution. Often, these are the metrics tied to performance on each channel. They are tracked on a regular basis as part of your execution plan.

Below are some examples of quantitative metrics for Social Media Key Performance Indicators(KPIs). Note that each of these has to be time bound (i.e., expressed with a specific period or 'as of' date):

- **Frequency:** Number of posts published (by users and UNHCR staff and partners);
- **Audience Growth:** Number of new followers ;
- **Reach:** Paid and Organic (or Earned/Owned) reach and impressions;
- **Engagement:** Number of interactions, video views, comments and shares;
- **Traffic Generation:** Number of Referrals or quality visits from Social Media channels.

141 [UNHCR, Practical Guide to the Systematic Use of Standards & Indicators in UNHCR Operations, 2006](#)



Qualitative Metrics for Social Media

While increasing reach, followers and impressions are crucial to achieving your CBP program objectives, the ultimate goals in a Social Media strategy are increased engagement and documenting. It is important to monitor the unintended consequences of using Social Media systematically, particularly looking at any protection risks or concerns that had not been identified before.

There are three levels of engagement on Social Media, which are based on a qualitative assessment of the behaviour of your audience on the platform:

- Low: Information goes one way. You push it out and your audience receives it and takes no action;
- Medium: Information goes two ways. You provide information and your audience responds (likes, replies or shares it);
- High: Your audience begins to create and share information. They may contribute photos, videos or blogs, and give insight on how to improve a campaign or take action.

Campaigns with **medium to high** engagement are more likely to see positive results. By monitoring Social Media engagement throughout your campaign, you can change your strategy if you're not achieving the desired results.

While measuring the number of comments, likes, shares, mentions, re-tweets and replies will give you a picture of the scale of audience engagement, tracking qualitative data will help you understand the nature of those interactions. For example, you can track individual messages communicated each week along with an analysis of the sentiment and/or content of specific comments and replies. Monitoring the conversation will allow you to identify trends on a number of vectors. Who is engaging and what are their levels of interest and knowledge about the topics covered?

Examples of Qualitative Social Media Metrics:

- Content of individual messages;
- Tone of comments and responses: positive, neutral or negative?
- Sentiment associated with certain conversations;
- Issues discussed, and how;
- Popular subjects and outliers;
- Rumors, misinformation and word-of-mouth issues;
- Use of words associated with xenophobia or hate speech.



Step 3: Consider how often you need to report to stakeholders

At this stage, consider the various stakeholders inside and outside UNHCR and how often you need to update them on the progress of your Social Media strategy/project. This will depend on the decisions they are making with the findings of the monitoring, and the time they need to do that.

While the frequency and scheduling of reporting may vary, depending on the topic of the SM strategy/project, it is important to have a clear and detailed monitoring plan to identify trends and/or specific real-time content that might highlight urgent protection risks. An example might be the appearance of sporadic but consistent comments about how much people have paid for relocation with UNHCR. This would indicate that people/groups are posing as UNHCR to profit from PoCs. Or it could be a message inciting people to harm others, specifying a location or time to do so.

Your ability to deal with such matters is directly related to your having pre-defined and tested workflows that allow you to react – and this doesn't mean just deleting messages. You also have to be able to connect with local authorities (as appropriate), offline structures, and staff and partners.



Step 4: Create your monitoring plan (process and schedule)

You saw in [Chapter 9](#) what tools you can use to monitor and track your metrics and progress. Many Social Media platforms, such as Facebook Insights and YouTube Analytics, include built-in metrics tools. There are also paid services that offer more comprehensive monitoring across platforms. Check your list of metrics against those available directly from the Social Media platforms' built-in tools and determine how to meet any gaps. Your indicator plan will show the chosen/prioritized metrics and data source(s) for each.

You must also decide how you will record and share data and information related to the monitoring plan, and what the schedule will be (based on your decision at step 3). These decisions should stem from the purpose of the Social Media project, i.e. its role in the overall CBP program. Once the frequency is determined, set up a schedule for monitoring, e.g. daily, weekly or monthly (see below). This will help you understand how much time you need for monitoring, bearing in mind how many platforms you are covering, what you are tracking, and how many metrics you have selected.

Sample Social Media Monitoring Schedule

Frequency	Action ¹⁴²	Metrics (examples)
Daily	Monitor and respond to Twitter and Facebook comments.	% of comments responded to; % of topics or questions re-occurring.
Weekly	Analyze AGD-disaggregated data to: ¹⁴³ <ul style="list-style-type: none"> Track new followers on Twitter. Identify trends by comparing these numbers to previous weeks; Track number of Facebook posts, comments and shares; Track preferences in post formats and topics; Track level of engagement with each type of format / topic. 	% increase of new followers per week on Twitter; % increase of new FB posts, comments and shares; % increase or decrease of PoCs' interest in selected topics.
Monthly	Monitor AGD-disaggregated data to: <ul style="list-style-type: none"> Track total activity (e.g. FB posts, Twitter tweets) and engagement (likes, comments, re-tweets, etc.); Track the tone and sentiment of PoCs' comments and posts and compare with previous data; Track referrals from your Social Media accounts to other UNHCR or partner websites; Track access to services described/advertised, including by People of Concern who have learned about it via Social Media. 	% increase/decrease in general activity on the Social Media channel; % sentiment associated with particular topics; % of successful referrals; % increase in number of PoCs who report learning about a service via our SM channel.
Quarterly	Track progress toward stated goals. While the above will produce performance data and help you track progress, it is always good to look at quarterly data to see if you can observe patterns over a longer period of time.	
Yearly	<ul style="list-style-type: none"> Review and revise Social Media strategy, internally and with partners; Use your results to plan for next year and inform new project designs and goals. 	

142 All actions and metrics must have a time limit (which may differ from how often indicator data is collected).

143 The specific AGD categories that are relevant for the Social Media and CBP program must be defined. Age, gender and disability are a must but other diversity characteristics could also come in to your plan.

Step 5: Identify reactions to monitoring findings

While your initial Social Media strategy may focus on building an audience, ultimately you want those people to DO something after interacting with you. With the right indicators/metrics, Social Media performance measures help you see how awareness becomes action and you can use these insights in your overall protection and communication planning.

How often you reassess your Social Media strategy (and perhaps the CBP program overall) depends on what is working.¹⁴⁴ Devoting time to monitoring helps you see your progress and if necessary, change the approach along the way. It shows the value of your efforts to your organization and funders.



¹⁴⁴ No one should be trying to adjust programs based on monitoring Social Media data alone. Rather, use this data to inform a Community-Based Approach to program design and adaptation.

2. Evaluating CBP Social Media Activities/Programs



Resources

- [UNHCR, Policy on Evaluation HCP, 2016 2](#)
- [UNEG, Norms and Standards for Evaluation, 2016](#)
- [IASC, Inter-Agency Humanitarian Evaluations of Large Scale System-Wide Emergencies \(IAHEs\) Guidelines, 2014](#)
- [UNHCR, Evaluation Strategy, 2018-2022](#)

An evaluation is “an assessment, conducted as systematically and impartially as possible, of an activity, project, program, strategy, policy, operational area or institutional performance. It analyzes both expected and unexpected results by examining the processes, contextual factors and causality using appropriate criteria such as relevance, effectiveness, efficiency, impact and sustainability.”¹⁴⁵

According to the [UNHCR, UNHCR Policy on Evaluation, 2016](#), an evaluation should provide useful evidence-based information that enables the timely incorporation of its findings into the decision-making processes of organizations and stakeholders. Applying rigorous methods and techniques, an evaluation provides the evidence needed to inform timely decision-making and promote learning. Evaluation is an ‘essential step’ in the Results-Based Management (RBM) approach.

Learning is the process of incorporating lessons learned into ongoing practices to increase effectiveness and sustainability. Learning includes sharing best practices both internally and externally. While learning does happen through the monitoring process, evaluation takes us a step further to assessing the overall program for learning and accountability purposes.¹⁴⁶

As explained above, you can monitor your performance on Social Media using qualitative and quantitative metrics, in real time and often from a dedicated dashboard embedded in the platform. While these tools make good use of data from our SM accounts to track our performance with standard measures, evaluations of Social Media projects are most effective when additional information is collected through engagement with Persons of Concern, affected communities and partners.

¹⁴⁵ [UNHCR, Policy on Evaluation HCP, 2016 2](#)

¹⁴⁶ Keeping regular “Lessons Learned Logs” can make it easier to do an evaluation when it due.



Factsheet

See [Factsheet 7](#) for an in-depth checklist to help you assess if your Feedback & Response mechanism is community-based and integrated to your programme monitoring and evaluation.

Performance indicators for Social Media will be clearly defined as part of the broader performance plan for the CBP program. An in-depth evaluation of the CBP program will reveal the link between Social Media and offline protection.

When evaluating the CBP program and Social Media component, your prior Situation Analysis will be the roadmap for looking at intended and unintended consequences and possible changes. The Participatory Assessments give a baseline and can be replicated over time to complement or complete the data collected during evaluation.



Messaging Apps

Like Social Media, Messaging Apps are used differently by different people. So relying on data gathered solely through apps risks introducing statistical bias into the analysis of a particular issue, as the sample may not be representative. Differences in individuals' access to mobile phones could affect the way populations are represented. Conclusions based on this skewed data risk reinforcing exclusion and inequality.

But Messaging Apps can be extremely useful for rapid assessments of PoCs' opinions or ideas. Third-party companies have systems to survey people in certain locations, using mobile credit as rewards. These could be used with PoCs in remote areas, providing the operational context allows for this and the systems match our CBP objectives.

Few Messaging Apps have embedded analytics systems, so you would have to use third-party systems via API to extract the data and analyze it.

As with Social Media, so with apps, it is important not to rely only on quantitative metrics to measure engagement or protection outcomes. The number of people engaged and/or the number of messages exchanged are not reliable indicators of the outcome of the activity or the effect it has on PoCs being able to access their rights



Resourcing

Implementing, monitoring and evaluating a Social Media strategy takes time, effort, resources and planning. Here are some ways to maximize your impact:

- Participate in evaluations by other agencies and partners at global, regional and country levels, especially if they too are looking at online content or SM protection strategies;
- Seize opportunities to initiate, commission and manage evaluations jointly with partners at global, regional and country level, so as to share costs and maximize outputs;
- Start with existing monitoring systems embedded in platforms and only after you have a better sense of what (if anything) is missing to meet your data needs, think of using third-party monitoring systems or creating your own;
- Remember that Excel is probably the best free tool to monitor, analyze and produce reports using your Social Media data;
- Rely on the expertise in your organization, especially Information Management colleagues in your operation or Regional Bureau, the Division of Strategic Planning and Results (DSPR), and the Evaluation Service.



Do's

DO keep it simple. Only measure what you need and can measure. It's not about what you can track but what you need to track to report on your selected metrics/indicators.

DO link back to your objectives. Be clear about the questions you are asking, why and how you plan to answer them. Select indicators that are most relevant and collect data only for these.

DO feed your Social Media M&E into wider efforts to measure protection outcomes and impact. M&E can't assess overall CBP project or programme impact but it should be a part of that process.

DO identify the intended users of your monitoring data and findings. Who can and should make decisions based on the findings and what is the best format for them to receive it? These questions should be answered before monitoring begins, so your monitoring plan reflects their needs and data can be processed, analyzed and presented in a way that will be useful to them.



Don'ts

DO NOT just focus on website statistics. Even if you only pick a few indicators, think more broadly about M&E to include quality and usefulness, uptake and use of your outputs.

DO NOT entirely base your M&E on data analytics, without involving communities and Persons of Concern.

DO NOT treat your Social Media activities as stand-alone but rather try to evaluate them in relation to the overall CBP strategy. Bear in mind the context, including possible changes on the ground.

DO NOT underestimate the use of qualitative metrics, especially if your protection outcomes involve some sort of behavioral change.



Check List

Have you identified how the findings of performance monitoring will be used to adapt the Social Media strategy specifically and/or the CBP strategy generally? Who will do this and when in relation to the program cycle?

Have you linked the performance indicators for your Social Media strategy to protection indicators?

Have you defined your objectives, activities and tools in collaboration with all stakeholders, including communities?

Have you defined with all stakeholders your SMART goals and SMART indicators/metrics?

Have you decided exactly what to monitor and which performance metrics/indicators will allow you to do this? How often and for how long will you monitor these?

Have you identified who will be responsible for each step of Social Media performance monitoring (i.e., collecting, compiling, cleaning, visualizing and analyzing the data, and reporting on the findings)?

Have you discussed with stakeholders the question of who needs to see the data and/or the findings, how often and in what format?

Have you created a schedule for monitoring real-time and asynchronous data?

Have you assessed the resources needed to implement your monitoring plan?



Case Studies

[DFID, Using Social Media for Research, Monitoring and Evaluation in the MENA Region: World Food Program Case Study, 2017](#)

[Cassidy C. and Ball L., Communications Monitoring, Evaluating and Learning Toolkit, ODI, January 2018](#)

[Pulido CM, Redondo-Sama G, Sordé-Martí T, Flecha R, Social Impact in Social Media: A New Method to Evaluate the Social Impact of Research, PLOS ONE, 2018](#)