

SOURCES & METHODS TRANSPARENCY TEMPLATE

PROJECT NAME:

TIMEFRAME ANALYZED

LEAD SOURCE:

FROM: _____ TO: _____

CHANNELS ANALYZED:

- Twitter
- Facebook
- LinkedIn
- Pinterest
- YouTube
- External blogs
- Instagram
- Tumblr
- Google+
- Reddit
- Other: _____

CONTENT SOURCES:

SEARCH STRING (attach additional pages if necessary):

ANALYSIS DEPTH/TYPE:

- Automated
 Manual
 Hybrid
 All content reviewed
 Representative sample. Percentage sampled: _____

SOURCE /SEARCH LANGUAGES:

- English

SENTIMENT CODING:

- Automated
 Manual
 Hybrid
 Manual sampling: _____ (percentage)
 3-pt scale
 5-pt scale
 Other scale: _____
 At entity level
 Paragraph/doc level

SPAMBOT FILTERING:

- Automated
 Manual
 Hybrid
 Includes news releases
 Excludes releases

METRICS CALCULATION AND SOURCES:

- Reach
- Conversation
- Engagement
- Opinion/advocacy
- Other: _____

PROPRIETARY METHODS (describe in detail):

OTHER QUESTIONS YOU MIGHT WANT TO ASK (especially before you give a vendor a new assignment):

1. What is, or will be, the actual research design or plan for the measurement and evaluation project?
2. Is there, or will there be, a full description in non-technical language of what is to be measured, how the data are to be collected, tabulated, analyzed, and reported?
3. Will the research design be consistent with the stated purpose of the PR/social media measurement and evaluation study that is to be conducted? Is there, or will there be, a precise statement of the universe or population to be studied?
4. Does, or will, the sampling source or frame fairly represent the total universe or population under study?
5. Who will actually be supervising and/or carrying out the PR/social media measurement and evaluation project?
6. What is, or are, their backgrounds and experience levels? Have they ever done research like this before? Can they give references?
7. Who will actually be doing the field work? If the assignment includes media content analysis, who actually will be reading the clips or viewing and/or listening to the broadcast video/audio tapes? If the assignments involve focus groups, who will be moderating the sessions? If the study involves conducting interviews, who will be doing those and how will they be trained, briefed, and monitored?
8. What quality control mechanisms have been built into the study to assure that all "readers," "moderators," and "interviewers" adhere to the research design and study parameters?
9. Who will be preparing any of the data collection instruments, including tally sheets or forms for media content analysis studies, topic guides for focus group projects, and/or questionnaires for telephone, face-to-face, or mail survey research projects?
10. What role will the organization commissioning the PR/social media measurement and evaluation assignment be asked, or be permitted, to play in the final review and approval of these data collection instruments?
11. Will there be a written set of instructions and guidelines for the "readers," the "moderators," and the "interviewers"?
