Implementing the Bellwether Methodology:
Lessons from Two Fast-Paced, Real-Time Advocacy Evaluations

Demonstration Session 690, AEA 2011
Anaheim, CA
November 4, 2011
1:35-2:20pm
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Session Agenda

1. Overview of the Bellwether Methodology
2. Implementing the Methodology in Two Advocacy Evaluations
3. Overall Considerations & Lessons Learned
4. Q&A/Discussion
Bellwether Methodology Overview

- Developed by Harvard Family Research Project
- Structured interviews by external evaluator
- “Bellwethers” = influential people whose positions require tracking broad range of policy issues
- Interviewees are unaware interview will discuss policy issue of interest to advocates
Uses of the Methodology

- Gauge policy issue’s salience, position on agenda, visibility, momentum
- Assess political will for future policy changes
- Contribute, with other methods, to evaluation of an advocacy campaign/message
- Repeatable over time
Bellwether Interview Protocol

- Request on behalf of external entity
- Scheduling FAQs
- Interview as short as possible (20 min.)
- Offer confidentiality
- Framing: e.g., “Interested in hearing about general local priorities re public services”
- Starts broad then narrows to issue area
- Close-ended questions
Resources


Case Study #1: Library Support Campaign

- Grant from a large family foundation to a library “field organization”
- Part of evaluation of library support campaign in two pilot markets
- Barometer of bellwether perceptions re: support and funding of public libraries
- Baseline (June) & follow-up (Jan)
- Used with other methods
26 interviews at two time points/two markets
City and county elected and appointed officials who make and influence funding decisions for public libraries (e.g., city/county council, mayor, city manager, board of ed)
Cluster sampling approach (vs. individual), changes from baseline to follow-up
- Request on behalf of foundation
- Baseline vs. follow-up interview request
- Starts broad then narrows to library funding/campaign awareness & perceptions
- Concerns with lobbying
Revealed important contextual differences between two markets: funding structures, decision maker attitudes, populations, etc.

Assessed early campaign “exposure”

Informed messaging (e.g., connect libraries to the economy)

Set realistic campaign expectations in short timeframe and difficult funding context
Case Study #2: the Chalkboard Project

- Civic engagement effort around education reform in Oregon
- Prospective and retrospective evaluation
- Bellwether interviews were one of several data collection methods designed to inform a suite of evaluation questions
Sample constructed with heavy input from client
Focused on those “in the know” regarding policy priorities for the Oregon legislature, including: media, policymakers, political consultants
Interview fatigue from recent evaluation/performance review interviews
Balancing retrospective and prospective sample lists
Protocol developed by ORS; refined by client

- Used funder name (major state foundation) in scheduling interviews
- Scheduled interviews with 4 of 7 people on sample list
- Protocol started broad and narrowed to focus on education reform
- Client’s information needs changed to focus more on credibility, alignment with key partners, and effectiveness, which shifted resources to Pulse Interviews
Bellwether findings reported in conjunction with other evaluation data in confidential memo to project staff and board

Because project staff were incredibly politically attuned, bellwether alone did not offer substantial new insight

Interview data were used for strategic learning and processed with staff, board, and key partners
Developing the sample
Short amount of time & limited availability for interviews
Conducting bellwether interviews at multiple time points
Sensitivity around “lobbying”
Dual purposes of prospective and retrospective look
When is this method most useful?

- In conjunction with other methods
- Looking for general themes of bellwether perceptions & probing on thought process
- When org does not know or have connections to insider political knowledge
- New campaign – to get baseline context
- Need evidence for other campaign stakeholders (e.g., funders)
Any Questions?
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More ORS resources available on the “Publications & Resources” page of our website:
• “Pathways for Change: 6 Theories about How Policy Change Happens”
• “A Guide to Measuring Advocacy and Policy”
• “Advocacy Evaluation Case Study: The Chalkboard Project” available: http://www.evaluationinnovation.org/publications/advocacy-evaluation-case-study-chalkboard-project