

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

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1:35-2:20pm

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

- 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

- 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

- 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

- Coffman & Reed. Unique Methods in Advocacy Evaluation. Paper presented Jan 21, 2009 at Advocacy Evaluation Advances Convening. Sponsored by the California Endowment, Los Angeles, CA.
- Blair, E. (2007). Evaluating an Issue's Position on the Policy Agenda: The Bellwether Methodology. The Evaluation Exchange, 13(1), 29.

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

Library Campaign Interview Process & Protocol

- 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

- 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

Chalkboard Project Sample

- 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

Chalkboard Project Interview Process & Protocol

- 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”
- “A Handbook of Data Collection Tools: A Companion to ‘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>