Measuring the Impact of Advocacy: A Framework and Associated Tools

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THE WILLIAM AND FLORA HEWLETT FOUNDATION

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Measuring advocacy effectiveness is inherently difficult…

- Political outcomes are dependent on a huge variety of factors, and context is key
- Understanding a given organization's specific contribution to policy change is very difficult, because there are typically multiple actors working on the same issue
- Data points are limited, making quantitative analyses of limited value
- There can be a significant time lag between interventions and any observable impact
- Different stakeholders may hold varying definitions of success
- Windows of political and policy opportunities open – and shut – suddenly and unexpectedly

> *It is the mark of an educated man to look for precision in each class of things just so far as the nature of the subject admits; it is evidently equally foolish to accept probable reasoning from a mathematician and to demand from a rhetorician scientific proofs.*
>
> \- Aristotle, *The Nicomachean Ethics* (talking about POLITICS!)

Sources: ODI, AECF/ORS Impact, SSIR, Center for Innovation Evaluation

…And in practice, there are several practical features of the work that breed frustration and anxiety

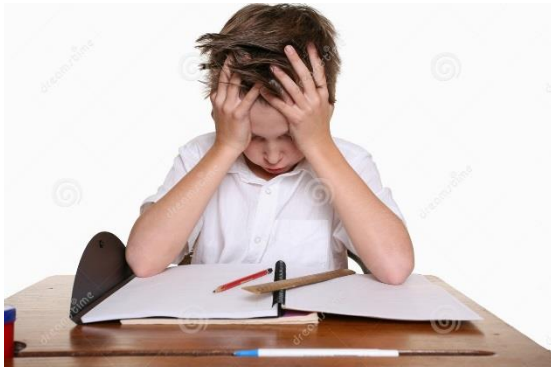
- *Monitoring and evaluation can be time and resource intensive:* Measuring impact takes resources away from the advocacy activities, and outsourcing evaluation is expensive
- *Measuring advocacy effectiveness encourages measurement at the risk of meaning:* Organizations often focus on what they can measure, rather than what they should measure
- *Evaluation can lead to competitiveness and over-contribution*: Despite the industry's move away from attribution, organizations are often incentivized to overstate their role and sell themselves

Sources: Expert interviews; literature review

We want to bridge the gap between what organizations measure and what matters – and find a way to achieve both objectives of evaluation

Accountability

Learning



- **Accountability (especially to funders) often crowds out capacity to truly learn**
- **When accountability is less prescriptive, organizations tend to invest less in M&E in order to focus on "getting the job done"**

Good news: the advocacy community is *not* less sophisticated than other industries interested in influence

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Industries we spoke with:

Branding/marketing

xerox Nestlé P&G

Lobbying

KyleHouse Group Sprint

Media/journalism

ATLANTICMEDIA CENTER FOR INVESTIGATIVE REPORTING npr

Diplomacy

Behavioral economics

ideas42

Key takeaway:

Other industries have not "cracked the nut" on impact measurement and commonly rely on gut feel, trial-and-error, and word of mouth

Bold assertion: the advocacy community's focus on outcomes has led to perverse incentives

- It skews the conversation away from learning and towards accountability
- It encourages a short-term time horizon (since the starting point of the analysis depends on *some* outcome being achieved)
- It places a higher premium on storytelling than on analytical rigor
- It incentivizes claiming disproportionate contribution
- It undervalues defensive advocacy, where success may involve no observable change

We recommend evaluating the *effectiveness* of an organization separately from the *outcomes* it achieves

- Assessing effectiveness facilitates learning. Even in instances of success, it allows organizations to find ways of improving. Where outcomes are not achieved, it still allows organizations to identify what it has done well and should continue, building overall capabilities

- A focus on effectiveness follows, to some degree, the spirit of Steven Teles and Mark Schmitt's article, *The Elusive Craft of Advocacy*, with its suggestion to focus on evaluating *advocates* rather than advocacy itself – since that implies a focus on capabilities rather than outcomes

- That said, the tools used by organizations and by professional evaluators are important for both accountability and especially for learning. Selecting which tools to use to assess effectiveness remains a challenge

Next, we propose an approach for tool selection that we hope can arm organizations and donors with a practical assessment of effectiveness

Sources: Schmidt and Teles, "The Elusive Craft of Evaluating Advocacy" in Stanford Social Innovation Review; Comments from David Devlin-Foltz, Julia Coffman and Tanya Beer, and Lisa Ranghelli;

We propose focusing on three categories of evaluation that together provide a holistic assessment of an organization's effectiveness

1. **Strategic positioning:** Is the organization well-positioned strategically to bring about a specific policy change?

2. **Selection of tactics:** Has the organization chosen its tactics to best achieve the desired policy change?

3. **Tactical effectiveness:** Is the organization effective at using those tactics to achieve that policy change?

When an organization is weak at any one of these three categories, it will likely stumble in the pursuit of its policy objective

1 **Poor strategic positioning:** If the organization is not well positioned to bring about change…

"The advocacy campaign to stop Kony… does not address the real problems on the ground and it does not offer the right solutions…the very pressure to arrest Kony generated by advocacy campaigns like this is actually contributing to him keeping up a steady stream of [child] abductions."

Patrick Wedner, *Justice in Conflict*

2 **Poor selection of tactics:** If the organization chooses the wrong tactics…

"A Google News search for "fwd.us" serves up page after page of stories about the backlash the group brought upon itself…for its strategy of running ads applauding regressive social and environmental positions by senators whose votes Fwd.us is trying to buy."

Leighton Woodhouse, *Huffington Post*

3 **Poor tactical effectiveness:** If the organization is ineffective…

Too many data points to count – every organization has an example of a campaign that was less successful because of execution!

If an organization uses tools in each category and can demonstrate success, it is likely effective, *even if the policy outcome is not achieved*

- An **effective organization** ought to be able to demonstrate:
  1) a sound campaign strategy
  2) strategically chosen tactics
  3) capable deployment of those tactics
- If the overall policy goal is not achieved, those outcomes were likely influenced by factors beyond the organization's control, and it can still use the situation as a learning experience

To implement the framework, we worked with eight organizations

We worked with three organizations to design a tool…

care

ONE

Save the Children

…and tested the tool with a further five organizations

breadfortheworld
HAVE FAITH. END HUNGER.

CRS
CATHOLIC RELIEF SERVICES

CCIH
Christian Connections for International Health

fh
food for the hungry

HOPE
THROUGH HEALING HANDS

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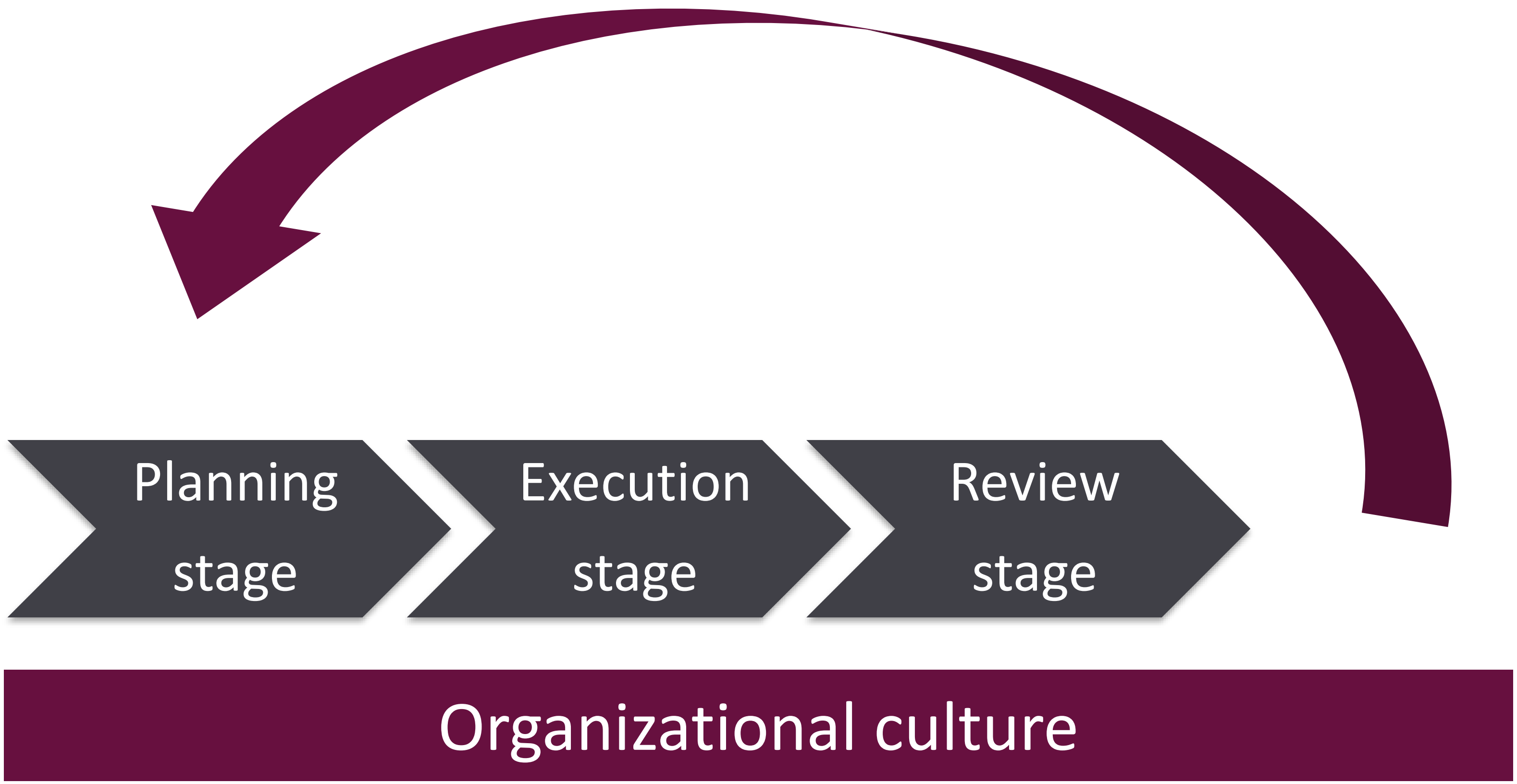
Measurement can occur at several points during a campaign, and the findings can feed into future campaign planning



Sources: Dalberg analysis 2017

For each stage, we designed questions and a rubric to evaluate the answers to the questions

Question	Category of tool	Evaluation of answer: 1	2	3	4	5	Score
What is the policy goal?	Strategic positioning	Policy goal not identified	High level policy goal identified, lacking specificity	Specific policy goal identified	Policy goal broken down into objectives	Policy goal broken down into SMART (specific, measurable, actionable, realistic & time-based) objectives	
Who are your targets?	Strategic positioning	No clear prioritization of countries (governments)	Target country identified; no clear identification of institutions within that government	Target country and institutions identified; no clear identification of individuals within those institutions	Target country, institution and individuals identified; no assessment of individuals' stance	Target country, institution and individuals identified; individuals categorized based on degree of	
What motivates those targets (e.g., media attention, citizen pressure, facts, etc.)?	Selection of tactics	No sense of what might motivate targets	General understanding of what might motivate targets, but not specific to individuals	Examination of what has motivated specific targets in the past	Targets analyzed, with clear sense - and examples - of what specific arguments and evidence motivate them to act	Targets analyzed, with clear sense - and examples - of what specific arguments an evidence mo them to act	
What tactics (e.g. policy research and expertise, meeting with policymakers, grassroots mobilization, etc.) will you use?						tracking built into application of tactics in future	
Have you thought about what teams and	Selection of tactics	Plan developed without	Plan developed without	Different teams/departments	Different teams/department	Different teams/departments	

Questions to encourage turning tacit knowledge into something explicit – and to spur thinking as appropriate

Space to self-score and reassess answers as a result (if helpful)

Though there can be overlap, the goals and implementation of MEL look different at each stage within the advocacy campaign cycle

	Planning	**Execution**	**Review**
Definition	The process of developing a strategy, selecting tactics and solidifying partnerships for an advocacy campaign	The execution of a campaign is the implementation of tactics to achieve a strategy	The period of time dedicated to understanding and disseminating lessons and outcomes of a campaign
Goals of MEL	MEL helps to identify the best opportunities for achieving an outcome, which tactics will be effective, and where partnerships are needed	MEL is needed to adjust the course of a campaign strategy, tactics or partners as needed, and to collect data for the review stage	This stage of a campaign is almost entirely devoted to MEL in order to harvest lessons from the campaign and report to donors
What is involved	• Analysis • Partnering • Incorporation of past learning	• Analysis • Adjustment of strategy, tactics and partners • Data collection	• Analysis • Dissemination
Sample tools	• Power mapping • After/before action review	• Champion-ness index • Media tracker	• Process tracing • Outcome harvesting

Lessons learned from the experience

Benefit of the tool

- It shifts the conversation away from evaluation and towards learning, and encourages discussion within each organization, which has potential strategic benefits
- It can prompt reflections and further work from the team to answer questions thoroughly (e.g., if their answers score low on a given rubric-question)
- The tool makes explicit much of the "tacit knowledge" used by organization leadership – which helps with donor communications *and* understanding from staff

Limitations and implications

- The tool by itself is meant for any advocacy organization; for any given campaign, it proved useful to layer in a specific framework (which can be articulated through a Theory of Change, itself a useful way to clarify some of the "Strategic Positioning" items)
- Some questions in the framework may be tough for any individual organization to answer on its own (e.g., what motivates specific policymaker targets); "club goods" make sense in the world of advocacy
- The tool is not a comprehensive MLE tool, though it does move the discussion from evaluation to

Thanks!

Please keep in touch:

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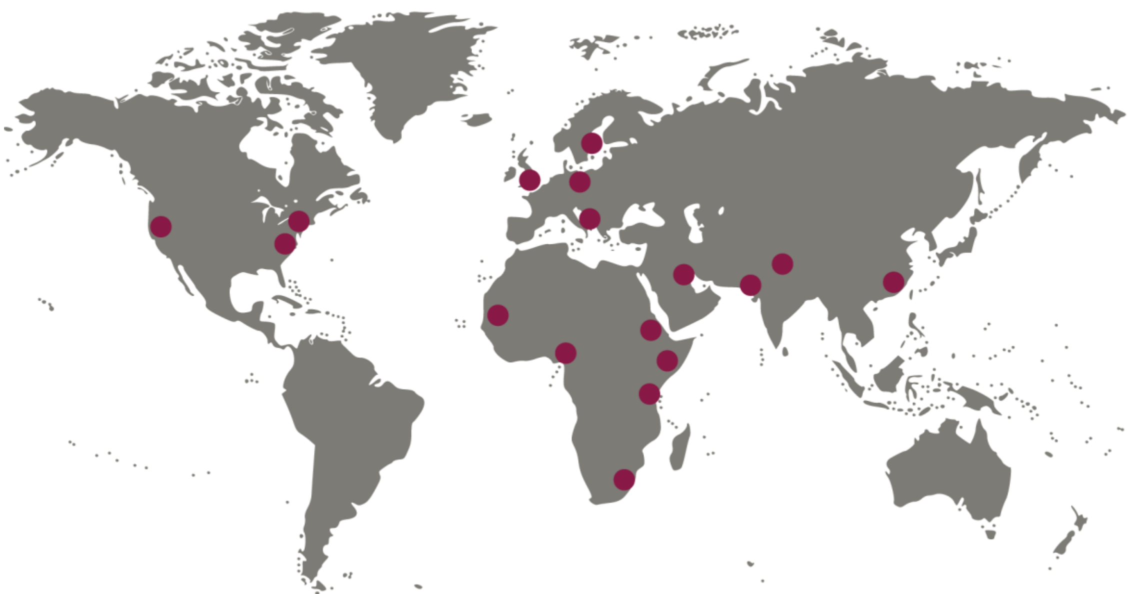

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