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Effective Advocacy Evaluation: The Role of Funders

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Key Points

- This article addresses the role of funders in supporting advocacy and advocacy evaluation work.
- The growth and strengthening of the advocacy evaluation field has lessened the “hard to measure” stigma attached to advocacy grantmaking.
- An increasingly broad array of evaluation designs and methods better capture advocacy data, enable rapid analysis and learning, and foster accountability.
- Based on a study of advocacy grantees and a study of advocacy grantmakers, the authors conclude that supporting evaluation and capacity building, providing multi-year funding commitments and core support, and creating custom reporting requirements and timelines are strategies that funders can use to strengthen their advocacy grantmaking.

Introduction

The people who work in the nonprofit and philanthropic sector are the idealists: We believe that through our collective work we can bring about a better world. We see the poverty, hunger, disease, lack of access to education, and myriad other hardships endured by our fellow humans and are inspired to create change.

At this writing, in January 2009, our sector is facing a crisis. The global economic downturn has diminished many foundation endowments while increasing the hardships in the communities we serve. We are operating in an environment

of more demand and less funding. In this climate more than ever, nonprofits and funders need to make strategic decisions about how to focus their efforts to do the most good.

Advocacy work is one possible solution. By addressing change at the systems level rather than by treating symptoms of social ills, advocacy work has the potential to affect many more lives than direct service work alone.

Our definition of advocacy is very broad: Advocacy is a wide range of activities conducted to influence decision makers at various levels. The definition includes established approaches such as policy change, lobbying, litigation, and public education and also capacity building, network formation, relationship building, communication, and leadership development. We have adopted this definition because of our experience in the field observing many nonprofit organizations and foundations involved in advocacy work. We believe that our inclusive definition accurately conveys the variety of strategies and activities necessary to mount an effective and successful advocacy campaign — much broader than policy change work alone.

As advocacy approaches become more common, nonprofits and their funders naturally want to know what impact they are having. Unfortunately, they soon discover that advocacy evaluation presents some specific challenges. Few evaluators

have had much experience evaluating advocacy, and many foundations consider advocacy efforts to be “hard to measure” — that is, beyond the scope of what can be evaluated effectively. This perception is based on an understanding that the changes desired by advocates often take a very long time to achieve, are difficult to think of in terms other than policies won or policies lost, and are influenced by myriad players and external factors that are often out of the control of those working on the issues.

This hard to measure view has, fortunately, begun to change. Beginning in 2005, a group of funders supporting advocacy and learning emerged. At the forefront were three foundations: Annie E. Casey Foundation, The Atlantic Philanthropies, and The California Endowment. These foundations chose to support effective advocacy, starting from the premise that evaluation could inform and strengthen the work of advocates and the advocacy strategy of funders.

The funders who supported advocacy also recognized a need to support the related field of advocacy evaluation. When we speak of “advocacy evaluation field building,” we don’t mean the creation of a new discipline with its own methodologies. Rather, we mean the transformation of existing evaluation techniques and tools, arising from the recognition that evaluating advocacy presents specific challenges.

One of the first visible products of the advocacy evaluation field-building work was Blueprint Research & Design’s (2005) publication *The Challenge of Assessing Policy and Advocacy Activities: Strategies for a Prospective Evaluation Approach*, produced for The California Endowment. The report described common challenges to evaluating advocacy work, which have been expanded on and modified as the field has evolved. The first five challenges are from Blueprint Research & Design (2005) and the last two are additions from Innovation Network (2008).

- *Complexity*: Advocates are trying to advance their goals in an ever-changing environment, and the path to success is complex and itera-

tive. Often, linear models are not very helpful for trying to understand the nonlinear nature of the systems.

- *Role of external forces*: There are forces beyond advocates’ control affecting the environment surrounding the campaign and advocates’ ability to make progress. Timing can be crucial to success and many organizations make great strides when a “window of opportunity” presents itself.
- *Time frame*: It may take 20 years to reach an ultimate advocacy “big win,” making it difficult to sustain organizational capacity, sustain funding, sustain issue area support, and communicate success over the long term.
- *Shifting strategies and milestones*: Advocates must adjust to the changing environment, which may result in modified strategies and altered ideas of campaign milestones.

Advocacy is a wide range of activities conducted to influence decision makers at various levels.

- *Attribution*: Successful campaigns are often composed of multiple players operating complementary campaigns. When a campaign is successful, there can be pressure for advocates to “own” the win. Contribution, on the other hand, acknowledges the complex, interrelated forces at work and does not alienate friendly partners and collaborators.
- *Sustainability*: Advocacy organizations need to maintain strength throughout the life of an issue. While funding is a component of sustainability, it is not the only issue: Staffing sustainability is also very important.
- *Interim progress*: Since advocacy’s long-term goals are far into the future, advocates need interim measures of success to show work is on track. Interim measures keep advocates informed about their own progress and help them share success stories on the way to the “big win.”

In addition to systematically describing the evaluation challenges advocacy work presents,

TABLE 1 Interview Participants

Name	Title	Organization
Lester Baxter	Director, planning and evaluation	The Pew Charitable Trusts
Tanya Beer	Assistant director of research, evaluation and strategic learning	The Colorado Trust
Gale Berkowitz	Evaluation director	The David and Lucile Packard Foundation
Sheri Brady	Senior policy fellow	Voices for America's Children
Tanya Coke	Independent consultant (former program manager)	U.S. Human Rights Fund
Don Crary	KIDS COUNT state coordinator	Annie E. Casey Foundation
Nicole Gray	Program officer	The William and Flora Hewlett Foundation
Jackie Williams Kaye	Strategic learning and evaluation executive	The Atlantic Philanthropies
Tom Kelly	Evaluation manager	Annie E. Casey Foundation
Kristi Kimball	Program officer	The William and Flora Hewlett Foundation
Brian Quinn	Program officer, research and evaluation	Robert Wood Johnson Foundation
Jennifer Lockwood-Shabat	Vice president, programs	Washington Area Women's Foundation
Rebecca Rittgers	Program executive	The Atlantic Philanthropies
Scott Scrivner	Officer, planning and evaluation	The Pew Charitable Trusts

Blueprint's *The Challenge of Assessing Policy and Advocacy Activities* sparked a great deal of interest among funders and evaluators, and the field-building process began to gain momentum.

But something was missing: the perspective of advocates themselves. This was an important gap since a field cannot progress without the buy-in of its practitioners. Advocates, evaluators, and funders must work together to move forward, so it is critical to understand the perspectives of all three, find out what they have learned so far, and build on insights from each viewpoint.

Methodology

In the spring of 2008, Innovation Network partnered with The Atlantic Philanthropies and the

Annie E. Casey Foundation to conduct a research study about evaluation practice and experience in advocacy work. More than 200 responses were received to our survey of nonprofit advocates. Survey findings were published in the August 2008 report *Speaking for Themselves: Advocates' Perspectives on Evaluation*.

The second stage of our research wrapped the conversation back to the funder perspective. Findings from *Speaking for Themselves* became the basis for a funder interview protocol. We conducted interviews in December 2008 and January 2009 with 14 advocacy funders (see Table 1), asking them to discuss the significance of findings from *Speaking for Themselves* and add their own views about the current practice and future devel-

opment of both advocacy and advocacy evaluation. With additional insights drawn from Innovation Network's experience and involvement in the advocacy evaluation field, this article discusses the state of the field and suggests ways for funders to further contribute to its development.

Effective Advocacy

For purposes of our research, we define advocacy as “a wide range of activities conducted to influence decision makers at various levels.” This definition consciously includes not only traditional advocacy work like litigation, lobbying, and public education but also capacity building, network formation, relationship building, communication, and leadership development.

But what do we mean by *effectiveness* in the context of advocacy work? One way of assessing advocacy effectiveness is to look at the internal *capacities* and advocacy *strategies* most necessary to be successful in an advocacy effort. (By capacities, we mean the skills and capabilities of an organization. By strategies, we mean broad approaches to advocacy work, such as community organizing and media campaigns.) Interestingly, our findings indicate no clear consensus on what the most important strategies and capacities are.

Capacities

In a 2006 report, TCC Group, representing the evaluator perspective, outlined eight capacities for effective advocacy: organizational characteristics, leadership, board leadership, adaptability, management, networks, technical skills, and organization culture.

In our research, advocates agreed with many but not all of TCC's findings. Advocates rated research and communications, organizational support for advocacy, collaboration with external parties, and resources and staffing for advocacy as the most important capacities (Innovation Network, 2008).

Funders, in contrast, tend to rate strong leadership as a key capacity — something that advocates did not mention. The Annie E. Casey Foundation's Don Crary explained, “I would put leadership and

credibility right at the top.” The Colorado Trust's Tanya Beer elaborated on desired leadership qualities: “When I'm most impressed by an advocacy organization . . . , it is because their leader is very savvy, quick on their feet, responsive, and flexible.”

“When I'm most impressed by an advocacy organization, it is because their leader is very savvy, quick on their feet, responsive, and flexible.”
— Tanya Beer

Strategies

In *Speaking for Themselves*, advocates were also asked to indicate what advocacy strategies they saw as most effective. Top responses included community and grassroots organizing, coalition building, public education, and legislative advocacy. Funders also mentioned coalition building, but they placed greater focus on political advocacy, communications and media, and the power of combining strategies. In other words, advocates focused more on communications and grassroots approaches, whereas funders focused more on leadership and political advocacy. These differences may be simply a matter of viewpoint: Advocates are closer to the work, so they see it from a more operational perspective, whereas funders have a more strategic viewpoint, looking across groups of grantees or across the whole field. These disconnects indicate a need for emphasizing communication between advocates and funders.

The “strategies and capacities” findings prompted some funders to comment more broadly. Tanya Coke, an independent consultant and former program manager of the U.S. Human Rights Fund, observed,

Some of the most effective organizations we fund are those that combine advocacy strategies to have a larger impact. Those with constituent members are

thinking deeply about how to project that constituency into policy making more effectively. The best legal groups in the field are partnering with community-based organizations to help solve long standing problems.

In short, “effectiveness” doesn’t just mean choosing the right mix of strategies for a particular advocacy effort; it also means having the requisite capacity and infrastructure to effectively implement those strategies. How do you know whether implementation is effective? You evaluate your work.

“In advocacy as in other areas, evaluation brings the potential to both learn from one’s work — better understanding where progress toward goals has been made, or not, and why — and make informed adjustments that improve the odds of success, however that might be defined.” — Scott Scrivner

The Argument for Evaluation

Evaluation is important because it provides a mechanism for ongoing learning. Grantees who can measure their own work can provide more meaningful data in grant reports and characterize progress more accurately. From such reports, funders would accumulate knowledge regarding principles for effective advocacy campaigns. Over time, the aggregated lessons — about both successes and failures — would enable funders to work in partnership with grantees to conduct more successful campaigns. This completes the circle, maximizing foundations’ positive impact in the lives of people they serve.

Scott Scrivner of the Pew Charitable Trusts said he thinks the benefits of advocacy evaluation are

the same as those of program evaluation, with which most funders are already familiar:

Advocates stand to benefit from gaining an independent and unbiased perspective on their work from both insiders to and the targets of their campaigns. In advocacy as in other areas, evaluation brings the potential to both learn from one’s work — better understanding where progress toward goals has been made, or not, and why — and make informed adjustments that improve the odds of success, however that might be defined.

Despite evaluation’s importance, only 25 percent of the 211 organizations surveyed for *Speaking for Themselves* had done any evaluation of their advocacy work. Only 17 percent had ever worked with an outside evaluator. The funders we interviewed reacted strongly to these statistics. There was overriding agreement that the numbers are very low, suggesting that much more can be done to support advocate adoption of evaluation. One area in which funders can help is to assist grantees in choosing an approach to evaluation — the methodology and team structure most appropriate for that grantee’s situation and learning needs.

Approaches

There is no correct, one-size-fits-all evaluation approach for advocacy. Just as there are multiple advocacy strategies an organization may choose to adopt (e.g., lobbying or grassroots organizing) when tackling an advocacy issue (e.g., reducing carbon emissions), there are a number of evaluation approaches that can produce useful results, either alone or in combination. The challenge is to find the correct approach for a given situation. By selecting and adapting the evaluation approach to fit the strategy and capturing data on progress and effectiveness, it is possible to learn about different advocacy strategies and become savvier about which are employed.

Common evaluation approaches include the following.

- *Formative evaluation* is conducted while a program or effort is implemented. The evaluation

documents program results to inform program redesign or course corrections. Most often, formative evaluations have an internal audience.

They may be conducted by an internal staff person, an external evaluator, or a combined team.

- *Summative evaluation* is retrospective: It takes place after a program has been in operation for some time or even ceased to operate. Summative evaluation seeks to understand the intended and unintended effects of an intervention, and is less concerned with how the effects happened. Summative evaluation results are more likely to be shared with external audiences than formative evaluation results. While it does have some utility to advocacy evaluation, it should not be the only approach because summative evaluation is ill equipped to attribute impact to the work of any one particular advocacy organization.
- *Developmental evaluation* holds particular promise for the fast-paced world of advocacy. Coined by Michael Quinn Patton (1994), developmental evaluation seeks to “provide feedback and support developmental decision making and course corrections along the emergent path.” While formative evaluation performs a similar function, developmental evaluation is distinguished by its flexibility in complex contexts. It is most suitable in contexts — like advocacy — that have many moving parts and in which outcomes and pathways to success are unclear. It accepts that progress *toward* a goal may be the only measure of success, particularly in the short term.

In discussing these three evaluation approaches, our purpose is to provide a high-level explanation of some evaluation design types to inform the discussion of strategic learning and evaluation. By no means is this list exhaustive. These are simply the evaluation approaches most commonly employed in the nascent advocacy evaluation field and gaining traction as evaluation approaches that support strategic learning.

To be most useful for decision making, evaluation data and analysis need to be completed and shared with advocates quickly in a much faster turnaround than traditional evaluation approaches. Developmental evaluation embodies the principles

of *strategic learning* — a process by which a funder, its grantees, and interested external audiences can respond to the lessons they learn from evaluation and monitoring (see Coffman & Harris, 2005). A strategic learning perspective is intrinsic to effectively supporting advocacy work: It gives advocates the high quality, up-to-date information necessary to conduct agile advocacy campaigns.

“I almost hate using the word ‘evaluation’ because it has so much baggage with it. ‘Strategic learning’ works so much better.” — Rebecca Rittgers

Finally, the use of the term *strategic learning* instead of evaluation can be helpful to encourage grantees to measure their work. Evaluation is a loaded word for many nonprofits. Some interpret the word to mean an audit: an accounting of money, time, activities, and a checklist of accomplishments (of course, the more accomplishments, the better). Tanya Coke, an independent consultant with the U.S. Human Rights Fund, noted this win/loss perception: “Many [advocacy] grantees get panicked when funders mention evaluation because they think we mean ‘policy win.’” The Atlantic Philanthropies’ Rebecca Rittgers agreed: “I almost hate using the word ‘evaluation’ because it has so much baggage with it. ‘Strategic learning’ works so much better.”

Tools and Resources

A key learning in *Speaking for Themselves* was that advocates were already collecting a wide variety of data, and wanted evaluation tools to better assess their work. Several tools have been modified or developed during the evaluation of actual advocacy campaigns. While some of these tools are fee based, others are available free of charge, such as the following:

- *A Handbook of Data Collection Tools: Companion to “A Guide to Measuring Advocacy and*

Policy” from Organizational Research Services (2007).

- *Unique Methods in Advocacy Evaluation* by Julia Coffman and Ehren Reed (2009).

These tools and many more are available through Innovation Network’s online resource collection at the Point K Learning Center (www.innonet.org/pointk) — free registration is required.

Internal or External?

As noted, evaluation can be conducted by internal staff, outside evaluators, or a combined team. Knowing when to use which approach is a major challenge for many advocates.

Evaluation by an internal evaluator requires a high level of organizational capacity for evaluation: preferably a formally trained and dedicated evaluator or, at a minimum, a staff person with other job responsibilities who also has some evaluation expertise. Many funders have found that advocacy organizations lack the capacity for conducting internal evaluation. However, the kind of ongoing evaluation most beneficial for strategic learning requires some evaluation capacity inside an organization. Funders interested in supporting strategic learning should thus also support evaluation capacity building.

Even if advocacy organizations have staff with evaluation expertise, during the heat of an advocacy campaign those staff people are more likely to be tasked with campaign-related work than with evaluation work, so bringing in an external evaluator can be very valuable. External evaluators also bring much-needed objectivity.

Funders had a great deal to say on this balance between internal and external perspectives. Jackie Williams Kaye of The Atlantic Philanthropies observed:

I absolutely believe that every organization should have internal capacity to use data to make decisions, but it’s to the benefit of the organization at times to have an independent perspective. . . . It helps them not only because it can often be helpful to have

somebody outside your organization to talk to, but it also can also help them in terms of credibility when you talk to other people about what you do. Most of the conversations [in the field] are about moving from external to internal evaluation, and the conversation really ought to be about “When should you use one or the other, and what’s the appropriate balance?”

Lester Baxter of The Pew Charitable Trusts agreed:

[Advocacy evaluation] provides a check on perceptions of progress . . . and helps identify which aspects of a strategy worked well, or didn’t work so well, and under what conditions. It gives the advocates an opportunity to hear unfiltered feedback. . . . In my experience, this unfiltered feedback offers unanticipated insights that improve practice.

Thus, funders can effectively support advocacy evaluation by taking a balanced view: helping grantees build capacity for ongoing internal evaluation and knowing when to recommend an outside perspective.

What Makes a Strong Advocacy Funder?

Since funder requirements tend to help drive adoption of evaluation, the conversation naturally turns to a new question: What are the key qualities of an effective advocacy funder?

In addition to carrying out formal research, Innovation Network has been involved in advocacy evaluation field-building efforts since 2005. We have observed that certain types of support seem to be more likely to help grantees conduct successful advocacy:

- *Extended grant cycles:* Advocacy success can take decades, so the one-year funding cycle so common in direct service may not be right for an advocacy effort. A grant over three to five years allows advocates to make longer-term plans in partnership with funders. A longer grant cycle also allows for more realistic expectations about what can be accomplished in the time span. One-year funding intervals are unlikely to produce notable advocacy

milestones; three to five years of funding is a reasonable time to plan and execute more complex campaigns — taking them at least far enough to show progress.

- *Capacity building:* Effective advocacy funding also involves supporting the capacity of grantees to evaluate their work. As Kristi Kimball of the William and Flora Hewlett Foundation explained,

In our first few years of giving advocacy funding, we asked grantees to be very clear about what they were measuring but we never gave funding to support the evaluation function . . . we were blind to the fact that most small nonprofits with small budgets did not have internal people to do systematic evaluation. What we got back did not demonstrate that they had been able to evaluate on their own. In 2006, we built evaluation capacity building funding into program funding . . . with the explicit purpose to work with an outside consultant to build capacity to measure and report on the outcomes that are most important to their advocacy work.

- *Core support:* Providing core support is another way funders can help advocacy organizations. Grant funds that are not tied to specific outcomes can help advocates respond flexibly to changing circumstances. The ability to repurpose grant funds means that advocates can take advantage of windows of opportunity — for example, moving resources from research to grassroots organizing in response to a high-profile event or from a focus on building political will to enacting actual policy change.
- *Reporting requirements:* Funders can also support advocates by being more conscious of the impact of reporting requirements. Reports to funders are a key driver of evaluation for many nonprofits: If a set of data is not required for a report, it may never be captured, no matter how helpful it could be to the organization. In advocacy, where the playing field can change rapidly and information is essential for success, funders must prioritize the collection of the right information that will ultimately support the advocacy organization's decision making.

Effective advocacy funders work with grantees and evaluators to prioritize what data to collect so that reporting produces the greatest benefit for both the grantee and the funder.

- *Reporting schedules:* Advocacy work is time sensitive, with peaks and valleys of intensity. If funders request reports during a period of peak activity and advocates sacrifice advocacy activities to complete the report, funders can limit the very work they are supporting. Just as funders and advocates should agree on what data to report, they should also agree on reporting deadlines, and preferably allow for some flexibility.
- *Staying informed:* Finally, some funders have expressed that their involvement in advocacy work was limited by their own staff's lack of knowledge. Program officers cannot be partners in advocacy work until they understand it. The Annie E. Casey Foundation's Don Cray said,

I think part of the task for a program officer funding advocacy is to educate the broader foundation . . . about what advocacy work is like, and how you do and don't reasonably expect to see outcomes measures change as a result of the work.

Conclusion

The need is clear: Three-quarters of advocacy organizations have not evaluated their work. More than 80 percent have never worked with an outside evaluator. A real opportunity exists for funders to create change by building the advocacy field. Many foundations have already made advocacy funding and evaluation a priority — but for advocacy to fulfill its promise, even more support is needed. Advocacy evaluation is still developing as a discipline and has not been adopted as standard practice by advocates — in large part because they lack the funds, skills, and tools to make it work. Before advocates are able to reap the full benefits of advocacy evaluation, they need a wider base of support from their funders.

Funders, in turn, need support of a different kind. Advocates and evaluators need to develop more materials to educate foundation program officers

and boards. More examples of best practices in advocacy and advocacy evaluation need to be captured and shared. With the creation of such resources, the internal conversation within foundations can spread from evaluation officers to program officers, helping to break down the barriers against advocacy funding.

More advocacy evaluation will reveal what works best. What advocacy strategies are appropriate in what contexts? What combinations of organizational capacities are most important? What are the most meaningful interim indicators in the journey from grassroots organizing to sweeping social change? These questions will not be answered until advocacy evaluation practice becomes more widespread, offering a base of data for additional reflection.

Pioneers have taken the lead in supporting advocacy and strategic learning, but there is much more work to be done. If advocates are to have the tools they need to be more effective and if more foundations are to understand the effectiveness of advocacy strategies, then more funders who believe in the power of advocacy need to join in — to recognize advocate perspectives and support their evaluation needs. The “hard to measure” barrier to advocacy work is still daunting for many would-be idealists. Let’s work together to bring that barrier down.

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