Overview of Current Advocacy Evaluation Practice

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This brief offers an overview of current practice in the new and now rapidly growing field of advocacy evaluation. It highlights the kinds of approaches being used, offers specific examples of how they are being used and who is using them, and identifies the advantages and disadvantages of each approach.
The brief is organized around the summary matrix on page 2, which identifies four key evaluation design questions and then offers common advocacy evaluation responses to those questions.[1] Questions include: 1) Who will do the evaluation? 2) What will the evaluation measure? 3) When will the evaluation take place? 4) What methodology will the evaluation use?

For each question, three options or possible responses are given. Options are based on the experiences of advocates, evaluators, and funders who already have responded to these questions and are learning about the benefits and drawbacks of their choices. The options for each question are not necessarily mutually exclusive. For some design questions, evaluations can blend two or even all three options simultaneously.

There is no one "right" approach to advocacy evaluation. Some options fit certain advocacy efforts better than others, and different evaluation users will make different choices.

The matrix describes each option in brief. Boxes contain shorthand labels, brief descriptions, the options' main advantages (pro) and disadvantages (con), and examples of existing evaluation efforts that feature each option. The pages that follow then describe the options and examples in more detail.

There is no one "right" approach or response to each design question. Some options fit certain advocacy efforts better than others, and different evaluation users will make different choices. In addition, the matrix is not an exhaustive list of the approaches being used. Rather, it highlights the approaches that are among the most common in the field.

In general, the approaches described reveal that advocacy evaluation is different from more conventional evaluation approaches in which the evaluator develops an evaluation design and then reports back when the data are all collected and analyzed. Advocacy evaluation focuses more on strategic and targeted data collection and analysis that can be used to refine or adjust the advocacy strategy while it is being implemented.

[1] The matrix was informed by Organizational Research Services' *A Guide to Measuring Policy and Advocacy*. Find the guide on their website at *www.organizationalresearch.com*.

Evaluation Design Questions and Common Advocacy Evaluation Responses

Question	Response		Response		Response	
1 EVALUATOR Who will do the evaluation?	**External**		**Internal**		**Combination**	
	External evaluators conduct evaluations and provide data for advocates or their funders to use.		Advocacy staff members are responsible for data collection, analysis, and for facilitating use.		External evaluators facilitate initial evaluation design and data collection, and then advocates take it over.	
	PRO: Evaluators have data expertise and capacity; objectivity	CON: Costly; time limited; not sustainable; uses evaluator vs. advocate lens	PRO: Advocates understand their evaluation needs best	CON: Advocates' evaluation capacity may be limited ; can be objectivity risks	PRO: Builds sustainable evaluation capacity within organizations	CON: Advocates' evaluation capacity may be limited (budget, time, roles)
	[Preschool for California's Children; Environmental Support Center]		[Humane Society of the US; The Brainerd Foundation, Wilburforce Foundation, ONE/NW]		[KIDS COUNT]	
2 FOCUS What will the evaluation measure?	**Advocacy Capacity**		**Progress**		**Impact**	
	The focus is on how the advocacy organization itself has changed.		The focus is on what the advocacy effort is achieving tactically on the way to policy change.		The focus is on longer-term outcomes and making a case for advocacy's contribution to them.	
	PRO: Targets an outcome that is critical to advocacy success	CON: Does not tell about the advocacy effort's success in the policy arena	PRO: Safeguards against concluding failure if policy is not achieved; data inform strategy	CON: Audiences may be less interested in these data; transparency may be an issue	PRO: Targets outcomes in which funders and external audiences often express more interest	CON: Impact can take a long time; outcomes hard to measure; hard to isolate contribution
	[Advocacy Capacity Assessment Tools]		[U.S. Connect]		[National Committee for Responsive Philanthropy]	
3 TIMING When will the evaluation take place?	**Before**		**During/Prospective**		**After/Retrospective**	
	Evaluators or evaluative thinking inform the strategy before it is implemented.		Evaluation occurs as the strategy is implemented to track progress and inform strategy over time.		Evaluation occurs after outcomes are known to assess advocacy's contribution and lessons learned.	
	PRO: Clarifies strategies, including the timing of outcomes; assesses risks	CON: Evaluators can be less familiar with advocacy	PRO: Positions the evaluation to be as useful as possible	CON: Can be time consuming and a more costly approach	PRO: Useful for identifying lessons; takes advantage of hindsight	CON: Post-hoc analysis may be less useful to advocates
	[Theory of Change/Composite Logic Model]		[Communities for Public Education Reform]		[Supreme Court Case Study]	
4 APPROACH What methodology will the evaluation use?	**Tracking/Monitoring**		**Developmental Evaluation**		**Case Studies**	
	Over time, the evaluation tracks specific indicators, benchmarks, or performance measures connected to advocacy outputs or outcomes.		[Used with external evaluators] Evaluators are embedded on the advocacy team and emphasize a collaborative process of continuous improvement.		Detailed descriptions and analyses (often qualitative) are performed on individual advocacy strategies or organizations and their results.	
	PRO: Efficient; tracks progress and signals needs for corrections	CON: Reveals little about *why* changes are (or are not) occurring	PRO: Can monitor and respond to evolving strategy	CON: Can be time consuming and a more costly approach	PRO: Offers a full story with context; useful for generating lessons	CON: Can be difficult to extrapolate learning to other contexts
	[Communications Evaluation/Tracking Tools]		[Coalition for Comprehensive Immigration Reform]		[Northern Ireland Case Studies]	

❶ EVALUATOR: Who will do the evaluation?

Just as in other fields, with advocacy evaluation, the individuals conducting the evaluation can be *external* evaluation consultants or *internal* advocacy organization staff members. A third option, the *combination* approach, blends both approaches. It features external consultants facilitating the evaluation's design and start up while building internal evaluation capacity so that advocacy organizations eventually can take over the evaluation's implementation.

Most formal advocacy evaluations so far have been conducted by external evaluation consultants (although more now are using the combination external-internal approach). In part, this is because larger foundations that fund advocacy efforts and tend to have more resources for external evaluation have been among the first to enter this emerging field. In addition, because advocacy is notoriously hard to measure and this field is new, funders and advocates have partnered with professional evaluators to tackle this formidable challenge.

However, because many advocacy organizations are small and resources often are limited, only about a quarter of advocacy organizations currently engage in some form of evaluation.[2] The reality moving forward is that many advocates will need to become their own evaluators. As the advocacy evaluation field grows, it will be important to make sure that resource-efficient ideas and supports exist for smaller advocacy organizations that must do their own monitoring and evaluation.

External evaluators are particularly useful when independence or objectivity is a primary concern, or when specific technical expertise is needed.

External

External evaluators commonly are used when advocacy efforts are large-scale campaigns or when they involve a collaborative or coalition of multiple organizations working toward similar policy goals.

External evaluators are particularly useful when independence or objectivity is a primary concern, or when specific technical expertise is needed (e.g., to assess advocates' influence with key audiences or constituencies such as policymakers, media, business, or voters). A potential disadvantage of this approach is that some evaluators are not well-versed in advocacy or the policy change process, and this knowledge can be critical in ensuring that evaluations are both realistic and useful.

Harvard Family Research Project's (HFRP) evaluation of the David and Lucile Packard Foundation's Preschool for California's Children grantmaking program is an example of an external advocacy evaluation. Since 2003, HFRP has been collecting data about the program's progress toward establishing state-level policies that would make high-quality preschool available to all three- and four-year-olds in the state. The evaluation's primary audience is the Packard Foundation, and data collected and provided in real time are intended to inform the grantmaking strategy as it evolves. Because the Packard Foundation maintains a close relationship with its grantees, HFRP's evaluation does not focus on what the grantees are doing and achieving individually. Rather, it focuses on the strategy's influence with external audiences who play an important role in the policy process—e.g., state and local policymakers

[2] For more on what advocates are doing and their capacity for evaluation, see Innovation Network's publication *Speaking for Themselves: Advocates' Perspectives on Evaluation* on their website at *www.innonet.org/advocacy*.

and other policy influencers in the state such as media, the business community, and other politically-important constituencies. The evaluation features two new methods—the bellwether methodology and policymaker ratings—to capture the advocacy strategy's influence with these audiences.[3]

Mosaica's recent evaluation with the Environmental Support Center (ESC)—an organization focused on improving the effectiveness of nonprofits working on environmental and environmental justice issues—is another example of an external evaluation. This evaluation assessed ESC's programs to support the advocacy capacity of small organizations. It yielded lessons about what ESC could do to improve its efforts, as well as valuable learning about what small organizations are capable of in terms of both advocacy and evaluation.

Internal

Internal evaluation is conducted by staff members or units from within organizations implementing advocacy efforts. For advocacy evaluation, internal evaluation tends to be conducted on a smaller scale than external evaluation, as resources available for evaluation generally are more limited, and the individuals responsible for data collection often have additional responsibilities within the organization.

Internal evaluators bring important knowledge of the organization and of advocacy to the table and are positioned to help ensure their recommendations are implemented.

The key advantages of this approach are that internal evaluators bring important knowledge of the organization and of advocacy to the table and are positioned to develop recommendations that internal stakeholders are likely to commit to (and internal evaluators can follow up on recommendations). The main disadvantage is that evaluation capacity within advocacy organizations often is not high, both in terms of the time and resources needed for the evaluation and in terms of specific methodological expertise.

The Humane Society of the United States is an example of an advocacy organization with an internal evaluation effort. Several years ago, the Humane Society—a national NGO with a budget exceeding $100 million and more than 400 staff—attempted to develop an approach for quantifying its policy and advocacy efforts and outcomes. Spearheaded by the organization's Director of Strategy and Performance Measurement, this effort resulted in a framework that identifies key outcome areas and indicators that can be used across the organization. Measurements focus on laws passed at the state and federal level; the enforcement of existing laws; and both formal and informal alliances with networks of policy enablers. Also, in a unique move, the framework includes scales that assign "weights" to different types of advocacy and policy outcomes (because some policies or outcomes have broader or larger-scale implications than others).

The Brainerd Foundation, Wilburforce Foundation, and ONE/Northwest (a grantee of both foundations) also are working on internal evaluation. These three conservation-focused organizations are trying to develop resource-effective evaluation approaches that advocacy organizations can implement on their own. The Brainerd Foundation, for example, has articulated its strategic plan as a theory of change with clear advocacy and policy change outcomes (e.g., strengthened base of support;

[3] Learn more about the Preschool for California's Children evaluation on Harvard Family Research Project's website at *www.hfrp.org*.

strengthened organizational capacity and improved policies).[4] The Foundation does not prescribe a specific evaluation process for its grantees; instead it promotes ongoing self-evaluation and reflection, particularly in areas aligned with the Foundation's outcomes. To this end, The Brainerd Foundation has developed a grantee reporting form that cultivates a culture of learning and is aimed at strengthening advocacy work on the ground.

Combination

The combination approach mixes external and internal evaluation. This might involve, for example, integrating self-evaluation into an external evaluation, or using external facilitators to help design and facilitate internal evaluation. Currently within the advocacy evaluation field, the latter approach is most common.

This approach's main benefit is that it helps to develop internal evaluation skills and capacity that can be sustained over time. It also helps to build support for evaluation and its use. A potential disadvantage is that this approach can work better in theory than in practice. The process generally starts off well, but unless an advocacy organization has sufficient resources and supports to sustain the evaluation once it is designed, enthusiasm and commitment can fall off when implementation begins.

The combination approach has external evaluators work with advocates to develop internal evaluation skills and capacity that can be sustained over time.

The Annie E. Casey Foundation uses a combination external-internal approach with its KIDS COUNT initiative. KIDS COUNT is a network of child advocates in all 50 states, the District of Columbia, Puerto Rico, and the Virgin Islands. The Foundation has invited several grantees to participate in a pilot project to develop evaluation strategies for their advocacy and policy change work. Organizational Research Services (ORS) is working with these grantees to develop their evaluation strategies, which includes the development of outcome maps.[5] Once designed, the expectation is that advocates will implement their own evaluations. While this process is still underway, the evaluators, advocates, and the Foundation have found that the process of identifying outcomes and their linkage to strategies calls into question a host of strategic questions, including consensus within the organization, transparency, real-time relevance, belief in the value of evaluation, and the interconnectedness among organizational strategies.

2 FOCUS: What will the evaluation measure?

Advocacy is unique in that its end goals—typically whether policies or appropriations are achieved (or blocked)—are easy to measure. The much harder challenge is assessing what happens either before or after that goal is achieved.

Advocacy evaluations generally focus their data collection on three types of outcomes or results—advocacy capacity, progress toward policy goals, or an advocacy effort's impact. While some advocacy evaluations focus on just one area, more often they focus on more than one.

[4] See The Brainerd Foundation's theory of change on their website at *www.brainerd.org/strategy*.

[5] See Organizational Research Services' publication *Orientation to Theory of Change* on their website at *www.organizationalresearch.com* for an easy-to-follow overview of theory of change techniques and how theory of change development fits into other types of outcomes-based planning.

Advocacy Capacity

Advocacy capacity refers to the knowledge, skills, and systems an organization needs to implement and sustain effective advocacy work. From the very beginning, the advocacy evaluation field has recognized the critical importance that advocacy capacity plays in determining the effectiveness of an organization's policy change efforts. Often, advocacy's most visible results are in the form of increased capacity through, for example, stronger leadership and partnerships, improved media skills or infrastructure, or increased knowledge and skills needed to navigate complex legislative, judicial, executive branch, and election-related processes.

Many evaluations treat advocacy capacity—the knowledge, skills, and systems an organization needs to implement and sustain effective advocacy work—as a key evaluation outcome.

Because advocacy capacity plays such an important role in success, and because some advocacy funders are including resources specifically for advocacy capacity building, many evaluations are treating it as a key evaluation outcome. Capacity typically is measured at the evaluation's start and then results are used to identify areas in which the organization might approve. Repeated assessments later determine whether changes have occurred.

To support advocacy capacity assessment, the Alliance for Justice, with assistance from Mosaica and in partnership with The George Gund Foundation, developed an *Advocacy Capacity Assessment Tool* that helps advocates and their funders assess their ability to sustain effective advocacy efforts; develop a plan for building advocacy capacity; and determine appropriate advocacy plans based on the organization's advocacy resources. The tool is available both online and in print, and has been used in numerous advocacy evaluations.[6]

TCC Group also has worked on this issue and has developed an advocacy capacity framework and complementary assessment tool. The framework outlines and defines in detail the four capacities—leadership, adaptive, management, technical—of an effective advocacy organization.[7]

Progress

Most advocacy evaluations emphasize the importance of tracking tactical progress on the way to achieving policy change. A focus on measuring progress ensures that advocates have data that signal if they are on the right track or if midcourse corrections are needed. It also ensures that the evaluation does not conclude unfairly that the whole advocacy effort was a failure if a policy was not achieved. For example, an advocacy organization might lose the battle for a specific legislative, regulatory, or judicial objective, but by motivating a large number of citizens to advocate on its issue, may have built a more experienced grassroots coalition for the future.

A focus on measuring progress ensures that advocates have data that signal if they are on the right track or if midcourse corrections are needed

The Connect U.S. Fund offers an example of an evaluation that includes a focus on tracking progress. Connect U.S. promotes responsible U.S. global engagement through grantmaking and operations that advance foreign policy objectives in the areas of human rights, climate change, nuclear weapons and proliferation, civil-military affairs, and trade and development. Continuous Progress Strategic Services

6 Find Alliance for Justice's *Advocacy Capacity Assessment Tool* at www.advocacyevaluation.org.

7 See TCC Group's publication *What Makes an Effective Advocacy Organization?* on their website at www.tccgrp.com.

(CPSS) has been working with Connect U.S. to help its more than 20 advocacy grantees establish evaluation objectives and benchmarks for tracking their progress toward policy goals. CPSS used its online *Advocacy Progress Planner* (APP), developed with support from The California Endowment, to work with grantees.[8] The APP offers a comprehensive menu of options that might go into an advocacy logic model or theory of change. Users can click through these options to highlight their policy goals, target audiences, assets, tactics, and benchmarks. Connect U.S. and CPSS found that defining appropriate benchmarks was grantees' single biggest challenge. While most grantees had clear objectives and benchmarks to help them determine if they were on course, others struggled to identify measurable benchmarks that would *meaningfully* indicate progress. From this experience, CPSS developed model benchmarks that grantees can use to track common advocacy outcomes that generally precede policy change.

Impact

For traditional program evaluation, capturing impact generally means that an evaluation uses a rigorous evaluation design to determine if a *causal* relationship can be established between a program and its intended outcomes. For advocacy evaluation, the meaning is different. An advocacy evaluation that focuses on impact does one or more of the following:

Assessing impact has a different meaning for advocacy evaluation than it does for traditional program evaluation.

1) Assesses the longer-term "big" outcomes that precede policy change (e.g. public will, political will, shifts in social norms)

2) Determines whether a *plausible and defensible* case can be made that an advocacy effort has impacted the policy process or contributed to a policy change

3) Documents the long-term impact of advocacy and policy change on people's lives (or on the environment, the economy, etc.).

Of these three approaches, the first two are most common. With the first approach, longer-term "big" outcomes typically refer to important shifts in how policy stakeholders are thinking about or acting on certain policy issues. For example, many evaluations that use this approach attempt to operationalize and measure changes in public will or political will surrounding an issue.

With the second approach, because advocacy work typically is collaborative and complex and the policy process is affected by many variables, definitively isolating whether a certain policy outcome would not have happened without an advocacy effort is difficult at best. Therefore, the standard that has developed in advocacy evaluation is a focus on contribution (using data to determine if a credible case can be made that the advocacy effort contributed to a particular policy outcome), rather than attribution (showing a causal connection between an advocacy effort and a policy outcome).

Although rarer, evaluations that address the third meaning of impact—documenting advocacy's long-term impact or return-on-investment—also exist. For example,

[8] See the online *Advocacy Progress Planner* at *www.planning.continuousprogress.org*.

the National Committee for Responsive Philanthropy (NCRP) recently studied the positive impacts of advocacy, community organizing, and civic engagement efforts in New Mexico (and also in North Carolina). This work, documented in the report *Strengthening Democracy, Increasing Opportunity*, found that for every dollar invested in the 14 advocacy and organizing groups studied, New Mexico's residents reaped more than $157 in benefits. That means the $16.6 million from foundations and other sources to support advocacy efforts totaled more than $2.6 billion of benefits to the broader public. The report also documents how New Mexico's overall economy has benefited from policy changes advocated for by local nonprofits, and highlights a range of successful advocacy efforts on issues such as economic security, environmental justice, civil and human rights, health, and education.[9]

3 TIMING: When will the evaluation take place?

Evaluation and evaluative thinking can play a role before, during, or after an advocacy strategy's implementation. Based on the principle that evaluation use increases when organizations can apply it to their planning and strategies, most advocacy evaluation is occurring during strategy implementation. This approach is particularly useful with advocacy efforts, where strategy is constantly evolving and regular feedback can be valuable for informing next steps. But many evaluators also work with advocates before advocacy strategies are implemented (or early on in their implementation) to ensure strategies have realistic and measurable outcomes. In addition, some retrospective evaluations are occurring after advocacy outcomes are known to identify what can be learned from the advocacy strategy's implementation and success (or lack thereof).

Evaluators and evaluative thinking can be a helpful resource early on before an advocacy strategy is implemented.

Before

When engaged early on in an advocacy strategy's development, evaluators can be helpful resources or partners as a strategy is being shaped. Commonly, this comes in the form of evaluators working with advocates on the development of a theory of change or logic model to articulate and clarify their strategy.

A number of tools have been created for use during both advocacy planning and evaluation. For example:

- The *Advocacy and Policy Change Composite Logic Model* and its online version the *Advocacy Progress Planner* (mentioned earlier) were developed to facilitate advocacy theory of change or logic model development. [10]

- The *Continuous Progress* website (www.continuousprogress.org) helps advocates and funders collaboratively plan and evaluate advocacy efforts.

- The Alliance for Justice *Advocacy Evaluation Tool* helps organizations identify and describe their specific advocacy achievements, both for pre-grant and post-grant

9 Find both the New Mexico and North Carolina reports *Strengthening Democracy, Increasing Opportunity* on the National Committee for Responsive Philanthropy's website at *www.ncrp.org*.

10 Find the *Advocacy and Policy Change Composite Logic Model* on Innovation Network's resource database at *www.innonet.org/advocacy*.
See the online *Advocacy Progress Planner* at *www.planning.continuousprogress.org*.

- information. In addition, their *Advocacy Capacity Assessment Tool* (mentioned earlier) helps organizations identify ways to strengthen their advocacy capacity.[11]

Evaluators and evaluative thinking also can be useful in other ways. For example, some evaluators are working with advocates on developing *contingency logic models*. Drawing on the concept of scenario planning, these models imagine that the political or economic context has changed in an important way, or that parts of the strategy do not go as planned. Contingency logic models identify how the strategy will shift if those scenarios occur.

The *advocacy premortem* is another before-implementation approach that has utility for both planning and evaluation.[12] The method is based on the concept of prospective hindsight, which involves imagining an event already has occurred. A premortem involves an exercise that assumes the effort has failed. Advocates and any other stakeholder involved in the advocacy effort are tasked with identifying possible reasons for the effort's failure. Stakeholders independently write down every possible reason that the effort might have failed. Each person then shares one reason from his or her list until all reasons have been recorded and a collective list is generated. The result is a comprehensive list of risks that an advocacy effort should be cognizant of and monitor. It also is a list that the evaluation can use later to guide its inquiry.

During/Prospective

Prospective evaluation occurs while an advocacy effort is being implemented. With this approach, evaluation regularly feeds back data to help advocates reflect, in real time, on their strategies to assess whether they're working and where midcourse corrections are needed. By more deeply integrating evaluation with implementation, prospective evaluation provides advocates and funders with data on progress long before policy change can be achieved, and collects insights that advocates can use to continuously improve and refine their strategies.[13]

Prospective evaluation occurs while a strategy is being implemented and regularly feeds back data to help advocates reflect in real time on their strategies.

The main benefit of a prospective approach is that it positions the evaluation to be useful for both learning and accountability purposes. It delivers feedback to refine advocacy strategy and implementation, and encourages advocate engagement in the evaluation process.

Blueprint Research and Design is using a prospective approach with Communities for Public Education Reform (CPER), a partnership of local and national foundations using community organizing to improve educational opportunities and outcomes for students in low-income communities. This participatory evaluation was designed to ensure that findings serve as ongoing learning tools for all sites and for CPER as a whole. Evaluation questions and data collection focus on the areas of policy change and education reform; capacity building and leadership development; student, parent, and community engagement; collaboration and coalition building; scaling up;

[11] For more information on both Alliance for Justice tools, go to *www.advocacyevaluation.org*.

[12] Klein, G. (2007). Performing a project premortem. *Harvard Business Review*, 85(9), 18-19.

[13] Guthrie, K., Louie, J., David, T., & Crystal Foster, C. (2005). *The challenge of assessing policy and advocacy activities: Strategies for a prospective evaluation approach.* San Francisco, CA: Blueprint Research and Design. Find this publication at *www.calendow.org*.

and the value of and support for education organizing. The evaluation also is providing valuable lessons about how to assess outcomes associated with community organizing.[14]

After/Retrospective

While the emphasis in the advocacy evaluation field is on prospective evaluation that occurs while the advocacy effort is being implemented, retrospective evaluation also can be extremely valuable. Retrospective evaluations take place after an advocacy effort has occurred and the outcome already is known. They look backward and examine the factors that led to or affected that outcome, and therefore are extremely useful for learning purposes. The benefit of a retrospective approach is that hindsight is 20/20. Often, it is easier to see after the fact where things went well and where the strategy might have improved for better effect.

Retrospective evaluation is a useful learning tool that takes place after an advocacy effort has occurred and the outcome already is known. It looks back to determine the factors that led to or affected that outcome.

Michael Quinn Patton's case study evaluation of a judicial advocacy effort designed to influence a Supreme Court decision is an example of a retrospective approach.[15] Patton used the "general elimination method" to determine whether a plausible and defensible case could be made that the advocacy effort in fact had an impact. The general elimination method begins with an intervention (advocacy) and searches for an effect. It uses evidence to eliminate alternative or rival explanations until the most compelling explanation remains. Patton's conclusion, based on a thorough review of the campaign's activities, key informant interviews, and analysis of the Supreme Court decision, was that the advocacy campaign did in fact contribute significantly to the Court's decision.

4 APPROACH: What methodology will the evaluation use?

Evaluations can use many different approaches or models. One study, for example, identified at least 22 available approaches.[16] Within the advocacy evaluation field, however, the list is smaller as many traditional program evaluation approaches do not work well with advocacy. The three options listed in the matrix—tracking/monitoring, developmental evaluation, and case studies—are not the only approaches being used in the field, but they are among the most common.

Tracking/Monitoring

Tracking and monitoring refers to the practice of identifying indicators, benchmarks, or performance measures (usually quantitative) connected to advocacy outcomes and then tracking those indicators over time. Tracking examines progress and identifies where midcourse corrections might be needed. For example, by determining whether issues or messages are appearing more in targeted media outlets, media tracking can identify whether media outreach tactics are making headway. Tracking's main disadvantage is that it often tells little about *why* changes are occurring over time.

Tracking and monitoring identifies indicators (usually quantitative) connected to advocacy outcomes and then tracks them over time.

[14] For more information on evaluating community organizing, see Alliance for Justice's online living library of resources *Resources for Evaluating Community Organizing* at *www.afj.org/for-nonprofits-foundations/reco*.

[15] Patton, M.Q. (2008). Advocacy impact evaluation. *Journal of Multidisciplinary Evaluation, 5*(9), 1-10.

[16] Stufflebeam, D. (2001). Evaluation models. *New Directions for Evaluation*, 89, Special issue .

Several recently-developed tools are helping the field understand how to track indicators associated with specific advocacy tactics. For example, the *Are We There Yet? A Communications Evaluation Guide* created by Asibey Consulting and published by The Communications Network helps users create plans for monitoring and measuring their communications. [17]

In addition, M+R Strategic Services has done groundbreaking work on tracking electronic advocacy efforts. Their *eNonprofit Benchmarks Study* (completed initially in 2006 and updated in 2008 and 2009) analyzed online messaging, fundraising, and e-advocacy data from 21 leading nonprofit organizations. This work resulted in a set of key indicators and valuable benchmark data that can be used for tracking and interpreting nonprofit online communications.[18]

Developmental Evaluation

Michael Quinn Patton coined the term "developmental evaluation" to describe an approach to evaluating complex or evolving efforts, like advocacy. "Developmental evaluation refers to long-term, partnering relationships between evaluators and those engaged in innovative initiatives and development…Evaluators become part of a team whose members collaborate to conceptualize, design and test new approaches in a long-term, ongoing process of continuous improvement, adaptation, and intentional change. The evaluator's primary function in the team is to elucidate team discussions with evaluative questions, data and logic, and to facilitate data-based assessments and decision-making in the unfolding and developmental processes of innovation."[19] Developmental evaluation is different from traditional evaluation in that evaluators do not make definitive judgments about success or failure. Rather, like with prospective evaluation, they provide feedback, generate learning, and either support strategy decisions or affirm changes to them.

Developmental evaluation features a long-term partnering relationship between evaluators and advocates, so that evaluators become a part of the advocacy team.

This approach is useful for advocacy efforts that are complex and constantly evolve. Developmental evaluation allows evaluators to be flexible, so that when strategies change or critical events occur, evaluators quickly become aware of those changes and can adjust the evaluation accordingly.

Since 2005, Innovation Network , with support from The Atlantic Philanthropies, has been using a developmental approach for its evaluation of the Coalition for Comprehensive Immigration Reform (CCIR)—a collaborative of immigrant advocacy, grassroots, and religious groups, labor organizations, and policy leaders on Capitol Hill and throughout the United States. For several years, Innovation Network has been documenting CCIR's work as it unfolds and is capturing best practices to inform other coalitions and the advocacy field. Because immigration reform activity fluctuates and has evolved over time, Innovation Network has been flexible and has experimented with different approaches to ensure the evaluation is both useful and not burdensome for advocates. The evaluation fosters continuous learning so CCIR leadership can act on evaluation findings and make real-time adjustments to their activities and strategies.

17 Find Asibey Consulting's *Are We There Yet? A Communications Evaluation Guide* on The Communication Network's website at www.comnetwork.org.

18 Download the *eNonprofit Benchmarks Study* at www.e-benchmarksstudy.com.

19 Patton, M. Q. (2006).Evaluation for the way we work. *The Nonprofit Quarterly*, 13(1), 28-33.

Case Studies

Case studies are used to collect descriptive data through the intensive examination of a phenomenon in a particular individual, group, or situation. Case studies are particularly useful for studying unique or complex phenomena, two descriptors that apply to most advocacy efforts.

A key advantage of case studies is that they tell a full story about what happened, rather than provide isolated data points that tell only part of the story or do not incorporate context or the environment in which the advocacy effort occurred. A potential disadvantage is that because context plays such an important role in this approach, at times it can be difficult to extrapolate lessons to other advocacy or political circumstances.

Case studies recently completed by Colin Knox of the University of Ulster and supported by The Atlantic Philanthropies offer an example of this approach. This series of seven case studies chronicles advocacy efforts in post-conflict Northern Ireland in the areas of human rights, children and youth, and aging. The case studies provide insights and lessons about how advocates achieved traction and influenced policy agendas in complex and challenging political environments that were extremely resistant to change.

Case studies can tell a full and rich story about what an advocacy strategy did and accomplished.

Conclusion

As this brief demonstrates, the past several years have been a tremendous opportunity for creativity and growth in the advocacy evaluation field. Where few resources and little expertise existed before, multiple tools and a growing base of experience now exist. This growth has been fueled by a group of pioneering funders, evaluators, and advocates who share a strong dedication to the field and are committed to growing it through collaboration.

For sure, there is much more happening that has not been captured here, and there is enormous opportunity for further growth and innovation. Although early work in this field has generated a great deal of momentum, there is much left to do. For example, the field must expand beyond eager innovators and reach out to the much larger majority of individuals and organizations who still know little about advocacy evaluation or remain skeptical about its value. In addition, the field must fill in some clear gaps in its infrastructure, particularly in the areas of outreach and training.

The past several years have been a tremendous opportunity for creativity and growth in the advocacy evaluation field. But there is much left to do.

Opportunities to stay updated on new developments as the field continues to grow include:

- Innovation Network has a free online clearinghouse and newsletter dedicated to advocacy evaluation (www.innonet.org/advocacy).
- The American Evaluation Association has an Advocacy and Policy Change Topical Interest Group (www.eval.org).
- The *Foundation Review* (www.foundationreview.org) has chosen advocacy and policy change as a theme a 2009 issue.

About the Author

Julia Coffman is Director of the Center for Evaluation Innovation. She is an evaluator with particular expertise in the evaluation of advocacy and policy change efforts. Her approach emphasizes real-time learning that helps organizations adapt their strategies and continuously improve. Julia also consults with nonprofit organizations and foundations on evaluation and works with the Harvard Family Research Project (HFRP), a research and evaluation organization at the Harvard Graduate School of Education.

About the Center for Evaluation Innovation

The Center for Evaluation Innovation is pushing evaluation practice in new directions and into new arenas. The Center specializes in areas that are hard to measure and where fresh thinking and new approaches are required. This includes, for example, advocacy and policy change, communications, and systems change efforts. The Center works with other organizations to develop and then share new ideas and solutions to evaluation challenges through research, communications, training development, and convening. Find the Center at www.evaluationinnovation.org. Contact Julia at jcoffman@evaluationinnovation.org.

About *Advocacy Evaluation Advances*

In January 2009, 120 advocates, evaluators and funders gathered at The California Endowment's Center for Healthy Communities for two days of thought-provoking presentations and discussions on recent advocacy evaluation advances. The convening, sponsored by The California Endowment with support from The Atlantic Philanthropies and Annie E. Casey Foundation, focused on real-life experiences with advocacy evaluation and what has been learned from testing different tools and approaches in this emerging field over the last several years. It also focused on challenges that still must be addressed, and identified priorities for the field moving forward. The examples featured in this brief were presented and discussed during the convening. To access other convening and presenter resources, including many mentioned in this brief, visit the *Advocacy Evaluation Advances* web page at www.calendow.org/article.aspx?id=3774.

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