Advocacy and Campaigning Monitoring, Evaluation and Learning

Advocacy and campaigning is focussed on the strategic use of information to achieve long lasting social change. The challenges of assessing the impact of this work are well documented in the non-governmental sector. However, done well, it allows organisations to strategically collect and use information; to continuously learn about the changing world around them, to define their contribution to change and to understand if approaches are the right ones or need changing.

Recognising the difficulty of assessing advocacy impact, along with the reality that most advocates do not have a lot of time, Save the Children resourced a team to design, develop and implement a more robust and systematic process. After two years of testing this framework, we feel confident in sharing our ideas and hope it will support others who do not have the time or resources to do the same.

This framework is by no means new; instead, we have used some of the most current thinking and adjusted it into a simple, practical, jargon-free and cost effective approach.
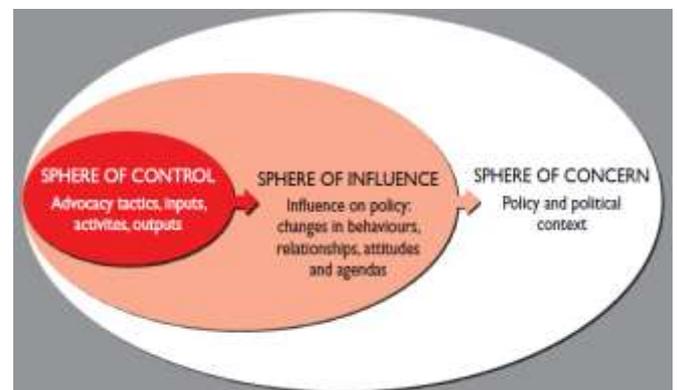
Part 1: Setting up a plan to monitor

All advocacy and campaigning strategies rely on a good contextual analysis and there are numerous tools to help organisations do this (see these guides from Unicef, WaterAid, Plan). Once an organisation has conducted this analysis, they move onto planning. Within Save the Children, we have identified that the biggest blocker to assessing our impact lies in our planning and the ability to clearly set out the changes we want to see. If our strategies make a clearer distinction between what we do and what we hope to influence it becomes much easier to assess impact.

STEP 1: One key principal to guide planning:

Recognising everyone will plan in a different way our approach is to use one core principal within planning.

That is to make distinctions between **what we plan to do** (eg. meet with a politician); **how this might influence behaviour or practice**, (eg. the politician raises the issue on the political agenda); and theorise on **how this might lead to the changes we want to see around us** (eg. these discussions and commitments lead to changes in policy or practice).

SPHERE OF CONTROL
Advocacy tactics, inputs, activites, outputs

SPHERE OF INFLUENCE
Influence on policy: changes in behaviours, relationships, attitudes and agendas

SPHERE OF CONCERN
Policy and political context

The diagram to the right and text box below provide more information.

> **Sphere of control:** includes our activities and approaches (outputs)
>
> **Sphere of influence:** includes the smaller level changes we hope to influence as a result of our activities such as influencing policy discourse, public attitudes, and relationships with partners (intermediate outcomes)
>
> **Sphere of Concern:** includes the ultimate changes we would like to see as a result of our work (outcome or objective)
>
> By using these spheres, we hope to draw a connection between our activities and the things we see changing in the external world.

The process can, unfortunately, be too simplistic and linear so it is important to have a range of actors in the planning discussion to ensure complexity, inter connecting issues and assumptions are appropriately tested.

STEP 2: Defining intermediate steps to change

The most difficult part of advocacy monitoring and evaluation is the fact that change takes time. One may not see change in a strategic cycle (as is evidenced by great social change movements in history such as Ending Slavery or Ending Apartheid). To address this Save the Children decided to focus on the intermediate changes one might see and use those as an indication that we might be on the right track. External thinking on this (see Annie Casey) has helped us to identify that every campaigning and advocacy strategy works towards achieving one or more of the following intermediate steps to change (they might be different in other organisations):

- The ability to access and develop relationships with decision makers and opinion shapers to push forward advocacy issues
- The evidence that decision makers, opinion shapers, partners and others are recognising an organisation's contribution in research and analysis
- The ability to identify and align with partners or support partners to create platforms for civil society to engage decision makers
- Participation in the implementation of policy decisions such as community mobilisation, awareness raising and monitoring budgets
- Public campaigning which aims to work towards three increased levels of engagement
    - ✓ The numbers of people who are informed about an issue
    - ✓ The numbers of people engaged in discussing, socialising and promoting the issue
    - ✓ The numbers of people who contribute or take part in an issue (such as campaigning or fundraising)
- A sixth area of change is the change in attitudes and behaviour

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STEP 3: Setting indicators

Once your pathway of change is outlined (i.e. clarity on control, influence and concern), it becomes much easier to set indicators. You can set indicators based on

1. The things you control i.e. your activities
2. The things you influence i.e. your intermediate steps to change
3. The things you want to change i.e. your objective

Setting indicators for activities and objectives are straightforward but setting indicators for the intermediate steps can be difficult. To support this we have developed an indicator menu, which can be contextualised.

STEP 4: Developing a monitoring plan[1]

The monitoring plan can be as complex or as simple as you require, although we lean towards simple so we have more time for campaigning. The most important aspect of the monitoring plan is to make sure it allows you to review your strategy and make changes and helps you to document and store information.

Every organisation will have a different format for a monitoring plan; here is one that we sometimes use:

Objective				
Intermediate changes	Key performance indicator	What data will we aim to collect?	Who is responsible?	How often will we review the information?
Activities	Key performance indicator	What data will we aim to collect?	Who is responsible?	How often will we review the information?

In addition to setting up a process and timeline for the review of information, we have also defined a set of **learning questions**:

- What has been the most significant change in your environment and why is it significant?
- What progress or digression have you seen against the objectives?
- What assumptions have you made?
- What have you learnt and what changes will you make to your plan?

STEP 5: Reporting on progress and campaigning achievements

Reporting on intermediate progress: Given that change takes time, more often than not you will need to find ways of reporting on your intermediate progress. You can use the learning questions (listed above) to report on intermediate progress.

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[1] Cartoon sourced from http://www.ifrc.org/Global/Publications/monitoring/IFRC-ME-Guide-8-2011.pdf

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You can also use the intermediate steps to change (listed above) to show your progress for example, reporting on the degree to which you have aligned with partners or been able to access decision makers. At Save the Children, we have to do this across a number of countries and we show this information using maps and diagrams like the one below.

27 offices with achievements on increased access to decision makers

7 offices with achievements on contributing to policy solutions

14 offices with achievements on strengthening partnerships

21 offices with achievements on raising awareness

2 offices with achievements on contributing to policy implementation

2 offices with achievements towards shifting people's attitudes

3 offices with achievements on increasing engagement

Collecting information across multiple countries

If you are responsible for collecting developments across multiple countries there are two tools, which might be helpful. Firstly utilising crowdsourcing to collect information and secondly using a standardised reporting template. We use the impact-reporting template, which is helpful for documentation over time as it allows us to go back and see how change has developed and what our contribution has been.

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Assessing campaigning achievements: When there are advocacy achievements, Save the Children tries to document the impact through an externally validated assessment charting our contribution. Given that most external evaluations are expensive, we have developed a quick assessment tool:

1. The assessment is based on a simple set of questions on impact and contribution, which are discussed during an internal learning meeting.
2. As part of this discussion, we conduct a ranking exercise to determine our contribution (as low, medium or high) and the potential impact this could have on children (as low, medium or high).
3. We then circulate this document with critical friends and external partners and ask them to validate our conclusions.

We have found this technique to be useful in the following ways: it helps us to document quickly and efficiently and it helps us to collect and store evidence, which we ask external evaluators to assess during a strategic period.

Given that Save the Children operate across many countries (and the internal pressure we have to represent our impact numerically), we chart our contribution and impact on the diagram to the right.

Each circle on the diagram represents an impact assessment. Collectively these assessments allow us to understand our strengths and weakness and how our approach changes and adapts to different contexts.

STEP 5: Developing reporting products

We reporting and showcase our work in many ways including the impact stories, narrative case studies, maps, grids etc. Below are two examples:

1. A video, although this can be expensive
2. Timelines and blogs which are free

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