

Greetings!

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*We define **advocacy** as "a wide range of activities conducted to **influence decision makers** at various levels." This means not only traditional advocacy work like litigation, lobbying, and public education, but also capacity building, network formation, relationship building, organizing, communication, and leadership development.*

–Innovation Network

Welcome to the second issue of *Advocacy Evaluation Update*.

The field of advocacy evaluation continues to be enriched by new models and knowledge. We hope you find our reports on these developments informative and inspirational.

Your feedback about the [first issue of the Update](#) let us know that we were on track, providing useful information to the advocacy evaluation community. If you would like us to share your experiences and lessons learned with the field, write to us: advocacy@innonet.org. We look forward to hearing from you!

Best,
-Sue

Susan Hoechstetter
Editor, Advocacy Evaluation Update
[Foundation Advocacy Director](#),
[Alliance for Justice](#)

What's New **(fresh findings / recent resources / current conversations)**

Current Research: Build the Field

Interested in the advocacy strategies being used by your peers? *Update* readers (particularly nonprofit staff, funders, and evaluators) are invited to take part in Innovation Network's ongoing research on current advocacy practices.

You can give your perspective in less than fifteen minutes (often much less). Take the [Advocacy Strategy & Capacity Survey](http://www.zoomerang.com/survey.zgi?p=WEB226ZL8A6HZK) (max. 20 questions) on Zoomerang's website at: <http://www.zoomerang.com/survey.zgi?p=WEB226ZL8A6HZK>.

When the results are in, we'll report back to you about how nonprofits engage in, and evaluate, advocacy activities. Look for the report later this year in the [innonet.org](http://www.innonet.org) [Focus Area: Advocacy Evaluation](#) and [Advocacy Evaluation Resource Center](#).

Common Language: The Composite Logic Model

In our June 2007 issue, *Advocacy Evaluation Update* reported on a joint effort to develop a "Composite Logic Model" for advocacy evaluation. The results of the effort are now available. The Composite Logic Model ("CLM") is now available as a collection of informative documents and as a flexible online tool.

The CLM was developed by [Julia Coffman](#) from [Harvard Family Research Project](#); Astrid Hendricks and Barbara Masters from [The California Endowment](#); Jackie Williams Kaye from [The Atlantic Philanthropies](#); and Tom Kelly from the [Annie E. Casey Foundation](#). More than 50 funders, evaluators, and advocates also lent their expertise to refine the Model.

Using the Composite Logic Model

A logic model is a solid basis for strategy development and evaluation planning: it shows how advocacy tactics connect to interim outcomes that set the stage for policy change. The advocacy and policy change [Composite Logic Model \(.ppt\)](#) addresses a common question about advocacy evaluation: *what kinds of outcomes can or should be measured, other than achievement of a public policy goal?*

On Paper

The CLM offers a detailed menu of items for building an advocacy logic model and offers [definitions for each component \(.pdf\)](#). Users then select the components (inputs, activities, outcomes, policy goals, and impacts) most relevant to their work.

Common Language: The Composite Logic Model, continued

The Composite Logic Model can be used to:

- Help advocates, funders, and evaluators articulate an advocacy or policy change strategy or theory of change, and
- Guide decisions about the design of an advocacy and policy change evaluation.

Supplements to the Model include [guiding questions \(.pdf\)](#) and samples based on hypothetical advocacy situations—one each for the [strategy \(.ppt\)](#) and [evaluation \(.ppt\)](#) uses of the Model.

Online

An online tool based on the Composite Logic Model is now available. The Advocacy Progress Planner (“APP”) went live in late September at the website of Continuous Progress, <http://www.planning.continuousprogress.org>. The APP gives advocates an at-a-glance look at the some of the building blocks of a campaign, including, such as goals and potential impacts, activities and tactics, and benchmarks.

As users make their choices in each area, a simple summary of their campaign strategy begins to come into focus. The end result is a tidy logic model that can be used as a planning document and as a basis for ongoing evaluation and learning. The APP’s web-based platform enables users to see the various components and try out different combinations of tactics. Advocates can save their completed logic models as a .pdf document, or create an individual URL that can be used to revisit the logic model later.

The APP also offers options for sharing the tool. By emailing their logic model to colleagues, coalition partners, or funders, advocates can take a collaborative approach to answering critical questions like:

- Will this set of activities reach the target audience?
- Am I trying to reach the right target audience?
- Does the organization or coalition have the resources necessary to reach the goal?
- Could the plan benefit from a partnership with another organization?

As advocates ask and answer these tough questions, they can improve their model, check their progress, and revise their plans to improve their chances of accomplishing their advocacy goals.

The [Advocacy Progress Planner](#) was developed by [Continuous Progress Strategic Services](#), which is a consulting group within the [Aspen Institute’s Global Interdependence Initiative](#). The effort is supported by [The California Endowment](#).

Testing and Feedback

The Composite Logic Model is now being applied and tested with multiple advocacy efforts both within the U.S. and internationally. Readers are invited to try the model (either on [paper](#) or [online](#)) and offer feedback:

- About the print Composite Logic Model, contact Julia Coffman, [jcoffman \[at\] evaluationexchange.org](mailto:jcoffman@evaluationexchange.org).
- About the Advocacy Progress Planner, contact David Devlin-Foltz, [david.devlin-foltz \[at\] aspeninst.org](mailto:david.devlin-foltz@aspennet.org).

Alliance for Justice: Evaluation Tools Now Online

Alliance for Justice (AFJ), in partnership with The George Gund Foundation, Kellogg Foundation, Alliance Healthcare Foundation, The California Endowment, and Joyce Foundation, released an online version of its advocacy capacity assessment and advocacy evaluation tools on September 15, 2007. The hardcopy version was published in 2005 for foundations seeking to better understand the capacities of potential advocacy grantees as well as the effectiveness of grantees' advocacy campaigns; and for advocacy organizations seeking to strengthen their work.

Alliance for Justice published the tools online to make it easier for organizations to evaluate their advocacy activities update the tools on a continuous basis—as part of AFJ's work to break down barriers to enable more foundations and nonprofit organizations to engage in advocacy. One of the tools is an indicator check-list to gauge an organization's ability to carry out sustained and effective advocacy campaigns. The nine indicators of advocacy capacity fit into the following three categories:

- **Organizational Operations Indicators:** Indicators that speak to ways of doing business that allow the organization to manage its advocacy work effectively. They include, for example, having an efficient method, such as a policy subcommittee of the board, which can make quick and strategic advocacy decisions when necessary.
- **Relationship Building Indicators:** Indicators that speak to relationships built with key players. Key players include people in organizations that can collaborate on advocacy work, the organization's members or constituents, and policy decisionmakers.
- **Implementation Skills and Knowledge Indicators:** Indicators that speak to potential impacts of and ways to work with the political, cultural, and economic environment; the media; and the legislative, regulatory, and other policymaking systems.

A second tool is an evaluation section which asks for incremental and long-term advocacy plans at the beginning of the grant period and at reporting time, and the results of grantees' work. Examples of key concepts included in the tool include:

- **Flexibility:** Flexible and nimble organizations are more effective advocates. Grantees are encouraged to explain why and how they may have changed their work strategies and objectives, and not to see changes as failure.
- **Capacity Building:** Strengthening an organization's capacity to be effective is a goal in itself that should be planned for, monitored, and evaluated.
- **Incremental Progress:** Since advocacy successes can be far down the road, incremental success along the way should also be planned for, monitored, and evaluated.

For more information about the tools and fee structure, please visit the Alliance for Justice at <http://www.advocacyevaluation.org>.

Quick Updates from around the Field

Gates Joins Advocacy Conversation: The [Bill and Melinda Gates Foundation](#) is exploring new ways to evaluate its expanding policy and advocacy portfolio. Over the last year, the Gates Foundation has developed outcomes frameworks for their community engagement work and launched several small evaluations. Senior Impact Planning and Improvement Officer Kendall Guthrie noted, "As the program officers are increasingly supporting public policy advocacy work, the Foundation is exploring how we take a more coherent approach to monitoring these grants in an appropriate manner and to help our grantees better assess the short and long term impact of their work."

Children's Advocacy Discussion: On August 23, the Child Advocacy Institute held a conference call entitled Advocacy Evaluation: New Thinking and New Ideas about 'Hard-to-Measure Activities.' The Child Advocacy Institute is a project of [Voices for America's Children](#). The call features Voices staff and members discussing their experiences of emerging practices in child advocacy evaluation. A recording of the call and its accompanying PowerPoint presentation are available at the [Voices for America's Children website](#).

Evaluating Advocacy Coalition Work and Influence: [Advocates for Youth](#), a Washington-based organization that works internationally, has published [Monitoring and Evaluating Advocacy Efforts: Learning from Successes and Challenges](#). This online article focuses on the evaluation of advocacy work performed on behalf of youth in Africa, and addresses the difficulty in attributing policy changes to a particular organization or network. The article suggests that organizations should be aware of advocacy efforts on similar issues that might be affecting policy makers elsewhere in order to accurately assess their own effectiveness. Also addressed is another advocacy evaluation challenge—assessing changes in thinking. [Read the article on the Advocates for Youth website](#).

Irvine Foundation Reports on Best Practices for Voter Mobilization: The [Irvine Foundation](#) has recently release an evaluation report on its [California Votes Initiative](#). The report describes best practices for voter mobilization efforts in communities with low voter turnout. The evaluation findings "indicate a strong correlation between the level of personal connection made through outreach and the likelihood that the members of a community with historically low voter participation will vote." Topics for further study are also included. An evaluation team composed of advocates from California State University, East Bay; University of California, Irvine; and Yale University collaborated with the nine organizations funded by the Irvine Foundation to evaluate the organizations' voter outreach support for two election cycles in 2006 and one election cycle in 2007. [Read the report \(.pdf\) on the Foundation's website](#).

TCC Group Resources for Advocacy Organizational Capacity: [TCC Group](#) has developed an organizational assessment tool for policy and advocacy organizations, and is working on papers addressing organizational capacity and general support funding. The "Advocacy CCAT" is a supplemental tool to TCC Group's more comprehensive Core Capacity Assessment Tool (www.tcccat.com). Both tools assess four core capacities of successful organizations: leadership, adaptive, management, and technical capacities. The Advocacy CCAT drills deeper into each of these four core capacities, adding and assessing capacities that are unique to policy and advocacy organizations.

In addition to the core capacities, organizational culture plays an important role in organizational effectiveness. The Advocacy CCAT includes cultural elements that are important for policy and advocacy organizations. These include:

- Willingness to take risks and advocate even when success is not guaranteed
- Overt acknowledgement of the value of partner organizations
- Overt acknowledgement of the value of individual staff members
- Celebration of success, both small and large scale
- Level of staff commitment to an issue

For more information about the supplemental Advocacy CCAT, contact TCC Group at 215-568-0399 or email your request to: info [at] tccgrp.com. Introductory pricing is now available.

TCC is also in the process of finalizing two papers relevant to advocacy organizations. The first discusses organizational capacity for policy and advocacy organizations, including ideas for evaluating organizational capacity. The second explores the unique role that general support funding can play for advocacy organizations. Both papers are being produced in collaboration with The California Endowment, and are due out at the beginning of 2008.

ORS—Improving Public Policy for Children: A pilot project to determine what works best to improve public policy for children is being conducted by [Organizational Research Services](#) (ORS) with [KIDS COUNT](#) organizations in four states.

KIDS COUNT groups are funded by Annie E. Casey Foundation to provide credible data about the welfare of children in their states for the purpose of informing state policy. The organizations employ variance strategies to make their data useful, ranging from research and dissemination to full-fledged advocacy campaigns. The framework for the evaluation is based on ORS' A Practical Guide to Documenting Influence and Leverage in Making Connections Communities [[read an abstract](#), or [click here for the full document](#) (.pdf)].

Evaluation Stories

(case studies / candid interviews / lessons learned)



Driven By Results: An Interview with the Annie E. Casey Foundation's Tom Kelly

The Annie E. Casey Foundation ("AECF") is on the cutting edge of advocacy evaluation. In 2004, the Foundation adopted and adapted [Mark Friedman's Results-Based Accountability](#) ("RBA") model to measure the difference the Foundation makes in the lives of America's children and families. AECF is embedding this system both in its own operations and in its work with grantees and partners. The Foundation's commitment to RBA is expressed in its Five Year Benchmark: "AECF will be seen as the most continuously data-driven, evidence-based and results-oriented of all U. S. philanthropies." The Foundation has included advocacy evaluation as part of its results accountability model. Tom Kelly, Evaluation Manager in AECF's Measurement, Evaluation, Communications & Advocacy department, recently discussed AECF's advocacy evaluation with Innovation Network's Johanna Gladfelter.

Driven By Results: An Interview with the Annie E. Casey Foundation's Tom Kelly, continued

InnoNet: Tom, thanks for taking the time to talk about your experiences and insights into advocacy evaluation. Could you begin by explaining your role at AECF?

Tom: I am the Evaluation Manager within the Measurement, Evaluation, Communications & Advocacy (MECA) department at Casey. As a unit we provide consultation and technical assistance internally to program officers, and externally to grantees around issues of data and evaluation across the foundation. We also lead and manage formal evaluation contracts and activities with our program officer colleagues. MECA is a cross-foundation support unit. Its main objectives are to support the organization's efforts in policy advocacy by providing data from our own evaluations or from other programs or research, and to conduct strategic communications such as with the KIDS COUNT data. The functions within MECA are all in service of the Foundation's core outcome: advance systems, policies, and practices that support vulnerable children. Evaluation is seen as a function of policy advocacy ability. We are better able to advocate for the policies based on data, evaluation, and experience. Evaluation is seen in service to that broader goal.

InnoNet: In 2004, AECF adopted Mark Friedman's RBA model. How is this model used to evaluate the work of the Foundation?

Tom: Doug Nelson [AECF President] and the Foundation leadership needed to respond to our trustees who had asked us to be more explicit about the effects of our grantmaking in terms of long-term outcomes and the impact on children and families. What was attractive about Mark Friedman's initial model was the question, "What difference does it make?" That is a question that our trustees ask us in a very concrete way. "How many more families were affected?" "How many more children served?" "Did this program actually result in a change in indicators that we would see at the population level?" The model focused our attention not only on the types of questions we were asking ourselves but also on the types of questions our trustees were asking us. Also, there were many people here at Casey who had worked with Mark [Friedman] in the past. Donna Stark (Director of Leadership Development at AECF) was in the Maryland state government with Mark and they used an early frame of his RBA model. So I believe we chose this model because it was asking us to think about the types of questions we already knew we wanted to answer, and a number of people on staff were already familiar with the model itself.

We also needed to bridge the multiple mechanisms of collecting and communicating data across the Foundation. Whether it is a logic model, theory of change, or outcome-based grantmaking, there is evaluation data wrapped around all of these things. We knew that a common language platform would make it easier for our trustees to hear one cohesive message across the Foundation, and that our lack of a common language platform kept us from telling a complete and integrated picture of the outcomes and impacts of the Foundation's investments over time in a way that made sense and in a way that tied our work to long-term outcomes for children. It is more difficult for people to recognize or to take credit for successes that are much further down a chain of events—and advocacy being one of those whose successes are much further removed—than an impact on children and families through direct service delivery.

[Interview continues on page 10](#)

Advocacy Evaluation in Action: An Interview with Rhonda Schlangen

Innovation Network interviewed Rhonda Schlangen of [Planned Parenthood Federation of America](#) earlier this year as a [Featured Advocate](#). This interview is an update on her activities.



InnoNet: Rhonda, thanks for giving us this opportunity to check in with you. What have you been doing related to advocacy evaluation since we last spoke?

Rhonda: Actually, since we last spoke my position has changed. I'm now doing Monitoring and Evaluation ("M&E") for Planned Parenthood's International Division, so I will be working with our developing country partners on evaluation of their advocacy efforts as well as their service delivery work.

Our regional offices work with NGO partners in the global south—what has, in the past, been referred to as the third world. These partners are characteristically innovative and risk-taking, but small and relatively young organizations. Many of these groups are increasingly engaging in public policy advocacy at the national level.

We are also supporting some new advocacy networks. These organizations need and want capacity-building in advocacy and advocacy evaluation (or M&E in the international context), and their ideas and approaches are very fresh and bold, which bodes well for an exciting collaboration. Working with these groups and networks from the ground up also provides us with an opportunity to integrate M&E from the first stages of planning. That is not to underplay the challenges—that advocacy and policy change environments have to be understood in a cross-cultural context, and channeling the ambitions of enthusiastic, committed partners into focused policy aims and measurable outcomes is a long-term challenge.

InnoNet: How and why did you become involved in your service area?

Rhonda: In the past, I have been involved in most elements of advocacy: I worked for a legislator; I have been a lobbyist; I have been involved in grassroots work, etc. At one point when I was a lobbyist, a donor asked how my organization evaluated the effectiveness of our advocacy work, since counting votes supporting a desired policy does not speak to effectiveness. After that conversation, I started to set up some systems to evaluate our advocacy progress.

In order to do this I started to educate myself on evaluation. Coming at it from my background (as that of an advocate), I was puzzled to see advocacy evaluation really wasn't being done. I was even told by a donor that it was impossible—that you could not establish a relationship between a vote and an advocacy effort so it was not worth trying.

I thought evaluation was a responsibility—knowing whether you actually did what you started out to do and whether you did so effectively. So, in my time with PPFA's international division, and with very positive support from our leadership, I have been working to integrate evaluation with our advocacy efforts.

[Interview continues on page 12](#)

Looking Ahead

(upcoming events / dates to save / work in progress)

November 7-10, 2007: Advocacy Evaluation Events at Annual AEA Conference Baltimore, MD, USA

Because American Evaluation Association (AEA) recently launched a new Advocacy and Policy Change Topical Interest Group (TIG). As a result, AEA will be putting a greater focus on advocacy evaluation at their conferences. The new TIG is building a community of practice to help interested evaluators learn about and contribute to new developments in the field.

» [Read the details](#)

November 8, 2007: Alliance for Justice Web Workshop

This one-hour web workshop describes the challenges to evaluating advocacy and tools for both assessing advocacy capacity and evaluating advocacy work.

» [Read the details](#)

January and July, 2008: Adapting Evaluation to Systems Change Work

The Evaluators Institute (TEI) is offering a one-day course, "Alternative Evaluation Designs: Implications from Systems Thinking and Complexity Theory," on evaluating systems change work.

» [Read the details](#)

If there are any events you would like us to post, please email us at advocacy@innonet.org.



Questions of Measurement

(surveys about your advocacy evaluation experiences)

*This is your newsletter, and we want to learn from you. Each Update will offer at least one short survey about your practices, your thinking, or other aspects of your work. We'll share what we learn from the results. Note: The "Coalition Advocacy" and "Getting to Know You" surveys originally appeared in the June 2007 issue. If you have already responded, **thank you!***

We have three surveys now open:

- [TStrategy and Capacity](#): How are you incorporating advocacy into your work, and how do you know it's working? If you only have time for one survey, please take this one! [Take this survey](#) (max. 20 questions)
- [Coalition Advocacy](#): Evaluating advocacy work done in the context of a coalition, versus work done on your own: what's the difference? [Take this survey](#) (max. 10 questions)
- [Getting to Know You](#): Tell us a little bit about yourself. We're interested in who is reading the advocacy section of our website, and how you might differ as a group from the whole online community. [Take this survey](#) (max. 7 questions)

Tom: Doug and Foundation leadership understood that this was a huge cultural shift, not just a programmatic shift. It wasn't just mandating that everyone was going to count a specific way; it was thinking about our internal processes. Casey programs and initiatives that had been formally evaluated had gone through the process of defining themselves, their theory of change and outcomes, but that represented only a small portion of the overall Casey portfolio. Adopting RBA did not replace our formal evaluation processes. It provided a framework around data and evaluation for those other areas of work that might be either too nascent to be formally evaluated, or in the case of advocacy, an area of work we never really put to the test by asking what impact or difference did the investment make. Adopting RBA was about changing expectations and perceptions and, even harder, the behaviors here at Casey about how such a framework can be used within portfolios, across portfolios and across the foundation as a whole. Adopting RBA provided us with a way of being clearer to ourselves, our trustees, and grantees about what we're trying to achieve and how we'll achieve it together.

“Foundation leadership understood that this was a huge cultural shift, not just a programmatic shift. It wasn't just mandating that everyone was going to count a specific way; it was thinking about our internal processes.”

InnoNet: More specifically, how is the RBA model used to evaluate the Foundation's advocacy work?

Tom: KIDS COUNT grantees represent a large portion of our state-based advocacy investment. We have the longest history and relationship with many of these grantees. There is certainly unevenness in terms of capacity: they are not all the same size and they are not all structured in ways that fully support policy advocacy. The purpose of Casey's early investment in KIDS COUNT was to make sure there was data to support the policy conversation. Our new interest became seeing how advocacy organizations, such as the KIDS COUNT grantees, better describe the progress that they are making within a multi-year frame using RBA. Using the Casey framework, we began providing trainings to grantees whose work was easier to document and demonstrate—work that tended to be direct service provision. After training direct service grantees, we then began to train grantees working with system or practice change. I think advocacy grantees were on the back burner because we were trying to get our feet wet in terms of how to best apply the model to outcomes that are more distally related to the work. In doing this, we could also be more specific about what it would take for a Kids Count grantee to be able to better report on its results. It's harder for people to connect themselves on an individual grant level to a population level change that involves many other people working on the same issue. The model plays a critical step by getting policy advocacy grantees to be more explicit about the results they can and are achieving within a given timeframe. The exercise of going through the RBA process clarifies to both the program officer and to the grantee the shared expectation about investment effect and expected results.

“The model’s frame of ‘Impact, Influence, and Leverage” went a long way in helping the service provider ask ‘What influence am I having on the systems around me?’”

Our advocacy grantees were late in the training because we wanted to be sure that we had appropriate examples. We wanted them to be more involved in testing models and trying different approaches and languages. In addition, we do have other grantees that sometimes are advocacy grantees and at other times are service providers who we wanted to involve in advocacy more. The model’s frame of “Impact, Influence, and Leverage” went a long way in helping even the service provider ask, “What influence am I having on the systems around me?” “What influence am I having on the policies for any of the services I deliver?”

When the program officer and the grantee discuss the model there is at least an initial conversation about expectations and what should the grantee be trying to achieve. From the feedback we’ve received, it was in some ways very liberating for some grantees to know that they’re not on the hook for some direct impact results but they are on the hook for something else and, ultimately, they need to be clear about what that is. However, what we should ask ourselves, what our trustees would ask us, and what the public should ask us is, “What difference did this make in the lives of children?” To me this is a connection between what we know we accomplished, how well we accomplished it, and how it had an impact.

InnoNet: You’ve been a part of many of the field-building conversations related to advocacy evaluation. Why are AECF and other funders interested in advocacy evaluation?

Tom: There are many evaluation tools and methodologies that could apply to advocacy evaluation but people haven’t had shared frameworks, vocabulary, or long-term expectations, and there is no single replicable model because of context and time shift. AECF and other funders (including the California Endowment and The Atlantic Philanthropies) are committed to a belief that evaluation is hugely important for anyone in terms of self-management, progress, and achieving results. As evaluators within foundations, we saw that the readily accessible evaluation tools focus on the more easily measured data, but we know that advocacy has a lot of things that are difficult to measure. Even when it’s something like public will—something that, on the surface, may be easy to measure—it’s expensive to go out and do a survey on public will. So we wanted to flesh out what are the options, strategies, and decision-making around deciding what and how to evaluate advocacy work.

We also recognize that many local advocacy organizations are small, lightly staffed, and don’t have the resources, time, and expertise to bring to bear. We have advocates that are in very small organizations working within their states and they need some of these skills. There wasn’t a model of sharing that level of technical assistance for advocacy evaluation similar to United Way’s outcome measurement resources for direct service providers. We needed a different frame of language for a new audience who didn’t focus on service outcomes. This was a newer approach.

Driven By Results: An Interview with the Annie E. Casey Foundation's Tom Kelly, continued

There was an additional dynamic that we were hearing from smaller advocacy organizations that these things—advocacy strategies and learnings—were top-of-mind for nonprofit directors and had not been made explicit for the next generation of leaders. Using the [Composite Logic Model](#) or [other tools](#), we wanted to help an advocacy organization define a better strategy, one that could be measured, carried on, replicated and supported by other advocates.

If grantmakers don't have a clear grantmaking theory of change about policy advocacy success, nothing the advocate can do to measure themselves will help the funder understand. We need to be clear about what foundations need to know to have more informed partnership conversations with their advocacy grantees. The relationship between a funder and an advocacy grantee isn't a traditional "we're buying outcomes" relationship; it involves partnership, communication, and shared expectations. We looked to this work not as coming up with something new (i.e., wildly different methodologies), but a whole different frame that was needed to introduce more effective evaluation technologies into advocacy work.

InnoNet: What challenges do foundations that engage in advocacy face? Does advocacy evaluation help them overcome any of those challenges?

Tom: I think a potential challenge is that we'll become too simplistic about activities and outputs, and, knowing that outcomes are distal, not push hard enough to ask people about the linkages between their strategies and theory of change.

I also think that time is a challenge. Advocacy grantees, like everyone else, don't have a lot of time. There is going to be a tendency to simplify when, in fact, the context advocacy grantees are operating in is so complex that it requires more attention about how success was or was not achieved.

The plus side is that I have seen examples from our advocacy grantees that when they are more explicit about intermediate outcomes and more concrete regarding their contribution to the overall, they're much better fundraisers for advocacy. By linking the short-term to the long-term outcomes, or in RBA by linking the programmatic level to the population level, we are able to be much more explicit around success and results achieved along a much longer timeline for change than is normally apparent in direct service provision.

"The plus side is that I have seen examples from our advocacy grantees that when they are more explicit about intermediate outcomes ... they're much better fundraisers for advocacy."

InnoNet: Thanks again for your time, Tom.

For more information on AECF's RBA model, visit <http://www.aecf.org/Home/OurApproach/DataAndEvaluation.aspx>.

*Advocacy Evaluation in Action: An Interview with Rhonda Schlangen,
continued from page 8*

InnoNet: How does PPFA use advocacy? Can you share examples of advocacy successes?

Rhonda: PPFA works for policy change in support of sound sexual and reproductive health and rights policies throughout the world. In the U.S., the International Division works at two levels. We work in Washington, D.C. to educate policymakers and their staff about sexual and reproductive health policy, and we work around the country through Planned Parenthood Federation of America local affiliates to incorporate international issues into their public policy work. A majority of local affiliates are interested in supporting global sexual/reproductive health advocacy in their work—and we help them do that. We are working with them to reach out to their communities to generate activism and advocacy on the behalf of sound policies.

“We are working with local affiliates to reach out to their communities to generate activism and advocacy on behalf of sound policies.”

InnoNet: How do you think evaluation affects advocacy?

Rhonda: Evaluation absolutely affects our ability to plan for advocacy. In my own part of the organization—I am in my 8th year with PPFA—planning has been revolutionized. Advocacy tends to focus on action—advocacy work by nature is very nimble and fluid according to the external environment. Therefore, planning has been focused on what we’re going to do—the action we’re going to take. However, planning tended not to be anchored in an explicit theory of change or focused on outcomes—what will change as a result of those actions. Advocates usually intuitively know these things. Evaluation is making that explicit.

Planning that integrates evaluation fills in those blanks and gives us a mechanism to test our assumptions, ask the hard questions, and obviously to monitor our progress. If we set up our advocacy activities correctly, we can consistently monitor against benchmarks we have set for ourselves. Evaluation enables us to test our strategies and helps us to assure our resources, which are limited, are being used to the most effect. Evaluation tightens our approaches.

Since we are unable to claim causality (i.e., confidently know exactly which organization's advocacy efforts brought about success), at the end of the day, it is hard to attribute what was the factor that caused the policymaker to vote the way they did. But we can use evaluation to review chain of influence that leads to policy change and test our strategies and methodologies.

InnoNet: Do you have any advice to share with others about evaluating their advocacy efforts?

Rhonda: Encouragement—advocacy evaluation is a rewarding undertaking. The process creates focus. It allows us to use our resources more efficiently. Though it is difficult to prove causation, evaluating your efforts is still important. Advocacy relies on influencing a chain of events that ultimately causes action in support of your policy target. It's a long chain of

Advocacy Evaluation in Action: An Interview with Rhonda Schlangen, continued

events with many external influences, but evaluation allows us to test our strategies. Is this approach attracting more supporters? What are effective ways to engage young advocates? At the other end of the chain of influence—the policymakers—it can be difficult or impossible in the US political context to assess why each policymaker voted the way they did.

“Advocacy is an important part of what we do, and, ultimately, evaluating those efforts helps ensure we are accountable to the people we are committed to serving.”

Our European counterparts apparently have more access to policymakers and are able to get direct feedback on their efforts to help assess their work. Since that is not the case in the U.S.—mostly because of the political context—it is more difficult to arrive at knowing how we influenced that final link of the chain. Evaluation helps us detect patterns and develop models. It is also an issue of fiscal responsibility. Advocacy is an important part of what PFFA's International Division does and, ultimately, evaluating those efforts helps ensure we are accountable to the people we are committed to serving.

InnoNet: What do you think is needed to move the field of advocacy evaluation forward?

Rhonda: I think two things are needed to move the field forward. First, there is the piece of needing evaluators out there who have experience doing advocacy—it is an alignment issue. The goal is a marriage of sound evaluation practice with the current culture of advocacy. We need people who can integrate those two pieces: being an evaluator and being an advocate. The second piece is that advocacy organizations need an increased understanding about the benefits of evaluation. For years it seems evaluation wasn't done because of the nature of advocacy—and advocacy planning focuses on being fluid and nimble. Evaluation has to be demonstrated to be beneficial and to add to the skill-set of staff people—something that helps advocates to work more effectively. It is a limited resource environment. Ultimately, you need to make the case that evaluation is worth it.

InnoNet: Rhonda, thank you again for your sharing your experiences with us. We look forward to our next conversation.

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