



Center for Evaluation Innovation

Assessing and Evaluating Change in Advocacy Fields



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INTRODUCTION

As more foundations venture into policy related grantmaking, the conversation about options for effectively supporting advocacy and policy work has grown more rich and nuanced. Funders may choose to design grantmaking to advance a specific policy goal (e.g., through campaigns), others may support a particular niche within the policy arena (e.g., policy analysis and research), and still others aim to build the capacity of individual advocacy organizations. However, we have noticed that increasingly funders are recognizing that a long-term strategy for meaningful and sustained policy change requires building the collective capacity and alignment of a field of individuals and organizations who work alongside one another toward a shared broad vision. More than achieving a single specific policy goal, this “field building” approach to advocacy and policy grantmaking is designed to strengthen the whole field of nonprofit advocates to more effectively advance, implement, and maintain a variety of policies that will contribute to the foundation’s larger mission (Beer, et al., 2012).

Funders engaged in **advocacy field building** have different evaluation needs than those that aim to build specific advocacy capacities or advance a particular policy change. They need to understand the strengths and weaknesses *across* a field of advocates, rather than only on the individual organizational level. They also want to know more about how the capacities, relationships and power dynamics of the field change over time and because of their interventions. Yet understanding the field and detecting changes within it is difficult because fields are a complex system of actors and relationships that change for a variety of reasons and in hard-to-see ways.

This white paper aims to bring together emerging ideas about how to assess advocacy fields and evaluate advocacy field building initiatives. I and other evaluators have developed a core set of dimensions to help organize our thinking about these complex advocacy fields, and have begun experimenting with indicators of a strong field, tools for assessing the baseline of a field, and strategies for measuring change in fields. This paper seeks to test and refine some of these ideas. It draws upon several sources of information, including a 2013 convening of evaluators and funders currently funding or interested in advocacy field building, a session at the American Evaluation Association’s 2013 Annual Meeting, ongoing conversations between evaluators working on field-level evaluations currently underway,¹ and an extensive review of literature, much of which has been published during the last few years as the conversation around field building has expanded

¹ This includes Tanya Beer and Julia Coffman from the Center for Evaluation Innovation, Jacquie Anderson from Community Catalyst, independent consultant Gigi Barsoum, Robin Kane from RK Evaluation and Strategies, Johanna Morariu of Innovation Network, and myself from Spark Policy Institute.

nationally. It also draws heavily on my own experience assessing the current state of an advocacy field in preparation for a field building funding strategy, which I use as a case study to illustrate approaches and challenges to field assessment throughout the paper.

With this paper, my hope is to trigger conversation and collaboration among a broader network of evaluators working in this arena, so that we can better articulate an approach to field assessment and evaluation, share methods and approaches, and learn from one another.

DEFINING “ADVOCACY FIELDS”

Existing definitions of a “field” are imprecise, with vague boundaries—not unlike a field itself. For our purposes, a field is a group of actors engaged in shared goals, values, and actions over time (The Bridgespan Group, 2009; Petrovich, 2013; Beer, et al., 2012; Bernholz & Wang, 2010) who bring different skills and capacities to these shared actions, and are connected to one another in various ways that allow for this shared action. A field is something that emerges and changes slowly over time. Influencing a field is a slow process with no “quick fixes” (Petrovich, 2013, p.3).

Some definitions of fields set boundaries around a field by suggesting that a field is composed of actors who have common strategies, a specific target population or even agreed upon standards of practice (e.g. The Bridgespan Group, 2009). These fields may include advocates, but are not advocacy fields specifically, as they also include the broader array of providers, government agencies, and others whose work affects a target population in different ways, such as program delivery, support services, rule-setting, etc.

Funders have been field building for many years. One of the classic examples of a foundation helping to trigger the *creation* of a field is the work of the Robert Wood Johnson Foundation on palliative care. Prior to the foundation’s engagement, many different kinds of professionals—from health care providers and pain managers to social workers and therapists—provided services to individuals at the end of life, but they did not operate as a field. In other words, these actors did not think about themselves or operate as a specific field of actors organizing around similar priorities and contributing diverse skill sets in order to advance the practice and policy of end-of-life care. As the Robert Wood Johnson Foundation and others began to convene these actors and re-frame their work as a shared enterprise, the field of palliative care began to take shape (Patrizi, Thompson & Spector, 2011).

In recent years, other funders have begun to talk about their work as “field building,” with a focus on a field of actors whose common arena of work is policy change in a particular

content area. In response, a definition of “fields” specific to advocacy was proposed by Bernholz and Wang (2010) and refined and turned into a framework with five specific dimensions by Beer, et al. (2012). The dimensions, which are based on a combination of existing literature (primarily in organizational sociology and social movements research), and on interviews with advocates and experienced policy funders, are intended to serve as an analytical framework to help understand the complex parts and dynamics in an advocacy field. This framework eliminates some of the previously proposed dimensions of field building that are more aligned with service delivery fields (e.g. standards of practice). This paper is organized according to the five dimensions articulated by Beer et al. (Table 1), but draws on a broader body of literature and the other sources of information mentioned above to explore options and challenges for measurement.

Table 1. Dimensions of an Advocacy Field*

DEFINITIONS AND RELEVANT ELEMENTS

Field Frame

A common frame of reference through which organizations identify themselves as a field and as part of a common enterprise.

- Defined and shared advocacy purpose/goals;
- Shared values driving advocacy efforts; and
- Language defining the goals and values in a way that inspires collective action and a sense of a broader collective effort.

Field Skills & Resources

The array of advocacy skills, knowledge and capacity needed to make progress on a wide variety of policy issues throughout all stages of the policy processes.

- Advocacy skills such as lobbying, regulatory advocacy, policy analysis, community mobilizing, voter outreach, etc.;
- Capacity to deploy an adequate level of the skills, including capacity focused on different audiences and levels of policy change; and
- Knowledge of the policy issues and potential solutions relevant to the goals of the field.

Connectivity

The capacity of different actors to communicate and cooperate in a way that allows skills and resources to be marshaled in increasingly productive ways over time. This includes habits of inter-organizational interaction, and the raw material that makes collaboration possible when appropriate.

- Structures that facilitate and sustain communication and cooperation (e.g. coalitions);
- Complimentary and collaborative actions over time in pursuit of common goals; and
- The productivity or effectiveness of the relationships at mobilizing skills and resources.

Composition

The variety of voices that can participate meaningfully and have influence in the policy process. This may include presenting different demographic, socio-economic, geographic, disability and sector interests.

- The variety of constituencies and advocates representing them who are part of the field;
- The readiness of the constituencies and advocates representing them to take action in the field; and
- The types of influence of the constituencies and advocates representing them have at each stage of the policy process from problem identification to policy definition and development all the way through to passage and implementation including blocking policy changes.

DEFINITIONS AND RELEVANT ELEMENTS

Adaptive Capacity

The ability at the field level to conduct a sound assessment of the external environment, select the strategies and tactics best suited for a particular situation and adapt to the shifting moves of the opposition, allies and potential allies.

- Ability to monitor external environment in order to identify needed shifts relevant to the strategies and tactics deployed;
- Ability to adapt strategies and tactics in response to new information;
- Flexibility of field resources, which can allow for adaptations in strategies; and
- Timeliness of adaptations.

* Definitions largely from Beer et al., 2012, supplemented from ideas in Petrovich, 2013 and the discussions mentioned above.

A FRAMEWORK FOR EVALUATION

Recent work on field building emphasizes the necessity of assessing the current state of the field in order to develop an effective field building funding strategy; but to date, the assessment ideas that are relevant to building an **advocacy** field have been more conceptual than operational (e.g., The Bridgespan Group, 2009; Nakae et al, 2009) or have heavily emphasized connectivity to the exclusion of other dimensions (e.g. Bernholz & Wang, 2010). Some of the models focus on the initial assessment of the field, and give less attention to measuring the effect of interventions on the field. This paper presents the beginnings of a framework for evaluation by articulating the definitions and components of each dimension, potential evaluation questions, measurement strategies and data sources, and measurement challenges within the dimensions. It also explores approaches and challenges for understanding the relationship between dimensions.

The framework is informed by current thinking about strategic learning and evaluating systems, social movements, and advocacy. It is also informed by my belief in the importance of conducting evaluations **for use by advocates**. I have chosen not to narrow the scope of inquiry by defining a limited menu of outcomes and indicators. Instead, I aim to broadly explore options and share my experience testing different evaluation approaches. This exploratory style is used throughout the paper, with light touches on key ideas and challenges. Suggestions of specific methodologies, for example, are made without an attempt to explain the methods in depth. With a focus on starting the conversation, my hope is that future articles will pick apart and rebuild this framework and the methods explored here to advance a knowledge base for evaluating advocacy fields.

INTRODUCING THE CASE STUDY

The example used throughout this paper is from The Colorado Trust (The Trust), a private health conversion foundation based in Denver, Colorado. The Trust has a long history of strategic philanthropy accompanied by robust evaluation, and has often supported opportunities for evaluators to explore new ways of evaluating emerging social change strategies; it was a major funder of the 2013 gathering of field building funders and evaluators.² The case focuses on an assessment of the health advocacy field in Colorado conducted in the summer of 2013 that was designed to inform a new funding strategy focused on building a field of advocates working toward health equity. The Trust's decision to use a field building approach was driven in part by a shift in its mission from

² Many thanks to The Colorado Trust for granting permission to share its experience in this brief. For more information about the Trust's health equity field building strategy, see www.coloradotrust.org.

improving health access to increasing health equity. The Trust's new mission recognizes that health is deeply affected by social, systemic and institutional dynamics that extend beyond health coverage and care. In this new strategy, The Trust believes that a field building approach to advocacy funding presents an opportunity to foster greater coordination and collaboration amongst a diverse array of individuals and organizations to increase health equity policy solutions.

Spark Policy Institute was contracted to help The Trust understand the current state of the field so that its resources could be targeted to coalesce and support a nascent field. The ultimate goal was to increase the ability of advocates to advance policy issues related to systemic inequities rooted in a variety of differences, including race, ethnicity, income and geography. One of The Trust's starting assumptions was that there was not a strong, existing "health equity advocacy field" comprising multiple, diverse actors who frame their work accordingly and who work alongside each other (if not together) to increase health equity. The process and results of this assessment will be used throughout this paper as an opportunity to explore different measurement issues.

The case study is not meant to be an exemplar and this paper highlights some limitations of the approaches we used. Perhaps the most significant limitation was the timeframe for designing the study, collecting the data, and analyzing and reporting on it. The two-stage advocacy field assessment was completed in fewer than four months in order to meet the strategy design timeline, which left too little time to include the advocates in the design of the assessment and interpretation of the findings. However, the findings have since been used at an advocates convening during which advocates had the opportunity to reflect on them and identify what resonated.

MEASURING THE DIMENSIONS OF A FIELD

The following sections explore how to set boundaries around the field for measurement purposes and then how to measure each dimension. Each measurement section includes:

- Sample evaluation questions
- Sample methods and data sources
- Examples from The Trust case study,
- Measurement issues and challenges to explore.

Each section provides concrete ideas for measuring the dimension while also presenting some of the major issues evaluators need to grapple with as we develop frameworks for evaluating advocacy fields. The paper closes with an exploration of how to assess the intersections between the five dimensions.

DEFINING THE BOUNDARIES OF THE FIELD

Advocacy field evaluations can be thought of as a type of systems evaluation (as an advocacy field is a system). In systems evaluations, the evaluator must “bound the system,” deciding what is within the evaluation’s scope. Here, the boundaries of the field help to identify which advocates are part of the field and which are outside it. The boundary of the field is permeable and ever-changing, in part because many advocates operate in more than one field (particularly organizations with multiple issue areas, such as a child advocacy organization who works on health, education, early childhood, etc.). In emerging fields, where there is no strong shared frame of reference, there might be no clearly identifiable boundaries as of yet and the evaluator’s job might be to identify where a new field is organically starting to emerge.

It is important to note that the boundary of an advocacy field is almost never synonymous with the cohort of grantees the funder supports. Even when a funder has chosen to support only a handful of organizations as part of a larger field building strategy, the boundary of the evaluation is the field as a whole, and the evaluation explores how the increased flow of resources and support to grantees affected the dynamics and strength of the field overall.

The process of setting boundaries may begin with recommendations from a funder or group of advocates, but should ideally involve asking a broader network of advocates to define the boundaries themselves. Otherwise, the boundary may be overly narrow because of the necessarily limited view that a funder has of the full range of actors who work within the policy domain.

Table 2: Overview of The Trust's field assessment

DATA COLLECTION STRATEGIES

April – May 2013

Online survey of health advocates and the partners they identified through snowball sampling

(n=173 out of 289 invitations; a 60% response rate)

Analysis Methods

- Quantitative social network analysis
- Descriptive and bivariate quantitative analysis
- Qualitative analysis using en vivo coding and theme generation

June - July 2013

In-depth interviews with advocates, policy targets and funders

(n=30 out of 31 invitations; a 97% response rate)

Analysis Methods

- Qualitative social network analysis
 - Qualitative analysis using a conceptually clustered matrix based on the dimensions
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Case Example:

In The Trust's assessment of the health equity field, we used a field wide survey of health advocacy organizations (broadly defined) to identify the boundaries of the field. Importantly, "health equity" is not a clear existing field in Colorado, so our task was to determine first who works on health advocacy broadly, and then to determine whether there is an emerging field or sub-field of organizations who think of themselves as doing "health equity" advocacy to know whether The Trust had some existing seeds of a field to build upon.

The initial survey recipients were identified by The Trust and included a core group of 67 health advocacy organizations, 14 of its current advocacy grantees, and organizations identified by those grantees as their partners. This collection of 180 organizational respondents were sent a survey that included an opportunity to identify up to seven other organizations as their organizational partners working with them on access to health. Each week, any new organizations identified by survey respondents received an invitation to the survey (for a total of 103 additional invitations). Near saturation had been reached by the survey's fourth week in the field, with most respondents identifying organizations already invited to complete the survey. The Trust hypothesized that it would find advocacy organizations who think about themselves as having a health equity frame within the larger health advocacy field.

All organizational respondents who identified advocacy strategies as part of their health work were selected as the core of the network, along with any organization they identified as a partner in their efforts on access to health. This set the boundaries of the health advocacy field writ large as 89 total advocacy organizations who responded to the survey and another 160 organizations that the 89 identified as their partners (many of which did not respond to the survey, but were included in the network analysis).

This combination of advocate-reported networks along with researcher-imposed boundaries based on the information gathered through the survey served as the initial definition of the full health advocacy field. But because The Trust was interested in understanding whether there was a distinct field or a sub-field of health equity advocates, we used an analysis of field frame and connectivity (based on interviews and other methods described in more detail below) to determine whether any cohort of actors within the group of respondents could be considered a health equity field. The data showed that the network of 249 organizations did not consist of one cohesive field. Instead, there were organizations working closely together on access related strategies who had limited experience working with a second, loosely distributed network of organizations with values focused on disparities and equity. These two groups lacked both

connectivity and a shared field frame, which we interpreted to mean that there are two fairly separate fields in operation.

Uncovering these boundary issues at the outset affected our approach to analyzing and interpreting data on the five dimensions. For example, if composition (the types of constituencies that are represented by advocacy organizations in the field) had been analyzed as if all 249 organizations were one field, the field overall could be seen as fairly representative of a broad array of communities and constituencies. But when composition is analyzed within the boundaries of the group that emerged as the health access field, that field appears to be largely lacking representation from communities of color.

MEASURING FIELD FRAME

The field frame is the shared identity between actors in the field, including that they see themselves as part of a broader collective effort with shared overarching goals, language about these goals and core values underlying that language (Beer et al., 2013; The Bridgespan Group, 2009). Importantly, this does **not** mean that advocates within a field are not often in conflict about specific policy goals and priorities. Nor should “shared language” be confused with shared messaging. Instead, the shared goals and language that make them a field might only exist on the broadest, almost “visionary” level. When the frame is in common, advocates may disagree on priorities, strategies, tactics or even the specific policies to work toward, but still have a long-term commitment to achieving the shared long-term goals.

Understanding the field frame is necessary for assessing how an advocacy field operates because it defines the set of advocates who are likely to interact with one another (or at least pay attention to one another’s positioning and strategies) in relation to a shared overarching goal. It also helps shape how actors within the field think about their commonalities and priorities. Consider, for example, how the evolution of the field frame from “game protection” to “wildlife management” might enlist a new set of environmental advocates in the arena and shape the kinds of policy solutions that field actors consider. In the context of The Trust’s assessment, the health access field shared overarching access goals, though organizations within this field advocate for different populations (children, people with disabilities, low-income families, rural populations, etc.), among different policy targets (e.g. state versus local policymakers, elected officials versus regulatory decision-makers), and often for different specific policy solutions (e.g., focusing on technical changes around scopes of practice versus focusing on overarching goals like Medicaid expansion).

For measurement purposes, there are three components to consider when assessing the existence or strength of a field frame:

- Defined and shared advocacy purpose/goals;
- Shared values driving advocacy efforts; and
- Language defining the goals and values in a way that inspires collective action and a sense of a broader collective effort.

The sense of being in a field together helps advocates to avoid either working in isolation from others who share their goals or perhaps even from working at cross-purposes (The Bridgespan Group, 2009). It is additionally important to consider the potential for multiple field frames to exist within the field of interest to an evaluator. That is, the definition of the field imposed by the design of the evaluation may or may not encompass actors working under only one coherent frame.

Table 3: Exploring the Evaluation of Field Frame

DEFINITION

A common frame of reference through which organizations identify themselves as a field and as part of a common enterprise.

ELEMENTS OF FIELD FRAME

- Defined and shared advocacy purpose/goals;
- Shared values driving advocacy efforts; and
- Language defining the goals and values in a way that inspires collective action and a sense of a broader collective effort.

ELEMENTS OF FIELD FRAME

- To what extent is there evidence of a specific set of values, goals or purpose commonly held within the field?
- Is there a perception of defined and shared goals among advocates who also share similar values?
- Are advocates using language around their goals that emphasizes the importance of shared action?
- How and where have the goals of the advocacy field changed with time?
- What kinds of advocates are included or excluded by existing field frames?
- How and where have the values driving behaviors in the advocacy field changed with time?
- What evidence is there of a shared goals and values in the actions of advocates within the field?
- How do the frames associated with specific policy issues differ or align with the defined and shared purpose/ values among advocates in the field?
- How and why is an emerging set of goals and values diffusing through the field?

ELEMENTS OF FIELD FRAME

- Self-report data about each individual's organization (survey for high numbers, interviews for more depth);
- Self-report data about perceptions of the field, similar to bellwether interviews (Coffman & Reed, 2009), only focused internally on the advocacy field;
- Evidence of shared goals and language in documents;
- Evidence of behaviors indicative of specific goals and values such as policy issues and solutions prioritized;
- Frame analysis of qualitative data such as formal communications, observation notes or interviews;
- Q-methodology surveys focused on mapping values and goals of the field;
- Reflective dialogue with advocates to interpret behaviors; and
- Establishing causal links through qualitative techniques like causal loop diagrams and process tracing.

Methods and Data Sources for Measuring Field Frame

The measurement of field frame can come from both direct and indirect evidence. Below are data collection methods and approaches to analyzing a field frame and its change over time.

Self-report data about an organization's goals, values, and the field(s) in which it operates:

The strength of this approach is the directness of the data with advocates sharing their organization's goals, the perceptions of being in a field with shared goals, and their specific language pertaining to the values underlying these goals. Unless the field is relatively small, capturing this information from most or all advocates in the field is likely to require a fairly light touch not unlike the survey included in The Trust's field assessment process (see Table 4 below). The Trust's 173 survey respondents provided surface level information about the field frame. In contrast, the interviews only engaged 30 advocates, funders, and policy targets, but the depth and range of questions made it easier to distinguish between a respondent whose organization operates from a health equity frame and a respondent who knows the term is an important one to talk about, but may not have an organizational focus or values rooted in equity.

Interviews reporting on the overall framing of the field: Similar to bellwether interviews or community readiness assessments (see Coffman & Reed, 2009; Edwards et al., 2010), interviews with individuals who have a broad view of the field can reveal useful information about what frames are in operation. You could interview a set of advocates and/or other bellwethers who are familiar with the advocacy field's sense of shared identity, language, values and goals. In interviews with 30 "broad view" advocates and funders in the field during The Trust's assessment, we asked a series of questions designed to uncover the goals and values of the field, including questions about the extent to which a health equity focus exists among advocates (the frame being investigated).

Evidence of shared goals and language: Documents generated by advocates can reveal the extent to which they share goals and language. A review includes organizations' missions and goals, job descriptions and internal documents, website content, hearing testimony, and annual reports. The Trust's assessment included a document review of materials available online for organizations reporting the use of a health equity and disparities frame to mitigate the risk that these respondents were reporting what they thought the funder wanted to hear. However, in follow-up interviews these advocates reported a perception that health equity framing is not politically viable. Thus, public facing documents may only tell part of the story.

Evidence of behaviors in the field: Monitoring the actions of the field, such as which policies are prioritized by whom, can reveal what frame(s) is in operation, since policy

priorities are a function of political opportunities, policy goals and underlying values. This approach could be implemented focusing on the field overall, with less attention to which organizations engaged in which policies or functions as drivers. It could also be implemented with a focus on individual organizational behaviors, paying attention to who engaged in which policy issues and solutions and to what extent. This would require far more in-depth data collection. It is important to note that observable information is likely to be incomplete, as advocacy often happens behind closed doors.

Q-methodology surveys: Measuring values is among the more challenging aspects of the measurement of field frame. It would be difficult to study behaviors in the field, as suggested above, without a sense of the values you are seeking in those behaviors. This could be particularly challenging when the evaluation task is to *discover* what frames are in operation rather than to detect whether a preferred frame exists. In this case, Q-methodology can be a powerful tool for uncovering values and their level of priority within a field, and it can also help in mapping policy goals (e.g. see Kathlene, 2006 and McHugh, Lynn, Portman-Marsh, and Kahn, 2008).

In a setting where there may be multiple frames in operation, Q-methodology can determine if underlying values are significant enough to justify treating the advocates as operating in more than one field. For those unfamiliar with Q, it is a method that lives between qualitative and quantitative research, using either factor or cluster analysis to examine how respondents rank order an array of statements. The use of forced ranking generates more meaningful results than value statements captured through a series of independent Likert scale questions. Q-methodology is also quite resource intensive when done properly, thus best suited to use in a field assessment where it is particularly important to understand the frame in depth.

Frame analysis: Frame analysis examines how people communicate ideas and what the patterns of their communication choices suggest about the underlying “frame.” For example, an advocate telling the story of a woman’s struggle with chronic health problems could tell the exact same story through different frames: as an individual failing, as a lack of access to healthcare or perhaps as many different challenges contributing to an unhealthy environment and stress. The choices an advocate makes in how to tell the story reveal the frame of the advocate – what issues they care about and what values and beliefs are driving their work. Frame analysis can be conducted on many types of data (e.g. formal communications, observation of advocates communicating in public or private settings, interviews). Keep in mind that the more public the setting, the more difficult it will be to untangle the difference between the analysis uncovering the field frame and the analysis uncovering the messaging being used by the field.

Reflective dialogue with advocates: Monitoring of behavior in the field would benefit from the engagement of advocates to interpret the behavior and describe how advocacy organizations engaged in the behavior. Even if the focus is self-report data about shared goals, language and values, a reflective dialogue with advocates will help in interpreting the results.

Establishing causal links: If there is an interest in explaining cause and effect as a new field frame emerges, an evaluator may want to consider collecting data to create a causal loop diagram or engage in process tracing. Both techniques are designed to uncover causation in complex settings. If a summative evaluation is underway without the benefit of a baseline assessment, using the general elimination method may help establish causes of changes in the field frame.³

³The three methods outlined have been applied in advocacy evaluation settings and may have value for field evaluation specifically. An advocacy case study using general elimination method provides insight into how this approach of establishing cause and effect is relevant in a complex advocacy setting (Patton, 2008).

Table 4: Measuring field frame – The Colorado Trust case study

METHODS

Survey

- Statement by advocates of the impact their organization is hoping to have on access to health in Colorado (focused on identifying their major goals).
- Close-ended list of words that advocates could select as being “front and center” in how their organization defines and talks about access to health.

Interviews

All interviewees were informed that The Trust was exploring health equity, and asked whether their organization focuses on health equity. If so, they were also questioned on how they define it. A second question was then asked about the health equity focus of the overall field.

FINDINGS

Survey

More than half of survey respondents identified access, prevention and wellness as front and center in how they define health. Many also identified the words low-income, underserved, statewide and affordability. Although over 40% of respondents identified health disparities, a verification process found more than a third of these were not using this term in any available public documents.

Interviews

Many of the interviewees whose organizations were at the core of the network described the health equity focus of their organization using language about access for all. Other interviewees, representing what was later identified as a second field, described health equity through a mix of inequitable access to healthcare and social determinants of health. The vast majority of interviewees reported the health advocacy field lacked an equity focus overall.

IMPLICATIONS FOR EVALUATORS

Survey

I do not encourage the use of a close-ended survey question similar to the one we used. Due to an inability to verify many of the words selected by respondents and the lack of alignment between their open-ended statements and the close-ended selections, I believe there was as much aspirational reporting tied to expectations about the funders' priorities as reporting on current framing. However, the findings did help to identify a frame that was predominantly access and prevention focused and often coverage focused. Overlaid with the connectivity findings, this helped explain disconnects between organizations with different framing.

Interviews

I had some concerns going into the interview process that it was too leading (announcing the health equity focus upfront), but I was also aware that the interviewees knew The Trust had an interest in the topic. Over-reporting an interest in health equity was not an issue, however, the analysis paid more attention to how they defined health equity than their declaration of a focus on health equity. The follow-up question about the overall field reinforced the findings that most of the power in the field was not oriented around an equity frame.

Measurement Issue 1: How can you untangle issue framing or message framing from field framing?

Advocacy evaluation literature identifies issue framing as a critical interim outcome that can be measured through methods such as content analysis of media stories and public statements. Issue framing can also be explored with public opinion polling to understand the public's understanding of the issue and which frames resonate. While this is important information for an advocacy strategy and evaluation, it is not necessarily reflective of the field's frame. Instead, these findings are reflective of the messaging strategy used by the more dominant influences within an advocacy arena, which may or may not include the advocates within the advocacy field of interest. Further, the language they are using to frame an issue may be driven more by strategy than by values. Evaluators have to be careful during data analysis to distinguish between the framing of issues for political purposes and the identity- or values-based framing through which advocates identify themselves as part of a shared enterprise.

Measurement Issue 2: How can you measure values in the field in a way that is meaningful?

"Values" as written in an organizational document may not equate to the values that drive the day-to-day decision-making in an advocacy organization. When faced with a situation where publicly stated values are potentially only an "espoused truism" of an organization without driving its decisions and behaviors, evaluators need more than a self-report of organizational values (Van Rekon et al., 2006). An alternative is to capture the choices that people make when faced with multiple courses of action that reflect different underlying values (Mumford, et. al, 2002). Potential behaviors include the policy problems that are prioritized and the types of policy solutions being generated and prioritized.

For example, while a field focused on health access might pursue policies to expand coverage broadly (e.g. an expansion of Medicaid) or expand access through service availability (e.g. focusing on the sustainability of safety net clinics in general), a field with a health equity frame might focus on the social determinants of health prevent specific populations from accessing care (e.g., considering the geographic placement of safety-net clinics in relationship to populations experiencing disparities in an attempt to address transportation issues that are a barrier to access). Political context may determine which policy options are viable at any given moment, but the range of policy options advocates are considering is driven by the values of the advocates.

A second example comes from movement building for reproductive justice. A field with the frame of "reproductive health" might focus primarily on policies directly related to access to reproductive health care. In contrast, a field with the frame of "reproductive

justice” would likely pay closer attention to issues that intersect with reproductive health for populations experiencing disparities. Evidence of a reproductive justice frame might include policy actions related to how immigration policy, health care reform or other policy domains negatively affect women of color and marginalized communities, leading to negative impacts on reproductive health and well-being (Nakae et al., 2009).

If you use this approach to identifying values, it will be important to actively engage either advocates or influencers to assess which policy problems and solutions represent which values. The evaluator in combination with the advocates can engage in a reflective practice regularly, exploring the why different issues and solutions are prioritized. With this type of approach, the evaluation itself becomes an intervention, particularly if the funder is interested in changing the field frame.

Measurement Issue 3: How can you measure a sense of shared identity or purpose?

Measuring shared identity or purpose is in many ways similar to measuring social cohesion. Social cohesion can be understood by asking questions about a sense of shared goals and purpose, consensus on those goals, social trust, reciprocity, sense of morale about participating in the social network and network cohesion (Figueroa et al., 2002). Other questions are: to what extent do advocates see themselves within a field, what field do they see themselves within, and to what extent is that field operating as a field? (Be careful to test what the term “field” means to advocates and whether alternative language may be more accessible.) In addition to testing the strength of the field frame, these questions also explore the connectivity of the field. This introduces another complexity: field frame and connectivity are likely interdependent, as the perception of a shared identity or purpose is dependent on some level of connectivity or at least awareness of the other organizations and advocates within the field, while a shared field frame could drive advocates toward increased connectivity. As a result, it is important to interpret results related to each dimension in light of the findings related to other dimensions.

Measurement Issue 4: Are there important things to consider in the intersection of the three components of field frame?

With three distinct concepts underlying field frame, there is potential for conflicting results. For example, the perception of being in the same field may exist without having shared goals or common values throughout the field – evidence of a field composed and sustained out of necessity rather than through shared values. There may be evidence of a shared language and common values without the perception of being in a shared field or having shared goals, resulting from limited connectivity. There can even be conflicts

between the language being used and the values underlying the language, despite perceptions of being in the same field.

The Trust's field assessment interviews uncovered this sort of conflict. When probed, most of the organizations who said they use the words "health disparities" or "health equity" to describe their work used an atypical definition (e.g. they did not mention one or more of the social determinants of health). Others defined it by citing social determinates. The evaluator could interpret this as an indication of a different set of underlying values despite their shared language. An evaluation of field frame may want to explore and unpack the conflicts or alignments across these three issues of shared goals, language and values.

Measurement Issue 5: What looks different if you're seeking a predefined frame versus exploring existing frames?

An evaluator must decide whether she is seeking to understand the existing frame(s), regardless of what it is, or whether a particular pre-identified frame exists (or is emerging) within a broader field. The Trust's assessment sought to uncover where and to what extent a health equity frame was present within the field. The findings helped zero in on one of the few places within a larger health access field where an equity frame could be found. Some of the richest framing data came from respondents' definitions of health equity; their answers helped to understand the health access framing dominating the field and how it differed from the equity frame.

When trying to uncover existing frames, measurement is more complex and may benefit first from interviews with influencers and advocates about their understanding of shared goals, language and values, followed by broader surveying to test the interviewees' assertions among a larger group of advocates.

Measurement Issue 6: How can we determine the causes of changes to field frame?

When an active intervention to change the frame is underway, evaluation can benefit from systems evaluation techniques, as framing is a driver of systems dynamics. Systems thinking directs us to explore the diversity of perspectives, including how new framing intersects with existing beliefs and values, and the impact of relationships—including the position and influence of different actors—on how a new frame diffuses throughout a field of actors. A systems thinking perspective also reminds you to consider retrospective, abductive analysis to uncover unpredictable outcomes (Hargreaves, 2010).

For example, if The Trust's new field building strategy prioritizes changing the field frame, it may want to monitor policy priorities initiated by the grantees and how those priorities diffuse through the field, including the language those organizations supporting the policy use to describe it. Their intervention may then be measured not only for its impact on their specific grantees, but also for its diffusion to the rest of the field.

This approach to measuring field frame begs the question of whether you can influence the frame by introducing new policy priorities that reflect the desired values. Can imposing a policy focus on a field, with adequate education on why those policies are critical, gradually change how the participants in the field understand and think about the overarching advocacy field within which they operate? If the evaluation engages in reflective practices with advocates to understand the values underlying policy choices, then there is potential for these practices to become part of the intervention changing the field frame.

MEASURING FIELD SKILLS AND RESOURCES

Field skills and resources include the array of skills, knowledge and capacity necessary to make progress on a wide variety of policy issues throughout all stages of the policy processes. This definition includes three very distinct components:

- Advocacy skills such as lobbying, regulatory advocacy, policy analysis, community mobilizing, voter outreach, etc.;
- Capacity to deploy an adequate level of the skills, including capacity focused on different audiences and levels of policy change; and
- Knowledge of the policy issues and potential solutions relevant to the goals of the field.

The field of advocacy evaluation has done much of the heavy lifting when it comes to understanding which advocacy skills are critical *within individual organizations* and how to measure them. But it lacks a set of methods for assessing whether and how the necessary skills and resources are dispersed across the field. Additionally, the capacity of organizations individually (or as a collective) to deploy their advocacy skills and resources at the right level of intensity is heavily influenced by the level of funding for different skills within the field. For example, a half dozen organizations with grassroots mobilizing skills may add little to the field if these organizations have insufficient dedicated staff time or funding to do this work.

Even less standardized is the measurement of advocates' level of knowledge about specific policy issues and solutions. Definitions of fields that are not specific to advocacy have emphasized the importance of a field having common knowledge of how to solve the

problem (e.g. see The Bridgespan Group, 2009 and Bernholz Seale, Linden & Wang, 2009). A field with high capacity to deploy many different advocacy skills may still lack the content knowledge to deploy those skills effectively on behalf of high quality policy solutions.

Table 5: Exploring the evaluation of field skills and resources

DEFINITION

The array of advocacy skills, knowledge and capacity needed to make progress on a wide variety of policy issues throughout all stages of the policy processes.

ELEMENTS OF FIELD SKILLS & RESOURCES

- Advocacy skills such as lobbying, regulatory advocacy, policy analysis, community mobilizing, voter outreach, etc.;
- Capacity to deploy an adequate level of the skills, including capacity focused on different audiences and levels of policy change; and
- Knowledge of the policy issues and potential solutions relevant to the goals of the field.

EVALUATION QUESTIONS

- What skills, knowledge and capacity are available in the field and how are they dispersed across organizations?
- When and how are skills and knowledge deployed in the field and to what extent is this deployment effective?
- What are the gaps in skills, knowledge and capacity experienced by the field?
- Do advocates in the field have adequate knowledge of policy issues and options in the context of the field's frame (goals, purposes and values)?
- How and why have skills, knowledge and capacity changed in the field over time?
- Are particular kinds of skills and resources concentrated within organizations representing certain constituencies and, if so, what are the consequences of this for the kinds of policy solutions that are successful?

METHODS & DATA SOURCES

- Advocacy capacity assessment tools aggregated across advocacy organizations.
- Interviews with advocates or influencers to understand specific skills, knowledge and capacity or overall field resources in the field.
- Intense period debriefs to explore to what extent and how effectively advocates skills, knowledge and capacity were deployed in the context of specific campaigns.
- Mapping field resource findings on the Visual Framework of Public Policy Strategies to assist with interpreting findings and identifying gaps.

Methods and Data Sources for Measuring Field Skills and Resources

Advocacy capacity self-assessment: Using one of the many existing advocacy capacity assessment tools (either in full or adapted to capture the skills identified as most critical to track in a field),⁴ evaluators can compile the scores of individual organizations into a field-level map of skills. To create an accurate picture of the field, analysis should account for how different skills are concentrated, either between levels (e.g., local or state level advocacy) or among different kinds of organizations. You will also need to measure the capacity to deploy the skills – do the organizations possess the skills and do they have sufficient staff time to put those skills into action?

Interviews about the overall capacity of the field: As noted in the section on field frame, assessing skills and resources across the field as a whole (rather than by aggregating individual organizational skills “scores”) requires identifying interviewees who have sufficient experience observing the knowledge, skills and capacities of a broad swath of actors, and asking them to share specific examples of when and how they were deployed. Alternately, specific subsets of interviewees may be better equipped to specific skills and resources of interest. For example, foundations might be best placed to provide data about their sense of the adequacy and flexibility of advocates’ budgets. Policymakers or legislative staffers who are deeply embedded in the field’s primary issues may have an important perspective about advocates’ lobbying skills. As with any interview **process**, one risk is that interviewees misrepresent skill gaps simply because they are not familiar with the entire field.

Intense period debriefs: Intense period debriefs are a common advocacy evaluation method (Coffman & Reed, 2009) that could be repurposed to assess the effective deployment of skills in a field by asking participants to reflect on who deployed what skills, when, how, and perceptions of the impact of that deployment on policy progress. In a large, diverse field (and perhaps particularly in a field that has lower connectivity), it may make sense to have multiple debriefs with different groups of advocates who can speak to different sub-sections of the field.

Mapping using the Visual Framework of Public Policy Strategies: Julia Coffman at the Center for Evaluation Innovation has developed a matrix that maps advocacy strategies along two axes: the target audience (public, influencers or decision-makers) that the strategy is intended to reach, and the outcomes (building awareness, will or action) that

⁴ There are multiple capacity assessment tools in advocacy that are available for use and well documented as being comprehensive and appropriate for advocacy. For an exploration of such tools in action, consider reading Hoechstetter (2011). Two well respected tools include:

Alliance for Justice: Advocacy Capacity Assessment Tool (www.advocacyevaluation.org)

TCC Group: Advocacy Core Capacity Assessment Tool (www.tccgrp.com)

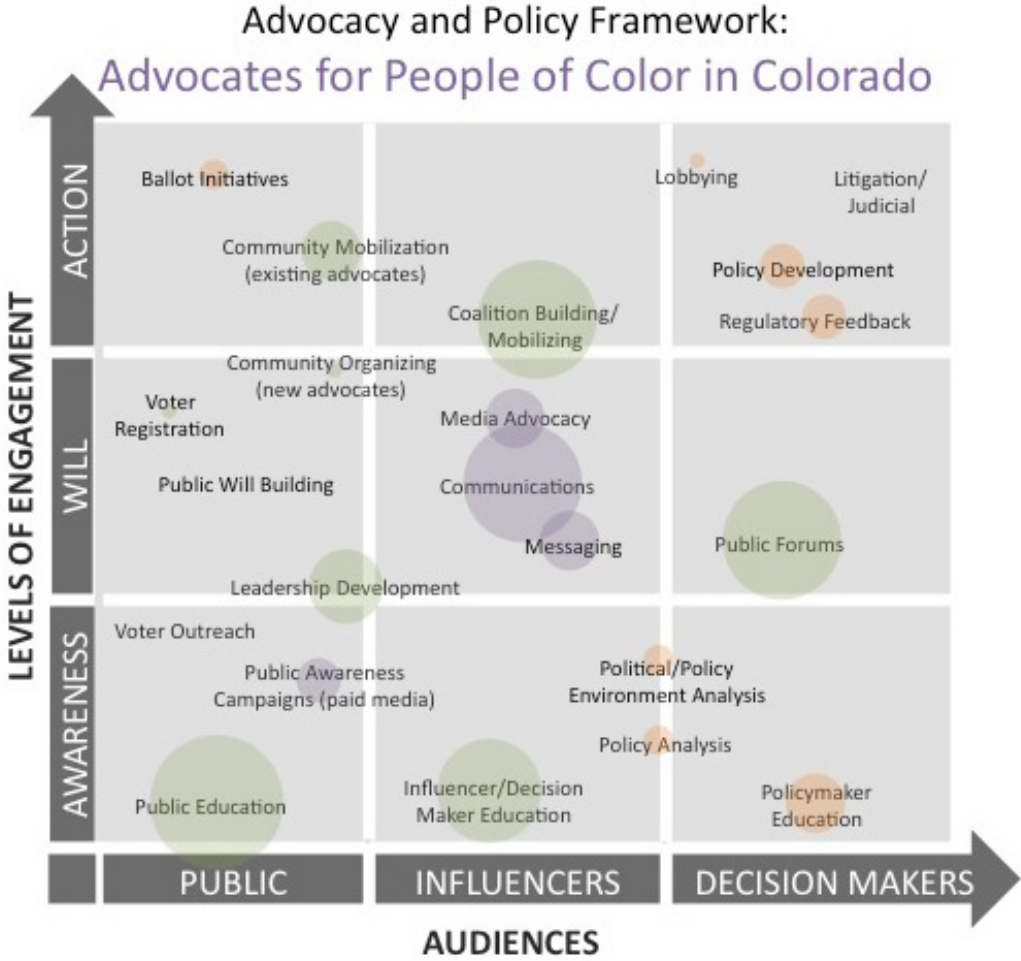
the strategy can be expected to generate among these audiences. This framework can be adapted to reflect the types of skills needed for policy progress on particular issues, serving as a powerful visual tool for mapping and displaying varying capacity levels. We used this approach in The Trust's assessment by creating bubbles whose size reflected the number of organizations reporting specific advocacy skills (e.g. see Chart 1).

Chart 1, Part 1. Example of mapping skills using the Visual Framework of Public Policy Strategies ⁵



⁵ For more about the Visual Framework of Public Policy Strategies, please see Campbell & Coffman (2009). This particular visual example is drawn from a report to The Trust (Lynn, 2013).

Chart 1, Part 2. Example of mapping skills using the Visual Framework of Public Policy Strategies ⁶



⁶ For more about the Visual Framework of Public Policy Strategies, please see Campbell & Coffman (2009). This particular visual example is drawn from a report to The Trust (Lynn, 2013).

Table 6: Measuring field resources – The Colorado Trust case study

METHODS

Survey

Self-reported advocacy skills and targets using close-ended lists.

Interviews

- Questions about the field’s overall strengths and weaknesses in relation to a targeted list of skills (ballot initiatives, grassroots engagement, communicating with policymakers, and voter outreach and education).
- Request to identify organizations positioned to “raise the power and voice” of different communities experiencing disparities.
- Questions about specific skills of the organizations representing the perspectives of disadvantaged and marginalized populations (e.g. policy analysis capacity).

FINDINGS

Survey

The survey aggregated the skills reported by respondents to describe the field. The skills were analyzed by different subgroups and displayed using bubble charts (see Chart 1 above). Gaps in skills were identified in the overall network (e.g. lack of ballot initiatives and voter outreach expertise). Gaps in skills were also identified specific to different interests which uncovered significant gaps in skills among the organizations representing people of color and revealed that many of the available skills in the field were with organizations prioritizing children’s health issues.

Interviews

The descriptions of strengths and weaknesses across specific skills differed greatly depending on the position of the interviewee in the fields. Interviewees at the core of the access field identified the weaknesses related to policymaker engagement as being primarily about the need to speak across the aisle and a lack of dedicated funding for lobbying. The interviewees from the equity field along with the less central interviewees in the access field spoke about the lack of capacity, credibility, influence and access to policymakers for smaller organizations and grassroots groups.

IMPLICATIONS FOR EVALUATORS

Survey

The combination of aggregating individual organization’s skills and then parsing them out in subgroups worked well: the information was useful, easy to interpret and later confirmed during interviews. It was limited by only including the capacities of those who responded to the survey. While the response rate was 87% among the original core of advocacy organizations receiving the survey and 60% overall, some voices were not included resulting in somewhat biased information.

Interviews

Similar to the challenge with the survey, the interview results suffered from missing data. The absence of knowledge among the 30 interviewees in regards to the resources available to advocates speaking on behalf of the Native American, Asian, and immigrant communities more generally left the analysis largely bereft of useful or actionable information. However, where data was available, the findings further reinforced the differences between the access field and the equity field.

Measurement Issue 1: Does it make more sense to aggregate the skills, resources, and capacities of individual organizations or to assess the field holistically?

Mapping the skills, knowledge and capacity of each organization may identify gaps in a fairly nuanced way as it did in The Trust's assessment. Yet a successful aggregation of the skills, knowledge and capacity of individual organizations into an accurate picture of the field as a whole is highly dependent on the participation of the advocates in organization-level assessments. Despite the relatively high response rate for The Trust's survey (60%), few organizations advocating for specific communities of color responded, resulting in an incomplete picture of the skills available to raise the power and voice of those communities. A secondary source of information could fill in the gaps left by non-respondents.

Any of the existing organizational advocacy capacity assessment tools can identify what skills organizations have. However, as noted above, the presence of the skills alone is not enough to understand the capacity to deploy them; a comprehensive assessment of skills and resources must somehow address this issue. Consider asking key informants to assess the field as a whole, identify organizations that have particular strengths, describe how skills and resources are typically deployed across the field, and assess the adequacy of skills and resources to meet the field's needs. Major funders could be interviewed to assess the long-term sustainability, diversity, and flexibility of funding, and to understand why organizations possessing some kinds of skills (e.g., policy maker engagement, lobbying, etc.) are funded more often than others (grassroots organizing, community mobilization, leadership development). However, when relying exclusively on key informants to describe the field as a whole, evaluators must be aware that informants are less likely to be familiar with advocates who are less influential or connected. The value of the concrete skills and knowledge these advocates have at their disposal might not be uncovered.

Measurement Issue 2: How can you measure the effective and adequate deployment of resources?

Measuring field skills and resources should include identifying whether advocates understand the strengths and contributions that other organizations can supply, whether there is a core set of stable and high capacity organizations supporting the field, and whether the presence of organizations taking on the role of "hubs" can assist in coordinating the deployment of capacities across the field. These questions can also be measured as part of connectivity, and will consequently be discussed in the following section. However, it is worth considering whether measuring the mere existence of

different types of field skills and resources is sufficient, without understanding whether and how those skills and resources are adequate to influence the policy agenda.

Rather than assessing what skills and resources each organization *could* deploy, it may be more meaningful to assess what skills and resources advocates *actually* deployed in specific advocacy campaigns or strategies. For example, a retrospective analysis of major campaigns might uncover a variety of skills generally available and deployed at adequate levels during campaigns. It may also reveal that other skills were insufficient for the needs of a campaign, either because they were deployed too late to be effective or deployed in ways that were ineffective. This kind of analysis also might provide insight into which field skills and resources are consistently missing. Such analysis could not be completed without the advocates sharing their perceptions of what the campaign needed versus what was available.

The distinction between the skills available and the capacity to deploy them could still be challenging to unpack even if you approach your analysis by focusing on field-level resources and deployment. If the assessment asks advocates to reflect on the range of skills deployed across different advocacy campaigns, it could potentially miss skills that do exist but have not yet been actively utilized by the field in the campaign context.

Measurement Issue 3: How can we measure a field's collective knowledge of policy issues and solutions?

Evaluating advocates' knowledge of policy issues and options faces the same challenges typically associated with measuring knowledge where an "exam" format is inappropriate. Evaluator observation of advocates' discussions could help determine levels of knowledge, but can result in an over-reporting of knowledge gaps if observed discussions do not include discussion of a full range of issues. Advocates' self-reported perceptions of being knowledgeable are suspect as well. Even an assessment of the "quality" of the policy issues and options advocates are prioritizing is complicated by the fact that advocates are often calculating which solutions to promote (or negotiate) based not only on the quality of the solution, but also on political viability.

Consider creating a base of knowledge by observing discussions on policy options and documenting what options are prioritized. Then engage advocates in a reflective dialogue to unpack the difference between issues and solutions left off of the table due to a lack of knowledge versus those left off of the table due to a lack of political viability.

Measurement Issue 4: How can we determine the cause of changes to field skills and resources over time?

Determining what causes changes in capacity and skills can be fairly straightforward when such changes occur through funding interventions or technical assistance. For example, if a state-level advocacy field lacks knowledge of relevant policy solutions, a funder might intervene by connecting grantees with advocates in another state who have made greater policy progress. The change in knowledge could be captured shortly after this intervention as the evaluator monitors whether any of the policy solutions discussed became priorities in the field. It could also be measured by debriefing with advocates on how they applied that knowledge.

Unfortunately, not all interventions will be that straightforward. If the field has an adequate diversity of skills but fails to deploy sufficient capacity of the right skills at the right time, interventions might be more “diffuse.” Advocates may need better connectivity, increased funding for specific skills, and/or improved adaptive capacity before they can better coordinate the deployment of skills and resources. In this case, changes to skills and resources may result from strategies that are designed to improve *other* dimensions of the field. For example, a field that includes advocates with the skills to mobilize communities of color but fails engage them until policy priorities have already been crafted may need interventions that build connections between the advocates crafting solutions and those mobilizing communities, increased knowledge of policy options among the advocates mobilizing communities, and increased capacity of these advocates to deploy their skills steadily and consistently. The ability to parse out causation is much more complicated for multi-layered interventions that address multiple dimensions. Rather than a one-size-fits-all solution to this challenge, any evaluation of a complex intervention should explore the intersections of multiple dimensions in the attempt to link cause and effect.

MEASURING CONNECTIVITY

Connectivity is the ability of different actors in the field to communicate and cooperate in a way that allows skills and resources to be marshaled in increasingly productive ways over time. This includes habits of inter-organizational interaction, and the raw material that makes collaboration possible when appropriate. This suggests from a measurement perspective that the components of connectivity to pay attention to might include:

- Structures that facilitate and sustain communication and cooperation (e.g. coalitions, regular convenings, ongoing communications platforms);

- Complimentary and collaborative actions over time in pursuit of common goals; and
- The productivity or effectiveness of the relationships at mobilizing skills and resources.

Connectivity is addressed in a broader literature about networks, and has been heavily explored by evaluators and foundations. However, much of this work has focused on point-in-time network analysis that fails to capture the *history* of connectivity among actors. This approach cannot capture why the patterns over interaction over time have built up into the current state of affairs, which is critical to understanding how to improve relationships. For example, the field assessment for The Trust revealed that the current level of trust and productive engagement between organizations has been heavily influenced by their history with one another, some of which has been contentious.

Table 7: Exploring the evaluation of connectivity

DEFINITION

The capacity of different actors in the field to communicate and cooperate in a way that allows skills and resources to be marshaled in increasingly productive ways over time.

ELEMENTS OF CONNECTIVITY

- Structures that facilitate and sustain communication and cooperation (e.g. coalitions);
- Complimentary and collaborative actions over time in pursuit of common goals; and
- The productivity or effectiveness of the relationships at mobilizing skills and resources.

EVALUATION QUESTIONS

- What is the structure of the overall organizational network? Within that structure, where are the gaps in connectivity?
- What are the motivators underlying the structure of the network? How can gaps in the network be understood through the gaps in motivators?
- What is the history of the field's relationships, and how does it influence the current connectivity of the field?
- What is the intersection between organizational power and the connectivity of the field?
- What are the structures, motivators, and history of the interpersonal networks? How does this relate to the way organizational networks function?
- How is the field's connectivity changing and what is contributing to that change?

METHODS & DATA SOURCES

- Quantitative social network analysis with the ability to explore the "what" and "how" of relationships in a network by aggregating the individual relationships;
- Qualitative network analysis with the ability to capture greater depths on the "why" of connectivity while focusing on the field as a whole;
- Partnership self-assessments at an organizational level, another method for aggregating the individual relationships within the field;
- Partnership self-assessment at a field level, giving criteria for respondents to explore the structure of connectivity in the field overall;
- Engaging advocates in collaboratively mapping relationships to generate a shared understanding of why the network functions the way it does; and
- Document review or observation of the structures that support collaboration, such as with coalitions or other groups of advocates.

Methods and Data Sources for Measuring Connectivity

The measurement of connectivity can benefit from more than just network analysis. Connectivity assessments should account for the drivers of relationships, including such things as roles and motivators, some of which can be uncovered through network analysis, but others of which are better understood through qualitative methods.

Social network analysis (SNA): SNA is a powerful tool for uncovering the patterns of interaction within a field. Most network analyses result in a combination of narrative description and visual maps of the network. These maps can show where networks are strongly connected and where connections are either lacking or heavily dependent on one or two key “broker” organizations that link different parts of the network. The maps can reveal smaller groups within a network that are working most closely together. Depending on how the SNA questions are asked, it can show how resources are deployed through the relationships in the field, as well as the motivators of relationships.

One of the challenges of quantitative network analysis is the superficial information it provides. Structural information about the network can be very valuable, but these types of maps are typically generated using a survey of a fairly complete sample of participants from the network. As a result, qualitative rather than quantitative analysis of the network might be more appropriate when the response rate is likely to be lower than needed or when the question is less about specific connections and more about the overall functioning of the network.

Qualitative network analysis: Qualitative network analysis that creates a narrative description of the network can explore in depth such issues as the ability of the connections in the network to help in achieving the shared goals of the field, who participates in the network and how (including the history underlying those patterns), how resource distribution and access (the structures that facilitate partnership in the network) occur, and even the overall form of the network and how it shifts and varies depending on the needs of the advocacy field. You might want to dig into questions such as:

- Is the network effective at collective fundraising and if so, why (Nakae et al., 2009)?
- Who works on developing shared messaging in the field and how does that message then disseminate out more broadly?
- Which resources are easily mobilized through connections in the field and which resources tend to be difficult to access?
- Which relationships are changing, in what direction and for what reason?
- Which structures for coordination work most effectively, and which ones create barriers to effective coordination?

The breadth and depth of connectivity issues that can be explored qualitatively goes far beyond the typical network analysis.

Qualitative network analysis can include interviews with bellwethers and influencers to understand the overall connectivity of the field, or engagement with a group of advocates in a reflective dialogue focused on the field more generally or using a specific advocacy campaign as an opportunity for reflection. Observation may be less fruitful for measuring connectivity than for other dimensions simply because so many relationships are leveraged in ways that are not fully observable (e.g. by email, phone and private meetings at key moments in a campaign versus a public meeting). Document review could focus on membership in coalitions, participation at specific meetings, formal agreements between organizations, etc.

Partnership self-assessment of specific organizational relationships: Partnership self-assessments are often used in advocacy evaluation as well as in evaluations of coalitions and collaborative efforts more broadly. These tools operationalize commonly concepts such as coordination, collaboration, integration, etc., by providing a very concrete set of criteria to help advocates identify the current status of a specific relationship. Data from partnership assessments can be used to map individual organizational relationships, and aggregate them to represent the strength of relationships in the field. You could analyze and present these results through the lens of social network analysis or through more traditional quantitative analysis techniques.

Partnership self-assessment at the field level: Partnership assessment tools could also be adapted into a field level assessment, creating concrete criteria for respondents to use when assessing the levels of partnership between different types of organizations or clusters within a field. In The Trust case study, such a tool might have asked respondents to assess the partnerships between mainstream advocacy organizations and organizations representing communities of color, using a concrete set of criteria and requesting relevant examples of those partnerships in action.

Adapting advocacy capacity assessment tools: The Alliance for Justice advocacy capacity assessment tool has an option for respondents to note that they are “relying on partners” to access a particular type of skill. If you are using these tools in the context of a field assessment, you could adapt them to ask respondents to identify which partners they turn to for each type of skill.

Participatory relationship mapping: An evaluation of connectivity seeks to understand the **value** of connections between advocates. Engaging the advocates in a participatory mapping exercise (either organization-by-organization or at a field level) may provide a deeper understanding of how the field’s relationships function. Such an approach would

have to carefully consider who is in the room and may not work as well when a field has a negative history to overcome.

Document review and observation: Equally important to measuring relationships is measuring the structures that support their development and maintenance. Document review and observation of advocacy coalitions and other gatherings will help you understand how existing structures are supporting the network. You may want to explore the membership, how members were selected or invited, and how membership has changed over time.

Table 8: Measuring connectivity – The Colorado Trust case study

METHODS

Survey:

- Respondents were asked to share the names of up to seven organizations with which they share information, engage in shared activities, and/or share resources with in order to achieve their organization’s access to health goals.

Interviews:

- Depending on their position in the field, interviewees were either asked about their organization’s relationship to the six most central health access advocates from the connectivity analysis or if they were among those six, asked about their relationship to organizations representing communities experiencing disparities.
- Questions about the consequences of competition for funding and motivations for connectivity.
- Questions about the personal perceptions of the overall connectedness of health advocacy organizations and groups advocating for disadvantaged or marginalized populations, including exploring how these groups typically hear about advocacy efforts and opportunities.

FINDINGS

Survey:

- A network of 249 organizations included a densely connected core with six highly central organizations collectively able to reach 28% of the organizations in the network. This network also included a very loosely connected periphery, including a cluster of organizations representing communities of color. Some of these organizations were three, four or even five steps away from the central hub of the network. Among organizations representing populations experiencing disparities, LGBT and Latino organizations were the most connected to the core of the network.

Interviews:

- The interviews helped to explain the survey’s findings by exploring the “why” behind the network’s structure. The findings did not find evidence of relationships between the core health access advocacy organizations and the organizations representing communities of color. They did provide historical context on why these relationships are not present and how the advocacy network overall has largely opportunistically engaged organizations representing communities of color. One of the main findings was that it was acceptable and even the norm to not engage organizations representing disadvantaged and marginalized communities in meaningful ways when discussing advocacy efforts.

IMPLICATIONS FOR EVALUATORS

- What is the structure of the overall organizational network? Within that structure, where are the gaps in connectivity?
- What are the motivators underlying the structure of the network? How can gaps in the network be understood through the gaps in motivators?
- What is the history of the field's relationships, and how does it influence the current connectivity of the field?
- What is the intersection between organizational power and the connectivity of the field?
- What are the structures, motivators, and history of the interpersonal networks? How does this relate to the way organizational networks function?
- How is the field's connectivity changing and what is contributing to that change?

METHODS & DATA SOURCES

- Quantitative social network analysis with the ability to explore the "what" and "how" of relationships in a network by aggregating the individual relationships;
 - Qualitative network analysis with the ability to capture greater depths on the "why" of connectivity while focusing on the field as a whole;
 - Partnership self-assessments at an organizational level, another method for aggregating the individual relationships within the field;
 - Partnership self-assessment at a field level, giving criteria for respondents to explore the structure of connectivity in the field overall;
 - Engaging advocates in collaboratively mapping relationships to generate a shared understanding of why the network functions the way it does; and
 - Document review or observation of the structures that support collaboration, such as with coalitions or other groups of advocates.
-

Measurement Issue 1: Should network relationships be measured through the lens of motivators?

A network analysis begins with decisions about the substance of the relationship that will be measured, which could include the motivators of relationships. Motivators serve as the basis for the structure of the network. The indicator of the strength of a “tie” is not its frequency, the self-reported value of the relationship, or the concrete transactions that occur, but rather the motivators that cause activation of the tie – that is, the conditions necessary for the tie to have value to each side. Actors within a network will be motivated in different ways at different times and multiple ways at the same time.

An evaluation might answer whether relationships are driven by the need to reciprocate past communications (exchange theory), to minimize the cost of communication (theories of self-interest) while maximizing access to resources (resource dependency theory), or perhaps by the tendency to communicate with those who are similar (theories of homophily) or most accessible to you (theories of proximity). It may be useful to explore whether there is motivation to maximize the collective value of communication in the network (theories of collective action) (Monge & Contractor, 2003).

- Interview questions to support such assessment include:
- Which organizations are your organization’s “go to” partners due to successful past partnerships on policy issues related to health and health care? (exchange theory)
- Which organizations are your organization’s “go to” partners due to the skills they can bring to the partnership? What are the skills you most value? (resource dependency)
- Which organizations share your organization’s values and priorities when it comes to health and health care? (homophily)

One challenge is identifying the *type* of tie most useful to understand in the field mapping process for a specific context. In a field that lacks a coherent frame, measuring connections motivated by homophily might help reveal organizations whose framing is reinforced by others. In a field with significant gaps in skills and resources, measuring connections motivated by the exchange of resources might uncover where skills and resources are most and least available.

Measurement using theory-driven motivations may help explain the absence of a tie between organizations or clusters of organizations. If there is no perception of similarity (homophily), no past experiences to suggest an opportunity to access skills and resources (resource dependency) and no past benefits that need to be returned in kind (exchange theory), then there may be no reason for one organization to initiate or sustain a relationship with another. The absence of motivators may provide a funder insight into

how to build new relationships (e.g. funding new skills that could be exchanged). The presence of a motivator that has not resulted in partnership may suggest a different strategy to build connectivity (e.g. helping two organizations understand their similar values).

Measurement Issue 2: What are the facilitators of and hindrances to connectivity?

An intervention to influence connectivity may benefit from understanding the current facilitators of and hindrances to the relationships. Beyond the motivators above, other facilitators may include dedicated capacity in organizations to manage relationships, coalitions or other partnership structures, and the exclusionary or inclusionary nature of these structures.

Hindrances might be within or outside the control of the advocacy field. A geographically dispersed advocacy field faces a natural barrier to developing strong connectivity. Other hindrances might include the history of relationships in the field, including positive and negative experiences with partnerships that have emerged, functioned and ended; or perhaps how conflict in the past has been addressed and current capacity to resolve new conflicts. Hindrances can also include imbalances in power within the field of advocates, the adequacy of resources, and the degree to which competition for resources is linked to the basic survival of organizations.

Advocates from the mainstream health access field in The Trust's assessment reported that the policy issues they prioritize are too nuanced and technical for others to understand. In contrast, advocates representing communities of color reported that the health access advocates primarily engage them to advocate for policies they've already decided upon, rather than engaging them as genuine participants in crafting policy solutions and strategies. These different explanations of what hinders connection are a reminder to include multiple voices in any analysis of connectivity.

Measurement Issue 3: How do power and influence function within relationships?

Movement building literature emphasizes that an exploration of organizational relationships is not complete without considering how differences in power, influence, and resources shape relationships (Nakae et al., 2009). This was evident in The Trust's assessment; organizations that were heavily resourced and at the center of the network were viewed by some of the less connected, lower-resourced organizations as a barrier to their participation in the development of policy solutions.

Power is important to the dimension of composition, and is explored in more detail below. However, it is also part of how networks function and should be taken into account in an analysis of connectivity. Network analysis tends to focus on power as a product of an organization's place in the structure of the network and their access to others who are also powerful in the network (Monge & Carpenter, 2003). This is one way to examine power in an evaluation, but is not the only one. Equally important are the relationship dynamics between powerful organizations and those that lack power due to resources, reputation, influence over the policy agenda and other dynamics at play in an advocacy field. The characteristics of an organization that relate to its power are attributes that can be overlaid on a network analysis to help explain the structure of the network.⁷ A network that has breakdowns in connectivity between organizations that are perceived as influencing the policy agenda and those perceived as lacking influence may require a more nuanced approach to building connectivity—one that addresses the inequalities in organizations' levels of influence.

Measurement Issue 4: What is more important to measure – the relationships between individuals or between organizations?

The initial survey in The Trust's assessment focused on organizational relationships; yet, interviewees described the field by talking about the attributes of individual advocacy leaders as often, if not more often, than by describing the history, skills and capacity of organizations. Given this, will mapping organizational networks provide an accurate description of an advocacy field? Advocates move from one advocacy organization to another and in and out of the field. Many of these moves allow for leveraging of existing relationships in new ways and for new purposes.

Below are questions to determine whether your evaluation should focus on individual or organizational connectivity:

- Is your goal to assess the position of key organizations in the field or to learn about the overall structure of the field? If the former, it would be problematic to focus on individual relationships, but the latter could go either way.
- Will you use the information to guide or evaluate interventions that occur at an individual level (e.g. leadership development programs) or at an organizational level (e.g. general operating grants to key organizations)?

⁷ This approach to a network analysis aligns well with social exchange theory, which considers both structural position and such things as how that structural position allows for access to resources within the network. However, social exchange theory is not as attentive to the inherent power of each organization in the network, before looking at power through this exchange lens.

- How are you gathering the information and from whom? Individual level relationships are less transparent and harder for others to observe and define than organizational relationships. If you're interviewing key advocates and bellwethers, it is more appropriate to focus on organizational dynamics.

Regardless of which focus you choose, no measurement strategy will generate results that only reflect organizational relationships or only reflect individual relationships. All relationships are to some extent interpersonal, and individual level relationships are similarly affected by the organizational roles of the individuals involved.

Measurement Issue 5: How can we determine the causes of changes to connectivity?

Interventions to build the connectivity of a network include nurturing key leaders to help build relationships, engaging stakeholders in collaborative work, or identifying potential motivators to build and activate new relationships. Evaluators should focus on establishing the contribution of such interventions on the connectivity, rather than establishing attribution (Scearce, 2011). Be careful not to assume that any intervention will be the sole cause of significant shifts in the network, given their natural flux and the number of factors that influence them.

Determining causality in connectivity might benefit from a three-part focus: measurement of changes in connectivity, measurement of the changes in the resources and structures supporting connectivity, and measurement of the value of both types of change to the outcomes of the field. In other words, do not just measure new relationships, but pay attention to how they are supported and ultimately how they are leveraged to accomplish the shared goals of the field. This aligns with recommendations to funders on the measurement of "network weaving" strategies (Scearce, 2011), where changes in networks occur in multiple ways. Measuring at each of these levels will tell a more comprehensive story of change, and allow for an exploration of how the change in connectivity is meaningful to the field's functioning overall.

MEASURING COMPOSITION

Composition is defined as the variety of voices able to participate meaningfully and have influence in the policy process, including different demographic, socio-economic, geographic, disability and sector interests. The concept of composition can be broken down into three components:

- The variety of constituencies and advocates representing them who are part of the field;

- The readiness of the constituencies and advocates representing them to take action in the field; and
- The types of influence that the constituencies and advocates representing them have at each stage of the policy process, from problem identification to policy definition and development all the way through to passage and implementation, including blocking policy changes.

The interpretation of composition is value-laden. Some at a 2013 funder/evaluation convening on field building interpreted “voices” in the field as specific roles in the advocacy environment such as policymakers, industry, service providers, etc. Others focused on the voices of constituents most affected by policies such as communities experiencing disparities. These two perspectives had difficulty finding a consensus due to the underlying values driving the discussion.

The composition of a field will influence the types of policy problems it prioritizes, the solutions it generates and prioritizes, and even the strategies used by the field to influence change (e.g. primarily insider-game strategies versus a mix of insider- and outsider-game strategies). Measuring the composition of the field and how it changes may be important to a funder that cares about the outcomes of the field, even if the funder is not prioritizing changing the composition of the field.

Table 9: Exploring the evaluation of composition

DEFINITION

The variety of voices that can participate meaningfully and have influence in the policy process. This may include presenting different demographic, socio-economic, geographic, disability and sector interests.

COMPONENTS

- The variety of constituencies and advocates representing them who are part of the field;
- The readiness of the constituencies and advocates representing them to take action in the field; and
- The types of influence of the constituencies and advocates representing them have at each stage of the policy process from problem identification to policy definition and development all the way through to passage and implementation including blocking policy changes.

EXPLORATORY EVALUATION QUESTIONS

- Which interests or voices need to be active in the field, and how are they represented and directly participating?
- Who is most affected by the policy changes the field is pursuing, and how are their voices included and represented?
- Are there alternative definitions of the policy problem and solution coming from outside the current actors in the field that are aligned with the field's values and goals?
- How are advocates representing traditionally excluded or disadvantaged populations influencing decisions and actions in the field including at each stage of the policy process (problem identification, solution generation, policy change, policy implementation and monitoring)?
- How are the lines of power in the field shifting and why?
- How are resources distributed across the field, and to which interests and voices?
- Which interests/ voices influence different parts of the policy process and levels of policy change?
- How do the structures of collaboration inhibit or increase the diversity of the composition of the field?
- How has the composition of the field changed and what contributed to the changes?

METHODS & DATA SOURCES

- Self-report data from advocates and bellwethers, able to explore both the direct questions about the current composition of the field as well as provide insight into the ideal composition of the field.
 - Observation, focusing on advocacy events (such as coalitions, hearings, etc.) during which composition can be seen in action.
 - Monitoring the participation of interests and voices across specific advocacy strategies.
 - Power mapping, able to capture the lines of influence inside of the field and in relation to different interests and voices.
-

Methods and Data Sources for Measuring Composition

The measurement of composition could be accomplished using many of the methods proposed above for measuring other dimensions of the field, provided that different questions and areas of investigation focused on power and representation are added.

Advocates and bellwethers reporting on the overall composition of the field: When interviewing advocates and bellwethers about composition, rather than asking which voices are represented or absent, you might ask who has influence over the policy agenda, who lacks it and whose influence is changing with time. You could ask who is most affected by the policies prioritized by the field and then ask whether these groups' voices are directly or indirectly represented. Advocates and bellwethers are also the right audience to ask about when and where decisions are made by advocates, helping to uncover where different interests need to be active in order to have influence. These same questions, if asked of advocates believed to be influential and those believed to lack influence, may uncover the extent to which the opportunities for influence look different depending on an advocate's position in the field.

Observation of advocacy events: A complimentary approach would be to observe coalitions at different stages of policy advocacy (issue identification, solution generation, strategy development, etc.), critical hearings on major policy priorities of the field and other events where advocates are acting in concert. You can gather evidence of which interests are driving decisions in a public setting. As is true with any observation strategy in advocacy, it would be inappropriate to suggest that specific interests lack a voice simply because you did not observe them in action as much advocacy work happens behind closed doors.

Monitoring participation of different interests: Changes in composition could be monitored by checking periodically with advocates or observers of the field to explore examples of when voices previously left out were engaged and how. Observations could contribute to this monitoring as well as the documentation of membership lists, meeting minutes and hearing transcripts. This measurement approach is an opportunity for evaluators to create a common tool that can be adapted to many settings, such as a checklist defining typical opportunities for influence in a policy arena and documenting evidence of which groups were able to participate in those opportunities.

Power mapping: Power mapping focuses on identifying who can be moved and by whom in order to achieve a desired policy win (Israel et. al, 2010). At the field level, a power map could identify the institutions that must be influenced to achieve the field's policy goals and the decision-makers associated with those institutions. The map could also identify the influencers of the decision-makers, which may include some combination of advocates

and targets of advocacy. An analysis of composition would explore who was included in the power map and where as well as who is left out of the power map and why. Gathering information for this type of mapping could occur through key informant interviews, but may bring greater value to the field and be more accurate if done in partnership with a group of advocates or multiple groups of advocates (including those initially identified as left outside of the power map).

Table 10: Measuring composition – The Colorado Trust case study

METHODS

Survey

- Respondents were asked to report which groups have a strong voice in the health advocacy field with a close-ended list including groups like children, women, people with disabilities, Latinos, rural populations, etc. A second question asked them to explain their responses.
- This information was combined with the framing information they provided in earlier questions to further understand how many were primarily focused on the needs of specific populations.

Interviews

- Respondents were asked which groups are uniquely placed to build the power and voice of specific disadvantaged and marginalized populations. They were then asked about the different advocacy capacities of these groups. Interviewees from the advocacy core were also questioned about their relationships to the groups, and how they seek to include them in advocacy decisions.
- Interviews with advocacy targets (policymakers) asked which groups have a particularly strong advocacy voice on health issues and which groups are absent (not advocating for their interests).

FINDINGS

Survey

The vast majority of respondents identified children, women, people with disabilities, older adults, LGBT and Latino populations as having a voice. Over two thirds identified Native Americans, Asian Americans, immigrants and refugees as lacking a voice. When asked to explain their answers, some indicated that vulnerable population's needs are being met by groups that advocate for all or even that advocates representing specific populations have too much power given the size of their population. We learned from other respondents that advocacy groups representing disenfranchised populations exist, but they are fragmented and often not at the table when they need to be in part due to a lack of organization and resources.

Interviews

Many of the composition findings came from comments interviewees made in response to other questions, highlighting how concepts of composition are highly embedded in how a field functions. Findings at an overall field level included a lack of diversity ("Many meetings are a sea of white people"), a need for more coordination, diversifying leadership and better use of strategic partnerships. The analysis also examined the power and influence of advocates representing eight population groups experiencing disparities.

Overall, the 25 advocacy organizations identified as representing Latinos were the only advocates representing a community experiencing disparities that had connectivity, skills and resources and at least some influence over the policy agenda. In contrast, the five organizations identified as building the power and voice of Native Americans were seen as lacking connectivity, skills and resources and influence, with interviewees comments explaining this deficit: "If people are going to extend resources to partner, they are most likely not going to choose the American Indian population."

IMPLICATIONS FOR EVALUATORS

Survey

The vast majority of respondents identified children, women, people with disabilities, older adults, LGBT and Latino populations as having a voice. Over two thirds identified Native Americans, Asian Americans, immigrants and refugees as lacking a voice. When asked to explain their answers, some indicated that vulnerable population's needs are being met by groups that advocate for all or even that advocates representing specific populations have too much power given the size of their population. We learned from other respondents that advocacy groups representing disenfranchised populations exist, but they are fragmented and often not at the table when they need to be in part due to a lack of organization and resources.

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METHODS & DATA SOURCES

Survey

The survey questions led to findings that guided the interview questions. Unlike some of the other dimensions, for this dimension the interview process without the initial information from the survey would likely have resulted in similar findings. While the interview questions were structured very differently than the survey, they generated similar types of information and in much more depth.

Interviews

Many of the composition questions in the interview intersect with other dimensions (particularly field resources and connectivity). As will be explored more below, concepts of power overlap with these areas and make it difficult to assess composition in isolation of other dimensions. The analysis of composition highlighted a lack of voice from many of the populations experiencing disparities. By asking a mix of resources, connectivity, influence and composition questions, the findings addressed not only the composition of the field but also the drivers of composition as well as barriers to changing the composition of the field.

Measurement Issue 1: How can you identify the interests or voices that should be in a given advocacy field?

There are many approaches to identifying the relevant interests. Bellwether or other interviews intended to understand the overarching nature of the field and its actors could explore who is present and absent in the field. A network analysis focused on connectivity could capture the interests each organization represents and which interests have less representation. Both approaches suffer from a critical flaw: when the actors in and observers of the field determine which interests should have a voice, they may unintentionally exclude a relevant interest due to their own values, experiences and beliefs.

For example, many advocacy fields to have professionally staffed advocacy organizations that are identified as the “consumer” advocacy organizations, leading to a perception that an array of different consumer voices are adequately represented. Consumer groups representing populations who often lack a voice in advocacy may disagree depending on how the “consumer” organization functions including how it selects its policy priorities and actions. In this context, consumer voices could be identified as present by one bellwether or advocate interviewed, while another might argue that consumer interests are not directly represented in the field.

This suggests a need to do more than allow the field and its observers to identify which interests should be represented. Instead, you may want to explore which populations are affected by the policy changes the field is pursuing and how their voices are directly and indirectly included in the field. This is a question that could be asked of advocates and further explored by the researcher using relevant literature. Such an approach could guide you to collect data from voices that are currently outside of the field, but have a vested interest in the outcomes of the field.

Measurement Issue 2: How do you measure quality versus quantity of composition?

Movement building researchers recognize the importance of focusing on the quality over quantity when measuring engagement (Nakae et al., 2009). Where quality in composition might be the frequency of engagement or number of people/organizations engaged, quality in composition can be thought of as the skills, capacity and knowledge of specific voices (overlapping with the resources dimension) as well as evidence they are able to communicate in the right places at the right time their understanding of the problem and their vision for solutions (overlapping with the connectivity and framing dimensions). This suggests that as you will want to consider the measurement of composition as you design the methods to measure connectivity, resources and field frame.

In The Trust's field assessment, advocates from organizations representing communities of color discussed the isolation they felt from the ongoing work of the health access advocacy field including not being aware of policy conversations during problem definition or the selection of policy strategies. They shared specific examples of being engaged once the priorities were selected and there was a need to mobilize their constituency behind the choices. This indicates that one way of measuring the composition of the field is to explore the equity of access to information, a measure that has been found relevant in the context of social movements (Figueroa et al., 2002).

Another approach to measuring "quality" is to pay attention to the composition of specific roles, such as in leadership roles, on invited only boards/committees and in organizations with greater resources. Interviewees talked about the gaps in composition during The Trust's assessment by expressing concerns over the largely white leadership and staffing of mainstream advocacy organizations. This concept of roles could be examined in a network analysis by exploring the composition of organizations serving as "hubs" or "brokers" in the field.

Measurement Issue 3: How can we assess power and influence in composition?

Composition in the context of an advocacy field is not just about who is within the field and who is outside, but also about the power that different actors in the field wield among one other and on the policy agenda. The concept of *power* has been defined in many ways, three of which are relevant to the concept of composition in an advocacy field:

Power over resources: Competition for resources in a field will increase as the density of the network increases and availability of resources decreases (Monge & Contractor, 2003) and some actors will emerge more successful than others. The size of the field versus resource availability becomes a motivator for the more resourced and powerful advocates to limit (or eliminate) other actors in the field. This suggests that one measure of power within a field is the distribution of resources, how and why this changes over time, and the behaviors of organizations that are able to influence the distribution of resources.

Power over the policy agenda: A second type of power is the ability to influence the decisions of others (Allen, 2013) and specifically influence over the policy agenda, both of which could be measured through power mapping. Power mapping from the perspective of composition would need to explore not only the lines of power in a field, but also the interests each organization represents in order to tell a comprehensive story of where and how different interests are able to influence the policy agenda in a field.

Power to engage the public: Often the advocates representing disadvantaged populations are uniquely placed to engage the constituents they represent. The advocates in the health access field in The Trust's assessment identified many barriers to engaging with communities of color, including the community members' lack of interest in the nuanced issues that are often the focus of advocacy. In contrast, the organizations identified as lifting the power and voice of these communities explained that mainstream advocates lacked the diversity and cultural competency to appropriately engage communities of color, often failing to address underlying issues of power and race. In other words, they lacked the power to engage these specific communities. This conceptualization of power draws on an ecological approach to empowerment as discussed in the context of community organizing (Speer & Hughey, 1995).

All three types of power are important, but the power over resources and policy agenda more easily stand on their own as being mechanisms for an interest group to have influence in the field. Having the power to engage the public, but lacking power over resources and the policy agenda can unfortunately result in the public's voice having little power of its own when it is engaged.

Measurement Issue 4: How can you measure the readiness of the field to expand its composition?

Inviting traditionally disadvantaged voices into an advocacy field will accomplish little if the barriers to engagement are not decreased. In the connectivity section of this paper, one of the measurement issues explores how to identify facilitators of and hindrances to connectivity. This same exploration can be adjusted to pay attention specifically to the facilitators and hindrances of different interests and voices participating fully in the field.

For example, if the field's coordinating and decision-making is occurring primarily behind closed doors or in coalitions with membership limited to an invited group, it may be difficult for new voices to influence the policy agenda. If the field has narrowly defined the policy priorities of interest, it may be difficult for new voices to influence on the policy outcomes of the field. Advocates inside and outside of the field could be asked about the structures for collaboration, how decision-making occurs and the issues on which the field is still trying to find answers. Over time monitoring can focus on places where collaboration and joint decision-making are initially found while exploring whether new venues are being created and how.

Measurement Issue 5: How can we determine the causes of changes to composition?

Measuring the changes in the field's composition could be relatively straightforward, relying on the repetition of the methods used to establish the baseline composition. Measuring the cause of the changes may be more difficult, particularly if there are unintended outcomes of interventions focused on other dimensions.

A composition of a healthy advocacy field is in constant flux, changing as the needs of the field naturally shift. You will need to tease apart the changes resulting from an intervention versus natural shifts. If the intervention is targeting specific organizations and individuals, you could track their changes in position, resources and influence. If the intervention is more at a field level (such as creating leadership trainings that are open to those already influential and others who lack influence), it may be challenging to identify the extent to which the intervention contributes directly to a shift in the composition of the field. Confounding factors become such things as whether the newer members would have entered the field regardless, leveraging whichever mechanisms for participation were available to them.

MEASURING ADAPTIVE CAPACITY

Adaptive capacity is defined as the ability to conduct a sound assessment of the external environment, select the strategies and tactics best suited for a particular situation and adapt to the shifting moves of the opposition, allies and potential allies. Strategies here are defined as the overarching decisions that provide a framework for action and explain how you will get to your goals while tactics are the actions themselves. There are four components within this:

- Ability to monitor the external environment in order to identify needed shifts relevant to the strategies and tactics deployed;
- Ability to adapt strategies and tactics in response to new information;
- Flexibility of field resources, which can allow for adaptations in strategies; and
- Timeliness of adaptations.

A theory of the policy process known as “agenda setting” has been proposed as useful to advocates as a tool for understanding the policy environment (Coffman, 2007). Using this theory, monitoring the external environment includes assessing (Kingdon, 2002):

- Whether the policy problem the advocates are trying to solve has salience and if not, how can they reframe their problem to have greater salience

politically or publicly. This includes assessing more than just the issue of interest to advocates, but also the range of policy issues on the agenda.⁸

- Whether the policy proposals advocates want to advance are seen as feasible, fiscally viable, and aligned with the values of both the public and policymakers as well as what evidence suggests the policy being proposed can solve the problem.
- The public and political supporters and opponents of the policy issue, including identifying constituencies who will support the issue as well as changes in levels of support.
- When a window of opportunity exists as policy problems, policy proposals, and public support begin to align or could be aligned through advocacy efforts.

The organization with the skill to assess whether a policy proposal aligns with the evidence of what can solve a particular policy problem may not be the same organization keeping a finger on the pulse of different constituencies, or the organization able to mobilize advocates around specific policy proposals. Effective adaptive capacity at a field level requires a range of assessment skills and the dissemination of assessment results across the field, influencing timely adoption of strategies and tactics most likely to be effective in the current environment.

Adaptive capacity is both the skills and resources needed to adapt, but also the action of adapting in response to specific environmental information. It can be seen retrospectively after a field has responded to a shift in the external environment, though this only tells the story of the field's capacity in response to that particular external shift. Jones, Ludi and Levine (2010) argue that adaptive capacity in public institutions cannot be measured directly or defined at a certain level in the present, but rather is a set of conditions that can only be observed retrospectively.

⁸ For example in 2013, gun violence was a high salience policy issue throughout the United States. Health advocates in Colorado noted that they were able to achieve a variety of smaller policy wins during the 2013 legislative session in part because there was less focus on health policy, including less attention from the opposition. Advocates for mental health issues in Colorado similarly used the same 2013 public focus on gun violence to advance policies to increase funding for mental health, leveraging the public's support for taking action to address gun violence to advance a policy proposal they had long championed.

Table 11: Exploring the evaluation of adaptive capacity

DEFINITION

The ability to conduct a sound assessment of the external environment by selecting the strategies and tactics best suited for a particular situation and adapt to the shifting moves of the opposition, allies and potential allies.

ELEMENTS OF ADAPTIVE CAPACITY

- Ability to monitor external environment in order to identify needed shifts relevant to the strategies and tactics deployed;
- Ability to adapt strategies and tactics in response to new information;
- Flexibility of field resources, which can allow for adaptations in strategies; and
- Timeliness of adaptations.

EVALUATION QUESTIONS

- What are the conditions in the field that support adaptive capacity in the field? What are the conditions that inhibit adaptive capacity?
- How are advocates assessing the external environment? What types of assessment skills are present, and how are they distributed through the field?
- How does adaptive capacity vary across the field, including by roles and power of individual organizations and what are the consequences of the variation?
- How did different adaptations move through the field in response to specific changes in the external environment?
- What are the long-term strategic shifts and changes in tactics occurring in the field?
- What is the evidence of the deployment of adaptive capacity at a field level?
- How has adaptive capacity changed over time in the field and what has contributed to that change?

METHODS & DATA SOURCES

- Advocates and bellwethers reporting on the overall conditions of the field;
- Advocates and bellwethers reporting on specific examples of adaptation in the field;
- Intense period debriefs focused on specific examples of adaptation in the field;
- Capacity assessments specific to the environmental assessment capacities and flexibility of resources; and
- Systems mapping as an analysis and presentation method.

5 Methods and Data Sources for Measuring Adaptive Capacity

Many of the methods presented here build on those described in the sections above, but with some adaptations to measure adaptive capacity.

Advocates and bellwethers reporting on the overall conditions of the field. It may take a variety of different types of interviewees to get a complete picture of adaptive capacity. Advocates can provide insights into the conditions that support adaptive capacity, such as the field's culture around self-reflection and self-evaluation. Bellwethers or other influencers might report evidence of the field being willing and able to innovate and take risks or, alternatively, being risk adverse. Funders may know about the extent to which financial resources are available and flexible.

Advocates and bellwethers reporting on specific examples of adaptation. Advocates and influencers could be asked to describe when the field has acted adaptively in response to changes in the external environment. In such interviews, you may want to first focus on the examples of adaptation, what changed in the external environment, what changed in advocacy strategies, and then ask about the organizations and individuals involved. This helps to keep the focus on the field level adaptation.

Intense Period Debriefs. Adaptive capacity could be measured with an intense period debrief focusing on what occurred during a specific campaign and why/when/how adaptations were made to the strategy. Depending on how connected the field is overall, it may make sense to debrief with advocates in different parts of the field playing different roles. This would allow for a better understanding of how the adaptation did or did not diffuse through the network.

Capacity assessment specific to environmental assessments and funding flexibility. If an advocacy capacity assessment tool is already part of your plan for a field assessment, it would make sense to add a series of questions about different types of environmental assessment. Questions can explore advocacy organizations' capacity to assess the position of the policy problem on the policy agenda, the viability of their policy proposals, likely sources of opposition, and the political and public will. This might also be an appropriate way to gather information on how many advocates have flexible, longer-term funding sources and the ability to shift strategies as a result.

Systems mapping as an analysis and presentation method. Systems mapping can show us how the different parts of a system relate to one another and how they might change in response to each other. A systems map is a messy, complex diagram that can illustrate how change could and has occurred (Coffman & Reed, 2009), visually representing how adaptation moves through a field. I think there is potential for information collected

through interviews, surveys and debriefs to be analyzed and presented using a systems map. If a network analysis is already part of your overall assessment, I would recommend using the network itself as the basis of the systems map by focusing on the people or organizations as the system components.

Table 12: Measuring adaptive capacity – The Colorado Trust case

METHODS

Survey

At the time of The Trust assessment, my definition of adaptive capacity was focused heavily on political and environmental analysis. The survey asked about the capacity for this type of analysis and requested organizations to describe how they had adapted their advocacy strategies in recent years.

Interviews

The first few respondents were asked to describe how the advocacy field adapted its strategies during the year-long campaign to pass the Medicaid expansion. This was identified by The Trust and Spark as a campaign relevant to many different interests where multiple significant strategy and tactical shifts occurred. While the insider-game advocates were able to share detailed thoughts about the shifts and their drivers, other interviewees lacked sufficient knowledge to answer the questions. As a result, we instead offered a definition of adaptive capacity and asked for examples of this type of adaptive behavior among advocates.

FINDINGS

Survey

The survey found that relatively few advocacy organizations identified one of their capacities as the ability not just to analyze policies, but also to analyze politics and the environment. Of those that did, they were almost exclusively the most connected organizations in the health access field. The analysis of open-ended comments revealed a variety of strategic adaptations in response to the passage of the Affordable Care Act, including some organizations reorienting around regulatory and implementation advocacy and other organizations identifying new areas of focus (e.g. long-term care, school-based care). Many respondents described more tactical shifts such as increasing use of technology, greater engagement in coalitions, use of data to inform decision-making, and engaging in more direct lobbying than in the past.

Interviews

Only four organizations in the network were regularly mentioned as having adaptive capacity and all four were at the core of the access field's network. The decision to use a definition emphasizing political analysis is likely a driver of these findings. Although the findings lacked depth around where adaptive capacity exists and how it is leveraged, respondents did help redefine adaptive capacity because of how they talked about it. One respondent, for example, described a highly adaptive organization this way: "The ability to turn on a dime. [Their approach] is to support any community to say their vision, and then support actualizing that vision."

IMPLICATIONS FOR EVALUATORS

Both the survey and interviews used a definition of adaptive capacity that was too narrow. While the questions asked may work well with a broader definition, the broader definition may result in the interview question becoming too complex for respondents to easily answer.

Measurement Issue 1: What are the conditions that facilitate adaptive capacity?

One approach to understanding the adaptive capacity of a field would be to seek evidence of conditions supporting or inhibiting adaptive capacity. Conditions to explore include:

- The flexibility of resources available to advocates, including general operating grants, longer timelines on funding, and funding not tied to specific policy agendas or issues. These were all identified by advocates in The Trust assessment as an important part of enabling advocates to deploy the right strategies on the right issues at the right time. There may also be other financial and legal structures beyond the structure of grant funding that can allow for greater flexibility in the field, including the field having a mix of C4 and C3 institutions.
- The extent to which advocates in the field carve out time for reflection and learning (Ongevalle, Maarse, Temmink, et al. Boutylkova and Huyse, 2012), have a culture of “inquisitiveness” (Sussman, 2003, p. 16) and have the skills to do so effectively. The Trust sought to create this type of environment in a previous funding strategy by deploying strategic learning coaches to advocates, building their capacity so they could reflect and learn (Lynn, Chung, Downes and Kahn, 2014). The use of intense period debriefs also creates a structure for purposeful reflection (Coffman & Reed, 2009). While both of these approaches help with doing reflection well, they do not necessarily result in time carved out by advocates to engage in reflection when advocates are too busy (in perception or reality) to take the time (Ongevalle, et al., 2012). Perhaps even more important than specific structures and tools is the culture or habit of engaging in self-evaluation (Sussman, 2003), which also requires that advocates regularly dedicate time.
- The analytic skills and capacity of organizations in the field to conduct sound assessments of the external environment, rather than relying entirely on intuition. This could be measured at an individual organizational level, drawing on the learning from advocacy capacity assessments on how to measure this type of capacity (e.g. see Kim, Peebles & Trenholm, 2012 and Raynor, York & Sim, 2009).
- The experience of the field with innovation and risk-taking (Jones, Ludi & Levine, 2010). The concept of innovative organizations being more prepared to adapt is supported in the literature on adaptation (e.g. Sussman, 2003) and can be applied to the field level. It might be measured as a field level condition by observing the extent to which the field has engaged in innovative and risky campaigns in the past, particularly when there have been successes that have laid the groundwork for future risk-taking.

- Whether the advocates with greater influence and resources are able to respond to the needs and innovations of other advocates. How do more influential organizations initiate, participate in or even block adaptation? Exploring adaptations that emerge from throughout the field, regardless of whether they successfully disseminate, may reveal types of adaptive capacity that are unknown or underutilized to the majority of the field. For example, academic partners on the periphery of the field may have policy proposals that are more likely to solve the problem, but lack the power to diffuse their ideas into the field. There could be constituent mobilizing opportunities identified and acted on by organizers that remain isolated from the inside-game strategy of the core of the network.

Additional conditions that facilitate adaptive capacity come from the other dimensions. Isolated advocates have less opportunity to engage in learning (Smit, 2007) and less ability to influence adaptation more broadly (Sussman, 2003). Therefore, a more connected field will be better at disseminating environmental assessments and triggering changes to strategies and tactics. A higher resourced field would have more options on what resources to deploy and when. A field with a greater diversity of composition would have more options of who to deploy and when, as well as a greater diversity of thinking and potential for innovation (ibid.).

One way to identify other facilitators in an advocacy environment is to ask the advocates themselves to discuss what facilitates adaptation in general. You could also use a specific example of a field level adaptation, and have advocates break down how it occurred and what facilitated or hindered the adaptations.

Measurement Issue 2: Should you aggregate adaptive capacity or should it only be measured at a field level?

The field of advocacy evaluation has defined and operationalized adaptive capacity at the individual organization level, including measuring an organization's ability to monitor the changing environment, build strategic partnerships, strategically position itself, use its resources flexibly, and monitor and measure the progress of its strategies and tactics in the policy environment (Kim, Peebles & Trenholm, 2012; Raynor, York & Sim, 2009). The challenge with measuring adaptive capacity at the individual organizational level is that some types of adaptation can only be observed in the context of multiple organizations together, such as the strategic positions an advocacy field deploys progressively and collectively. For example, multiple interviewees in The Trust's assessment suggested the field needed to be more strategic with the deployment of advocates across the political spectrum. They gave the example of deploying advocates with far left values in order to set the stage for more moderate advocates to enter into the policy dialogue after the

issue is high on the agenda, allowing them to move forward more progressive policies than would have been possible without the initial agitating.

Thus, adaptive capacity at a field level is fundamentally more than the sum of its parts. If all organizations operating in a field analyzed their environment and shifted their strategies without an attempt to coordinate with one another, they could potentially do more damage to their position. There may however be specific elements of adaptive capacity that can be aggregated, including which organizations have the capacity to engage in the different types of environmental assessments and how many organizations have funding that is flexible in nature. A basic capacity assessment tool might be helpful for these types of issues, but should only serve as the beginning of the analysis rather than the end.

Measurement Issue 3: Is adaptive capacity primarily about political assessment and responding to shifts in the political environment?

At the February 2013 convening and the American Evaluation Association session on field assessments, the adaptive capacity breakout groups focused heavily on political access, political acumen, and awareness of political will and landscape. Yet in the composition conversations, the participants talked about the importance of fields including community organizers. Organizations in an advocacy field take on many different roles. Some organizations use “inside game” skills focused on policymakers like policy analysis, political analysis, lobbying, etc. Other organizations engage specific constituencies and aim to create opportunities for them to influence policy. Other organizations play a convening role, bringing together coalitions of partners and assisting them in coordinating their advocacy strategies. Some fields also have academics and scientists feeding new information into the field to help shape policy proposals. Each of these types of roles, as well as all the others that come into play in a healthy advocacy environment, would adapt strategies and tactics in response to different types of information.

If, per Kingdon, a field needs high priority policy problems, viable policy proposals and a political window of opportunity in order to achieve policy wins, then multiple types of environmental assessment and adaptation are an important part of a healthy field. If all of these roles and skills are critical to the field, is there any reason to believe that organizers, scientists, coalition builders and others would not be contributing their own types of environmental assessment that may perhaps be less focused on the political context and more on such things as the scientific and public contexts? From an evaluation perspective, this broadens the scope of the investigation, but also increases the potential to see how

each organization within a network contributes towards adaptation rather than just how they respond to it.

Measurement Issue 4: Is it relevant to measure both short term tactical shifts and longer-term strategic shifts?

Much of the exploration above has focused on conditions and examples of strategy shifts specific to an advocacy campaign. In contrast, many of the examples shared by advocates in The Trust's assessment referred to longer-term shifts in strategy that related to overall organizational focus and shifts in tactics relevant to many if not all of an organization's campaigns. These larger shifts may be equally important to measure as the campaign-specific adaptations.

For example, in The Trust assessment, interviewees reported an overall strategic shift from a focus on the passage of new laws to a focus on the implementation of an existing law, the Affordable Care Act. While this shift may be specific to one law, advocates that moved into ACA implementation advocacy have engaged in many different campaigns related to different elements of the law and had to bring different types of capacity to bear, including changes in strategic partners, staff skills, and how organizational resources are deployed (Lynn, 2012).

Examples of long-term tactical shifts from The Trust's assessment include advocates increasing use of social media and electronic organizing tactics more broadly as part of all of their campaigns. Similarly, a recent discussion by an advocacy coalition seeking to improve the health of the Mississippi River focused on moving from a long-term focus on tactics primarily aimed at engaging new members of the public to tactics aimed at activating existing participants.

These examples argue that measurement of adaptive capacity should explore both mid-campaign adaptations as well as long-term shifts in strategic focus and tactics.

Measurement Issue 5: What can you learn from a retrospective exploration of a specific set of adaptations by the field during an advocacy campaign?

Evaluations of adaptive capacity at an advocacy organization level have found retrospective evaluations to be powerful tools in uncovering adaptation behaviors. For example, Mathematic Policy Research explored how a set of state advocacy groups demonstrated adaptive capacity during a time of intense upheaval in the health policy and funding landscapes, discovering shifts in strategic relationships, changes to campaigns, changes to messages, greater leveraging of outside assistance, position changes, etc.

(Trenholm et al., 2012). While this information was all at an individual organization level, it does highlight the potential for a retrospective evaluation to provide insight into the types of adaptation that occurred during a campaign.

Pulling together many of the measurement issues explored previously, a retrospective analysis of an adaptation (or failure to adapt) may want to pay attention to:

- The timing of the adaptation in response to the shift in the external environment, including whether the advocates adapted rapidly or well after the environment had changed;
- Whether the adaptation was proactive or reactive (Sorgenfrei, Wrigley, & Crooks, 2005), including whether the advocates shifted when evidence suggested a change in strategy would be needed but before their current strategy was noticeably ineffective;
- Whether there was a specific place in the field where the adaptation emerged or multiple places in the field pushing adaptations at the same time;
- How and when an adaptation diffused through the field;
- How organizations with different resources and capacities adapted;
- How organizations with different resources and capacities were repositioned in the field;
- Which organizations led the adaptation and which failed to engage in it;
- The specific adaptations themselves, including whether the field shifted in strategy or only at a tactical level;
- The options considered and rejected before final choices were made at each point of adaptation;
- The extent to which the adaptation was a series of decisions in response to external information versus one significant shift; and
- The extent to which the field monitored the success of its new strategies and tactics.

Measurement Issue 6: How can we determine the causes of changes to adaptive capacity?

In The Trust's field assessment, advocates repeatedly referenced an example of when The Trust provided a core group of advocates with a communications consultant to help them plan how to respond to the Supreme Court ruling on the Affordable Care Act. This specific intervention from a funder was identified as an example of supporting adaptation in the field. That might be one of the easiest cause and effect findings you can get in the context of an advocacy field assessment.

A more robust analysis could have further explored how the use of the newly crafted message was disseminated throughout the field, the extent to which the message aligned

with the policy proposals that different parts of the field were championing, and whether the message was effective with both policymakers and constituents. The analysis might have explored whether other adaptations were already occurring in response to the Supreme Court ruling as well as the sources of information instructing those adaptations. Did one adaptation dominate the field, pushing others aside that had their own merit? Did multiple adaptations take different parts of the field in different directions? An exploration of the cause of an adaptation should attempt to investigate with enough depth that the link because cause and effect is fully explained, including the range of other possible causes occurring in the environment.

MEASURING THE INTERSECTIONS OF DIMENSIONS

Understanding the intersections between the five dimensions of an advocacy field is fundamental to an evaluation framework for advocacy field building. Changes in one dimension can drive changes in another, intentionally or not. For example, expanding the composition of the field may decrease the overall connectivity of the field, but also increase the range of skills and resources available to the field. The power of evaluating the intersection lies in the potential to explain and understand how the field functions overall, including defining the real boundaries of the field. It is also critical to evaluate the intersections if the unintended consequences (positive or negative) of interventions targeted at one dimension are to be fully understood.

Knowing up front that this is a goal of an evaluation means very practical things in terms of the methods and analytical approaches that the evaluation will want to use.

Table 13: Exploring the intersection of the dimensions

OVERARCHING EVALUATION QUESTIONS

- What are the boundaries of the field?
- How are strengths and gaps across each dimension intersecting with the other dimensions?
- What is the impact on the field across all five dimensions of an intervention focused on a specific dimension?

METHODS & DATA SOURCES

- Collect data on each dimension in a way that can be analyzed together.
 - Collect data on multiple dimensions together, allowing informants to explore their intersection with you.
 - Collect and analyze data in a way that allows for interpretation of multiple dimensions together, even if the dimension level data cannot be analyzed together.
-

Methods and Data Sources for Measuring the Intersection of Dimensions

Measuring the intersection of dimensions may not require any additional methods, but would certainly require up front planning to consider how the analyses of each dimension can be brought together into one coherent, multi-dimensional story that tells a meaningful, accurate story about the field as a whole, rather than as five dimensions in the field. The intersections could be approached in at least three places:

Collecting data on each dimension in a way that can be analyzed together. An example would be collecting organizational-level data across all of the dimensions – e.g. a survey of all advocates in the field asking about their organizations connections, skills and resources, adaptive skills, frame, etc. The analysis could then explore such things as the potential for different types of resources to be deployed adaptively depending on the connectivity between highly adaptive organizations and specific resources.

Collecting data for all five dimensions at a field level from bellwethers and other influencers would similarly allow for a thoughtful exploration of how each dimension is changing across the field in relationship to one another.

Collecting data that explicitly allows informants to examine the intersection of dimensions. An example is asking a key informant to talk not just about how adaptive the field is, but which skills are most often deployed adaptively and which ones are not, as well as which voices are most often driving adaptation and which are often left out. Asking informants to explore the intersection might work particularly well when collecting information qualitatively and through interviews, focus groups, or intense period debriefs.

Collecting and analyzing data in a way that allows for cross-interpretation of findings related to each dimension. For the intersection of dimensions to be explored, it is not necessary that all data are collected in the same way (e.g. through one survey) and with the same unit of analysis. It may also work to plan how the interpretation of data from one dimension will be used to help understand the findings from another dimension. The changes in composition of the field may, for example, be measured separately from the changes in field frame yet trends across the two could be interpreted together.

Table 14: Measuring the intersection of dimensions – The Colorado Trust case study

THE INTERSECTION OF COMPOSITION WITH FIELD FRAME

Survey

When exploring composition, only 39% of the respondents who were verified as having a health equity focus according to their definition of health reported that communities of color have a voice in the health advocacy field as compared to 63% of other respondents. This trend held true across other populations as well, suggesting that those with the health equity field frame were more aware of the gaps in the composition of the field in relation to populations experiencing disparities.

THE INTERSECTION OF COMPOSITION WITH FIELD SKILLS AND RESOURCES

Survey

The intersection of composition and field skills & resources from the survey data was used to create the bubble charts, which explored differences in advocacy skills by populations being represented.

Survey and Interviews

When exploring composition in the report on the interview findings, the analysis integrated the findings from both the survey and interviews on the resources available to organizations representing specific populations who are experiencing disparities and their connections into the broader network. For each population experiencing disparities, we generated a profile of the group of advocacy organizations positioned to raise the power and voice of that population. The profiles included the organizations' skills & resources, connections into the broader network of the field, framing, adaptive capacity and perceived influence over the policy agenda. This highlighted different needs for each group of advocates to fully engage

THE INTERSECTION OF COMPOSITION WITH FIELD SKILLS AND RESOURCES

Survey and Interview:

The analysis brought together the connectivity and framing results from the survey in order to identify the field boundaries. It also included the framing results from the interviews, and some of the explanations advocates had for the current connectivity of the field along with its historical context. The combination of information allowed for a clear understanding of how two fields are functioning within one broader health advocacy environment

Measurement Issue 1: What is the intersection of field boundaries with how dimensions are interpreted?

One of the first steps in a field evaluation is defining the boundaries of the field for the purposes of the analysis. As your data comes in, you can refine and redefine the boundaries. Using The Trust analysis as an example, we revised our field boundaries (from one to two fields) based on the evaluation data that showed differing frames and breakdowns in connectivity. The results of the composition analysis, had there been only one field, would have suggested that the field's composition included a wide variety of types of interests. But, when analyzed through the lens of two fields, the findings indicated that one field was largely lacking representation from communities of color. The analysis of the field's skills & resources was also influenced by the finding that there were two fields in operation. Instead of a highly resourced field with the majority of needed resources present, the findings resulted in one highly resourced field and a second field lacking resources and key advocacy capacities.

Measurement Issue 2: How does the measurement of all five dimensions help in understanding the results of an intervention focused on one dimension?

An evaluation of an advocacy field is not unlike a systems evaluation in that we should be careful to account for emergent and unplanned outcomes. For example, changing the capacity of organizations with few resources to engage in the field in order to diversify the composition might result in decreases in overall connectivity as the field boundaries expand to include these new advocates. Building the connectivity of the network may result in changes in the overall field's adaptive capacity as information about the political and public context flows more quickly through the field. Expanding the field's knowledge of policy solutions relevant to the problems they are facing might result in changes in the field's frame, as the field collectively better understands what it means in practical terms to achieve the shared goals they are oriented around.

These types of unintended consequences suggest that any evaluation of interventions to an advocacy field should pay attention to all five dimensions, though perhaps not with equal weight. This five-dimension focus also allows you and the field to understand changes that are occurring unrelated to the interventions, as fields are always in flux for a variety of reasons.

Measurement Issue 3: What are some of the methodological implications of measuring the intersection of multiple dimensions?

An analysis of the intersection of dimensions will sometimes require making choices about which dimensions are assumed to be drivers and which are followers. This is particularly true when a technique like social network analysis is used because network analysis is designed around the concept of the explanatory power of relationships.

In an examination of connectivity within an a field of advocates focused on water policy, differing field frames (measured through a series of Likert scale questions about the values underlying policy priorities for the actors in the field) were assumed to have a relationship to how the actors were connected (measured using network analysis questions about trust and communication). I had to make a choice as the analyst: would I map the network and attempt to explain that map using frames? Or would I analyze the frames and explore how relationships functioned within those frames? I made the latter choice. Instead of focusing on how the network analysis clustered actors in the field, I began by clustering those with similar values and exploring their connectivity within their value-driven clusters and outside of those clusters (Lynn, 2010). This was an atypical strategy for using network data in an analysis.

By measuring connectivity in the context of framing, rather than connectivity first and then overlaying framing, the learning from the analysis was practical and easily placed within the historical context of the field. For example, the densely connected and highly trusting cluster of environmental activists had a historical experience of depending on joint advocacy to achieve wins in water policy. The two loosely connected clusters of agricultural interests and individuals valuing high population and industry growth had very different reasons for lacking connectivity. The former because until recently, their water policy needs were largely met – they did not need to advocate – and the latter because they are heavily resourced and have historically been able to advocate for their needs without high dependency on other voices in the field.

While many methodological choices will allow for a two directional exploration of dimensional intersections, not all will be this flexible. You will want to carefully consider the implications of allowing one dimension's findings to drive the interpretation of a second dimension and pick the direction that makes the most sense conceptually for the field you are studying, rather than letting the traditional application of the methods you used drive the direction of the analysis.

Measurement Issue 4: How can we best measure relationship between connectivity and the diffusion of field frame, knowledge and adaptation?

Although the intersection of dimensions can be explored in many different ways, exploring the concept of diffusion using connectivity data may be one of the more methodologically complex approaches and is worth some discussion. If a network analysis is used to measure connectivity it can also be used to explore the diffusion (Carrington & Wasserman, 2006) of the other dimensions. Theories of diffusion explore how and at what rate new ideas move through a society and have identified that this occurs through a mix of communication channels, time, and the overall structure of the social system (Rogers, 2005).

Diffusion of the field frame: If a funder is attempting to influence the frame of a field, monitoring how changes diffuse through the network might help better understand whether the intervention is having an impact and where. The change might be measured by directly by exploring how values and goals have changed in the field (e.g. through repeat implementation of q-methodology surveys over time) or by indirect measures (e.g. monitoring the types of policy priorities that emerge from the field, and interpreting the underlying values of those priorities with advocates).

Diffusion of policy knowledge: If a field lacks adequate knowledge of the policy problems and solutions within the goals and values of the field, the diffusion of new knowledge may be measured directly through questions on specific knowledge and understanding of the issue or indirectly through choices being made by advocates.

Diffusion of adaptations: Monitoring where adaptations in overarching advocacy strategies begin and how they diffuse through the network over time may be useful. Given the resource intensiveness of a high quality network analysis, it seems unlikely that this analysis could be used to assess the changes occurring during a specific campaign. It may, however, have great potential to understand how strategies overall are changing in the field.

All three types of diffusion would need to be overlaid on the network data, including knowing when each organization or individual shifted on the dimension of interest. You would also need to decide on the methodological approach. If the network analysis includes a qualitative component, a sociometric approach would be very appropriate. Sociometric studies often gather data through interviews, and can be a powerful technique for understanding how an idea or innovation flows through a community of actors as well as how the structure of the network affects that diffusion. This technique can measure diffusion even when using retrospective data or data from one point in time. If you are in the position of planning an evaluation that will have data across multiple

points in time, event history analysis will be possible and can begin to parse out the different drivers of the diffusion. Studies using this technique have been able to uncover how media messages paid for by highly resourced interest groups have influenced the diffusion of innovations, demonstrating that network connectivity is only one factor in how innovations diffuse (Valente, 2006). Please note though, these techniques are not for the beginning network analyst. If you have not delved deeply into the method, I strongly encourage a partnership with a network methodologist to implement a diffusion study.

Measurement Issue 5: How can we measure power across all of the dimensions?

The dimensions from Beer et al.'s (2012) brief have been explored and debated over the course of the last year with particular attention to how to best include power. One argument is that power is primarily picked up through the composition dimension, as power can be measured and associated with each interest or voice in the field. An alternative view is that power intersects with multiple dimensions and perhaps should be its own dimension. While I did not pull power out as a separate dimension in this paper, I do think it belongs in more places than in merely composition. Power can be thought of as a mix of such things as resources and access to resources (field resources), influence over the policy agenda (composition), ability to engage the public (composition), position within the network (connectivity), and access to information (connectivity). A particular interest or organization having high adaptive capacity or specific resources otherwise lacking in the field and without power may find they have little ability to contribute those capacities to the field. Without power, the knowledge that an interest or organization has of potential policy solutions may not diffuse within the field in time to influence the priorities set by the field.

Power is conceptualized in very different ways theoretically. It can be seen as an individual trait (the power of a single organization over others) or as a systemic trait (the ways that the structure of a system confers different levels of power on different actors within the system) (Allen, 2013). The former approach to thinking about and measuring power argues for a field assessment that aggregates the power of individual organizations. The latter would explore the power of the field as a whole, how power is distributed within the field, and ultimately how it is used as a resource that the field or interests within the field can wield in pursuit of policy goals.

In addition to making decisions on how to approach power overall, I would suggest exploring the concept of power throughout the analysis of each dimension and across dimensions, as well as creating ways for advocates to explore these issues with you. Advocates may have their own conceptualizations of power within their field, with variations in these definitions depending on their position within the field.

Measurement Issue 6: How do we connect changes in the dimensions to changes in the field's overall impact on policy?

Any intervention at a field level is presumably not just seeking to build a more robust field, but doing so with a larger set of policy goals in mind. If a funder is investing for the long-term in a field, at what point in the process of measuring changes in the field is it important to begin to connect those changes to the achievement of policy goals?

The focus of this paper is not to measure the impact of advocacy on policy change and there are other resources available to guide you on that measurement. The question of interest here is how to connect the measurement of policy impact to the changes in the strength of the field. One approach would be to analyze each dimension in the context of a specific set of policy wins, answering the question of how the improvements to that dimension were leveraged and to what extent it was critical for the win.

For example, to explore how changes in composition affected policy progress, you could explore whether newly engaged advocates were directly involved in any of the policy wins, their unique contributions and the extent to which those contributions are perceived as critical to the policy success. For field skills & resources, you might explore the extent to which skills, capacity and knowledge were marshaled in ways not seen in previous campaigns, and the perceptions of the importance of those new resources to policy progress. Adaptive capacity could be explored by retrospectively investigating when and how the advocacy strategies and tactics changed in response to the external environment, what triggered those changes, how they diffused through the field and the extent to which the changes are seen as contributing to the policy wins. Mapping the impact of the changes in each of the five dimensions against policy wins certainly adds another layer of complexity to the analysis approaches explored throughout this paper, including the complexity of selecting which advocacy wins to investigate. Yet it would also help to explain the value of investing resources in field building, provided the analysis is not conducted so early in a field building strategy that the interventions are unlikely to have caused sufficient change to meaningfully contribute towards policy wins.

Measurement Issue 7: What are some ways that dimensions influence each other?

There are many possibilities for how each dimension might have an impact on the other dimensions while experiencing a similar impact from the other dimensions. Table 15 explores some of the ideas and experiences articulated during the February convening, the dialogue at the American Evaluation Association and my own experience analyzing different advocacy fields.

Table 15. Exploring how each dimension's findings can be understood through the intersection with other dimensions

	Field Frame	Resources	Connectivity	Composition	Adaptive Capacity
Field Frame		Advocates shared goals may be limited by the types of policy skills and resources available to the field (e.g. they may primarily seek local level change if that is the type of capacity in the field).	Diffusion of changing field frame (or failure to diffuse throughout the field) can be better understood when connectivity is understood.	Monitoring changes in composition might help explain changes in field frame if new voices with different values and goals are brought into the field.	Shifts in the field frame may necessitate shifts in advocacy strategies, if the policy goals are significantly different. In such cases, changes in these dimensions should be monitored together.
Resources	Decisions about specific advocacy skills and resources to develop and deploy are influenced by values and goals (e.g. the level of value placed on community mobilizing).		Skills & resources can be explored through the connections in the field by examining how easily different parts of the field can mobilize different types of resources.	Skills & resources in the field could be interpreted by exploring how they are distributed across the different voices in the field.	Skills & resources could be assessed as an overlap with adaptive capacity, allowing an exploration of what resources are likely to be deployed adaptively.
Connectivity	Connectivity and gaps in connectivity within the field can be explored by assessing the organizations' values and purposes (shared field frame).	Connectivity can be partially explained by the capacity that advocates have to spend on networking as well as structures (e.g. coalitions) that support networking.	Connectivity can help in understanding where and how different interests and voices have influence in the policy arena.	The tendency to communicate with those most like yourself suggests overlaying voices in the field on the connectivity analysis can help explain network structure.	Connectivity might be better understood if adaptation is overlaid, as the strategic leveraging of relationships is part of being adaptive.
Composition	Changes in field frame may be a red flag to suggest changes in composition might be occurring or be needed, as well as vice versa.	Understanding the concepts of power within the composition dimension should include an examination of the distribution of resources.	Connectivity can help in understanding how adaptation can diffuse through a field, including where adaptations are least likely to occur.	The tendency to communicate with those most like yourself suggests overlaying voices in the field on the connectivity analysis can help explain network structure.	The combination of connectivity and adaptive capacity can help in understanding which interests may be left behind as the field shifts.
Adaptive Capacity	Adaptive capacity at a strategy level should be tied to achieving specific goals. Understanding the field frame may help in monitoring adaptations.	Adaptive capacity is dependent on having resources to adapt. Without knowing the full adaption potential cannot be known.	Connectivity findings can help in understanding how adaptation can diffuse through a field, including where adaptations are least likely to occur.	Exploring different voices in the field might help uncover the different types of adaptive capacity, including adapting in response to the public.	

EVALUATION AS A TOOL FOR STRATEGY

As may be evident from the review of measurement issues, there is tremendous potential in a field level advocacy evaluation to generate information that can be useful to a funder or to advocates in the field. Designing a field level evaluation that is useful to the advocates is in alignment with the orientation of advocacy evaluation more generally. As noted by Coe and Schlangen (2011), advocacy evaluations are most effective when they help advocates become more effective.

I have mentioned ways of engaging advocates in reflection on the different dimensions and the intersection of dimensions. Many of these approaches could serve not only an evaluation purpose, but also a strategy purpose (Table 16). Funders, advocates and evaluators should work together to develop evaluation strategies and actively discuss how the evaluation can have intended and unintended effects on the field itself.

Table 16. Exploring how evaluation strategies can also function as interventions

MEASUREMENT STRATEGY
<p>Measuring field frame by examining behaviors and engaging advocates in interpreting the underlying values driving these behaviors.</p> <p>Potential Impact: Advocates may become more aware of their values, each other's values, and the values of the field as a whole by taking the time to reflect on the "why" of these choices.</p>
<p>Engaging advocates in collaboratively mapping the relationships in the field.</p> <p>Potential Impact: Advocates may identify where and how to overcome gaps in connectivity. They may also have solutions to connectivity gaps that would never occur to someone outside the field or that would not be viable without the buy-in of the advocates.</p>
<p>Engaging advocates in examining the motivators of relationships in the field.</p> <p>Potential Impact: If advocates are participating in understanding the motivators in the field, they can be part of identifying what motivators would overcome gaps in connectivity in the field and therefore feel motivated to take action themselves.</p>
<p>Power mapping to explore the composition of the field.</p> <p>Potential Impact: Creating a power map collaboratively to observe the range of interests and voices in the field may uncover lines of influence to key decision-makers that advocates collectively did not realize were a part of the field.</p>
<p>Engaging advocates in reflecting on recent field level adaptations.</p> <p>Potential Impact: Engaging advocates in assessing how adaptations moved through the field might help them uncover where they need to have better communication and may help advocates in one part of the field realize they are missing an opportunity to benefit from the environmental assessment skills in another part of the field.</p>

Table 16 is not comprehensive, but hopefully shines a light on the potential of a field assessment to be a strategic tool for advocates. An assessment of the field would ideally reveal more than any one advocacy organization themselves can know. A well designed assessment should have the power to uncover dynamics that are not transparent to all actors in the field, and do so in a way that supports advocates finding their own solutions to improve the field rather than relying on outside interventions to target different aspects of the field.

WHERE DO WE GO FROM HERE?

The intent of this paper is to start a dialogue about field level advocacy evaluations by exploring evaluation questions, measurement strategies, and measurement issues. As the evaluation of advocacy fields continues to develop, there are many questions left to consider. Among them:

Where and how should the framework incorporate measurement of how the five dimensions are facilitating the ability of the field to achieve policy wins? While a field building enterprise is a long-term goal, funders and advocates will undoubtedly want to understand whether the field building efforts are generating greater ability to achieve policy wins in alignment with the shared purpose, goals and values.

Where does the concept of power and influence best fit within a field evaluation? It overlaps with all of the dimensions, but is also heavily embedded in the definition of the composition dimension. Should it be pulled out as its own dimension?

Which methods will allow us to measure evidence of the dimensions *in action*, not just in perception? A strong evaluation must be careful to collect evidence from both the perceptions of the field as well as the field in action. It is one thing for advocates to report relationships, capacities, influence and a shared identity. It is another to collect evidence of those relationships being engaged in order to deploy the variety of capacities and influence needed to advance a set of policy priorities with a common underlying values orientation.

Measuring the dimensions in action is inherently more complex than the self-report of advocates or perceptions of bellwethers on the five dimensions. This is not to suggest the advocates and bellwether's perceptions lack value. An evaluation that fails to take these into account would in fact find itself making many assumptions based on incomplete knowledge. But, as is often true in the collection of perception data, an analysis that is entirely dependent on perception will find itself dealing with some mix of conflicting perceptions and perceptions that are unfounded.

I look forward to the continuation of the conversation on field assessments. As you conduct your own evaluations, I encourage you to reach out to The Center for Evaluation Innovation and share your experiences. My hope is that we can develop a shared practice around evaluating advocacy fields similar to the work dedicated to developing the field of advocacy evaluation more broadly and the continued efforts of advocacy evaluators to develop specialized methods and tools. Field level advocacy evaluation is genuinely unique from advocacy evaluation. The methods and tools we will develop to evaluate fields will be their own body of work and one that funders, advocates, and evaluators can all benefit from using.

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