

# TIPS

## . . . for Evaluating Advocacy

### *A Checklist for Grantmaking Organizations*

- ✓ Discuss Evaluation Expectations Early  
Grantors and grantees can arrive at a common understanding early on of reasonable expectations and ways to demonstrate the grantee's contribution.
- ✓ Recognize That the Evaluation Must Fit the Nature of the Work  
As an example, obtaining face-to-face meetings with key state officials to discuss a policy issue might sound routine. In fact, the meetings might be hard-won critical steps in an effort to influence state regulators, and should be documented, evaluated, and valued accordingly.
- ✓ Value Capacity Building  
A grantee might lose the battle for a legislative, regulatory, or judicial objective, but by motivating a large number of citizens to advocate on its issue, may have built a more experienced grassroots base for the next round.
- ✓ Value Adjustments in Strategies to Address Factors Outside Grantee's Control  
Successful advocates must change strategies to meet changing circumstances, such as a new governor, a shift in public opinion, or the introduction of related legislation.
- ✓ Recognize that Credit for Advocacy Work Is Shared  
Multiple advocates are often required in order to organize, research, and communicate various points of view, litigate, etc., for public policy or election-related efforts. Each organization takes credit for its contribution.
- ✓ Make Use of Available Evaluation Resources and Plan Ahead  
Organizations' self-evaluations can be very informative. When using outside evaluators, grantee should include them in early budgets. Grantmakers must recognize that evaluation requires resources.
- ✓ Consider Evaluating the Foundation's Non-Financial Contribution  
Grantmakers contribute non-grantmaking assistance to grantees' advocacy work by convening grantees working on the same issue, introducing grantees to policy leaders, and in other ways. Assessing that contribution can yield helpful information.

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