Evaluating Social Justice Advocacy:

A Values Based Approach
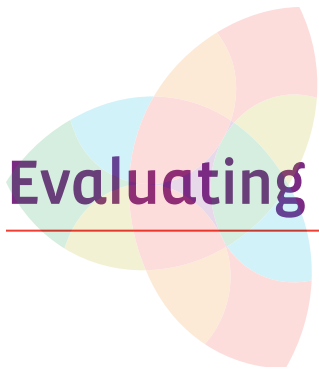
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Barbara Klugman

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Although social justice is a concept inherent in many advocacy efforts, it often remains unspoken or is ignored during the evaluation process. In some ways, the use of a social justice lens when evaluating advocacy should be self-evident. If advocacy efforts aim for social justice outcomes, evaluations should look for evidence that such outcomes have been achieved. But understanding just what social justice means can be a challenge, as can knowing how to look for it in the context of complex and often long-term advocacy efforts.

This brief offers ideas on how to incorporate the concept of social justice and its underlying values into advocacy evaluation. It points to ways in which social justice values should influence what evaluators examine in terms of advocacy goals, theories of change, outcomes, and strategies. It also considers how the evaluation process itself can promote social justice values.

What is Social Justice Advocacy?

Social justice advocacy works for structural and enduring changes that increase the power of those who are most disadvantaged politically, economically, and socially. It tackles the root and avoidable causes of inequities for those who are systematically and institutionally disadvantaged by their race, ethnicity, economic status, nationality, gender, gender expression, age, sexual orientation, or religion.[1] It also aims for better participation in, alignment with, and adherence to, international human rights treaties.[2]

Not all advocacy is social justice advocacy. In fact, a great deal of advocacy happens without consideration of disadvantaged groups' needs or perspectives.[3] This brief, however, deals with advocacy efforts that either implicitly or explicitly embrace social justice values when deciding what to do and how to do it. It also focuses on policy advocacy as the most common route to achieving the structural and sustainable changes that social justice typically requires.

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1   LaMarche. G. (2009). Social justice: A guiding vision for Atlantic's final chapter. Retrieved May 29, 2010 from http://www.atlanticphilanthro-pies.org/currents/social-justice-guiding-vision-atlantic%E2%80%99s-final-chapter.

2   For example, the Convention on the Elimination of All Forms of Discrimination Against Women, International Convention on the Elimination of All Forms of Racial Discrimination, and International Covenant on Civil and Political Rights

3   For example, advocacy may attempt to further corporate interests, or the interests of specific constituency groups whose members are not disadvantaged.

What are Social Justice Values?

Social justice advocacy adheres to three broad and interconnected values:[4]

1. Resources should be distributed so that everyone can live a decent life.
2. Human beings all have equal human rights, and should be recognized in all of their diversity.
3. All people should be represented and be able to advocate on their own behalf.

The value of *distributing resources* equitably is easiest to grasp, as poverty and a related lack of services are fairly visible when justice is lacking. We can view an uneven distribution of resources in, for example, employment, education, housing, health care, and land. Distribution of resources refers to people's access to these resources and their control over them. Also important is the quality of resources, such as whether land is polluted, or whether health services are adequate. Marginalization in this area also limits people's self-esteem, making them feel unwelcome in broader society, and preventing them from developing to their full potential.[5]

The value of *recognizing people in all of their diversity* captures the need to redress the failure of society to value people equally. Social justice advocacy that values diversity aims to increase the power and recognition of people who are marginalized. Particularly when discrimination is involved, this may require legal redress along with exposing and challenging the stigmatization that is embedded in social norms.[6]

The third social justice value, *participation*, is about developing and sustaining meaningful citizen participation in the democratic process.[7] Social justice advocacy should include mechanisms for building public participation in policy making, implementation, and monitoring as part of efforts to hold democratic governments accountable. This value is critical because lack of recognition is so socially accepted that it leads people on the margins to buy into the broader society's estimation of their lower status and value; it engenders a kind of "internalized domination."[8] For this reason, realizing the right to participation means creating conditions under which people can shift from being objects upon which government and others with power act, or fail to act, and instead become active participants in political processes.

Where Should Evaluations Look for Social Justice Values?

Values-based evaluation means using evaluation to judge how well values are integrated into practice, as well as using values to shape how evaluations are conducted. This section covers the first meaning, focusing on the fundamental premise of values-based evaluation—that effective practice should include the translation of values into concrete reality. It shows where to look and what to look for in determining whether social justice values have been integrated into advocacy strategy and practice.

In the advocacy goals

In the pursuit of a fair and just society, advocacy goals should be based on a consideration of all three social justice values. Whether they seek changes in public policy or the conditions for successful policy implementation, advocacy goals should be considered in terms of whether they increase marginalized groups' access to resources, social recognition, and participation.

4   Fraser, N. (1997). Justice interruptus: Critical reflections on the "postsocialist" condition. New York: Routledge; Fraser, N. (2006). Social justice in the knowledge society: Redistribution, recognition, and participation. Retrieved on August 17, 2009 from wissensgesellschaft.org/the-men/orientierung/socialjustice.pdf.
5   Armas, H. (2006). Exploring linkages between sexuality and rights to tackle poverty. IDS Bulletin: Sexuality Matters, 37(5), 21-26.
6   Gruskin, S., & Ferguson. L. (2009). Using indicators to determine the contribution of human rights to public health efforts: Why? What? and How?" Bulletin World Health Organization , 87, 714–719.
7   Gaventa, J. (2006). Triumph, deficit, or contestation? Deepening the 'deepening democracy' debate. Working Paper 264, Institute of Development Studies.
8   Yamin, A. (2009). Suffering and powerlessness: The significance of promoting participation in rights-based approaches to health. Health Policy and Planning, 11(1), 5-22.

This raises questions about how goals are identified, whose interests they represent, who will benefit if goals are realized, and who will lose or be neutralized. To what extent did those with the least power play a part in shaping the goals? If so, to what extent did those people know about the political, economic, and social forces shaping their situation, and the short and long-term consequences for their lives?

No advocacy goal is likely to perfectly align with social justice values. Rather, the point is that when goal setting takes place, advocates should be aware of the social justice implications. They should set goals that honestly commit to redressing past injustices regarding resources, recognition, and participation.

In the theory of change

Policy actors use different theories of change as the basis for their advocacy. For example, some use money to support politicians' campaigns, or to invest in politicians' constituencies as a way to influence policy outcomes. Others emphasize shared membership in, or commitments to, a particular religious institution or ethnic group when asking politicians to support their causes.

In identifying the social justice dimensions of a theory of change, considerations should focus on the dynamics that went into identifying a particular problem as the focus of advocacy, the process for identifying proposals to address this problem, and the process for gaining public, policymaker, and administrator interest in those proposals.

In the interim outcomes

When developing a theory of change, social justice advocates should consider the interim outcomes they need to achieve in order to meet their ultimate goals regarding resources, recognition, and participation. A set of "outcome categories" that may be the shorter-term focus of social justice advocacy efforts as they aim for longer-term changes include:[9]

- Strengthened organizational capacity
- Strengthened base of support
- Strengthened alliances
- Increased data and analysis from a social justice perspective.

Strengthened organizational capacity. Looking at this outcome through a social justice lens requires examining the extent to which advocates value participation. This includes the degree to which organizational members are able to contribute to an advocacy effort's direction; whether leaders engage staff and listen to their perspectives; and whether new leaders are developed. A commitment to the value of fair resource distribution raises questions about the difference between salary scales and work conditions between the most junior and most senior staff. A clear sign of whether an organization's practice matches its social justice values is the extent to which it includes those affected by the issue on which advocacy is focused.

Application of a social justice lens to this outcome also applies to volunteer organizations. What is the balance between valuing voluntarism and taking advantage of people? At its most basic level, this might mean providing lunch to volunteers engaged in a day's work, particularly if volunteers are from poor communities. At a more complex level it manifests in how an organization recruits and sustains volunteers and ensures that they are fully engaged and comfortable with the implications of planned activities to their time, resources, and security.

9   The first three outcome categories come from Reisman, J., Gienapp, A. and Stachowiak, S. (2007). A guide to measuring advocacy and policy. Seattle, WA: Organizational Research Services. The author added the fourth category of "increased data and analysis from a social justice perspective."

Strengthened base of support. For this outcome, similar values questions arise about the extent to which the base reflects and recognizes those most affected. Presence does not necessarily mean recognition. Are problems defined and proposals generated from the perspectives of those who are most affected? Examining this question requires gaining deep insights into people's experiences and considering the consequences of a diverse range of proposals. It marks the difference between a "rent a crowd" approach, and a serious commitment to processes that empower people to strategize and speak for themselves.

One challenge here is that the greater a group's marginalization, the less its members may be able to articulate more than their immediate needs. As a result, it is frequently necessary to draw on diverse and outside expertise to consider what kinds of options might be possible. Yet the moment that "outside" experts are brought into an advocacy process—for research or to provide insights from a corporate or professional point of view—maintaining a social justice perspective becomes more challenging. While many of these individuals will have values aligned with those most affected, others will not and will write papers or engage policymakers without first engaging those with "skin in the game."[10] Hence, advocacy committed to social justice outcomes must find ways to hold experts accountable to the affected communities.

It is here that the frequently used term "community" becomes problematic. Even within a community that takes up an issue, there will be power differentials. Certain groups within the community will likely have less say in defining problems and how to address them, whether they be women, young people, older people, or groups stigmatized on the basis of any number of other factors (such as disability, sexual orientation, gender expression, disability, or HIV status). It is common for many community members, however defined, to assume the role of storytellers rather than as experts in their own right. For example, in international advocacy, advocates from the global South are often seen as valuable only in relation to the case studies they provide, not for their strategic capacity in shaping a global campaign. Similarly, one frequently finds references to "advocates" versus "experts," as if advocates cannot be experts. Advocacy committed to social justice will work hard to undercut these notions—not by ignoring useful expertise from those outside of an affected community, but by fully valuing the insights and experiences of those who are inside.

Strengthened alliances. Alliances are particularly important when trying to change inequities that are sanctioned by the state or other powerful entities such as corporations, the media, or religious institutions.

As complex forms of collaboration develop through networks or coalitions, the challenges of meaningful participation increase beyond those that apply to strengthening the base of support. It becomes harder to hold leadership accountable, and harder to ensure that all participating groups contribute to the extent that they want. Hence, ongoing assessment of decision-making transparency is particularly necessary with alliances.[11] This can be a complex and delicate process, particularly where money is involved and where trust and cooperation are critical for both recognizing all parties involved and for implementing advocacy effectively.

Alliance-building challenges also can be exacerbated by how problems are defined. For example, identity-based claims frequently specify how one group has been stigmatized or excluded from resources, which makes it difficult to build alliances with other groups that may also be affected. The fundamental social justice value that all people have human rights can get lost in a quagmire of identity-specific claims. Notions of difference and subordination get reinforced, since every identity category gains meaning by its relationship to dominant categories.[12] Building alliances helps to counter the normativity of the dominant group and to politicize the idea that only one way of life

10 Pastor, M., & Ortiz, R. (2009). Making change: How social movements work and how to support them. Los Angeles, CA: Program for Environmental and Regional Equity, University of Southern California.
11 Church, M., Bitel, M., Armstrong, K., Fernando, P., Gould, H., Joss, S., Marwaha-Diedrich, M., de la Torre, A.L., & Vouhe, C. (2002). Participation, relationships, and dynamic change: New thinking on evaluating the work of international networks. London: University College. Retrieved on September 10, 2009 at www.actionresearch.net/madpdf/app1a.pdf.
12 Hollinger, D. (2004). Identity in the United States. In Tazi, N. (ed.) Key words: Identity. (pp. 27- 45). New York: Other Press.

is acceptable.[13] There are many examples where groups have acknowledged others' situations and forged effective alliances by first accepting each other's specific claims and then articulating them within a broader one. The point is that many groups are marginalized and need to work together to collectively envision alternatives. They need to "balance diversity with common values."[14]

Increased data and analysis from a social justice perspective. Values concerns on this outcome have already been raised regarding the perspectives of researchers and others whose experiences they draw on when analyzing problems and identifying possible solutions.

The framing of research questions themselves is a values-based exercise, particularly in relation to social and policy questions. Research questions frequently reflect the concerns of a particular interest group, and therefore need examination by both advocates and evaluators. Certain sectors, such as the corporate sector, can put much more money than impoverished communities into research to frame problems and develop proposals that support their interests. As a result, policy arguments based on research must be seriously evaluated to assess who commissioned the research and who shaped the questions asked and proposals found.

More invidious, from a values perspective, are narrow judgments about what kinds of data and research "count" as evidence. To be sure, when research is used to support advocacy claims, target audiences must recognize its validity. But contemporary beliefs about what constitutes valid evidence tend to be shaped by particular paradigms, most notably from the West. Confidence exists in findings produced only by certain research designs, but does not exist for findings based on alternative approaches, even when the context or the research questions requires them. This can result in competing understandings about the nature of the problem, and in different ideas about what interventions make the most sense.

In policies themselves

The outcome categories discussed thus far are all part of the advocacy process. Policy outcomes themselves should also be examined against the three social justice values. Clearly, policies designed to advance social justice should foster a fair distribution of resources and better recognize and serve marginalized groups. But beyond this, policies should address the value of participation in terms of their ongoing implementation and monitoring. Does the policy specify how the public will be informed and engaged during implementation? Does it enable those on the margins to participate in monitoring activities? Does it take into account the needs of specific groups, such as blind, deaf, or illiterate people, when it comes to these communications?

In the impacts

Impacts are usually expected beyond the timeframe of a specific advocacy effort, but are still part of the long-term vision. They include:
■ Shifts in social norms
■ Shifts in population-level impact indicators.

Shifts in social norms. Shifts in social norms are evident, for example, as decreased discrimination against a specific group, or as an increase in beliefs that the state should provide services for indigent people.
When broad public opinion is seen as a reflection of social norms, questions about social justice values should be approached with caution. One cannot presume that majority opinion reflects social justice values. It is possible that a democratically elected government will propose policies that do not embrace the social justice values espoused here. This is why, despite the frequent focus of social justice advocacy on policy change, advocacy efforts

13 Cohen, C. (2001). Punks, buldaggers and welfare queens: The radical potential of queer politics? In Blasics, M. (ed.), Social identities, queer politics. (pp. 200-225). Princeton: Princeton; Sharma, J. (2006). Reflections on the language of rights from a queer perspective. IDS Bulletin: Sexuality Matters, 37 (5), 52-57.
14 Weeks, J. (1998). The sexual citizen. Theory, Culture and Society, 15(3-4), 35-52, p. 48.

also need to shift broader social norms. What is the value of a policy victory to advance social justice when the implementation process does not also follow social justice values? There is much work to be done after policy victories are achieved.

Shifts in population-level impact indicators. Data on population-level shifts address the ultimate question of whether social justice has been advanced. If it has, data should show that for marginalized groups, resources are more evenly distributed; people are recognized in their diversity; and all groups have opportunities to participate in the decisions that impact their lives. These indicators might include, for example, lower school dropout rates for transgender youth because of declines in bullying, or a decreased incidence of water-borne diseases because of cleaner water.

In the advocacy strategies

Values issues related to each outcome category described above invariably play out in the strategies taken to achieve those outcomes. Advocacy efforts should be assessed on whether they have the right mix of strategies to achieve their desired outcomes in both the short and longer term. They should also be assessed on the role that social justice values played in strategy selection and implementation. Assessing the values underpinning an advocacy strategy is part of an assessment of that strategy's quality.

If the strategy involves public dialogue, for example, questions exist about how the problem and proposals to address it are articulated. What perspectives will attract the desired media attention, and does this approach fit with social justice values? How were decisions made about the public face of a campaign, and does this process and the choice of public speakers adhere to social justice values? If the strategy involves public protests, were protestors involved in identifying this strategy? Do they understand the implications both personally (in terms of personal time, costs, and security) and for their community (where backlash might undermine community welfare through curfews or shop closings, for example)?

Strategic advocacy is the ability to read the terrain and shift strategies to take advantage of windows of opportunity. In this process, complex decisions must be made about how to push the agenda forward. Is it too much of a compromise to ally with an organization that shares some, but not all, of a group's concerns? Should a group ally with an organization if the group does not fully agree with that organization's position on other issues? In the navigation of strategic options, values questions can get lost in the pressure for victories. In these contexts, power relationships become most evident, and evaluators should assess whose interests come to the fore and why.

Values considerations should not, however, be confused with political analysis. There may be situations where the most viable way forward is achieving incremental steps toward an overall goal, and arguing against this approach would be politically naive. For example, sometimes a strategy is most effective when, whether by design or not, some advocates protest from the outside while others negotiate on the inside. This situation often makes insiders' positions seem more "reasonable" to policymakers, resulting in greater policy gains than would be possible if outsiders were not present. However, going the incremental route may risk the chance that the interests of those furthest on the margins never get addressed because some alliance members stop supporting the original set of claims once their particular needs are met. The nature of such strategy decisions and the interests they represent should be traced. Where advocates do not have the capacity or courage to address them, the evaluation process itself can put them on the table.

In a similar vein, when diverse groups are engaged in a struggle to achieve a particular goal, they bring different interests and capacities that may not always work together. Groups often give different priorities to different strategies. Legal groups, for example, lean toward litigation. What happens when legal groups come up with a litigation opportunity, but the case raises issues that others feel undermine broader advocacy goals? What happens

if they decide to litigate, but there is no base of support to pick up when litigation either fails or succeeds? Litigation strategies can be crucial for securing social justice, and are frequently attractive to donors. But social mobilization is essential for building people's capacity to organize to protect their interests and hold policymakers accountable (e.g., after a legal victory). Supporting litigation is also inadequate unless sufficient resources exist for support structures that can sustain legal mobilization (e.g., rights-advocacy organizations or rights-advocacy lawyers).[15]

Networks and coalitions should be assessed on whether collaborative strategizing trumps the desires of particular groups to push forward their individual agendas. This can be particularly vexing when questions of class or other power determinants are in play because some network members have more time, funds, or even arguments. In international advocacy, it talks to the power dynamics between international NGOs, usually based in the U.S. or Europe, and NGOs and community-based organizations in the global South. The extent to which advocacy values its diversity by enabling meaningful participation of less resourced groups and individuals is one of the core questions for social justice evaluation. Networks can be monitored on whether they build shared purpose and values;[16] whether they use trust and cooperation as the basis for dialogue;[17] and if they enable collaborative action and reflection.[18]

How can the evaluation process incorporate social justice values?

This section covers the second meaning of values-based evaluation—incorporating social justice values into the evaluation process itself. Evaluations often focus only on donor needs or efficient processes, without taking into account how the evaluation process can model social justice concepts. There are many opportunities for incorporating social justice values when planning and undertaking an evaluation.

In relationships with advocates

Complaints about evaluators chosen by donors include that they make demands of organizations' time that had not been budgeted for; that they conceptualize the evaluation in ways that do not match the organization's own theory of change; and that they give feedback to the donor before, or sometimes even without, sharing it with the organization or network first. All of these are signs that the evaluation does not embrace social justice values—it lacks recognition and representation, and promotes an unfair distribution of resources. The evaluation process and the evaluator need to be respectful, recognizing the capacities and constraints of those whose work is being evaluated, aiming to enhance their capacities, and minimizing their reporting burdens where possible.

In theory of change development

Many evaluators promote social justice by engaging advocates in the process of articulating their theory of change. In the best of scenarios, advocates will do this for themselves. When this is not the case, an evaluator who facilitates the process can be enormously empowering of advocates and can help to expose and negotiate group differences.

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15 Marcus, G., & Budlender, S. (2008). A strategic evaluation of public interest litigation in South Africa, Johannesburg: The Atlantic Philanthropies.

16 Hoppe, B., & Reinelt, C. (in progress). Social network analysis and the evaluation of leadership networks. Leadership Quarterly.

17 Wilson-Grau, R. (2007). Evaluating the effects of international advocacy networks. Paper developed for the Marc Lindenberg Center at the University of Washington's Evans School of Public Affairs.

18 Church, et al., 2002; Coffman, J. (2007). Using the advocacy and policy change composite logic model to guide evaluation planning. Harvard Family Research Project.; Reisman, J., Gienapp, A. and Stachowiak, S. (2007). A guide to measuring advocacy and policy. Seattle, WA: Organizational Research Services.

This participatory approach to theory of change development builds collective ownership of advocacy strategies and a shared understanding of the roles different organizations play in them. This process also reveals that it is seldom possible to predict which strategies will be more or less effective in catalyzing desired changes. It validates everyone's roles and helps to neutralize the competition that is invariably present within advocacy efforts. Donors can reinforce this by articulating that they want to understand the contribution that a mix of strategies has in achieving advocacy goals, rather than the role that any one organization plays in success or failure.

In evaluation reporting

Evaluation involves gathering data from various sources, whether through surveys, interviews, or analyses of media coverage. Here, adhering to social justice values means feeding findings back to advocates in ways that are respectful, as well as easy to hear and interpret.

In capacity building

While there are many solid arguments for the value of external evaluators, in the long run one would like to see social justice advocates fundraising for and managing their own strategic planning and evaluation. They would not rely on an external evaluator or donor to facilitate these processes, thus avoiding the negative aspects of the power dynamics built into donor-grantee relationships. Advocates would commission external evaluators where necessary, and invite donors into their learning processes.

Achieving this vision requires that donors and evaluators who embrace social justice values see their role as including evaluation capacity building. Evaluators should have their own social justice goals of enhancing the capacity and independence of advocacy organizations and networks to undertake high-quality strategic planning and evaluation as part of ongoing reflection and learning.

What Should Happen Next?

Currently, the advocacy evaluation field is making great progress in identifying approaches and methods that fit well with the complex and dynamic nature of advocacy. But even though values are deeply embedded in most advocates' notions about how advocacy should be done and the goals advocacy efforts should aim for, few people are talking about the importance and usefulness of taking a values-based approach to evaluation.

Looking ahead, the hope is that more advocates, evaluators, and donors will recognize the importance of focusing on values when thinking about appropriate evaluation priorities and approaches. The hope is also that the broader advocacy evaluation field will make values-based approaches a regular part of discussions about how best to meet the challenges of evaluating advocacy.

*Barbara Klugman is an independent consultant based in South Africa and the U.S. She works with advocacy groups, mass-based organizations, donors, and government agencies to strengthen their strategic and evaluation capacity on social justice objectives. She also researches, writes about, and trains on sexual and reproductive health and rights. She is a former Senior Program Officer in the Ford Foundation's Sexual and Reproductive Health and Rights division. **bklugman@mweb.co.za.***