# How to measure and evaluate your advocacy and policy efforts

# Mission Possible

By Mark Brewer

Of all the things you can measure, advocacy and policy work are among the most difficult. That said, the risk of not evaluating your policy work is that you are shooting in the dark every time you engage in advocacy, says evaluation expert Jacob Allen, who leads the social impact practice at the Cicero Group (**www.cicerogroup.com**) in Salt Lake City.

By its nature, advocacy is complex, and its impact is often indirect. Advocates work in an evolving context that is dynamic and unpredictable because things you have no control over are constantly shifting. The political landscape is fluid. Other issues compete with yours. You may have direct or indirect opposition. And the process is slow, with change taking years or decades.

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Advocacy strategies need to adapt and change in response to this dynamic environment, and the advocacy plan you started with is most likely not the plan you eventually will have later on. “The political environment shifts constantly, so you need to adapt to changes in policymakers, who’s in power and what issues are competing with yours for attention and funding,” says Julia Coffman, founder and director of the Center for Evaluation Innovation (**www.evaluationinnovation.org**) in Washington, D.C. “There’s an evolving context that you need to pay attention to.”

In such a dynamic, long-term environment, how do you know if your efforts are bearing fruit? Tracking legislative victories may seem like an obvious measure of success, but it does not provide advocates with actionable intelligence while sweating in the advocacy trenches. What if your legislative agenda fails but you had measureable success along the way, such as effectively mobilizing community leaders around your cause? What if you are good at deflecting bad ideas before they become law? Or what if your legislation passes, but it is not implemented? How can you claim a win without any real change to go with it? “Ultimately, if you’re going after a policy change, you’ll know in the end if you did or didn’t achieve it,” Coffman says. “But you can’t predict how long it will take to get to a win. So, the questions in the meantime become, ‘How do we know if we’re making progress at all? What can we capture that tells us that our strategy is on the right track or if we need to change it?’”

## Advocacy Evaluation Considerations

The key to knowing whether you are making progress or not is to track incremental successes and outcomes along the journey to policy change. Rather than measuring long-term outcomes, such as whether a bill is passed, advocacy is better measured along the way, enabling nimble course correction, incremental improvement and feedback on strategy effectiveness.

Janelle Brazington, vice president of administration for Kansas Action for Children (**http://kac.org**) in Topeka, Kan., says that advocating for car booster seats was a six-

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## CREATING YOUR THEORY OF CHANGE

Your theory of change, also called a logic model, is a road map to finding metrics that are meaningful in measuring the effectiveness of your advocacy work.

Jacob Allen, partner at the Cicero Group (**www.cicerogroup.com**) in Salt Lake City, suggests a process to create a simplified theory of change by working backward from the desired outcome. Using a sheet of paper or a whiteboard, write the ultimate policy goal on the right side. To the left of that, write down the intermediate goals required to achieve the ultimate goal. To the left of that, write down the near-term activities and goals. Reading from left to right, you now have the anticipated path forward.

For example, if you want to reform the criminal justice system, your simplified theory of change may resemble the following:

- We need people to be aware of and informed on criminal justice.
- Once they become more informed, some people will become more active and engaged in specific ways.
- Once they are engaged in specific ways, then they will engage directly with legislators.
- Once legislators hear more from their constituents, they will change their vote.
- When they change their vote, then we believe the bill will pass.
- When the bill passes, we have achieved our policy goal.

As an organization, you cannot take responsibility for the whole chain, but you can take responsibility for the areas in which you work. So, if your mission is education and engagement, you may focus on tracking whether your audience is aware of the issues. You also could track whether your information engaged your audience in the ways you expected.

To create a more complete theory of change, the Advocacy Progress Planner is an online tool for advocacy planning and evaluation that will walk you and your team through a process to create a theory of change and provide an at-a-glance look at the ingredients of advocacy efforts. It can guide you to clarify the goal, audience and tactics of your own campaign. Visit **http://planning.continuousprogress.org**.

year process. "We learned to measure our impact little by little," she says. "We set incremental goals, and we looked for ways to measure progress toward those goals."

Incremental advocacy evaluations give advocates timely answers to the strategic questions they frequently face and provide solid direction when changes need to be made, whether changing tactics to improve your results or responding to a changing environment. Furthermore, you can share these evaluations with funders and other partners who may be interested in your progress. Incremental success along the way is enough to keep many funders engaged, even when your efforts may not directly change policy.

It is also important to remember that program evaluations are not the same as advocacy evaluations. According to Coffman, the discipline of evaluation grew up with programs that have predictable plans and outcomes. However, evaluating advocacy is different.

Your advocacy strategy probably will change over time, and you cannot predict outcomes with any reasonable certainty.

Amy Blouin, founder and executive director of the Missouri Budget Project (**www.mobudget.org**) in St. Louis, says that direct service metrics tend to be clear, but advocacy metrics are not. "With direct service organizations, it's easier to capture the number of meals provided or the number of at-risk kids who now have been provided with a safe environment," she explains. However, the same cannot be said for advocacy metrics. "You don't know if you're evaluating everything that you need to," she points out.

## Knowing What to Measure

Measuring advocacy is inherently qualitative, Brazington says. "I have a degree in math. I want a quantitative perspective. What I've learned in advocacy evaluation is that you can measure numbers to an extent, but that ends with your outputs, such as the number of policy briefs you sent out. That doesn't measure impact," she explains. "We started by asking ourselves, 'How do we know if we're effective?'"

Allen suggests creating a theory of change, also called a logic model, to get the clarity you need. By being precise on the chain of outcomes or events that lead to a broader policy change, you will get an understanding of what to measure. "The way to decide what to measure is to first be very clear on what change needs to happen and how your organization is involved with making that change happen," he says.

At the Missouri Budget Project, Blouin says they encourage advocates to identify upfront their theory of how change will occur. "Is it that you need to mobilize the grassroots, or is it more of an insider game? What's your theory about the path you need to take to get there?" she asks. "Once you know that, you can identify a set of interim outcomes. Is there any evidence that you're building political goodwill? Is there any evidence that the media is covering your issue in a way you want them to?"

What you measure should be within the context of your theory of change, advises Carol Hedges, executive director of the Colorado Fiscal Institute (**www.coloradofiscal.org**) in Denver. "If everything measures well but you are falling short of your objectives, then either the theory needs to change or you need to be more effective in executing the theory's strategy," she says.

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Hedges' metrics include the number and growth of partners in their coalition and the number of people who have used their messaging or participated in their Twitter campaigns. "These metrics help show if we're building toward our theory of change," she says.

Kansas Action for Children (KAC) uses advocacy evaluations to understand if its activities are creating the change it seeks. One thing it has learned is that legislators pay more attention to constituents than they do to KAC's research and analysis. Consequently, KAC created a network of eight state-level, grassroots organizers who reach out to their networks in response to a KAC call to action. Based on the evaluations of the program, Brazington feels confident that KAC is getting better traction through grassroots mobilizing. "People are responding. We know that by tracking our Facebook and Twitter followers who engage by doing what we ask them to do," she says. "We track that through hashtags and monitoring Twitter feeds so we can see how many people are tweeting our message to the governor or legislators.

"We not only track if our grassroots network is acting on our behalf but we also measure if they're effective," Brazington adds. "We monitor that by having our staff sit in legislative hearings and by following the

#ksleg hashtag on Twitter. We measure the extent to which legislators champion our efforts. We also monitor the media reaching out to us for information and background on issues and topics." If the media ask for political background, that is even better. "Finally," Brazington continues, "we measure whether we can neutralize our opponents."

## Mixing Concrete With Anecdotal

The Missouri Budget Project (MBP) tracks a mix of concrete metrics and anecdotal information to measure growth in awareness, support and outreach. "We measure to what extent we are building awareness of the policy issues we work on," Blouin says. "Sometimes, that's public awareness or key influencer awareness. Sometimes, it's grassroots awareness. We also measure to what extent we are building support for these issues among those audiences and how effective we are in engaging those supporters in advocacy. It's not enough to just give them information. Are we moving them to become involved somehow?"

To answer that, MBP measures the distribution of its policy analyses, whether those documents get to the right partners and whether distribution is increasing to reach more people. It also measures the total number of presentations to strategic audiences. "Are we making presentations and increasing awareness among those key business and civic leaders throughout the state who then influence public opinion in their areas?" Blouin says she wants to know.

**"Are we reaching the right people to help us influence that legislation?"**

MBP evaluates its email list growth and social media impact to learn whether it is increasing the number of constituents it attracts through those media. It also gauges awareness through its partners by tracking the number of partners that request newsletter content geared to their audience, keeping a record of the number of people reached through those networks. Finally, MBP tracks media hits, such as op-eds and letters to the editor, that it writes or helps partners write.

In addition, MBP monitors support by measuring the growth in the number of coalition partners, formal and informal, and evaluating whether the diversity of its partners meets its needs. "We measure the growth of civic and business leaders who take some sort of action to support a policy issue that we've asked them to take," Blouin explains. "Are they actively engaging? Are they distributing our information to their networks? Are they doing media outreach? Are they hosting policy forums, and are they communicating with lawmakers directly?

"We measure outreach to targeted community leaders and lawmakers that result in support for policy issues," she adds. "For example, if a local chamber of commerce votes to support our policy issue, we capture that as a measure of outreach."

MBP's evaluation plan includes an annual review, during which it examines the extent to which its policy issues have advanced. "Each year, we survey coalition partners to determine how effective the coalition engagement is," Blouin says. "Are our policy analyses useful? Are our talking points helpful? Are they distributing information? How many people do they reach? Have they used our sample social media posts? Are they writing letters to the editor? And we ask open-ended questions, such as 'How can we be more effective in our work?' At the end of the year, we compare those metrics with the anecdotal information we have about how we've influenced policy.

"If our metrics tell us that we're successful but other dynamics prevented what we wanted in terms of legislation, is there something different we should be doing?" she asks. "Are we reaching the right people to help us influence that legislation?"

MBP recently worked on a bill that was suddenly and dramatically changed midcourse. Through conversations with the sponsor and others, it was able to change the bill back to the original text. "We capture these anecdotal situations where partnering with lawmakers resulted in a change we wanted," Blouin says.

Of course, with limited resources, you cannot measure everything. So, in an ocean of possible metrics, how do you make the best choices? Prioritize. Blouin

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suggests prioritizing based on the main purpose of your evaluation. Is it to demonstrate impact, or is it to support your organization's learning and adaptation? Prioritize based on your theory of change. Choose indicators that show progress as your theory plays out as anticipated, and based on that, make choices about what you do and do not measure.

## Resources

*Advocacy Evaluation Update,* Fall 2011, Center for Evaluation Innovation
**http://evaluationinnovation.org/sites/default/files/AEU_Fall_2011.pdf**

"The Elusive Craft of Evaluating Advocacy" by Steven Teles and Mark Schmitt, *Stanford Social Innovation Review*
**http://ssir.org/articles/entry/the_elusive_craft_of_evaluating_advocacy**

"Measuring Advocacy—Yes We Can!" by Matthew Forti, *Stanford Social Innovation Review*
**http://ssir.org/articles/entry/measuring_advocacy_yes_we_can**

"Six Theory of Change Pitfalls to Avoid" by Matthew Forti, *Stanford Social Innovation Review*
**http://ssir.org/articles/entry/six_theory_of_change_pitfalls_to_avoid**

UNICEF Advocacy Toolkit
**www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf**

"Unique Methods in Advocacy Evaluation" by Julia Coffman and Ehren Reed
**www.innonet.org/resources/files/Unique_Methods_Brief.pdf**

*A User's Guide to Advocacy Evaluation Planning* by Julia Coffman, Harvard Family Research Project
**www.hfrp.org/evaluation/publications-resources/a-user-s-guide-to-advocacy-evaluation-planning**

"What's Different About Evaluating Advocacy and Policy Change" by Julia Coffman, Harvard Family Research Project
**www.hfrp.org/evaluation/the-evaluation-exchange/issue-archive/advocacy-and-policy-change/what-s-different-about-evaluating-advocacy-and-policy-change**

Focus on evaluating activities related to nearer-term outcomes and those that align with your advocacy strategy. A clear theory of change will help you find that strategy focus.

Focus on your organization's unique contribution to the larger effort and how you are able to adapt to change and make a difference. "It's less about advancing policy and more about whether the organization has been able to adapt when serendipity [or disaster] arrives," Hedges explains. "Funders like to see that you're nimble and can adapt to change."

## Common Pitfalls

Allen says that a common pitfall for advocates is measuring only activities and not outcomes. While it is not necessarily wrong to measure activities, "if you don't measure some level of outcome, you don't know if your activities are effective," he says.

Also, strive for meaningful measurements, and avoid the tendency to count only what is easy. "It's easy to count meetings and press releases," Coffman says. "That measures what you did instead of measuring the effect those actions have. A better measure might be, 'What happened as a result of your meetings with policymakers? Did they become champions for your cause? Did you change their minds? What was the result of the meetings?'

"And make sure what gets measured matches up with the strategy," she advises. "Many efforts are focused on educating an audience on an issue. There's research showing that raising awareness alone does not produce policy change."

Finally, remember that measuring advocacy is not a one-size-fits-all endeavor, Coffman says. "Every advocacy evaluation strategy needs to be different."

After all, your organization provides a unique contribution to the change that many others are working toward.

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