

# Getting a real return from evaluating policy advocacy work



# Letting Go of a Program Delivery Mindset



Complexity & attribution

Extended timeframe

Changing Milestones

Shifting context and strategies

Tight resources

# The Most Common Mistakes in Advocacy Evaluation

- ✓ Lack of specificity about strategy and target audiences
- ✓ Sticking to outputs—or even outcomes—that are no longer relevant
- ✓ Assuming that “more” is better
- ✓ Relying on indicators to describe what’s happening
- ✓ Mismatch between the tactics used and the outcomes expected
- ✓ Unrealistic expectations for change within the measurement period

# Failing to use evaluation to inform strategy



# The Foundation Challenge

How can foundations approach policy advocacy evaluation in a way that :

- produces actionable insights to inform strategy
- draws meaningful conclusions about progress & contribution?

**1**

Zoom your evaluation lens to the strategy level

**2**

Ask questions that fit your design

**3**

Strategy questions first, evaluation questions follow

Thinking about the  
“level” of your  
evaluation lens

# Grantee-level Evaluation & Data



What kind of change is  
grantee X producing and why?

**PROBLEM**

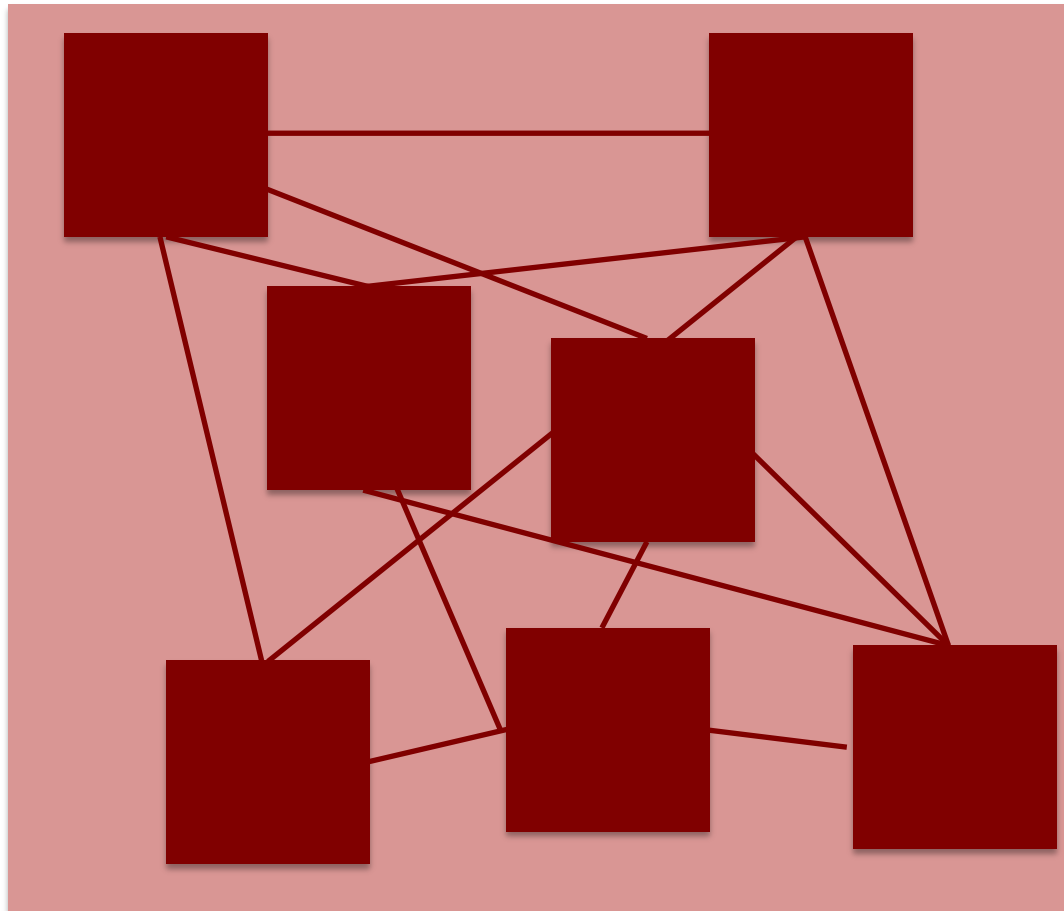
The sum of individual  
grantee changes



Policy Progress

Thinking about the  
“level” of your  
evaluation lens

# Strategy-level Evaluation & Data



What kind of change is the portfolio of investments and supporting activities producing and why?

Thinking about the  
“level” of your  
evaluation lens

## Strategy-level Evaluation & Data

To make it work...

The composition of your portfolio and design of auxiliary support must have a goal and a theory.

- Why this mix of grantees?
- How is their work complementary or additive?
- Does it matter how they relate to each other or the rest of the field?
- How do our auxiliary supports affect the capacity of individual orgs or the group to achieve our goal?
- How is this package of investments affecting the policy environment?



Thinking about  
the design of  
your strategy

# Are grantmaking and auxiliary activities designed to ...

**Policy  
Target  
Approach**

**...advance a specific policy goal?**

*such as Medicaid expansion, public investment in  
early childhood screenings & referrals, tobacco tax*

**Advocacy  
Niche  
Approach**

**...strengthen the presence or influence of a particular  
strategic “function” within the advocacy arena?**

*such as  
communications, community organizing, or data & analysis*

**Field  
Building  
Approach**

**...build the capacity and influence of the field of advocacy  
organizations to shape and respond to a shifting policy  
environment?**

*like building a “deep bench” of  
advocates to be ready to move a variety of policy targets*

Strategy  
questions first,  
then evaluation

What are meaningful strategy  
questions for these approaches?

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Policy  
Target  
Approach

Advocacy  
Niche  
Approach

Field  
Building  
Approach

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## World Café Round 1

20 minutes

1. Select one person to capture insights on the flip chart.
1. Drawing from your experience in your own foundation and using concrete examples where possible, discuss:
  - *What kinds of questions, if answered, would be most strategically useful to:  
    *Foundation board?*  
    *Program staff?*  
    *Advocates in the field?**
  - *Why? What kinds of decisions would it help each of those users make?*

## World Café Round 2

30 minutes

1. The person who stayed at their own flip chart briefly reviews highlights from the previous conversation and asks if there is any fresh insights from other groups. (5-10 minutes)
  
1. Discuss and capture:
  - *What kinds of data might help you answer these questions?*
  - *If our evaluation efforts focused on these kinds of questions, how would our foundation's mindset, capacity, resources, or communications about evaluation have to change?*
  - *What tradeoffs and resistance can we foresee if we shifted to this kind of evaluation approach and how can we prepare for that?*

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