

Advocacy evaluation: What it is and where to find out more about it

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INTRODUCTION

Advocacy and policy change have become increasingly important strategies in health promotion efforts. As a result, advocacy evaluation is emerging as a necessary competency for health promotion practitioners. This article introduces the growing field of advocacy evaluation. We asked two experts to help us write it: Ehren Reed from Innovation Network, and Jackie Williams Kaye from the Atlantic Philanthropies. They are co-chairs of the American Evaluation Association’s Advocacy and Policy Change Topical Interest Group.

WHAT IS ADVOCACY EVALUATION?

In order to describe advocacy evaluation, we start by defining advocacy. According to Innovation Network, a nonprofit dedicated to “transforming evaluation for social change,” advocacy encompasses the wide range of activities used to influence decision makers, such as: litigation, lobbying, public education, capacity building, network formation, relationship building, communication, and leadership development. For example, health promotion advocacy might involve a coalition’s effort to help pass a local anti-smoking ordinance or an agency’s effort to promote changes to a school district’s sexual health education policy.

Given advocacy’s broad scope and application, advocacy evaluation differs from more traditional approaches to evaluation in several fundamental ways. Whereas many evaluations assess the worth of a program or activity retrospectively, advocacy evaluation often takes a prospective approach. Evaluation is seen as an integral component of the advocacy effort that is useful for goal-setting, strategy development, and program monitoring. Learning and mid-course

strategic corrections are emphasized in a fast-paced environment where tactics often need to change quickly based on environmental conditions. Evaluation data are collected and used in real-time to inform advocates' decision-making and help shape efforts that produce intended policy-related outcomes. Michael Quinn Patton (1994) first articulated many of the approaches that have become central to advocacy evaluation in his article on developmental evaluation.

A number of challenges are inherent to conducting advocacy evaluations. Policy change is a complex process that typically involves many advocates and organizations working over long time periods (sometimes decades). In addition, the context for an advocacy campaign can change quickly based on shifting political, social, or economic conditions. As a result, advocacy evaluators need to use their methods flexibly to ensure that contributions from the many players involved in a campaign are captured as environmental conditions evolve. While the evaluator's methods mix might be typical (e.g., interviews, surveys, and document reviews), the emphasis on assessing continuous progress toward a long-term policy goal might not be. In practice, this focus on flexibility and forward movement often means using non-traditional evaluation reporting techniques such as extended memos and intense debriefing meetings (as opposed to end-of-project reports).

EXAMPLES OF ADVOCACY EVALUATIONS AND QUESTIONS

Many foundations, nonprofits, and community-based agencies are now using advocacy evaluation in their work. For example, as its first major investment in advocacy, The Colorado Trust recently provided nine advocacy organizations with general operating support to promote comprehensive statewide health care access (see www.coloradotrust.org). The Trust has worked with Innovation Network and a team of Colorado-based evaluators to design an evaluation that builds grantees' evaluation capacity while monitoring grantees' progress – both individually and

collectively – toward the desired policy outcomes. Similarly, the Strategic Alliance is a California coalition that is using advocacy evaluation to inform its efforts to promote nutrition and physical activity (see www.preventioninstitute.org/SA). For the Strategic Alliance, advocacy evaluation is grounded in the concept of “strategic learning”: their ongoing evaluation is designed to identify and answer questions that, in turn, will help the Alliance determine and refine its strategies.

In these and other examples, asking about the extent to which a targeted policy changes is only one of multiple questions that might be used to frame the evaluation. Other common advocacy evaluation questions include:

- How are advocates building their professional capacities by learning skills such as communications, media relations, strategy development, and campaign planning?
- Based on influential factors in the political, social, and economic environments, what advocacy strategies are likely to be most effective for policy change efforts?
- How can multiple agencies work together effectively in order to advocate for mutually desirable policy changes?
- How can advocacy strategies be changed during a campaign in order to more effectively influence desired policy changes?

As you can see, advocacy evaluations are often focused on promoting and assessing changes to capacity, collaboration, strategies, and learning.

ADVOCACY EVALUATION RESOURCES

While advocacy evaluation is still a young field, there are a number of organizations that provide access to excellent resources that are useful for understanding its key concepts and methods. These include:

- **Innovation Network:** www.innonet.org. This nonprofit’s website offers a free clearinghouse of over 100 advocacy evaluation resources. For example, this site contains summaries of (1) useful advocacy evaluation data collection methods and (2) organizational capacities that appear critical to effective advocacy. In addition, Innonet provides a free Advocacy Evaluation Update newsletter and recently published a free report called Speaking For Themselves: Advocates’ Perspectives on Evaluation.
- **The California Endowment:** www.calendow.org. This foundation’s website has sections

devoted to advocacy and evaluation. Several of its freely downloadable materials are particularly relevant: The Challenges of Assessing Advocacy: Parts I and II and a Framing Paper from the foundation's January 2009 convening on advocacy and policy change evaluation.

- **The Evaluation Exchange:** www.hfrp.org/evaluation/the-evaluation-exchange/issue-archive/advocacy-and-policy-change. A freely downloadable publication from the Harvard Family Research Project, the Evaluation Exchange devoted its entire spring 2007 issue to advocacy evaluation. It contains numerous strategies, tips, and resources.

CONCLUSION

Advocacy evaluation is an increasingly important element of health promotion practice, and a number of freely available resources help guide its use. There is no doubt that advocacy evaluation is challenging to undertake and often differs from more traditional evaluation approaches. For example, the need to collect and utilize real-time data that responds to changing environmental conditions requires high levels of flexibility, both in evaluation planning and reporting. However, a number of benefits inherent to advocacy evaluation should resonate with health promotion practitioners. Well-executed advocacy evaluations promote “in-the-moment” decision-making that leads to mid-campaign course corrections, organizational learning, and capacity building. These positive effects can in turn highlight the contributions and growth of both advocates and agencies in ways that end-stage evaluations might miss. Thus, it is our hope that you will consider learning more about advocacy evaluation and integrating some of its core concepts and methods into your work.

REFERENCES

Patton, M. Q. (1994). Developmental evaluation. *American Journal of Evaluation*, 15(3), 311-319.

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