

# M&E OF ADVOCACY PORTFOLIOS



Different methods can be used to aggregate and summarise change across a portfolio of advocacy interventions. Sometimes, advocacy interventions can have a cumulative effect that is greater than the sum of their parts. CSOs may also seek to generate lessons or draw conclusions across multiple advocacy interventions.

In addition to monitoring individual advocacy interventions, CSOs often need (or are required) to monitor and/or evaluate portfolios of advocacy interventions. These can vary widely in scope, and may include:

- interventions based around a common theme, such as land rights;
- interventions within a sector of work, such as health or education; or
- interventions carried out within a specific geographic area.

At the other end of the scale, some International non-governmental organisations (INGOs) have large portfolios of advocacy interventions that have little in common with each other, except for the INGOs' involvement.

Sometimes, a series of advocacy interventions can be deliberately designed to make up an advocacy programme. In this case a CSO would be expected to develop an M&E system to support the programme right from the start. But portfolios of advocacy work may also develop and evolve organically over time. This means that rather than being planned from the start as deliberate programmes, they instead emerge as a set of advocacy interventions which can be linked together in some way.

Within a portfolio of work there may be some advocacy interventions that have been designed and implemented as discrete projects or programmes, and have been formally monitored (or evaluated) over their lifetime. However,

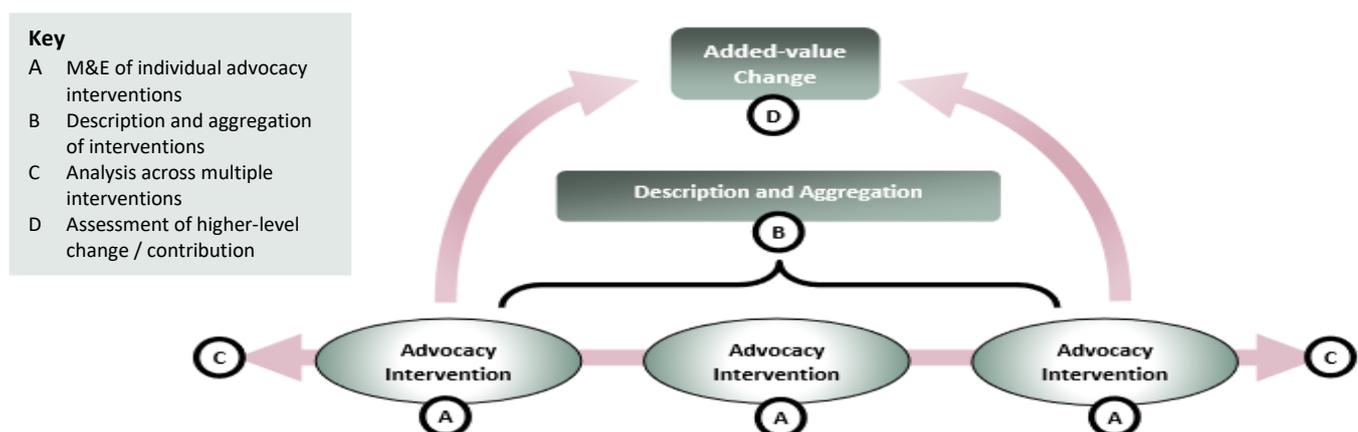
there may also be pieces of advocacy work that were not considered to be large or important (or successful) enough to be formally monitored or evaluated. This could potentially include many small pieces of advocacy work that were carried out in response to immediate challenges or opportunities, but did not evolve into larger interventions for one reason or another. This means that an advocacy portfolio may contain a range of different interventions, some of which have been monitored and evaluated over time, and some of which have not.

There are no set rules for monitoring and/or evaluating an advocacy portfolio. CSOs wishing to monitor or evaluate an advocacy portfolio need to adjust and adapt their methodology depending on what the portfolio looks like, and how closely the individual advocacy interventions are linked. In general, however, there are four different aspects to monitoring or evaluating an advocacy portfolio. These are shown in the diagram below, and are described in the rest of this paper.

## Understanding individual advocacy interventions

In order to understand an advocacy portfolio it is usually important to understand the individual advocacy interventions within that portfolio. Some of the papers in this section of the M&E Universe provide guidance on how to monitor and evaluate individual advocacy interventions. This M&E may be based around:

M&E of advocacy portfolios at different levels



- informal monitoring carried out by advocates as they go about their normal tasks;
- standard monitoring processes, such as defining objectives and indicators, collecting and reporting information on an ongoing basis, answering monitoring questions, or writing regular reports;
- formal evaluations of advocacy interventions;
- research carried out as part of (or including) advocacy interventions; or
- sense-making activities such as informal reviews, workshops, away days, etc.

When seeking to monitor or evaluate an advocacy portfolio it is important to note that information on discrete advocacy interventions may already exist in the form of reports, documents, case studies, audio-visual materials, or more innovative types of media such as songs, dance and theatre. Or it may exist through institutional memory – for example, in the minds and memories of CSO staff or other actors deeply involved in individual interventions.

However, it may not. Sometimes the first task when assessing an advocacy portfolio is to seek to gain an understanding of the work carried out under individual interventions, and what changed because of that work. It is not impossible to assess an advocacy portfolio without understanding the individual interventions that make up that portfolio, but it certainly makes it more difficult.

## Description and aggregation

Historically, the standard way of reporting multiple advocacy interventions was to develop an indicator such as ‘# of policy changes’, and then to count the number of policy changes a CSO thinks it has contributed to. Unfortunately, this kind of approach is over-simplistic.

Better indicators may be qualitative (e.g. ‘nature of policy change to which [a CSO] has contributed’) or mixed (e.g. ‘# and description of changes to policy, with a contribution from [the CSO]’). These more nuanced indicators allow a CSO to pull together a series of descriptions of advocacy interventions, covering at the very least:

- what was the purpose of the advocacy intervention;
- which activities were carried out;
- what changed in the short- and medium-term;
- what the contribution of a CSO was to that change; and
- what other factors were important.

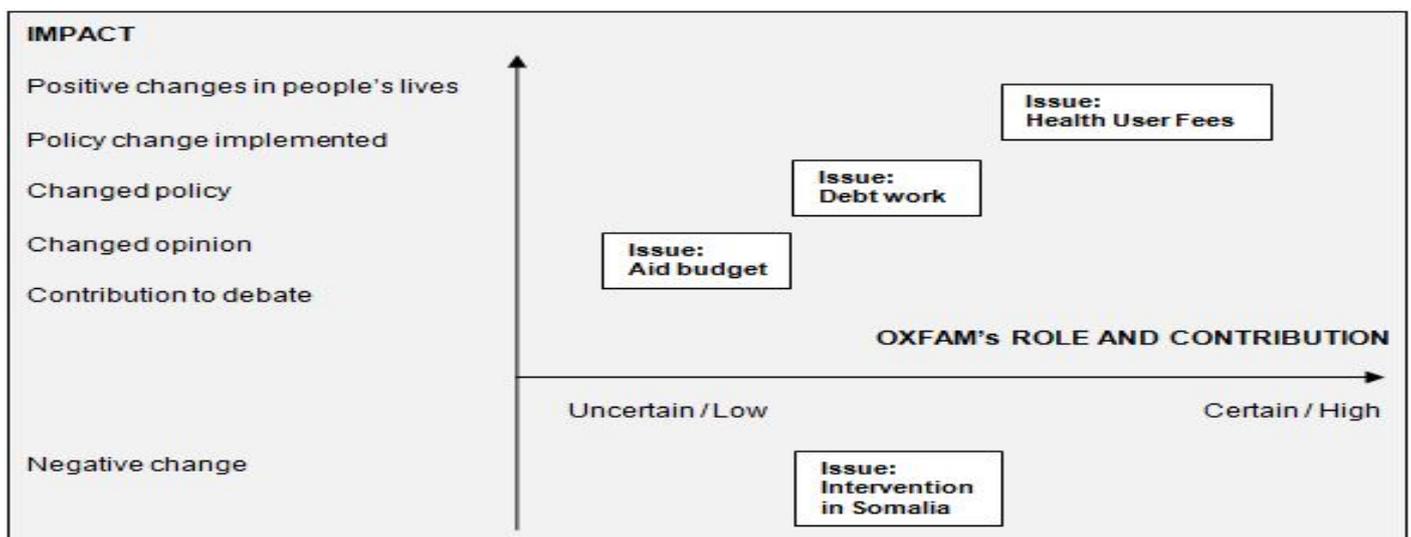
Sometimes this can be done for all relevant advocacy interventions across a portfolio. Alternatively, a CSO might choose to describe a sample of interventions based on different criteria, such as best cases, worst cases, unusual cases, or cases that generated significant learning.

Some M&E methodologies are deliberately designed to examine multiple interventions, cases or changes. For example, the Most Significant Change (MSC) technique is based around purposeful sampling of most significant cases; whereas outcome harvesting is designed to describe multiple change cases in order to answer defined monitoring questions.

Sometimes, CSOs use more visual methods to describe changes across portfolios. An example from Oxfam GB is shown in the diagram at the bottom of the page (Roche 1997). In this particular example the advocacy interventions had nothing much in common. Yet the diagram is still capable of showing the range of work carried out by Oxfam, along with the estimated impact of the advocacy interventions and the degree to which Oxfam contributed.

More nuanced visualisations might be capable of showing a range of different criteria such as:

- the overall impact of the intervention;
- the *type* of change resulting (e.g. policy change, capacity change, changes in social norms);
- the type of contribution made by a CSO (e.g. sole actor, lead contributor, team role, etc.);
- the degree of certainty of findings;
- the amount of resources devoted to the advocacy intervention; and
- the baseline situation before the intervention started.



## Analysis across multiple interventions

CSOs may also seek to generate lessons or draw conclusions across multiple advocacy interventions. This may involve looking for patterns across different pieces of work, identifying the strengths and weaknesses of different advocacy approaches, assessing what worked and what didn't, and generally trying to identify what can be done to improve future performance.

Again, this can be done by looking across a range of formal products, such as case studies of advocacy interventions or evaluation/review reports. Some formal evaluations attempt to look across multiple interventions in this way, and some may be designed to go beyond individual CSOs to look at how multiple organisations have contributed to a portfolio of advocacy interventions.

However, analysing across multiple interventions does not have to be an expensive or time consuming exercise. For instance, it can be done by inviting different stakeholders to a meeting or workshop, and interrogating their experiences of different advocacy interventions. Obviously, the more that is known about the impact of different interventions, the more useful such an exercise will be. But sometimes, simply getting people to sit down and analyse jointly can reveal important lessons.

More formal M&E methods also exist that can enable analysis across multiple cases. One method described in the M&E Universe is Qualitative Comparative Analysis (QCA). QCA is designed to enable the analysis of multiple cases in complex situations, and can help explain why change happens in some cases but not others.

Learning across portfolios may also focus on internal issues within an advocacy intervention that can help improve performance. For example, reviews across multiple advocacy interventions could highlight the need to ensure that there are plans in place to replace key staff at short notice if they become ill, so as not to lose momentum. Or they could highlight the need to enhance partners' capacity in specific areas of advocacy work.

In some large advocacy campaigns, reviews may be designed to support work across different levels. For example, regular reviews of local-level advocacy work may feed into wider reviews across national, regional or international campaigns. Or findings from international or regional reviews may be fed back down to local levels.

## Assessing added-value change

CSOs' advocacy interventions can sometimes have a cumulative effect that is more than simply the sum of their parts. For example:

- different advocacy interventions carried out over a long period of time may have a cumulative effect that helps bring about policy change, or improvements in the way that different policies or plans are implemented;

- multiple interventions aimed at addressing local implementation of policies and laws might mean that those enacting the policies or laws pay more attention to how they are applied; or
- advocacy interventions aimed at different policy changes under a common theme – such as land rights or water access – may contribute to longer-term advocacy outcomes such as improved civil society capacity to engage in advocacy work, increased public support for issues, or enhanced democratic space (Schlangen and Coe 2014).

The last point is particularly important. Many advocacy interventions that did not achieve medium-term objectives such as preventing a new law or changing a policy, might still have contributed to longer-term change agendas, such as altered power relations. These kinds of changes may be missed if CSOs only assess or describe the outcomes arising from individual advocacy interventions. Advocacy portfolios often contain a lot of 'failures', alongside a small number of big successes (Teles and Schmitt 2011), and looking at the big picture can help a CSO better understand the contribution it is making to longer-term change.

One possible way of assessing the impact of an advocacy portfolio is to treat it as if it were a single, very large advocacy intervention. This would involve:

- assessing the high-level change that has taken place;
- getting as good an understanding as possible of the impact of individual advocacy interventions;
- working backwards from the high-level change to investigate how individual advocacy interventions contributed to that change; and
- taking account of other factors that may have contributed.

Viewed in this way, assessing the cumulative effect of a large portfolio of advocacy interventions is perhaps no more difficult than assessing individual advocacy interventions. The scale is different, but the processes may be similar.

A lot depends on when the assessment is carried out. Sometimes, a set of advocacy interventions can evolve and coalesce around a theme over time. They may not be planned with specific longer-term goals in mind, but they may end up that way. In this case, an evaluation or review may be carried out after the event, in an attempt to bring together many disparate interventions under a common theme.

At the other end of the scale, a CSO might design a large advocacy intervention, and then break it down into smaller parts. For example, large advocacy interventions designed to address major international or national challenges might be broken down into a portfolio of multiple smaller, linked interventions, each with their own M&E systems and approaches that feed into a broader M&E framework. Here, there would be more scope for engaging in ongoing M&E across the portfolio that is capable of feeding into decision-making on a continuous basis.

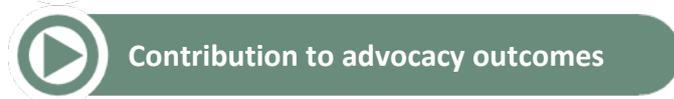
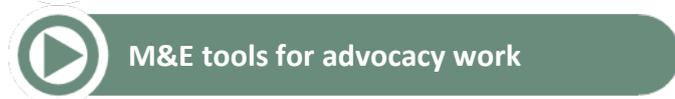
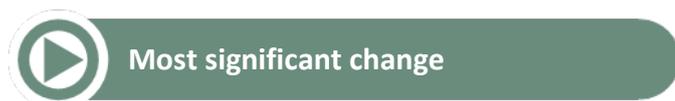
## Summary

When assessing an advocacy portfolio, some CSOs will use all four of the approaches highlighted in this paper. Others will pick and choose different approaches for different purposes. As ever in M&E, it depends to a large extent on the purpose of the exercise, the nature of the portfolio, and the resources available.

As highlighted throughout this section of the M&E Universe, advocacy M&E requires clarity on what a CSO is (or was) seeking to achieve, a good understanding of the uncertainties and complexities involved in advocacy work, and a willingness to be honest and open about the opportunities and limitations of such work.

## Further reading and resources

Some of the methods described in this paper can be accessed by clicking on the links below. Some tools and methods for advocacy work can also be found in the papers on 'M&E tools for advocacy work' and 'Contribution to advocacy outcomes'.



## References

- Roche, C (1997) "Assessing the impact of advocacy work" in *Appropriate Technology, Vol. 24 no 2*, Intermediate Technology Development Group, Rugby, England.
- Schlangen, R and Coe, J (2014). *The Value Iceberg: Weighing the benefits of advocacy and campaigning*. Better Evaluation. Discussion paper 1, December 2014. Second ref (date). Title. Guff
- Teles, S & Schmitt, M (2011). *The Elusive Craft of Evaluating Advocacy*. Stanford Social Innovation Review. (Summer 2011), 38–43.

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