MONITORING ADVOCACY ACTIVITIES

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Most advocacy work is carried out in complex environments where there are many different influences on change. This has important consequences for how monitoring and evaluation (M&E) is carried out, and how objectives, indicators and questions are developed.

In a straightforward, service delivery project, CSOs often develop a simple logic model, which defines the activities they intend to conduct, their outputs (deliverables), the desired outcomes (short- to medium-term changes) and impacts (long-term, sustainable change). This is based on a belief that if a CSO can show that it implemented activities well, it can then measure predicted changes and claim these resulted from its work. However, even within a simple project this kind of logic may be misleading. And within advocacy projects it is almost never appropriate. This is explained in the diagram below.

A crucial difference is that conventional, service delivery projects are often based on an assumption that many different project activities together combine to bring about
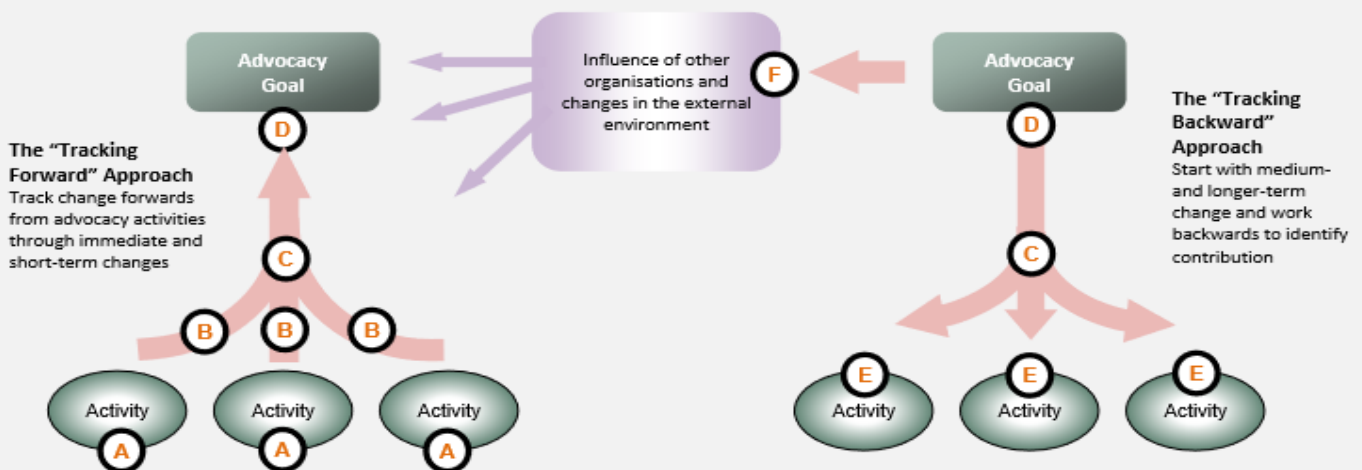
Different advocacy activities		
Press conferences	Expert advice	Marches
Court cases	Poster campaigns	Piloting
Pamphlets	TV or radio drama	Letter writing
Workshops	Technical support	Theatre
Petitions	Public forums	Conferencing
Press releases	Policy briefs	Exposure tours
Lobbying	Leaflets	Boycotts
Networking	Press adverts	Publicity stunts

Source: Ross and Collinson (u.d.)

the desired change. All are necessary, and all contribute. But in advocacy work, many different activities may be tested within the same intervention (see box above). Some may have little or no effect, whilst some may even be counterproductive. Therefore, in order to truly understand how an advocacy intervention has influenced change, it is necessary to investigate the contribution of the different advocacy activities carried out as part of the intervention.

The "tracking forward" approach: In the diagram on the left, there are multiple advocacy activities. It is usually fairly straightforward to describe the activities (A) carried out, and to assess some of the immediate or short-term changes resulting from those activities (B). However, as change is tracked forward over time, it becomes more and more difficult to separate out changes resulting from different advocacy activities (C). Eventually, there may be many contributors to longer-term change (D), including other organisations working on the same advocacy issues, and changes in the wider political, social or economic environment.

The "tracking backward" approach: In the diagram on the right, the direction of M&E is reversed. Rather than starting with activities and following changes over time, organisations can work backwards from medium- or long-term change (C & D) and seek to identify what contributed to the change. Changes may be partly the result of work carried out under different advocacy activities (E), but they may also have been influenced by external factors or events, including the work of other organisations (F).

In reality, the diagram shown on the previous page is often an oversimplification. The true position in a large advocacy programme might be that a CSO implements many different advocacy activities; several CSOs contribute to an advocacy intervention; and/or many advocacy interventions contribute to advocacy goals over time. And it is very common for CSOs to cooperate with each other even at the level of activities.

Very simple advocacy interventions may get away with applying the standard "tracking forward" approach on its own. But as advocacy interventions get larger and more complicated, involving more actors and having multiple advocacy objectives, it becomes increasingly important to supplement this with the "tracking backward" approach.

Both are often necessary when monitoring advocacy interventions. CSOs need to assess the immediate and short-term changes resulting from advocacy work in order to understand whether it is having the desired effect. They can then use this information to adapt if necessary during the course of an advocacy intervention. Later on, CSOs may also need to assess medium- and long-term change, and then work backwards to identify the factors that contributed to those changes.

This paper largely deals with the "tracking forward" approach. It covers M&E work designed to assess immediate or short-term change. A separate paper in the M&E Universe focuses on assessing contribution to medium- or longer-term advocacy outcomes.

Indicators and questions

Change resulting from different advocacy activities can happen at different levels. These include:

- the activities carried out, and outputs delivered, over which a CSO (or coalition) has almost complete control;
- The immediate or short-term changes resulting from an advocacy activity, where a CSO (or coalition) can reasonably claim a direct contribution.
- The medium- and longer-term changes that a CSO (or coalition) is contributing to, which may be the result of the work of many different actors, as well as changes in the external environment.

Most CSOs do not find it difficult to measure their activities or their outputs (deliverables). However, it is quite common to see CSOs attempting to claim influence over high-level changes, such as government policy change, on the assumption that if they have delivered activities and outputs as planned there must be a connection. This can be dangerous in advocacy work (see case study).

A key part of monitoring an advocacy intervention is therefore to try and identify the desired immediate or short-term changes that it is hoped will directly result from advocacy activities. The purpose is to identify changes that show clearly whether or not the advocacy activities are having their desired effects.

Case study: The Dangers of Ignoring External Factors

INTRAC worked on several climate change programmes between 2010 and 2020. Many of these dealt with mitigation - actions to limit the magnitude or rate of global warming and its related effects. For example, one project sought to promote alternatives to local communities, which meant they did not have to burn fossil fuels. Another supported developing country negotiators to become more influential in high level climate change conferences.

These programmes all had different objectives and indicators. However, most of them had the long-term goal of reducing Greenhouse Gas Emissions (GHGs). In 2020 there was indeed a significant reduction in GHGs. Using a simple logic model, it would have been easy for each programme to track forwards and claim some influence over this change. For instance, a programme could show that it helped raise the capacity of developing country negotiators, thereby leading to their increasing influence over climate change negotiations, thus resulting in an improved international deal, and eventually to lower Greenhouse Gas Emissions (GHGs).

In point of fact, even the most cursory analysis of change would reveal that the reduction in GHGs was almost entirely the result of the Covid-19 pandemic that swept the world in early 2020, and caused the closure of many factories and industries that cause GHG emissions. This emphasises the dangers of trying to treat advocacy interventions as if they were simple, straightforward service delivery projects, where cause and effect is (sometimes) easier to establish.

The desired short- and medium-term changes, once defined, can be assessed in a number of different ways

- **Specific objectives:** Some advocacy objectives are specific enough to be measured directly. For example, if an objective is to *"influence 100 people to sign a petition"* then there is no need to go to all the effort of developing an indicator that will look almost exactly the same as the objective.

- **Quantitative indicators:** These are most useful when the type of change resulting from an advocacy activity can be accurately identified. For example, if an advocacy intervention involves a letter-writing campaign, then counting the number of letters written and sent by supporters is an obvious first step.

- **Qualitative indicators:** Qualitative indictors are more useful when there is a range of potential actions that can be taken by advocacy targets or allies. For example, an indicator such as *'actions taken by members of the public following an advocacy event'* is capable of capturing a variety of different changes, even if the exact nature of those changes cannot be accurately predicted beforehand.

- **Questions:** These usually provide the most flexibility. Questions may focus on what changed (e.g. *'how did local government decision-makers react to the advocacy message?'*). These kind of questions are often known as evaluation or monitoring questions. Or they may focus on wider issues (e.g. *'which advocacy messages resonated most strongly with the public'*). These are sometimes known as learning questions.

There is often confusion around the distinction between qualitative indicators and questions. In some cases, a potential change can be phrased as either a qualitative indicator or a question, and it doesn't matter much. For example, if a CSO wants to know how people are reacting to its messages it could develop a qualitative indicator ('*ways in which people are responding to messages*') or a question ('*how are people responding to messages?*').

The main difference is that qualitative indicators should always provide direct evidence of a change of some kind – such as an objective or goal – whereas questions can be broader. For example, a question such as '*which advocacy activities were most or least effective in contributing to change?*' is not designed to provide direct evidence of a change statement, but is instead designed to understand how or why a change happened.

CSOs can, and often do, use multiple options (e.g. both quantitative and qualitative indicators) when monitoring and evaluating advocacy work. And, of course, many changes cannot easily be predicted, and only show up as unexpected changes once work has begun.

There are so many different potential objectives, indicators and questions that it is futile to attempt to develop a comprehensive listing. However, the table below provides some illustrations and examples of indicators and questions across a range of different advocacy activities.

It is clear from the table that many indicators and questions can be monitored as advocates go about their daily tasks, and there is often no need to carry out extra work for M&E purposes. However, there are exceptions. For example, additional M&E work may be needed to record the number of column inches in newspapers devoted to an advocacy issue, or to identify the number of people quoting research.

Whether advocates develop quantitative indicators, qualitative indicators or questions – or indeed do none of these and rely instead on mapping changes directly against objectives – is sometimes down to which is most suitable for the particular task, and sometimes simply a matter of preference. And sometimes, of course, CSOs may have to develop indicators in specific formats to suit the needs of external agencies such as donors or host government. The key thing is that advocates are clear about:

- the immediate and short-term changes they hope will result from advocacy activities, if those activities are successful; and
- how they intend to find out whether or not this has happened.

In most situations, advocates will need to know this information whether or not it is required for M&E purposes. The key thing is to acquire the information at a time, and in a manner, that best supports the management of the advocacy intervention.

Sample indicators and questions designed to show immediate or short-term change

Activity	Objective	Quantitative indicators	Qualitative indicators	Questions
Lobbying	Increased willingness of decision-makers to act in support of an issue	# of emails received from decision-makers after meeting ed># of invites to further meetings received from decision-makers	Tone of discussions during meeting Follow-up actions taken by decision-makers immediately after lobbying Evidence of change in discourse / declaration after meeting	How did decision-makers react or behave in the meeting? What follow-up actions, if any, were taken by decision-makers immediately after the meeting? How much respect and trust was there at the meeting?
Public Campaigning	Increased interest and pressure from the public around an advocacy issue	# of people attending events or rallies # of people making enquiries to a campaign or requesting materials # of hits / likes on social media sites	Actions taken by community members in support of an issue Extent to which targeted audiences can recall particular campaign messages Ways in which the public are becoming involved in an issue	How have targeted audiences encountered a campaign (if at all)? What actions have they taken to support the issue? How important is this issue for people? Are there differences in how men and women perceive it?
Media work	Increased positive, high-quality, media coverage of an issue, leading to action on behalf of the public	Column inches in newspapers Amount of air time on TV or radio # hits on websites or social media sides	Quality of coverage generated in print, broadcast, or online media Range of media through which an issue is being discussed Actions taken by people based on media coverage	How is media coverage of an issue changing over time? What range of people or communities are being reached through media? How are men and women responding to media messages?
Research	Decisions are informed by relevant, high-quality research	# of invites to discuss research findings with key decision-makers # of quotes/citations of research # of people accessing articles, reports, briefs or websites	Different ways in which people / institutions have used the research Actions taken based on research findings Extent of interest shown in the research findings by policy-makers	How have decision-makers reacted to the research findings? How were decision-makers involved in developing and shaping the research? Has the research been developed and communicated in the right way to influence people?
Networking	An increasing number of organisations become involved in an advocacy issue	# of organisations actively involved in an issue # of partners signing up to an alliance or coalition Amount of resources contributed to the cause	Range or diversity of organisations involved in an issue Level of collaboration between partners around an issue	In what ways are different organisations involved in an issue? To what extent are the organisations the right ones? To what extent are partnership efforts aligned?

Progress markers

Some CSOs prefer to use progress markers as an alternative (or supplement) to indicators and questions. Commonly used in Outcome Mapping, progress markers are a bit like very specific objectives, and a bit like indicators. In Outcome Mapping, they are identified as the behavioural changes a CSO would *expect to see* in targeted individuals or institutions, those they would *like to see*, and those they would *love to see*. The important thing is not whether any individual progress marker is achieved, but whether as a group they show the kind of changes hoped for.

In advocacy interventions, CSOs might choose to develop a range of progress markers for individuals or institutions over which they have some influence. The box opposite, for example, shows some potential progress markers for government decision-makers who are the targets of lobbying efforts.

Progress markers can be developed and adapted in many ways, and do not have to be used alongside Outcome Mapping. Some CSOs choose to set a range of progress markers across different dimensions of an advocacy intervention, to provide a fuller picture of what is, or isn't changing. For example, the broad progress markers contained in the diagram below are set against multiple dimensions of an advocacy campaign. They range from results directly influenced by an advocacy intervention, to longer-term changes that are needed in order to realise the

Example progress markers for lobbying work	
Expect to see decision-makers ...	• responding to requests for meetings • agreeing to meet with CSO to discuss concerns • sending staff to meetings with the appropriate level of authority
Like to see decision-makers ...	• reading materials provided by CSO before the meeting(s) • asking relevant questions during the meetings • making positive statements during meetings about future actions • proactively inviting the CSO to supply further information or attend future meetings
Love to see decision-makers ...	• making public declarations around issues raised by CSO • taking independent action on issues raised by CSO • inviting CSO to further meetings to review progress

ultimate goals. If made more specific to match the expectations of a specific advocacy intervention, the model could provide an effective tool to help a CSO identify and explain change across a large advocacy intervention. The full explanation for the model can be found in Coe and Schlangen (2019, p35-36).

Table: Progress Markers Set Against Multiple Dimensions of Change

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As demonstrated by the diagram, there are many different options for defining and capturing results in large advocacy interventions, other than using simple logic models such as the logical framework.

Summary

In any advocacy intervention, it is important to know how well work is being carried out, and to identify early signs of change. In smaller interventions, this can be done informally. But in larger interventions it is often useful to develop a limited number of indicators, questions, or progress markers designed to assess the immediate or short-term changes directly resulting from an advocacy activity, or set of activities.

For small, localised advocacy interventions run by an individual CSO this may be enough. For larger interventions, or for interventions that operate over long time periods, it is not usually possible to assume that higher-level change resulted from defined advocacy activities. Assessing the immediate changes brought about through individual activities may be a first, necessary step. But it will not be sufficient on its own.

In these cases, CSOs need to do two additional things. Firstly, they need to find out whether higher-level, desired changes have taken place. Secondly, they need to identify their own role in contributing to those changes. This is the subject of the next paper in this section of the M&E Universe.

Further reading and resources

The next paper in this section of the M&E Universe looks at how to assess contribution towards longer-term change. Other papers deal with developing M&E systems for advocacy interventions, and monitoring advocacy portfolios.

▶ **Contribution to advocacy outcomes**

▶ **M&E systems for advocacy work**

▶ **M&E of advocacy portfolios**

▶ **M&E tools for advocacy work**
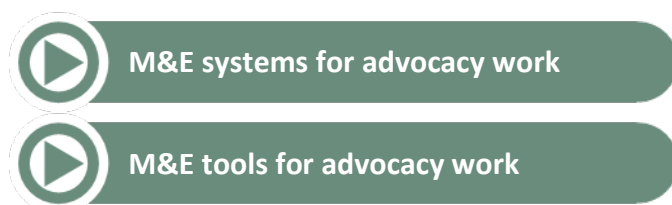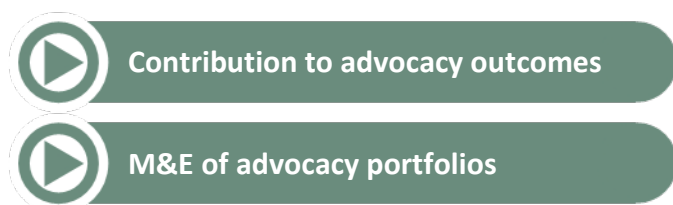
The diagram showing how progress markers can be used to track change across multiple dimensions of an advocacy intervention can be found in the paper by Coe and Schlangen (2019) referenced below. This can be found at https://www.evaluationinnovation.org/publication/no-royal-road-finding-and-following-the-natural-pathways-in-advocacy-evaluation/.

References

▪ Coe, J and Schlangen, R (2019). *No Royal Road: Finding and following the natural pathways in advocacy evaluation*. Center for Evaluation Innovation, February 2019.
▪ Ross, J and Collinson, H (undated). *Selecting the right advocacy activities to achieve the outcomes you are seeking.* Advocacy and Policy Influencing Blended Learning Course Guide. Jenny Ross for INTRAC; adapted by Helen Collinson. INTRAC, Oxford, UK.

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