

## MONITORING AND EVALUATION

Monitoring and evaluating the impact of advocacy can be a difficult task. Many fail to do it, despite building it into their advocacy plans. Nevertheless, monitoring and evaluating advocacy programmes is an important and unavoidable part of advocacy work. Monitoring and evaluation must be central to your advocacy action plan right from the beginning, something that takes place alongside research, planning and execution of your plans, and which influences how you work at every stage. By building it into advocacy planning from the start, you can connect the goals you want to achieve with the development of indicators for success. Ongoing monitoring acts as a way of measuring the progress you have made at every stage. Carrying out periodic evaluation allows you to identify any impacts that your advocacy work is having at the same time as the planning and doing takes place. Evaluation is not just about analyzing the end result, for example, the completion of a piece of work, but an appraisal of longer-term impact.

Monitoring and evaluation rely on collecting and analyzing information about the positive and negative aspects, and impacts, of your work and its progress. A test of quality advocacy planning is the ease by which your plans can be monitored, and how your impacts can be evaluated. Plans with clear objectives, indicators, targets and a stakeholder analysis make monitoring very simple; whereas if your objectives are vague and unspecific, it is almost impossible to monitor or evaluate your progress.

### **Monitoring.**

*Monitoring* is —the systematic and continuous assessment of the progress of a piece of work over time, which checks that things are ‘going to plan’ and enables adjustments to be made in a methodical way. Your monitoring should examine how well your plans are working in practice.

The core aim of monitoring is to decide if your plans and practice need to be adjusted in light of new information, or things not going in the direction expected, or to account for unexpected factors. Effective monitoring will show warning signs if something is failing. It will also help to guide your actions, to ensure they are as effective as possible. While your advocacy goal may be consistent, you need to be prepared to revise your activities in light of what monitoring reveals as your advocacy work develops, and your targets respond.

## **Evaluation**

*Evaluation* is —the periodic assessment of the relevance, performance, efficiency and impact of a piece of work with respect to its stated objectives. An evaluation is usually carried out at some significant stage in the project's development, e.g. at the end of a planning period, as the project moves to a new phase, or in response to a particular critical issue. Evaluation measures whether the objectives of an activity have been achieved, how they were achieved, and what can be learnt from this success or failure.

## **What is the difference between monitoring and evaluation?**

Monitoring is an integral part of the management system and will generally be carried out by those involved in the project from day to day. At the least this will involve the project staff, but it is even better if the project users also participate in monitoring. An evaluation will measure what progress the project has made, not only in completing its activities but also in achieving its objectives and overall goal. It will assess what changes have occurred as a result of the project. Both monitoring and evaluation are concerned with answering questions about outputs, objectives and impacts. Experience has shown that it is very difficult to assess progress in

achieving objectives in periodic evaluations if information has not been collected throughout the project's operation. It is even harder to understand the project's impact unless changes have been regularly monitored. The monitoring and evaluation system is expected to provide evidence that the project has caused a set of immediate effects and long-term changes. The system must be able to show that this evidence is both credible and valid.

**Table summarizing the differences between monitoring and evaluation:**

	<b>monitoring</b>	<b>evaluation</b>
Timing	Continuous throughout the project	Periodic review at significant point in project progress – end of project,
Scope	Day to day activities, outputs, indicators of	Assess overall delivery of outputs and progress towards objectives and goal
Main particip	Project staff, project users	External evaluators/facilitators,
Process	Regular meetings, interviews – monthly, quarterly	Extraordinary meetings, additional data collection exercises etc.
Written outputs	Regular reports and updates to project users,	Written report with recommendations for changes to project –

***Quick and useful: Impact assessment***

Impact assessment is the systematic analysis of the lasting or significant changes – positive or negative, intended or not – in peoples' lives, brought about by a given action or series of actions. (Roche (1999) Oxfam)

**What aspects of advocacy work can be monitored and evaluated?**

Basic levels of activity should be monitored regularly using simple, straightforward and manageable documentation (see a few examples of inputs and outputs that you could monitor, in

the box below). Monitoring works best when the information generated by the process is both useful and used, and that demands it is recorded properly and presented in an understandable way. You should also build in specific review points into your planning; places where you can stop and take stock of progress, examine indicators and future actions, and consider if you need to revise your plan, shift focus or re-direct resources where necessary. Advocacy plans inevitably require strategic choices and shifts, which your monitoring should highlight. Should you continue working with a particular partner? Should you work at a slower pace in order to achieve your goals? Should you work alone and faster, to achieve your goals?

***Quick and useful: Inputs and outputs***

The following are just a few examples of data you can store for monitoring: Inputs: outline the resources you have dedicated and the actions you have taken: the number of emails sent, the plans you have drawn up, terms of reference of research, the number of leaflets produced (time plans, staff time spent, finances), advocacy plans, lobby plans, training sessions, meetings organized, etc. Outputs: record the immediate results of the actions: responses to emails, information sought from you about your campaign, reports produced and/or published, minutes of meetings, reports of visits made, organizational membership of network, number of mentions of your campaign in Parliament, press coverage, etc. Effective monitoring helps guide your actions to ensure that they are as effective as possible. It also provides the information needed for accountability (including reporting to your donors and to your own organization), assessing and improving your performance, increasing and documenting your learning and improving your communications. Where possible you should measure quantitative (numbers) as well as qualitative (narrative) indicators. Much advocacy work results in things that cannot be recorded

statistically: the quality and tone of speeches made by public figures, the networks established, drafts of new agreements and policies. In these cases, you will need to describe the activity, and your analysis, in a narrative way. Recording such data in numbers can restrict understanding of it. The linkages between activities, outputs, outcomes and goals are not straightforward or even easy to predict. Each step depends to some extent on the response of those who have been the target of the advocacy activity. We must anticipate indifference, resistance and opposition and thus our progress will depend on the actions of people outside the project. While our advocacy goal may be constant, our activities may need to be revised in the light of those targeted by our advocacy as well as other developments, and our monitoring should assist this.

### **What are the challenges of monitoring and evaluating advocacy work?**

A great deal of NGO monitoring and evaluation – not just of advocacy work – tends to focus on inputs and outputs, with less attention given to the more challenging but ultimately more important outcomes and impact. Evaluation is the assessment of the impacts from advocacy and is full of methodological challenge. Some of the particular difficulties associated with assessing the impact of advocacy work – in contrast to that of practical project work – are listed below:

- Advocacy is often a long-term activity and policy change may be incremental and slow and implementation may lag significantly behind legislative change. It is therefore often hard to say when a significant change has occurred
- The process of change is often unpredictable
- Multiple objectives – advocacy objectives may sometimes be process orientated and include policy changes, programme changes, networking, opening up democratic space for citizens and increased accountability from service providers

- Hidden decision-making processes may be used by bureaucracies and politicians
- Technology2010Cause and effects are usually difficult if not impossible to clearly demonstrate, as you will be working to influence using a number of advocacy tools, and it may not be clear which activity made the difference to the direction taken by the decision-maker
- Advocacy work is often carried out through networks and coalitions and whilst this is likely to increase the visibility and power of advocacy work, it also makes it more difficult to attribute the results to the work of a particular organization or assess the exact contribution of each organization or group
- A variety of approaches is commonly used at the same time, some more confrontational, others based around private debate. This combination may be effective but renders the evaluation of the contribution of each approach difficult
- Much advocacy work is unique with little repetition

### **How can you review progress in advocacy?**

For all of the challenges associated with evaluating advocacy, the outcomes and the impact of advocacy work need to be recorded. Where possible we need to measure quantitative as well as qualitative indicators. Inevitably, the indicators to measure progress towards advocacy objectives will mainly be qualitative. They may often have to be proxy indicators, as results of advocacy are often intangible (especially the intermediate results before policy change is achieved). This makes the monitoring and evaluation of advocacy more difficult, but the principles remain the same. In practice, it will be necessary to monitor advocacy in a wide range of ways, including, for example: monitoring your target, your relationships, the media, your reputation and public opinion. However, it is vital the monitoring and evaluating system does not get too complex -

keep it simple. Given the contested outcomes of advocacy, it will be useful if data collected for monitoring and evaluation can sometimes be triangulated – using different sources of information; using different methods of data collection; and, using different people to collect data. Advocacy activities also need to be periodically examined in the light of your organization’s aims, in order to prevent advocacy work losing its sense of direction or absorbing resources without being able to justify or account for their use.

### **Advocacy objective**

- Is your advocacy objective moving smoothly or have you encountered obstacles? What are the obstacles and how can they be overcome?
- What else can you do to move your objective forward? Would building new alliances or increasing your media outreach help move your objective through the decision-making process?
- If your objective does not seem achievable, should you alter it? What would be achievable?
- Could you achieve part of your objectives by negotiating or compromising?
- How much does the policy/programme change reflect your objective? Did you win your objective entirely, partly or not at all?
- Can/should you try to achieve the rest of your objective during the next decision-making cycle?
- Or should you move on to an entirely new advocacy objective? What are the pros and cons for each decision?
- Did the policy/programme change make a difference to the problem you were addressing? If you achieved your objective in whole or in part, has it had the impact you intended?

### **Message delivery/communications**

- Did your message reach the key audiences? If not, how can you better reach those audiences?
- Did your audiences respond positively to your message? Which messages worked? Why? Which did not work and why? How can you alter the messages which were not effective?
- Which formats for delivery worked well? Which were not effective and why? How can these formats be changed or improved?
- Did you receive any media or press coverage? Was it helpful to your effort? How could your media relations be improved?

### **Use of research and data**

- How did using data and research enhance your effort?
- Were data presented clearly and persuasively? How could your presentation be improved?
- Did your advocacy effort raise new research questions? Are more data needed to support your advocacy objective? If so, are the data available elsewhere or do you need to conduct the research?

### **Decision-making process**

- How is the decision-making process more open because of your efforts?
- Will it be easier to reach and persuade the decision-makers next time? Why, or why not?
- How many more people/organizations are involved in the decision-making process than before you began? How has this helped or hindered your efforts?
- How could you improve the way you move the decision-making process forward?
- What alternative strategies can you pursue to help take the discussion forward? Should you

target different decision-makers? Should you consider different activities e.g. joint learning seminars?

### **Coalition-building**

- How was your coalition successful in drawing attention to the issue and building support for the advocacy objective?
- Was information distributed to coalition members in a timely fashion? How could information dissemination be improved?
- Are there any unresolved conflicts in the coalition? How can these be addressed and resolved?
- Is there a high level of cooperation and information exchange among coalition members? How could internal coalition relations be enhanced?
- Did the coalition gain or lose any members? How can you enlist new members and/or prevent members from leaving?
- Does the coalition provide opportunities for leadership development among members?
- How was your network helpful to your advocacy? How can you expand your network?

### **Overall management/organizational issues**

- Is your advocacy effort financially viable? How could you raise additional resources?
- Is the accounting system adequate? Can you provide to funders an accurate accounting of how money was spent?
- How could your financial resources have been used more efficiently?
- Were all events produced successfully and meetings run smoothly? Which were not and why not? How could logistics be improved?

- Are you or your organization overwhelmed or discouraged? How could you get more assistance?
- Should you narrow your goal or extend your timeframe to make your effort more manageable?

### **Linking local, national and international advocacy**

Advocacy may be targeted at various political contexts, but in the development sector it will most often need to be targeted at a number of different contexts at the same time – particularly at local, national and international levels.

Effective advocacy work, therefore, demands good communication between actors operating at these different levels. After all, the causes of the development problems that advocacy seeks to tackle are themselves complex and interconnected at every level.

- **Local to national.** When local projects require advocacy, the target of that advocacy might often be at a national level. For example, a local project to install water pumps might depend on advocating nationally for funding streams from which they can be paid. Such a nationally relevant advocacy issue cannot be tackled at a local level alone. Many national advocacy issues originally emerge at a local level where their impact is really felt. The ‘feeding up’ of local advocacy issues to the national level ensures officials and politicians are responding to the priorities of poor communities.

- **National to local.** Sometimes advocacy issues may well emerge only at a national level, for example, the development of a national sanitation strategy. Nevertheless, these

‘policy windows’ offer an opportunity to highlight the impact such policies have on local communities, and to bring local voices to the forefront.

- **International to national.** These inter-related processes are replicated at a national/international level too. For example, national NGO offices may wish to respond to an international issue – such as the conditions attached to World Bank lending. Meanwhile, national NGO offices may advocate at the international level on issues affecting their national policy agendas – such as how World Bank lending is actually used in country. Indeed, when global issues are addressed simultaneously at the international and national level, a much more powerful response can be given. An example is the global campaign on debt relief, and the Global Campaign against Poverty. A similar power exists when national and local advocacy takes place on a unified issue.

- **National to national.** Exchanges can also work sideways with different national networks advocating on a particular issue according to their own particular context, or developing a series of shared national advocacy activities between one country and another country, or regionally, e.g. West Africa or South Asia Regions. For international NGOs, this multi-level approach to advocacy is possible due to their organizational structures. Larger organizations may be connected to international networks through formal or informal links, while national and local NGOs may have access to national level networks. This process of coordination and interrelationship between advocacy networks at different levels is important. Not only does it increase the legitimacy and relevance of advocacy work, but it enables vital support between levels and networks. Advocacy workers of national level organizations rely on detailed

information from the grassroots to support their advocacy work; while they in turn can provide training, analysis, information and advocacy support to local organizations