

# TIPS

## . . . for Evaluating Advocacy

### *A Checklist for Grantmaking Organizations*

- ✓ Discuss Evaluation Expectations Early  
Grantors and grantees can arrive at a common understanding early on of reasonable expectations and ways to demonstrate the grantee's contribution.
- ✓ Recognize That the Evaluation Must Fit the Nature of the Work  
As an example, obtaining face-to-face meetings with key state officials to discuss a policy issue might sound routine. In fact, the meetings might be hard-won critical steps in an effort to influence state regulators, and should be documented, evaluated, and valued accordingly.
- ✓ Value Capacity Building  
A grantee might lose the battle for a legislative, regulatory, or judicial objective, but by motivating a large number of citizens to advocate on its issue, may have built a more experienced grassroots base for the next round.
- ✓ Value Adjustments in Strategies to Address Factors Outside Grantee's Control  
Successful advocates must change strategies to meet changing circumstances, such as a new governor, a shift in public opinion, or the introduction of related legislation.
- ✓ Recognize that Credit for Advocacy Work Is Shared  
Multiple advocates are often required in order to organize, research, and communicate various points of view, litigate, etc., for public policy or election-related efforts. Each organization takes credit for its contribution.
- ✓ Make Use of Available Evaluation Resources and Plan Ahead  
Organizations' self-evaluations can be very informative. When using outside evaluators, grantee should include them in early budgets. Grantmakers must recognize that evaluation requires resources.
- ✓ Consider Evaluating the Foundation's Non-Financial Contribution  
Grantmakers contribute non-grantmaking assistance to grantees' advocacy work by convening grantees working on the same issue, introducing grantees to policy leaders, and in other ways. Assessing that contribution can yield helpful information.

**From *Investing in Change: A Funder's Guide to Supporting Advocacy*, a publication of:**



# TIPS

## . . . for Evaluating Advocacy

### *A Checklist for Grantees*

- ✓ Discuss Evaluation Expectations Early  
Grantors and grantees can arrive at a common understanding early on of reasonable advocacy expectations and of ways to demonstrate the grantee's contribution.
- ✓ Develop Long-Term as well as Incremental Goals  
Policy goals may take years or even decades to achieve. For instance, a grantee may have a long-term goal to make emergency food available by 2010 to all Californians in need and an incremental goal of educating 25% of the public about hunger in the state by the end of this year.
- ✓ Use Benchmarks to Measure Outcomes, Progress, Capacity Building  
A sample *outcome* benchmark may be obtaining a \$2 million appropriation for clean water programs; a *progress* benchmark could be support gained from a key legislator; a *capacity building* benchmark may be educating 50 constituents about the issue and mobilizing them to contact officials.
- ✓ Use Benchmarks of Success that Target Relevant Audiences  
Target audiences may include public officials, the public/constituents, other organizations, and the grantee's own organization.
- ✓ Tell the Story  
Tell the story behind the benchmarks. Explain the process, and why something did or didn't work. Maintaining a budget appropriation level, for example, can be viewed as a success rather than a failure to achieve the goal of more funding, if the context is explained.
- ✓ Make Use of Available Evaluation Resources and Plan Ahead  
Organizations' self-evaluations can be very informative. When planning to use outside evaluators, grantees should include them in early budgets.
- ✓ Make the Evaluation Fit the Nature of the Advocacy Work Conducted  
As an example, obtaining face-to-face meetings with key state officials to discuss a policy issue might sound routine. In fact, the meetings might be hard-won, critical steps in an effort to influence state regulators, and should be documented and evaluated accordingly.

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