

An alternative approach to monitoring and evaluation for advocacy campaigns

When thinking about your approach to monitoring and evaluating your advocacy campaign, I think it is vitally important to be crystal clear about how you define advocacy campaigns.

For me, I think the definition should be incredibly simple. Advocacy campaigns are all about identifying a problem, over which you do not have the power; identifying a clear solution; being clear who has got the power to make the change you want to see; and then persistently seeking to influence that person to bring about change.

So why should you as an advocacy campaigner be interested in monitoring and evaluation (M&E)? Well for you, it should be about looking at your progress and assessing how you are moving towards achieving the change that you want to see. Advocacy campaigns are not just about activity, doing stuff – they are about having and making a discernible impact in the outside world. M&E is also important for your accountability, and accountability is incredibly important for anyone doing advocacy campaigns. Your M&E reporting can be useful for how you communicate within your organisation, to your supporters and allies, and to your funders.

An advocacy campaign is not a project. While they can involve some of the same skills, it requires a very different mindset as you seek to achieve change in a fast moving external environment.

And taking the wrong approach to monitoring and evaluation can be both costly and detrimental to the change you want to see happen. I remember when I was working for a big NGO, and there were plans being drawn up for a new campaign. While there was no clarity on the real problem, solution, target or means to reach that target, I was still asked persistently for my key performance indicators for this prospective campaign. I remember being asked how many MPs I would seek to be lobbying in the months ahead. Now, I could easily have answered that question, but it would've been a completely arbitrary, and indeed possibly fantasy, target.

And this kind of situation is both costly and detrimental. As a result of agreeing to these targets you then feel that you are driven to meet these targets even though they are arbitrary and have no real relationship to what you actually need to be doing as you respond to the reality of your external context. And in some organisations, especially those that operate a traffic light system for their key indicators, a failure to meet an agreed target can put you in a lot of hot water.

So, you need to be incredibly wary about signing up to arbitrary targets, which have the potential to severely restrict your freedom for manoeuvre and ability to respond to external opportunities in the future.

But all of this does not mean that you do nothing. As an advocacy campaigner, it is so important to monitor so that you can record the progress and thinking as your campaign develops. It is also so important to evaluate and check if you are actually making a difference.

Yet at this stage in my argument, I think it's really vital to reflect on two important points. Firstly, most advocacy campaigners are often activists. They want to do things. They don't want to write reports. It is what it is. But this does not mean that advocacy campaigns should not be held accountable and report on their progress; it has been very often not our number one priority. Yet campaigners need to take more ownership of how they should be reporting on their advocacy campaign.

Secondly, all advocacy campaign costs are an opportunity cost. Economists see opportunity costs basically how money could be spent elsewhere for what impact. I have always been hyper conscious that spending in any organisation on advocacy campaigns could equally easily be spent on providing direct frontline services. Advocacy campaigners should never forget that point, and therefore it is so important through our M&E reporting to show the difference that we for making and the progress we are achieving towards our mission.

My approach in more recent years to M&E has been to use a theory of change. I am always wary of using the term theory of change. It has become an incredibly popular phrase in the NGO sector, and not always, I think, in a helpful way. I know that some colleagues have encouraged me to look at some academic theories of change which I've just made my heart sink with their sheer complexity. They are not a catalyst to action!

I also remember running an advocacy training session in Bulgaria many years ago and talking about a theory of change. It was only later in the break that a woman told me that when she heard me mention the words theory of change, she had had a compelling urge to jump out of the window of the hotel. Fortunately, she did not as we were on the top floors, and she reassured me that my alternative approach to a theory of change did not encourage her to complete this action.

In more recent years, I've even stopped using the term theory of change, as I do see that it has so much baggage attached to it, and instead I've talked about the importance of advocacy campaigners developing their future story.

I have written a lot of the past about the importance of storytelling in effective campaigning. I think as a campaigner when you're talking about your campaign, you need to be able to talk about where you've come from (the past), where you are now (the present), and where you are going (the future).

As a campaigner, in addition to a clear message, you need to be able to tell your future story of how you think, based on your assessment of your external environment, that change will happen in the future. I find that using two little words in the English language: 'so' and 'that', can be so helpful in constructing a future story. You do an action so that you can do something else so that you can do something else.

Advocacy campaigns are all about momentum. Change does not happen because you do one thing in isolation. Change happens because you build momentum from one activity leading to another activity. And your articulation of your future story is basically a series of so that's – but it is a logical series of one activity leading to another to build momentum for change.

I have written a lot in the past about the importance of a future story in advocacy campaigns. And if this idea is of interest to you, and you want to know a bit more about a practical example of how to construct a future story and how it might work in practice, do please look at [my pamphlet](#) on the subject.

So as advocacy campaigners having made an assessment collectively of the reality of your external environment, and using that as your foundation, you can then construct your future story. And this is what you need to monitor and evaluate.

And as you think about your future story, I like to think both in terms of big steps and small steps to achieving change. You might want to start thinking about the big steps that you need to take to bring about change. For example: you need to get the evidence, so that you can attract allies, so that you can pressure the government, so that they respond. These are all very big steps.

And in between these steps there are many smaller steps. So, it is also important to think about the small steps particularly in terms of how you will get going in your advocacy campaign. So, for example: you going to draw up terms of reference to advertise for a researcher, so that you can advertise and recruit a researcher, so that they can develop a research plan etc.

As an advocacy campaigner you need the ability to think both of the big picture and the ultimate destination, together with having a micro focus on the small steps that you need to be taking now to build momentum. It's not either or, it's both.

But once you have your future story there are two really important things to remember:

Firstly, there is that great quotation from the German military theorist von Moltke: "no battleplan ever survives the first contact with the enemy." Now I'm conscious that your campaign is not a battle and that your target may well not be your enemy, but nevertheless there is some real wisdom here for all advocacy campaigners.

Once you've drawn up your future story, and done your first external action, you need to review what happened, reflect on your learning and assess together whether you need to make any changes to your future story. Your future story needs to be a living breathing document that is reviewed on a regular basis as a result of your external engagements.

Secondly, I see that it is vitally important for advocacy campaigners to be able to hold two possibly contradictory skills at the same time. Advocacy campaigners need to have the confidence to construct a future story. This does require confidence as none of us can see into the future, and this activity requires us, using our external political intelligence, to construct the best possible future story. But that is not enough.

Advocacy campaigners also need to have humility. Having constructed and then presented their future story, they then need to be open and humble to invite challenge. The best thing you can do with your future story is to share it with other people, to invite challenge. But if you come across a challenge that you can't answer, you need to have the humility to accept that fact, and to reflect and review what this means for your future story.

So, what does all of this mean for M&E? Well, I think it shows that it is vitally important that you keep a copy of each version of your future story. This shows the historic progression and thinking that has underpinned your campaign. I also think that it is so important that you report on the progress developing and implementing your future story.

When I have sat on a board with a responsibility for campaigning, there has only really been two elements that I have been very interested to focus in on. I have wanted to make sure that there is a clear advocacy message with an absence of ambiguity. I have also been really focused in ensuring that they have a robust future story for how they see change happening. And as a board member I expect to be updated with the progress and very importantly the learning that they have acquired through the implementation of their future story and the changes that they have subsequently made.

And in terms of evaluation, a focus on a future story approach will ensure that you are not just passive, but that you are actively asking yourself at regular occasions what have we actually learnt and what do we need to change. Evaluation must be built in at regular intervals in your campaigning, and I would argue that it needs to be done after almost every external engagement. Advocacy campaigning is not just about doing things, it is also about learning from your actions on an ongoing basis.

So, in conclusion, when you are thinking about M&E for an advocacy campaign, I think that it is vitally important that you take a theory of change or a future story approach. Right at the start it is vital that you get organisational buy-in to your thinking. Indeed, as you are pitching an advocacy campaign internally, having a clear message and a robust future story can be a really effective way in building support.

And as you develop your thinking, it is so important that you are genuinely open to challenge on your future story and that you are seeking to openly invite questions. You need to show the confidence to build your future story, and then the humility to invite and accept challenge. You need to be making sure that there is regular space to learn, and then reflecting on that learning to consider what you need to change before you then take the next action.

Advocacy campaigns is a dynamic process operating in a dynamic environment and your M&E needs to be equally dynamic!