

RESOURCE REVIEW

A User's Guide to Advocacy Evaluation Planning

Several months ago I reviewed a resource called *Pathways to Change: Six Theories about How Policy Change Happens*. This excellent resource describes six common pathways or theories of change that advocates for policy change can use to plan their work. If you found that paper helpful for the upstream task of planning policy change activities, you will find *A User's Guide to Advocacy Evaluation Planning* a very useful resource for the downstream task of evaluating policy change efforts.



The Guide is produced by staff and partners at the Harvard Family Research Project. Like all the resources that have emerged from this impressive project, the material is well written and nicely laid out. There are three things, however, that make this resource a “must-have” for advocates of policy change, and the funders and evaluators that support them.

First, the authors explore the different types of outcome that emerge from policy change efforts. This includes making the distinction between policy goals (e.g., the adoption of a subsidized bus pass for low income residents by a city council) and the anticipated impacts that result from achieving that goal (e.g., increased ridership by low-income residents, their increased access/use of social services, changes to transit revenue stream, public perception of the value of the pass, etc.).

They go further by elaborating seven policy goals that a group might aim for throughout the life-cycle of the policy process. This ranges from getting a

new policy on the legislative agenda, to pushing for the proper implementation of a policy once passed, to blocking the passage of undesired policies. These distinctions encourage advocates to be as clear as possible about the types of outcome they seek to generate and evaluate.

The second strength of the resource is the common-sense approach to planning an evaluation. These include four steps that are described fully in the Guide and are summarized in an attractive planning worksheet:

- **Step 1 - Focus:** Identify the evaluation users, their evaluation questions, and how they will use the evaluation results.
- **Step 2 - Map:** Clarify the advocacy strategy, including the desired impacts, the types of policy change sought, and the activities and interim outcomes to get there.
- **Step 3 - Prioritize:** Review which elements of the strategy are most important and/or most feasible to evaluate.
- **Step 4 - Design:** Develop outcomes, indicators and methods to monitor and assess progress and learnings about the policy change effort.

The third strength of the resource is the comprehensive summary of information for each step of the process. This includes an extensive list of outcomes, measures and methods that users can choose from when developing their own evaluation plans. While the authors review some fairly conventional methods well-known to the field, they also include several new and innovative ones, including: Intense Period Debriefs, Bellwether Evaluation and Policy Maker Rating Scales.

The planning and evaluation of policy change efforts encompass a complex and demanding set of inter-related tasks that reflect the dynamic and adaptive nature of the policy process. Advocates, funders and evaluators can make the work more manageable by employing the insights, frameworks and tools contained in this Guide.

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Learn more:

Julie Coffman. 2009. *A User's Guide to Advocacy Evaluation Planning*. Harvard Family Research Project. Link: <http://www.hfrp.org/evaluation/publications-resources/a-user-s-guide-to-advocacy-evaluation-planning>

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Resource Reviews are a series of documents exploring new frameworks, tools and resources for building communities and solving tough challenges.

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