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Author(s): Barry Coates and Rosalind David

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Learning for change: the art of assessing the impact of advocacy work

Barry Coates and Rosalind David

The field of advocacy work is growing and changing rapidly and there is much to be done in exploring not only how best to carry out effective advocacy, but also how best to use the tools of monitoring & evaluation and impact assessment (M&E/IA) to promote learning, improve accountability, and assess the value of advocacy. This paper starts by exploring the complex and changing nature of advocacy work, arguing that standardised forms of M&E/IA are likely to be inappropriate—they will probably provide misleading information, and may create perverse incentives that undermine joint action. However, while there are obvious pitfalls, there are few ready-made answers. The authors suggest that NGOs involved in advocacy at all levels should identify essential elements of their work at the outset and ensure that they monitor and evaluate those areas that they deem most important. Indeed, evidence shows that short-term successes of advocacy work may often be won at the expense of longer-term aims—such as building capacity among partners and contributing to more fundamental change in the future. Throughout, the authors argue that an analysis of power and power structures should guide advocacy strategy and the ways in which advocacy can effectively be evaluated. A successful M&E approach must be flexible enough not only to adapt to external events, but also to be a tool for reshaping the campaign. Those of us concerned with developing M&E/IA tools for effective and accountable advocacy need to start breaking new ground.

Introduction

Advocacy work has become the latest enthusiasm for most agencies involved in international aid and development. Over the past decade NGOs have dedicated more resources and given a higher priority to influencing and advocacy work at all levels (local, national, and international levels). These trends have been driven by a number of factors.

Perhaps the most fundamental of these has been a deeper understanding of the causes of poverty and marginalisation. NGOs and many donors have come to recognise that several decades of aid projects, even those using improved methodologies for intervention, are neither addressing the determinants of poverty nor alleviating its symptoms on a sufficient scale. Indeed, the underlying causes of poverty and social exclusion remain very much intact.

The context for development work has changed dramatically, as Southern NGOs have increased in size and capacity. In many cases, they have (legitimately) displaced Northern NGOs as implementers, or even as channels for aid from government or multilateral agencies.

As democracy and political pluralism have spread, Southern NGOs and social movements have become more assertive in challenging power structures within their own countries and increasingly at the international level.

With a diminished role as aid implementers, many Northern NGOs have sought a new role in advocacy. The recent success of campaigns (such as those on landmines, some World Bank projects, debt, and the Multilateral Agreement on Investment or MAI) has stimulated interest among Northern NGOs. The media profile and potential for public involvement in such campaigns have added attraction as a source of profile and funding. More substantively, some Southern NGOs have called on their Northern counterparts to change the policies of their own home governments, recognising that international policy is still largely driven by the OECD countries. In some countries, such as the UK, increased advocacy work has also been made possible by a relaxation in the interpretation of the legal framework governing charities.

On the heels of the enthusiasm for advocacy is an emerging enthusiasm for understanding whether the substantial devotion of resources to these activities is having an impact. NGOs are asking whether advocacy and influencing initiatives are cost effective and whether they are contributing to the fulfilment of their mission (i.e. improving the lives of their intended beneficiaries). These are important questions to ask, not only for accountability purposes (such as how NGOs are using donors' or the public's funds), but also to learn from experience and improve the way advocacy work is undertaken. Monitoring and evaluation (M&E) and impact assessment (IA) can also help NGOs understand how far their work is supporting the efforts of others, particularly in strengthening civil society, and the degree to which advocacy and influencing work results in lasting improvements in the lives of poor and marginalised people.

There are two major problems in M&E when applied to advocacy. First, there is currently little experience or capacity. The 'market' (of internal staff, research institutes, and/or consultants) is just starting to respond, recognising that M&E is set to become a growth industry. The multinational consultancy agencies are pursuing the potentially lucrative sector of monitoring the impact of companies on workers, local communities, and the environment, and attempting to establish themselves as credible verifiers. Smaller consultancy firms that have experience in M&E for project work are now eyeing the potential for evaluating advocacy activities. Meanwhile, NGOs are adding internal staff and starting internal training and capacity building in M&E for advocacy.

Yet a second problem remains: how do you do it? This paper suggests some deep pitfalls and some broad approaches to M&E/IA for advocacy.

What is advocacy and how is it changing?

The deepest pitfall of advocacy is failing to understand the nature of the work it involves. This is scarcely surprising, given the paucity of systematic research and analysis into its diverse forms, methods, institutional structures, and the dynamics of decision-making processes it seeks to influence. Further, the whole field of advocacy work is changing rapidly. The dominant role of major corporations, pressures to reduce the role of the state, new challenges for civil society, globalisation of media and entertainment, and new communications technologies are among the many factors introducing new challenges and new opportunities.

The complexity of the advocacy field can be illustrated across four dimensions:

- the increasing globalisation of advocacy work;
- the rise of a diverse civil society;
- the increasing diversity of advocacy structures;
- the increasing diversity in strategies.