Systematically Incorporating Broader Political Contexts in Advocacy Evaluations: Challenges & Opportunities

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Abstract

Despite greater access to advocacy evaluation resources, one area receiving little attention is how evaluators systematically document, measure, and assess the role of the political context in the social and policy change process. Few evaluators have the necessary resources to accurately and cost-effectively account for the impact and effects of multiple known change agents (e.g., partners, constituents, and allies), target entities, and oppositional forces. Without this information, such evaluations may lack sufficient contextual data and precision about the true impact of an organization and produce findings that are biased, unsupported, and incomplete. Further, the advocacy evaluation field has not developed common minimal standards of practice in this area. This poster presents preliminary results of an ongoing study identifying the added-value of measuring political context data in short- and long-term projects and situating wins/losses using such data, measurement challenges, implications for evaluation practice, potential data sources, and current field development needs.

Methods

Data Collection: Semi-structured telephone interviews were conducted with a range of professionals (n=19) including evaluation consultants, advocacy funders, nonprofit civic engagement advocates, information technology consultants, and social scientists using convenience and snow-ball sampling. Interviews were approximately one hour. All but two interviews were audio recorded and professionally transcribed.
Analysis: Standard thematic analysis was used to synthesize and critique field interview notes and interview transcriptions.
Limitations: The findings must be considered given the following limitations: Only a few interview participants were of color and most engaged in larger-scale advocacy evaluation projects. Few evaluators of conservative projects were identified for inclusion in this study.

Most interview participants used political climate, political context, political space, issue or external environment, operating environment, and ecosystem interchangeably. For brevity, political context is used to encompass these terms.

Results: General

1. Interview participants agreed that **political context is important** in developing a theory of change, selecting advocacy strategy, developing reasonable objectives, and when characterizing, and assessing policy outcomes, specifically policy wins/losses and advocacy capacity.
2. While **no common definition** of political context was used, multiple dimensions of the political context were consistent across interview participants. Such dimensions included: role of influencers, power structure, political will, public opinion, policy decision making process and procedures, historical legacies, electoral and other leverage points, anticipated events, general trends, and finally, the advocate's credibility, influence, and capacity among multiple actors.
3. Determining the importance of different dimensions of the political context is most likely case-specific.
4. The opposition included direct opposition groups, non-supporters, competitors, and critics. Opposition groups were rarely contacted as part of the evaluation but there was strong agreement among interviewees to **consider systematic inclusion of opposition group activities and perspectives**. It may support contribution arguments.
5. The "same" political context varies across different points of view (constituent versus organizational views, mainstream versus marginalized views). Some interviewees were concerned that novice advocate perspectives might introduce anomalies in how the political context is described.
6. Some funders are in tune with the political context, others are not. Some use it to select and appraise grantees. When relaying findings to a funder, an important role for the evaluator is to **frame evaluation findings within the political context** and move beyond simplified characterizations of the political context.
7. Advocacy evaluators may need to position the data in a global political context as advocates begin to work globally or infuse global arguments into their theory of change.
8. Interview participants cautioned: further investigation and incorporation of the political context into evaluation activities is only warranted if it reflects the evaluation's overarching goals and needs.

Results: Challenges

- Advocacy evaluation resources are often limited. Evaluators have limited resources to interview a wider range of stakeholders or use costlier data sources (e.g., LexisNexis subscriptions). Evaluators may donate time to understand the context.
- Smaller evaluation teams and shorter evaluations may over rely on the advocate's assessments and understandings of the political context.
- Multiple evaluator skills and competencies are needed to determine contextual data saturation.
- Lack of software to store and analyze contextual data pulled from multiple sources.
- Managing multiple political contexts is difficult, particularly for multi-state advocacy efforts. Saturation and triangulation of contextual data in multi-state or long-term evaluations may be impractical.
- Political science and public policy research may inform the measurement and assessment of the political context, however it is unclear if these approaches are suitable to real-time analysis.
- While there is great interest and potential to include the role of the opposition, there are many ethical, logistical, and methodological considerations.

Results: Opportunities

- Advocates formally assess the political context during initial and ongoing planning (e.g., power maps, SWOT analysis, and situational analysis). Most advocates will have expert-level skill in this area.
- Stakeholder, key informant, and bellwether interviews, participant observations, and event debriefings capture some contextual data.
- Grantee self-reported contextual analysis is validated through triangulation with administrative datasets, media, and other data sources.
- New software is available for multiple parties to use simultaneously and across larger geographical areas (e.g., QUAD); several capture both qualitative and quantitative contextual data.
- Participatory evaluations share responsibility for contextual data collection between the advocates and the evaluators.

Future Work

1. Develop a common definition or description of political context that is informed by advocacy evaluation and political science. Further, develop a matrix of political context elements and potential data sources or methods.
2. Examine a sample of evaluation reports to further understand the use of political context in reporting evaluation findings and the extent to which opposition groups are monitored advocacy evaluations (phase two of the current project).
3. Develop technical assistance materials to clarify which elements of the political context are important to document and measure at specific stages of the policy and social change process (available in 2015).
4. Future evaluation research should determine if specific elements of the political context are essential to monitor and document for specific issue areas and advocacy strategies.
5. Future evaluation research may expand the categories denoting specific political climates. Common labels used by interview participants include "favorable" and "unfavorable" climates. Other categories may be needed.

Figure 1: Diagram of Political Context Dimensions

Organization being evaluated + Stakeholder(s) Partner(s) Target(s) Constituent(s) + Opposition Groups + Power Structure Leverage Points Public Will Public Opinion History/Culture Events/Trends Policy Procedures

So what?

- Invisible actors and intermediary groups focus on changing the political context or climate from unfavorable to favorable as an advocacy outcome.
- As more groups work under a unified agenda, evaluators may need to monitor more actors and larger scale political contexts.
- To assess an advocate's contribution to policy or social change, a rich understanding of the context is needed. A lot of context is not public and context has to be "proven" and accurately portrayed.
- Political context has important implications for the legitimacy of evaluation findings. Advocacy evaluators may need greater systematic documentation, measurement, and assessment of the political context.

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