

## **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.

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