PLANNING AND ASSESSING SUCCESS

To assess the success of equity campaigns, advocates need to ask the right questions. This guide, a companion to the GEAR Overview, which describes the components and stages of equity advocacy, and the GEAR Snapshots, which detail the benchmarks for measuring equity advocacy, raises important questions that must be addressed when planning and assessing an equity campaign.

Consistent with the values of social justice, the approaches presented here emphasize the priorities and needs of equity advocates: their commitment to inclusion and systems change, their flexibility and readiness to act in changing circumstances and despite limited resources. The guidance here is not prescriptive, but rather, suggestive; the content may be tailored to the specific situations faced in individual campaigns, which have their own trajectories, priorities, and challenges. Though written for advocates, this guide may also be useful to allies in the academic and for-profit sectors, in the evaluation field, and in philanthropy. It is organized into three main sections:

Winding Up: Planning the Equity Campaign and Assessment

Before launching an equity campaign, or before embarking upon the assessment of one, there are some big-picture questions to consider related to goals and strategies for tracking and assessing success. GEAR can help advocates focus their efforts and prepare for the ambiguity that lies ahead. This section considers the why and what of Getting Equity Advocacy Results.

Cranking Ahead: Implementing Assessment Strategies

Once the priorities for assessment have been established, the mechanics of measurement must be determined. This section tackles the who, how, and when of Getting Equity Advocacy Results. It includes specific questions to guide the adoption of GEAR benchmarks and strategies for data collection.

Greasing the Wheels: Using Results to Improve Strategies

For advocates, getting results is only part of the challenge; using those results to improve efforts is another. This section looks at ways to use GEAR to improve advocacy strategy. It considers the questions, "What's working?" and "What needs to change?"

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equity: *Just and fair inclusion. An equitable society is one in which all can participate and prosper. The goals of equity must be to create conditions that allow all to reach their full potential. In short, equity creates a path from hope to change.*

WINDING UP:
PLANNING THE EQUITY CAMPAIGN AND ASSESSMENT

Each section includes questions to support the development of an assessment strategy. Further information and resources to support various topics in this guide are available online: **www.policylink.org/gear.**

Why assess?

Assessing the interim accomplishments, ancillary outcomes, and challenges of equity-focused policy reform efforts—ones that aim to benefit low-income people and communities of color and engage them in partnership in advocacy and implementation—can provide important information and distinct advantages to advocates.

Tracking and Assessing Equity Campaigns: Potential Advantages for Advocates

- ✓ Benchmarks and measurement tools can serve as guideposts for navigating change.
- ✓ Ongoing feedback can inform campaigns by signaling both challenges and momentum.
- ✓ Tracking can inform participants and help them to be effective leaders.
- ✓ Stories about equity advocacy can be crafted from tracking data to tell the story of the campaign, highlighting its purpose and building additional support.
- ✓ The knowledge gained from tracking can lead to better, more authentically implemented policies creating opportunities to learn from failures, stalemates, and successes.

At the outset of an equity campaign, it is important for stakeholders to come together to consider the value of tracking and assessing their campaign, and to determine the goals and interests to be served by the assessment. Assessment goals may differ among stakeholders, and reaching agreement at the beginning can distill the purpose and facilitate a smoother and more productive assessment process throughout a campaign. Important questions to consider when planning an assessment include:

→ ***Who should be involved in making decisions about tracking and assessment priorities for the equity campaign?***

→ ***How would inclusion or exclusion in the decision-making process broaden or narrow the priorities for assessment and impact the decision-making and power structure for the campaign?***

→ ***Which priorities will be the focus, given resource constraints for tracking and assessment?***

→ ***How will decisions regarding final priorities affect the roles of allies and partners?*** *Consider how priorities encourage or discourage support, participation, and leadership of the equity campaign and each of its components.*

Transparency and agreement on the plans for assessment allows for smoother integration of action and assessment throughout the campaign.

One of the greatest challenges of assessing advocacy is predicting political impacts and outcomes. Effective advocacy requires agility—strategizing and pivoting amidst changing political circumstances. Campaigns for equity bring added complexity, as they strive not only to achieve equitable objectives, but also to apply equity values in the implementation of the strategies for change. Equity campaigns involve strengthening the engagement, leadership, and capacity of the community most impacted by the issues. What's more, research and communications are necessary to articulate disparate impacts and reach diverse audiences. Though every campaign is unique, certain strategies and outcomes are common across all equity campaigns. Assessment helps advocates to understand campaign strengths and potential pitfalls, and adjust strategies accordingly.

What results matter most?

The politics of a campaign can be unpredictable, but assessment can help advocates be as prepared as possible for what lies ahead. GEAR can be used to scope potential advocacy directions and help determine where to look for results. Like a map, GEAR lays out the landscape of a campaign, and helps advocates locate their current status and intended outcomes, and possible routes between the two. Questions to help navigate the journey include:

→ ***What GEAR stage or stages are active?***
Consider both the stages represented by the four color gears and ongoing components represented by the four gray gears.

→ ***What is the projected time frame for the assessment?***

→ ***What GEAR stages will likely become relevant during the course of the campaign?***
For instance, efforts might focus exclusively on education and organizing to build a strong base.

→ ***What GEAR stages might become relevant, given potential changes to the political circumstances?***
For instance, activities focused on building a strong base might shift to moving a proposal, if a promising new policy opportunity emerges and the base leadership is in place to advance it.

→ ***Do expectations regarding the intended course of the campaign match the available resources?***

→ ***How will priorities be determined or shifted if—and when—the course changes?***

With the goals for assessment clear, the next step is identifying GEAR benchmarks for measurement.

Using GEAR to develop a clear sense of the starting point, the projected ending point, and the possible routes of the campaign allows advocates to not only identify potential areas for assessment, but also ideas for moving advocacy ahead. The GEAR benchmarks associated with each stage can serve as useful guiding posts for planning equity campaigns.

CRANKING AHEAD: IMPLEMENTING ASSESSMENT STRATEGIES

Many advocates are challenged to find the time and money needed to achieve campaign goals, let alone meaningfully evaluate efforts. In assessing equity advocacy, limited resources must be used strategically to maximize impact. How efficiently resources are utilized, as well as the effectiveness of the advocacy approach itself, are determined not only by the kinds of questions and methods used in the assessment, but also by important decisions about when to track and assess, as well as who tracks and assesses.

Who might benefit from a feedback loop?

- ✓ Campaign leaders are sometimes responsible for making quick decisions regarding the strategy of the collaborative, and need complete, up-to-date information to navigate changing political circumstances.
- ✓ Members of a collaborative, who support the strategic direction of the campaign through specific efforts, need regular updates on relevant information to work effectively.
- ✓ Regular updates on campaign progress and direction can help engage community members.

When to assess?

Assessment may occur during and after a campaign. If the priorities and goals for the assessment include sharpening and refining strategies, then assessment during the campaign is required. Improving advocacy strategy necessitates real-time information that feeds back to advocates. Some considerations regarding feedback are listed to the right. Real-time assessment raises practical questions about tracking progress, gathering the appropriate information, and packaging it to provide feedback. These questions include:

- → ***Who must receive ongoing feedback during a campaign?***
  Consider different groups, constituencies or leaders who need specific data/information from the assessment and when they need the data/information, as timing needs may differ across groups.

- → ***At what points in time is feedback essential?***
  Consider campaign events, such as meetings with policymakers or demonstrations, before or after which data/information from the assessment might be needed.

- → ***What points in time are available or convenient for receiving results?***
  Consider planned meetings or events that can be used for assessment or regularly scheduled emails or newsletters that can be used for updates and information.

Assessment and tracking during a campaign provides the greatest benefits for sharpening strategy. It can also prove beneficial after a campaign, to identify and share lessons learned to inform future efforts.

Who will assess?

Tracking and assessing the success of equity advocacy requires a commitment to identifying, gathering, and assembling relevant information to meet the goals of the assessment. The person or team taking responsibility for this work could be internal or external to the campaign, responsible for all of the assessment, or simply parts of it. As with many aspects of equity advocacy, there is not a single, one-size-fits-all answer to the question of who is best. In some cases, the best fit might be an external evaluator dedicated to observing and reporting results. In other cases, it might be a team of advocates with the right tools and resources for participatory evaluation or self-assessment. In yet others, the right fit might even be a hybrid of the two. Considerations include:

- ***What standards must be met to achieve the stated goals of the assessment?***
  Consider the types of skills and expertise needed to meet those standards.

- ***How engaged must the evaluator be in campaign activities to gather information and report results, particularly in fast-paced or complex environments involving multiple partners and parties?***
  Consider the level of depth and involvement the evaluator may need to understand important campaign issues and changing strategies.

- ***What is the capacity of the collaborative to potentially engage in disciplined self-assessment, and to apply participatory evaluation approaches to their own work?***
  Consider the availability of resources to potentially support external evaluator(s).

- ***How might responsibilities for carrying out the assessment be assigned to both external parties and internally to maximize limited resources?***

The decision to bring in an external consultant, appoint a staff person or partner, or create an internal team to track progress may be influenced by many factors, including cost, knowledge, flexibility, objectivity, accountability, ethics, and utilization of results. Each type brings its own unique advantages and challenges. For instance, an outsider who is unfamiliar with the effort, and the people involved in it, might offer a fresh perspective and objective feedback, while an insider who knows the effort well might be able to offer insightful analyses of information and navigate the data collection process without disrupting important political relationships.

Valuable resources are available to support the selection of external evaluators and to assess capacity for evaluation. Links to these tools are available online at **www.policylink.org/gear.**

How to track and assess?

Evaluation of advocacy efforts is not an easy task, but there is a growing body of work in this area, producing useful frameworks and tools to meet the needs of multiple audiences. Much of this work states the utility of interim benchmarks and indicators to measure progress. GEAR includes detailed benchmarks for equity campaigns. This section includes key questions to help guide the strategy for measurement of the GEAR benchmarks and examples.

Benchmarks are points of reference useful for making comparisons. They are typically set in advance to help track progress. Indicators are the specific, measurable signs that a benchmark is being accomplished. GEAR benchmarks were created to help document and understand the interim achievements of advocacy campaigns for equity, especially important given the twists and turns of such efforts, and/or to measure the outcomes and impacts of campaigns.

- ***Which benchmarks are most relevant for this campaign?*** *Consider how advocates will be involved in refining and reviewing benchmarks, and the types of strategies needed to update benchmarks as the campaign progresses.*

EXAMPLE

Advocates can work together to refine and periodically review benchmarks at regular campaign leadership meetings. The decision-making process can be facilitated by an external evaluator, or can be self-guided. Work plans for assessment can be developed to include reviews of benchmarks.

→ ***Which indicators, specific to the campaign, will show progress toward each benchmark?***
Indicators are the signs that advocates are accomplishing the benchmark.

→ ***Are the indicators SMART?***
In other words, are indicators Specific, Measurable, Attainable, Relevant, and Time-bound?

EXAMPLE

During the planning of a campaign, a small team of advocates or campaign leaders can work together to develop SMART indicators from GEAR benchmarks. For a campaign at the "Name and Frame" stage, for instance, advocates might choose to measure the following benchmark:

> *Data and information to understand the problem and possible policy change objectives are disaggregated (e.g., by population, place, race, etc.) and analyzed frequently during the campaign to illuminate the equity dimensions (e.g., consequences for people of different race, class, or gender) of the possible policy change objectives.*

While an initial indicator might look like this—"the completion of several research memos over the course of the effort"—conversion into a SMART indicator would require:

- **Greater *Specificity* about what is being measured**—e.g., research memos will detail both community concerns and priorities gathered at community meetings, as well as new or emerging evidence gathered via online and in library research, and summarize findings by relevant geographies—blocks, neighborhood, counties, etc.
- **Details regarding *Measurability***—e.g., completion will be signaled by the development of at least three memos, reviewed by community leaders and technical experts, and submitted to a campaign leader.
- **Consideration to *Attainability***—e.g., a research committee has elected to lead and complete the task, and resources are available to support assessment.
- **Assurance regarding *Relevance***—e.g., the memos will drive the discussions of the collaborative that has formed to address the issue.
- **Clarification on *Time-sensitivity***—e.g., memos will be completed before, during, and after the campaign.

A possible final SMART indicator could then look like this:

"The Research Committee will submit three research memos next year, to be developed, reviewed, and submitted to campaign leaders in the spring, autumn, and winter, for discussion at collaborative meetings. Memos will detail community concerns and priorities gathered via community meetings, as well as new or emerging evidence gathered via online and library research, and will summarize findings by neighborhood."

→ ***In what ways might each SMART indicator be measured?***

EXAMPLE

Surveys of campaign leaders, allies, and members at periodic points during the campaign might consist of in-person interviews, phone- or internet-based questionnaires, or focus groups. In the SMART indicator example above, for instance, a survey question might focus on the impacts of the research memos on the strategy of the collaborative.

→ ***How rigorous or thorough must measurement be, in order to meet the assessment needs spelled out in the planning phase?***

→ ***When would it be best to enlist researchers with particular skills and awareness and when would it be best to leverage existing campaign processes, activities?***
Consider plans that allow advocates to integrate measurement into decision making.

EXAMPLE

A community-focused researcher could be recruited to **observe and report on the planning and campaign processes** with respect to the GEAR benchmarks and SMART indicators, using a process co-designed with campaign leaders. The researcher might also be helpful in developing SMART indicators. In the SMART indicator example above, a community-focused researcher might **conduct document reviews, attend meetings, and engage in focus groups or interviews** to take note of completion of, or obstacles in, the creation of the memos over time.

EXAMPLE

Specific instruments could be developed to analyze the levels, quality, and impact of participation in the planning and action of the campaign. Measures of the growth in skills, knowledge, and experience of the participants could include indicators developed from the GEAR benchmarks. In the earlier example, a capacity assessment of campaign leaders might include questions based on their knowledge of the content of the research memos.

→ ***When should assessment tools be reviewed for adjustments?***

EXAMPLE

Simple but effective **strategies to report progress** might be integrated into existing activities, such as meeting minutes, newsletters, or email blasts. For example, monthly meeting minutes might capture the completion of the research memos, report the next steps resulting from them, or even summarize key findings.

To truly impact advocacy strategy, these assessment activities should represent a cycle of continuous improvement. The first round of developing GEAR benchmarks can lead to new strategies and, in turn, new ways to learn from experience.

GREASING THE WHEELS: USING RESULTS TO IMPROVE STRATEGIES

In the process of assessment, equity advocates are mindful of numerous conceptual and logistical questions: Why assess? What results matter? When to assess? Who will lead the assessment? What are the right methods to employ? These lead to two important questions that are best answered upon the collection of results: **"What's working?"** and "**What needs to change?"** These two questions can be powerful tools for campaign leaders to review with collaborative members, allies, and other stakeholders to refine their advocacy approach to impact equity, both during the campaign and at its end. When drilling down into these questions, others arise:

- ***How does the information that has been gathered test assumptions related to campaign strategy? What information contributes to decisions about next steps?***
- ***What is the story that the results tell? What shifts do these results signal, with respect to the equity issue, the circumstances surrounding the issue, and to the advocacy work?***
- ***What lessons can be shared with others working for equity?***

The self-assessment of equity results both during and after the campaign is essential for improvement. This self-assessment also helps grow the movement for equity by contributing to the momentum created through building capacity, generating and reinforcing community leadership, unearthing important information, and broadening awareness.

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GEAR supports the simple, straightforward assessment of otherwise complex efforts. With the right questions, creativity, and thoughtful planning, equity advocates can apply GEAR to improve their work, and to determine their contributions to advancing equity, even in the face of limited resources.

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GEAR was created with generous support from The James Irvine Foundation.

This document was written by Jme McLean, with contributions from Judith Bell and Victor Rubin.

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