Evaluating Political Social Work Efforts

13

Table of Contents

Section 1: Overview

Is victory at the polls or successful passage of a law the only way to evaluate a campaign? This chapter considers other ways that a political strategy may be viewed to be successful, such as building candidate name recognition, facilitating the election of other candidates on a ticket, gaining credibility, and developing relationships. This chapter builds evaluation skills for advocacy and electoral campaigns through selecting appropriate metrics and methods to evaluate political social work efforts. Evaluation plans should be developed alongside your other strategic planning efforts, with benchmarks in pace before your efforts start. This helps to ensure that your evaluation efforts can inform and increase the effectiveness of your work while also ensuring that you collect the relevant data to assess the outcomes of your effort. We emphasize the ways in which evaluation can be used throughout a campaign, through both formative and summative evaluation, to assess progress and refine your strategy for success. Finally, the need for attention to monitoring implementation after a political success is discussed.

Developing Social Work Competency
The Council on Social Work Education establishes educational standards for all social work programs in the USA. Content in this chapter supports building competency in the following areas that are considered core to the practice of social work:
COMPETENCY 4: Engage in Practice-Informed Research and Research-Informed Practice
COMPETENCY 5: Engage in Policy Practice
COMPETENCY 9: Evaluate Practice with Individuals, Families, Groups, Organizations, and Communities

Domains of Political Social Work	
1. Engaging individuals and communities in political processes	◄
2. Influencing policy agendas and decision-making	◄
3. Holding professional and political positions	◄
4. Engaging with electoral campaigns	◄
5. Seeking and holding elected office	◄

Section 2: Evaluating Political Social Work

Evaluating our political campaigns is an important part of political social work practice. It is not enough for us to conduct advocacy campaigns on behalf of causes we care about or to work on behalf of good candidates. We need to make sure that the techniques we use are effective and that we are achieving our intended

outcomes. The efforts we put into strategic planning are most successful when we consider how we will evaluate our political social work as part of our strategic planning. This attention to evaluating political social work practice mirrors the work we do in direct practice. Taking our clients through a planned change process involves having clear goals in mind from the beginning and identifying measures of success that help us evaluate whether those goals have been achieved. Just as we would not practice with individuals without being able to evaluate our work, we should not engage in political practice without evaluation.

Despite the importance of evaluation, many advocacy and electoral campaigns lack the resources and evaluation capacity to participate in evaluation (Whelan 2008). Some advocacy organizations are reluctant to engage in evaluation, because they perceive it as distracting from their core work. From an ethical perspective, however, if the political interventions we use are ineffective, we are obligated to consider whether we are really serving the needs of our clients and their communities. Furthermore, funders increasingly expect organizations to evaluate their advocacy efforts to ensure that their funds are being used effectively. In particular, funders are requesting evaluation measures beyond specific campaign or project outcomes. Funders are interested in methods that facilitate an organization or a community's ability to be more effective in future efforts, such as whether an advocacy campaign is building **capacity** for further political action.

At first glance, it might seem rather easy to evaluate the success of a campaign. Did your candidate win? Did your bill pass? These seem like straightforward ways to evaluate success. However, advocacy and electoral campaigns are generally not so straightforward. The complexity of political processes means that processes for conducting evaluations and identifying realistic benchmarks for measuring success are often challenging (Devlin-Foltz et al. 2012). A campaign that at first seems to have failed in reaching its desired goal may, in fact, have succeeded in moving the needle forward in important and meaningful ways.

FURTHER REFLECTION: Defining Success

Three different campaigns, both advocacy and electoral, are briefly described below. For each scenario, consider how the campaign might have defined "success" at the time. Then reflect upon what we see as the campaign's successes now, from our modern vantage point. What do *you* think ultimately constitutes success in each of these scenarios?

Scenario 1: Advocates in the USA have worked toward an Equal Rights Amendment (ERA), stating that "Equality of rights under the law shall not be denied or abridged by the United States or by any state on account of sex" since social worker Alice Paul introduced it to the Seneca Falls Convention in 1923 (Alice Paul Institute n.d.). The amendment was introduced to Congress in every session until its passage in 1972, after which it was ratified by 35

states. Because it was not ratified by the required 38 states, however, the amendment was not added to the Constitution. To date, the amendment still has not been added to the Constitution, although efforts to do so continue. Some argue that efforts to pass and ratify the ERA set the stage for women's movements in the twentieth century. In turn, these movements led to other legislative and judicial changes that have accomplished much of the ERA's initial purpose (Teles and Schmitt 2011).

Scenario 2: In 2005, advocates in Connecticut worked with legislators to introduce a bill called "EC in the ER" to mandate that the option of emergency contraception to prevent pregnancy be offered to sexual assault survivors who came to emergency departments within 72 hours after their assault. The bill was assigned to a key legislative committee, but it never came before the full legislature for a vote. Two years later, in 2007, a revised version of this bill was signed into law by the Connecticut governor (S.B. 1343 2007). Very little about the law had changed since its introduction, but advocates shifted their approach in the intervening years.

Scenario 3: Shirley Chisolm, an educator from Brooklyn, served as a New York state legislator for 6 years. In 1968, she was the first black woman elected to the US Congress. During her second term in the House, she ran for president in the Democratic primary. Chisolm wanted to be not just the first black woman to run for president, but a viable candidate. However, she received just 151 delegate votes at that year's Democratic National Convention. She served in Congress for 14 years and cofounded the National Political Congress of Black Women. About her legacy, she said, "When I die, I want to be remembered as a woman who lived in the 20th century and who dared to be a catalyst of change. I don't want to be remembered as the first black woman who went to Congress. And I don't even want to be remembered as the first woman who happened to be black to make the bid for the presidency. I want to be remembered as a woman who fought for change in the 20th century. That's what I want" (Landers 2016). Today, her candidacy is seen as having laid the groundwork for subsequent candidacies like those of former President Barack Obama and Hillary Clinton.

Challenges in Evaluating Political Social Work Campaigns

Social work education highlights both evaluation of practice with individual clients and evaluation of service delivery, interventions, and policy on a broader scale. While many of the same themes you have learned elsewhere apply to evaluating political social work—and are discussed in this chapter—Teles and Schmitt (2011)

eloquently describe some of the critical differences between evaluating service delivery and evaluating practice in the political sphere:

> *[A]dvocacy, even when carefully nonpartisan and based in research, is inherently political, and it's the nature of politics that events evolve rapidly and in a nonlinear fashion, so an effort that doesn't seem to be working might suddenly bear fruit, or one that seemed to be on track can suddenly lose momentum. Because of these peculiar features of politics, few if any best practices can be identified through the sophisticated methods that have been developed to evaluate the delivery of services. Advocacy evaluation should be seen, therefore, as a form of trained judgment—a craft requiring judgment and tacit knowledge—rather than as a scientific method. To be a skilled advocacy evaluator requires a deep knowledge of and feel for the politics of the issues, strong networks of trust among the key players, an ability to assess organizational quality, and a sense for the right time horizon against which to measure accomplishments. In particular, evaluators must recognize the complex, foggy chains of causality in politics, which make evaluating particular projects—as opposed to entire fields or organizations—almost impossible (n.p.).*

In the subsections below, we identify three of the largest challenges, aside from resource restrictions, to evaluating practice in the political sphere.

Complex Situations

As you have learned throughout this book, public policy-making is complex. It can be challenging to determine which specific forces actually lead to political change. It is similarly challenging to assess which specific forces are responsible for preventing social change from taking place. Just when we think we understand what factors cause or prevent change, we find that we might be wrong, such as when all of our predictors for an election (fundraising, polls, etc.) suggest one winner, but the opposite happens.

FURTHER REFLECTION: What Factors Cause Political Success or Failure?

Read through some of polling expert Nate Silver's analysis of why the 2016 US presidential election results turned out as they did at http://fivethirtyeight. com/features/the-real-story-of-2016/. You may know of other analyses that seek to explain Donald Trump's victory and Hillary Clinton's loss in that election. How many different factors can you name that have been identified as possible contributors to the success of the Trump campaign or to the Clinton campaign's loss?

Multiple Groups Working Simultaneously, Changing Tactics

Evaluation of political social work efforts is also complicated because often many groups work simultaneously on an effort. Sometimes this work happens intentionally together in coalition, but often it involves groups working on their own alongside one another. This makes it hard to determine the extent to which your specific organization contributed to the policy outcome. Did your one-on-one meeting with

the chair of the Health and Human Services Committee stop the bill from passing, or did the bill die due to the protest on the capitol steps led by another organization? Or can you both claim some responsibility for victory?

This is further complicated by the fact that campaigns often change their tactics, making it hard to determine whether a single tactic or combination of tactics moved the needle. As Teles and Schmitt (2011) point out, advocacy is rarely achieved through a singular effort. It requires flexibility and the use of different tactics over time in order to bring about policy change. In fact, there are generally declining returns when a campaign repeatedly uses the same political tactics over time.

Systems Resist Change

By its very nature, in a political system that is designed to limit sudden policy changes, social change in the USA is rarely immediate. Often, policy changes—even some that appear immediate—are the result of years, or even decades, of efforts. In fact, well-designed and implemented tactics often fail to meet their goals even when done "correctly" because the political system is oriented toward preserving the status quo (Teles and Schmitt 2011). At the same time, politics can shift rapidly and in a nonlinear manner, throwing off what may otherwise have been successful advocacy efforts. Take, for example, climate change activism. Under President Barack Obama, efforts to address climate change were making inroads, and were expected to continue to move forward had Hillary Clinton been elected. In contrast, activists perceive that President Donald Trump's election moved those efforts in the opposite direction, particularly after his withdrawal from the international Paris climate agreement (Viscidi 2017).

Overcoming Challenges to Evaluating Political Social Work Practice

While these are all real challenges you will face in evaluating your political social work practice, there is increasing attention within the management, evaluation, and development literatures to practices that can help overcome these barriers. Consistently, these practices emphasize the need to pair evaluation efforts with assessment of the political context. This builds on the assessment skills that you have developed over the course of this book.

Acknowledge Various Definitions of Success

Experts consistently advise expanding our focus beyond policy change as the only marker of success in advocacy campaigns (Whelan 2008; Guthrie et al. 2005). Together with our funders, our boards, and our partners, we need to acknowledge explicitly that even exceptionally well-done advocacy campaigns may not yield our desired legislative goals. The political climate and other outside factors play a role in what we are able to achieve. Success in advocacy may include laying the foundation for future advocacy efforts by changing public opinion, raising awareness about the policy change among policy-makers, or building capacity to achieve your

ultimate policy goal. Depending on the political context, success in advocacy may by necessity also include **playing defense** to keep bad legislation from passing—advocacy often requires advocates to act both in offensive and defensive roles (Guthrie et al. 2005). As policy conditions change, successful political efforts must continue to evaluate tactics, replicate successful ones, and change ineffective tactics to address the new realities and work toward overall social change (Teles and Schmitt 2011). Such factors should be acknowledged and measured in the evaluation process.

A similar dynamic applies to electoral campaigns. While an electoral victory is always a campaign's primary goal, it is important to acknowledge the other ways in which an electoral campaign may be successful, e.g., building name recognition for a first-time candidate, achieving a higher vote percentage than any prior candidate from the same party in your district, or creating such a formidable challenge to the incumbent that he/she spends the next 2 years in office being more responsive to the interests of your supporters.

Acknowledge Multiple Contributions to Success

As noted previously, no major policy change is solely the result of work by one person or one group (Teles and Schmitt 2011). Seeking individual claim for work done in coalition with others can fracture existing partnerships. Therefore, evaluation efforts are better spent focusing on what each organization or campaign contributed to the overall effort, rather than determining what specific part of a change is attributable to any specific actor (Devlin-Foltz et al. 2012). Focus on the process of the advocacy or electoral campaign and the ways in which participating in a particular effort may have helped an organization or a community develop the capacity to engage in future efforts.

Section 3: Evaluation Strategies

The evidence base for evaluating the effectiveness and costs of political social work efforts is limited in comparison to some other areas of social work practice (McNutt 2011). The lack of prior evidence increases the importance of introducing evaluation into your own political work. Incorporating evaluation into your practice will enable you to gauge for yourself and your organization(s) what is working and what is not and to share the results of your work to inform others.

Effective political social work, then, involves building evaluation into strategic and campaign planning from the beginning, so that all stakeholders have an agreed-upon set of benchmarks in advance (Whelan 2008; Guthrie et al. 2005). Through consistent attention to evaluating both the process of the campaign and its outcomes, a campaign can adjust its tactics, if needed (Teles and Schmitt 2011). The two approaches most commonly used in evaluating political social work practice can be defined as formative evaluation or summative evaluation.

Formative Evaluation

Formative evaluation measures the processes that are occurring within an advocacy or electoral campaign and/or within the organization(s) that is implementing the campaign. Formative evaluation can be used to measure whether we have all the resources (**inputs)** that we thought we would have access to in our campaign, and whether we are using them as effectively as intended. This approach to evaluation also measures **process indicators**, or **output measures**, that enable us to assess a campaign's "activities or efforts to make change happen" (Guthrie et al. 2005). Outputs refer to the direct products of your activities, specifically what you have directly *produced* as a result of your efforts. These may include quantitative indicators such as the number of meetings held, number of people reached by educational materials, or percentage of fundraising e-mails that are opened. These also may be qualitative in nature, such as whether all stakeholders are being included in activities or whether a campaign is staying consistent with its overall goal.

Formative evaluation allows us to monitor how our campaign is moving forward, and whether we need to adjust our strategic plan. It takes place in an ongoing fashion during the campaign. One way to continually monitor your campaign is by intentionally developing interim reports or "check-ins" that help inform your work and guide you in changing your actions as needed based on your measures of success (Whelan 2008; Guthrie et al. 2005). Such formative evaluation helps us critically assess whether we have carried out the campaign as intended, and if not, why not. For example, has the political context changed, resulting in our initial target(s) no longer being willing to meet with us? Has the media been more receptive to our campaign than we originally anticipated, suggesting a need to better integrate media-based tactics? Did our electoral campaign not reach our targeted numbers of voters during our phone banks, leaving us needing to identify new tactics for increasing turnout for our candidate? Formative evaluation and the outputs we measure can be very useful in helping us make decisions about adding, modifying, or eliminating tactics during the course of a campaign.

It is important to be clear, however, that formative evaluation and accompanying output measures are specifically focused on measuring *how a campaign is proceeding*. They are not the best approach for trying to determine whether the campaign's goals are actually being accomplished.

POLITICAL SOCIAL WORKER PROFILE: Juliana Cruz Kerker, MSW, JD

Contract Lobbyist/Legislative Advocate/Legislative Consultant (Fig. 13.1).

Fig. 13.1   Juliana Cruz
Kerker, M.S.W., J.D.

Juliana Cruz Kerker lobbies on behalf of the Texas Association of OB/GYNs and American Congress of OB/GYNs—District XI (Texas). Juliana sees her social work background as critical to her practice, giving her the skills that are required by her job on a daily basis. As a political social worker, Juliana places importance on "focusing on what my particular client needs" and practicing a client-centered approach while keeping in mind potential conflicts of interest and ethical conflicts.

Juliana began her political career as a participant in the University of Houston Graduate College of Social Work Legislative Internship Program, becoming Legislative Director for Texas State Rep. Garnet Coleman (D-147) upon graduation. Her legislative experience has taught her to always think carefully about strategy. "Working in the [Texas] Legislature, you always have to be five steps ahead of everybody"; as early as primary elections, strategy to move policy forward should be taking shape. Juliana has learned the importance of building relationships with candidates, elected officials, and their staff. She has also learned that relationships with those who may not necessarily always be on your side, but with whom you can begin to make progress, are also important. Through relationship and coalition building, Juliana says that you learn how to draw on the strengths and abilities of other allies to help make moves toward progress.

Ongoing assessment is a critical component of how Juliana approaches political strategy. She describes "testing the waters" as vital for anticipating changing environments and aiding in flexibility. She recommends preparing for the unexpected. It can be frustrating to see a well-researched and well-supported bill vetoed unexpectedly at the last minute for reasons beyond her control. Always being prepared for the unexpected has helped her to be able to quickly recover from setbacks, maintain focus on the larger goals she is trying to achieve, and move on.

Juliana advises political social workers to be kind to yourself when working toward change on a macro level. Progress can come slowly at times, but by securing and celebrating the small incremental wins, eventually you will see a shift. For Juliana, this is best illustrated by her work with Rep. Coleman on mental health legislation nearly 10 years ago that got little traction in the Texas Legislature. During the most recent legislative session, mental health has been a priority for Texas Leadership, and a mental health bill that mirrored that earlier work has now passed the Texas House with substantial bipartisan support. What matters is the progress for people helped by the bill, not the speed at which it happens, nor the credit or thanks.

Summative Evaluation

Summative evaluation is used instead to focus on measuring the outcomes of a political campaign. This approach to evaluation collects **outcome indicators** to measure whether a change has occurred (Guthrie et al. 2005). Outcomes refer to the policy changes that accrue *as a result* of your efforts. Outcome indicators may be quantitative or qualitative. They can include indicators such as whether a bill passed, decision-makers' attitudes or behaviors on behalf of the campaign issue changed, or whether a candidate was endorsed by a major organization.

Summative evaluation is the approach that enables us to measure whether our campaign is impacting our targets in the intended way, and therefore whether it is reaching its goals. As discussed earlier in this chapter, outcome indicators often are not fully under the control of a specific campaign or organization. There may be many more factors in play, leaving it hard to discern the extent to which your specific campaign contributed to these outcomes.

As Guthrie et al. (2005) explain, summative evaluation and accompanying outcome indicators focus specifically on measuring *whether the campaign's goals are being accomplished*, rather than on measuring the campaign's activities. Belton (2001) suggests one potential method for carrying out a summative evaluation for an advocacy campaign. First, identify what policy outcome(s) would have been most likely without our campaign. Second, identify what policy outcome(s) emerged after our advocacy campaign. Third, calculate the difference between these two possible sets of outcomes. In some cases, this will be an easy calculation; in many others, it may be very difficult to discern. While political outcome measures—particularly as related to advocacy campaigns—may be harder to measure than outputs, they are a more accurate reflection of success.

A simplified illustration of Belton's method (in real life, this would have more moving parts): Let's assume we are part of an advocacy campaign to require foster care workers and foster caregivers in our state to receive training on identifying and

preventing trafficking of youth in the foster care system. In step one, we consider what would have happened without our campaign. In this case, a prior bill had passed to develop training to identify youth in the foster care system at risk of becoming victims. Therefore, without our campaign, the outcome is that this training would have been developed and made available to foster care workers. In step two, we consider what outcome emerged after our campaign. In this hypothetical example, our outcome is that the state agreed to require this training of all foster care workers prior to the beginning of their employment and also of all caregivers before caring for a child in foster care. In the third step, we calculate the difference between these two outcomes. Here, we can calculate that our advocacy effort succeeded on two fronts: moving a voluntary training to a requirement for all foster care workers and adding a training requirement for caregivers.

Selecting Benchmarks

Given the challenges described above and the range of potential indicators available to a campaign, how do we choose which measures to evaluate? In using evaluation methods to determine success, it is important to identify specific **benchmarks**, which are observable, measurable standards that we use to measure how our campaign is progressing and whether it is succeeding.

Because of the challenges to measuring political work previously discussed, attention to identifying benchmarks for both output and outcome measures is critical. As Devlin-Foltz et al. (2012) note, "counting outputs such as visits to policy makers or fact sheets mailed is necessary, but not sufficient, to understand the potential impact of an advocacy effort" (p. 582). Benchmarks that track our outputs tell us what we have done, but do not provide information about how well a political social worker has influenced the decision-maker or whether engaging in these efforts has achieved the desired change. Similarly, while benchmarks that track our outcomes tell us a lot about whether our effort has been successful, they may not tell us the full story about what our campaign has accomplished—i.e., not achieving our bill's passage this year does not necessarily mean our campaign is a failure. Even if we do achieve our intended outcome, it is often not the end of a successful political effort. A policy change that passes the legislature may not be successful unless advocates continue to focus on the legislation by pushing for appropriate implementation, funding, and/or evaluation.

Section 4: Measuring Success in Political Social Work

In an ideal situation, a strategy for evaluation is discussed along with your other strategic decisions at the beginning of an advocacy or electoral campaign. We will be honest: this still rarely happens in political settings for a variety of reasons. However, we encourage you to consider ways to better integrate evaluation strategy into the political settings in

which you practice—your social work training in evaluation may be one of the key skills you bring to the table. An ideal evaluation strategy incorporates the following steps:

1. Adopt an overall model for the change you are trying to create. This, at its essence, is what you are doing when you design the strategic plans we introduced you to in Part II of this book. Through this strategic planning process, you develop a clear—and logical—plan for why you expect the specific tactics you select to impact your target(s) in such a way as to enable your goals to be achieved.
2. Identify specific benchmarks that will define success for your campaign. These should match up with your campaign's long-term, intermediate, and short-term goals. In fact, you identify these when you evaluate the "M" (measurability) of your SMART goals.
3. Identify specific benchmarks for the output measures that will demonstrate that your campaign is moving forward as expected and that you are building capacity. These benchmarks should allow you to take into account changes in the political context that may influence your campaign's progress.
4. Develop a plan to collect data on these output and outcome measures.
5. Determine how you will continually report the data you collect back to key decision-makers (Guthrie et al. 2005).
6. Make changes as needed to the strategic plan to reflect these evaluation findings.

Our Code of Ethics calls on us to seek ways to meaningfully involve those who are directly affected by proposed policies both in implementing and evaluating our campaign. This is consistent with our ethical imperative for promoting empowerment and meaningful involvement in decision-making. It helps us increase our own accountability, to make sure that we do not label our work as successful when it will not result in meaningful impacts for those most directly affected (Whelan 2008).

In identifying the measures of success that your campaign will use in this strategy, it is important to acknowledge that campaigns differ widely in the types of questions they need to ask and the items they need to measure. They may pose different questions, have differing time frames, or have reasons to need different levels of rigor in the data they collect (Whelan 2008). In all cases, select benchmarks that are as rigorous as possible *and* can be feasibly collected and used with the resources you have available. Benchmarks should be clear and quantifiable, so that you know when they have or have not been reached. Care also should be taken to ensure that these benchmarks are consistent with your strategic plan or campaign plan. Bolder Advocacy, an initiative of the Alliance for Justice (see link in Resources), has played a leading role in developing benchmarks for evaluating advocacy and organizing work, and works extensively with funders to guide them in funding advocacy efforts. In the sections below, we outline some common output and outcome benchmarks, including many identified by Bolder Advocacy, which political social workers may use to evaluate their work.

POLITICAL SOCIAL WORKER PROFILE: Susan Hoechstetter, MSW
Senior Advisor for Foundation Advocacy and Evaluation, Alliance for Justice
(Fig. 13.2).

Fig. 13.2 Susan
Hoechstetter, MSW

Sue began her career path working with at-risk teens and entered her MSW
program on the clinical track. As a student, she felt that working on the micro
level was "going about change too slowly" for her, so she finished her clinical
degree and additionally pursued a community organizing concentration at the
University of Pittsburgh School of Social Work. Her last field placement was
with a presidential campaign in Washington, D.C., and she says, "I just never
left [DC]." Ever since, Sue has been involved in political social work working
with advocates and community organizers including with the National
Association of Social Workers as government relations director.

One of Sue's first post-MSW experiences was working for a migrant farm-
workers group, the National Association of Farmworkers Organization
(NAFO). This experience instilled in her a confidence that "people who focus
on it really can get changes in the law." She was surprised at how relatively
easy it was to change legislation if you can successfully organize around a
specific issue. Over time, Sue explains, "what became important to me was
getting people more involved in organizations and affecting policy because I
could see how much we were able to get done for farmworkers."

Sue came to her current position at the Alliance for Justice with the goal of
getting "foundations to not be so afraid to fund organizations that advocate to
change policy." Quickly, the feedback from funders was that "we have to be
responsive to our boards and show the effectiveness of the grants we're giving out,
and we don't know how to evaluate that." Sue and her team at Alliance for Justice
then worked to put together one of the first systems for evaluating advocacy work.

Sue realized that "there wasn't enough attention paid, in the evaluation pro-
cess, to building an organization's capacity." She emphasizes that "advocacy
successes are so dependent on external forces," such as who is in office, public
opinion, the state of the economy, and changes in all of these factors. "Advocates
and their organizations have to be ready to take advantage of opportunities"
that are constantly appearing in the fluctuating political environment.

The primary capacity assessment process that the Alliance for Justice created, the Advocacy Capacity Tool, is now used by organizations to take a snapshot of their ability and progress in building capacity for further advocacy. Sue also cited the importance of monitoring incremental progress that has been made through an advocacy effort (measuring more than just whether or not a bill passed) and noting how well an organization adapts to external changes in the evaluation process. As Sue notes, these "are now the basics in the field of advocacy evaluation."

Sue describes an example from her work coaching a group in California through the Advocacy Capacity Tool. Once they applied the tool "they realized that they had not considered what was going on in the [contemporaneous] election" and how that external force was impacting the advocacy work that they were trying to accomplish. After using the Advocacy Capacity Tool, the organization was able to recognize this gap and include nonpartisan election activities into the work that they were already doing. Sue reflects that, "having been an advocate myself, so much of what we do is intuitive, [and] I really appreciate having a tool" that helps groups and organizations have a systematic way to look at what they are doing.

Identifying Output Measures

Benchmarks used to measure the outputs of electoral and advocacy campaigns vary based on the type of campaign, goals, and tactics involved. As Devlin-Foltz et al. (2012) note, however, it is easy to make the mistake of measuring unnecessary outputs, such as the number of meetings we hold with a target, rather than whether we have built a meaningful relationship with that target:

> Advocates sometimes forget to distinguish between what can be measured and what is worth measuring …. When evaluators look at proposed measurable objectives, they must ask themselves and their clients the "so what?" question. That is, will achieving this objective tell us something we really need to know? (p. 583)

Table 13.1 lists some outputs that you might consider measuring in an electoral campaign. Others include voters contacted at each stage of the campaign process (in both voter identification and get-out-the-vote efforts), house parties held, and donor contacts made. Open rates, whether people open your campaign's e-mails, and **conversion rates**, whether people are actually completing a donation through your e-mail, can gauge the quality and utility of your e-mails. Electoral campaign outputs also may include the percentage of contacted voters who actually vote. Benchmarks focused on measuring capacity-building within electoral campaigns may include the number and level of commitment of volunteers working on behalf of the campaign. A campaign that recruits and retains a large number of volunteers may have more capacity for a subsequent run than one that does not.

There are a wide array of possible benchmarks to measure advocacy campaign outputs, as indicated in Table 13.1. Other benchmarks specifically focus on how a

Table 13.1 Example output measures for campaigns

Electoral campaign	Advocacy campaign
Number of voters contacted overall	Number of stakeholders who commit to advocacy
Numbers of 1s and 2s contacted (voters who support your candidate)	Number of legislative meetings held
Money raised	Money raised
Amount of favorable press coverage	Amount of favorable press coverage
Volunteers who come back regularly	Number of supporters who sign up to testify
Relationships built that may improve success of next run	Relationships built that may improve success of next year's advocacy campaign

campaign implements its tactics, such as the number of phone calls made, presentations or testimonies given, petitions signed, or number of asks to your network to act in support of your advocacy goal (e.g., action alerts sent), or whether your campaign has identified individuals who can serve as media spokespeople. These can tell you whether your campaign is doing what it says it will, but may not give you enough information about whether your campaign is making progress in translating these tactics into policy change. Outputs that may tell you more about how your campaign is progressing include whether a campaign has built an ongoing relationship with key decision-makers relevant to your policy issue, how often key decision-makers return your phone calls, and whether representatives of your campaign are being asked to testify at legislative hearings, or contacted by legislative staff to provide relevant, factual information (Dodson et al. 2015; Tabak et al. 2015).

Output benchmarks that focus on whether the campaign is building capacity for this specific effort may include an increase in public awareness around your issue, involvement of members of the public in your campaign, or an increase in advocacy skills among campaign participants (Belton 2001). Additionally, benchmarks may focus on the organization more broadly to assess whether it is building long-term advocacy capacity that can last beyond the current effort. Some benchmarks that Alliance for Justice (2004) has identified to assess an agency's capacity-building are presented here. Achieving these benchmarks demonstrates that an organization/campaign is developing a presence and is prepared to carry out subsequent advocacy efforts.

Benchmarks for Organizational Capacity-Building
- Maintains a consistent presence in federal, state, county, and local legislative bodies
- Can identify and has contacts in agencies that implement policies and programs related to its issue priorities
- Understands relevant agencies' deliberation and rule-making processes
- Regularly communicates with its network [of interested individuals and organizations] through e-mail, newsletters, meetings, or other means
- Regularly provides formal activities to educate and build the advocacy capacity of its network

Excerpted from *Investing in change: A funder's guide to supporting advocacy* (Alliance for Justice 2004)

In voter engagement campaigns, output-focused benchmarks might include the number of voter registration events conducted by your organization, number of new voters registered, number of candidate forums held, number of pledge cards signed, or number of brochures handed out to provide nonpartisan information about candidates. It could also include the number of social workers trained to participate in voter engagement or the level of positive response to the training.

APPLY YOUR SKILLS: Identifying Output Measures
Consider a campaign that you planned earlier in this book or a political social work campaign in which you have participated. Identify three output measures for the campaign that would be relevant, could be gathered in a fairly short period of time, and could be implemented efficiently, without placing great burden on your campaign.

Selecting Outcome Measures

Benchmarks focusing on the outcomes of political campaigns should be closely tied to the goals you have identified for your campaign. That is, you will know your campaign has been successful when you have achieved the goals you set out for the campaign.

In an electoral campaign, this commonly involves seeing your candidate elected or seeing your position reflected in the outcome of a ballot measure. Outcome measures may include those listed in Table 13.2, as well as such benchmarks as seeing a marked change in public views about your candidate (e.g., more favorable views toward your candidate, an increase in credibility as a candidate), seeing your candidate win by a specific target number of votes or achieve a specified share of the votes. Whether or not your own candidate wins, depending on your political context, an outcome that may be of interest to some campaigns is facilitating the election of other candidates on a ticket. In electoral politics, we are often interested in whether our campaign's efforts help bring out more support for other candidates who are also running. In the end, however, winning the election is the ultimate benchmark in electoral campaigns. As social worker and political trainer Kate Coyne-McCoy says, "You should enter races that you think you can win. Period" (personal communication, March 3, 2017).

Table 13.2 Sample outcome measures for campaigns

Electoral campaign	Advocacy campaign
Election victory	Successful legislative vote
Number of votes the candidate received	Bill signed by governor
Issue stances supported by the candidate that are adopted by the opponent	Regulation upheld, modified, or defeated (depending on your goal)
Increase in candidate name recognition	Public commitments to vote for future version of the bill

In an advocacy campaign, goals—and therefore desired outcome measures—may vary more widely from campaign to campaign. Typically, outcome measures focus on a change in policy, accomplishment of specific steps that indicate movement toward a policy change, or changes in the views of decision-makers. Success is often achieved when your campaign's targeted legislation passes and is signed into law, as indicated in Table 13.2.

Alliance for Justice (2004) provides a more expansive list of potential benchmarks a campaign may use to evaluate success in advocacy, beyond progress on a specific regulation of piece of legislation. Some of the benchmarks they identify are presented here.

Benchmarks for Assessing Advocacy Outcomes
- Shows that policy-makers introduce bills which reflect some or all of its interests
- Establishes that legislation representing its interests proceeds through different steps of approval in the legislative process
- Shows that policy-makers champion its issue in committee or with other legislators
- Confirms that legislation representing its interests is signed into law
- Has its comments on proposed regulations cited by the targeted administrative agency in final regulations
- Influences regular press coverage on its key issue priorities, demonstrated through quotes and issue stances reflecting its view
- Attracts media coverage of its issues

Excerpted from *Investing in change: A funder's guide to supporting advocacy* (Alliance for Justice 2004)

In voter engagement campaigns, outcome-focused benchmarks may include showing a specific increase in voter registration or voter turnout in your targeted community. It also could include measures of community empowerment connected to political engagement, such as increased expression of political voice and power.

APPLY YOUR SKILLS: Identifying Outcome Measures
Consider the campaign that you discussed in the last activity. Identify three outcome measures for the campaign that would be relevant, could be gathered in a fairly short period of time, and could be implemented efficiently, without placing great burden on your campaign. (See further discussion of these three considerations in the paragraph below.)

Data Collection

An evaluation strategy requires attention to not just what we measure, but also to how we collect our output and outcome data. There are three considerations political social workers need to keep in mind when selecting data collection methods: relevance, timeliness, and efficiency (Coffman and Reed 2009). **Relevance** of data collection asks: will the methods we are considering truly help us collect data that can inform our strategic decisions? **Timeliness** of data collection considers whether the methods can be administered and analyzed fairly quickly so that we can respond and adapt our strategy in a timely manner. Finally, given the many constraints on our time and resources, **efficiency** of data collection examines whether the data collection methods are burdensome. Can we implement them with minimal impact on our other work, given the resources at hand?

Evaluations of political social work campaigns often incorporate the same data collection methods as other types of evaluations you may have learned about in your social work education. These may include interviews, focus groups, and surveys, in order to gather information and perspectives from relevant policy stakeholders. However, given the complexities of evaluating political efforts described previously, you may find other data collection methods to be useful as well. These methods may incorporate reviews of public records, such as records of individuals' voter registrations and voter history; legislators' vote history, committee statements, and bill introduction/sponsorship; as well as the language used in bills, laws, and regulations. Some other methods for collecting data to evaluate political efforts are outlined below.

Public polling is often useful in political work, although it can be expensive to implement. For small campaigns with limited resources, partnerships with universities who conduct polling research may be one way to access this kind of data, while large electoral campaigns may incorporate polling into their campaign infrastructure. **Public polling** interviews stakeholders at random to assess their attitudes and/or behaviors. This data collection method is particularly useful for electoral campaigns interested in learning more about name recognition and favorability ratings for their candidate. However, it can also be used to gauge the knowledge, attitudes, or behaviors of advocacy stakeholders (Coffman and Reed 2009).

Legislative tracking, which we have discussed earlier in this book, is a data collection method commonly used in advocacy campaigns. Through legislative tracking, you monitor how the bill(s) or ordinance(s) you are working on is progressing through the policy-making process. As your campaign proceeds, you will also want to track companion or related proposals that are moving through the legislative process to monitor how they may be affecting your issue, and whether you need to adapt your strategy to respond to any of these. Similarly, you might track the process of proposed regulations through the *Federal Register*, or your state's equivalent publication.

At times, your evaluation strategy may require you to examine media coverage of your campaign. **Media tracking** is one method for doing this; through media tracking, you can count occurrences of your campaign, issue, or candidate being covered in various media sources. Depending on the geographical context for your campaign, you might track media on a local, state, or national level. This tracking can include print, electronic, or broadcast media sources. Through a media content analysis, you can track what the specific content related to your campaign, issue, or candidate looks like and how it is being framed.

Coffman and Reed (2009) identify several new data collection methods that have been developed for the unique characteristics associated with efforts to seek policy change. Here, we introduce two of these that may have particular relevance to the work in which readers of this book will engage. Developed by the Harvard Family Research Project, the **Policymaker Ratings** method seeks to evaluate the extent of support for a specific advocacy issue among relevant decision-makers. As part of their evaluation efforts, multiple advocates work together (or individually, and then average their ratings) to rate relevant decision-makers along a series of three scales assessing:

1. Each policy-makers' level of support for the issue, based on the policy-makers' public behaviors or actions—from 1 (not at all supportive) to 4 (extremely supportive).
2. Their level of influence over the issue, based on six criteria (member of majority party, seniority, member of a key committee, formal leadership position, relevant expertise in the content area, reputation within the legislative body)—from 1 (not very influential) to 4 (extremely influential).
3. The advocates' level of confidence around ratings #1 and #2—from 1 (not very confident) to 3 (extremely confident).

This data collection method shares similarities with the power analyses that we use to help design our strategy; however, it reminds us that such analyses are working documents. The level of support and/or influence that policy-makers hold vis-à-vis our issue can change over time, necessitating changes to our strategy. Revisiting our power analyses or conducting regular Policymaker Ratings reviews over the course of our efforts can help us identify and adapt to any shifts that occur.

The **Intense Period Debrief**, developed by the Innovation Network, responds to the extensive time constraints advocates commonly face mid-campaign by creating a very brief opportunity for advocates to pause and reflect on their campaign's progress (Coffman and Reed 2009). A **debrief interview protocol** is used either with a one-time focus group of advocates or in brief individual interviews to capture real-time information about how the campaign is proceeding and what is happening behind the scenes in the effort. This may be especially useful after a major event or shift happens in an advocacy effort. We provide sample questions provided by the Innovation Network that advocates might use as a basis for developing a one-time intensive debriefing guide.

Intense Period Debrief: Sample Questions

Excerpted from *Unique Methods in Advocacy Evaluation* (Coffman and Reed 2009)

1. What events triggered this intense period?
2. How was the organization's response determined? Who was responsible for that decision? How was that decision communicated to other partners and allies?
3. Which elements of the organization's response worked well? Which elements could have been improved?
4. What was the outcome of the intense period? Was the result positive or negative?
5. What insights will you take away from this experience that might inform your strategies going forward?

FURTHER REFLECTION: Considering Data Collection Methods

Consider the campaign that you discussed in the activities earlier in Section 3. Describe a data collection strategy you could use to gather each of those measures. Once you have identified that data collection strategy, reassess whether it is possible to collect those measures in a manner that is relevant, timely, and efficient. Is it, or do you now feel, that other measures would be more suited to the work at hand?

APPLY YOUR SKILLS: Bringing It All Together to Evaluate a Political Social Work Effort

The Nancy A. Humphreys Institute for Political Social Work has launched a campaign with the goal of engaging more social workers in electoral politics (Lane et al. 2017.; Ostrander et al. 2017). Primary tactics utilized by this campaign include presentations at conferences, meetings with interested social workers and faculty, development of relationships with elected officials and campaigns, and development of political field placements. This campaign centers around an annual Campaign School for Social Workers (www.politicalnstitute.uconn.edu). This is a 2-day training for social workers that prepares them for leadership roles in campaigns, to run their own electoral campaigns, and/or to hold careers in political social work. Over 1000 participants have attended the Campaign School over the last 21 years, from across the country.

You have been asked to join the team responsible for evaluating the campaign's success to date. Some measures that the team has already considered are listed below.

- Creation of policy that represents social work values and ethics
- Creation of policy that prioritizes the impact on marginalized populations
- Number of social workers who run for office
- Number of social workers who hold leadership positions in electoral campaigns
- Number of social workers who volunteer on electoral campaigns
- Number of social workers who report interest in running for office
- Increase in political efficacy from the beginning of the training to the end of the training
- Number of social workers who attend the Campaign School for Social Workers

The team will be conducting both a formative and summative evaluation. Create your own set of measures that you think should be included in these evaluations, dividing the measures into output and outcome measures. You can use all or some of the measures listed here, or identify other relevant output or outcome measures that are not listed here.

Once you have identified a set of output and outcome measures to evaluate this campaign, plan your data collection. What methods would you use to collect data on each of your selected measures?

Data Analysis

How you analyze your evaluation data depends on the types of measures you select. Most of the measures we have discussed in this chapter rely on quantitative analyses that are descriptive (e.g., how many volunteers supported your campaign) or bivariate (e.g., what rates of voters contacted by your campaign voted when compared to those not contacted by the campaign) in nature. Some of the measures require qualitative analyses (e.g., have you influenced the content of press coverage). Other more advanced analytical approaches can be useful when evaluating political work, but are beyond the scope of this textbook. For example, McNutt (2011) outlines analysis methods that social workers can use to determine if their campaign is spending its funds appropriately on advocacy. These include return on investment analysis, cost-effectiveness analysis, and cost-benefit analysis.

Section 5: Win Number: The Key to Electoral Outputs and Outcomes

In an electoral campaign, your primary goal is for your candidate or issue to win, that is, to get more votes than the other side (or to get an absolute majority—more than half—in jurisdictions where a plurality is not considered enough to win an election). In advocacy campaigns, the closest analogy to this is your **whip count**, which is your estimate of how many legislators would vote the way you want them to if your issue was voted on today.

Determining your specific benchmark for reaching electoral success is not as simple as identifying how many registered voters there are in your jurisdiction and calculating the majority-plus-one. As discussed elsewhere, not all eligible voters vote, so the number of votes you win is actually dependent on the number of voters who will vote in the election, not the total number of eligible voters. How can you determine what that will be, and therefore the number of votes you will need to win the election (your "**win number**")?

One tool that is helpful in calculating a win number is the Wellstone Action "WIN Number Calculator." Here, we will use it to help us identify an outcome benchmark for the candidacy of Lisa Simpson, running for City Council in the fictional town of Springfield in November 2018.

Step 1: Determine how many candidates are in the race Fig. 13.3.

In this example, there are two candidates: our candidate, Lisa Simpson, and her opponent James Incumbent. Our example focuses on the most straightforward
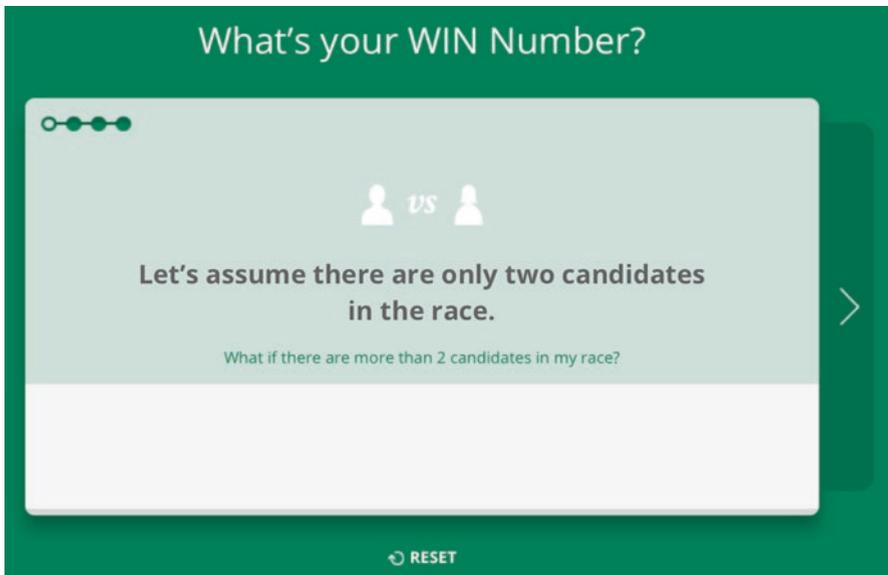

Fig. 13.3 Wellstone WIN Number calculation, Step 1

Fig. 13.4 Wellstone WIN Number calculation, Step 2

scenario—two major candidates—however, the math is slightly different if three or more candidates are in your race, or if multiple candidates are running for multiple seats (i.e., if two at-large seats are open on the City Council, and six candidates are running for these two seats) (Levy-Pollans 2013).

Step 2: Find out what the average turnout was in the last three underline similar elections in the district. Fig. 13.4

Our best estimate of future voter turnout is past turnout. However, it is important to be sure that we are comparing apples to apples when we make this estimate. If you are running in a midterm election year (e.g., 2018 or 2022), the turnout will be different than it was in a presidential election year (e.g., 2016 or 2020). Municipal or state elections that happen in odd number years or in times of the year other than the second Tuesday in November will have different voter turnout than federal elections. As we have discussed elsewhere in this textbook, the highest voter turnout in the USA is for presidential elections, while turnout is typically quite low for municipal and non-regular elections.

So, Lisa Simpson will want to identify the last three elections in her city that occurred in non-presidential years (e.g., 2014, 2010, and 2006). These numbers can be gathered from your state or local election officials. Lisa Simpson is running for office in a comparatively highly engaged district (in some of your own municipal elections, you may see voter turnout as low as in the single digits). In Lisa's district, the turnout for those past three elections is as follows: 62% (2014), 58% (2010), and 60% (2006). Enter these numbers into the Wellstone calculator, as shown here.

Step 3: Determine how many people are registered to vote in your district (Fig. 13.4).

Voter turnout percentages are based on the population of registered voters in a district. Remember that if individuals are not registered to vote, they cannot vote.

Fig. 13.5 Wellstone WIN Number calculation, Step 3

Therefore, campaigns typically target those individuals who are registered to vote. If your state has Election Day Voter Registration, this can change your calculations somewhat; however, for the most part, people who have never voted are hard to get to the polls to vote. (If it's still bothering you that we are not counting marginalized populations who do not participate because they do not feel they have a voice, you are not alone!) For these purposes, those who are not registered to vote may be better thought of as voters who will help us exceed, not meet, our win number (Fig. 13.5).

In Lisa's district, 1000 people are registered to vote.

Step 4: Using these variables, calculate how many votes are needed to win the election (Fig. 13.6).

So how many votes does Lisa need to win?

The calculator shows that Lisa needs 313 votes to win this election. Thus, her outcome benchmark would be "receiving 313 votes to win this City Council election."

But wait, you say, there are 1000 registered voters in Lisa's district—shouldn't we be shooting for 501 votes? Think back to our voter turnout numbers. Not everyone who is eligible to vote registers, and not everyone who is registered to vote votes. The only way we can reasonably estimate the turnout for this year is by looking to previous years that are similar to this one. Of course, no one wants to win an election by just one vote. The Resources section lists tools that can help you predict what a cushion over the last few candidates who ran in your position in this race might look like. You also can do the math yourself and calculate your **vote deficit**,
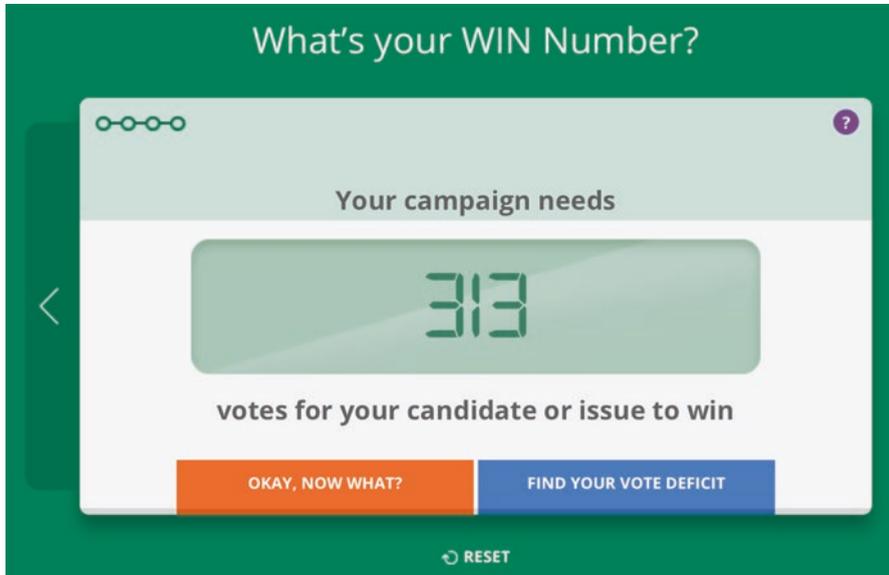
Fig. 13.6 Wellstone WIN Number calculation, Step 4

the gap between the number of people who are definitely supporting you and the number you need to win.

These calculations of course assume that turnout in this election will be consistent with other similar elections in the past. This is not always the case. There may be factors that encourage some groups to turn out or to stay home, making turnout this year higher (e.g., controversial issues on the ballot) or lower (e.g., bad weather) than prior elections. Changes in voting laws in your area also can make it easier or harder for specific groups to get to the polls. Predicting voter turnout is not an exact science, and you should assess your overall context as well as this win number as you identify your target benchmarks. However, we would not ever recommend aiming for a win number <u>lower</u> than the one that is calculated. Always aim for this number or higher to be on the safe side.

APPLY YOUR SKILLS: Selecting a Win Number
Select an upcoming election in your local municipality. Follow the four steps identified above, using the Wellstone Action "WIN Number Calculator" (http://www.wellstone.org/resources/win-number-calculator), and identify the win number for a candidate in that election. Was this process straightforward, or challenging? Why?

Section 6: Implementation

Too often, both our advocacy campaigns and our measurement of a campaign's success end when our policy goal has been reached: a bill signed in to law, a budget amendment adopted, or a local ordinance approved. Perhaps the legislature passed the bill we were supporting, or an executive agreed to change the way in which services are delivered. Unfortunately, this means that we often stop our advocacy efforts and our monitoring too soon. A similar mistake can happen after electoral campaigns. Our favored candidate wins, and we no longer pay as careful attention to the stances or actions the newly elected official takes once in office. It is critical to remember that political success only is lasting if the policy change is implemented as intended.

The **policy implementation** process is what truly brings a policy change from an idea to actuality. If they think of it at all, most people think of policy implementation as a straightforward process: A policy is approved by the relevant body and then is given to the relevant experts within that level of government to enact. This idea comes from classical Weberian models of bureaucratic decision-making, which assume that policy-makers are the ones making key decisions, and that technicians within government are merely carrying out those decisions. This makes sense in theory, but in actuality, the implementation process is a fundamental part of policy-making that has the potential to transform policy.

The policy implementation process may involve implementing policies exactly as intended by the policy-makers. It may involve developing new policies that go beyond the parameters of existing policies. It even may involve subverting the original intentions of policy-makers. The latter two options suggest a need for continued monitoring and evaluation of the implementation process, as the policies that result may do more—or less—for your policy issue than you were seeking.

In the typical implementation of a piece of legislation passed by a legislature, the responsibility for implementing the law, that is, moving the law into practice, is given to the executive branch agency or department responsible for oversight of that specific content area. This implementation process involves the agency or department developing ("promulgating") a series of written regulations (sometimes referred to as "regs," and, in final form, referred to as "rules") that explain how the law will be enacted, enforced, and evaluated by the government (Mickelson 2013). These rules or regs, subject to public comment, may include details of how a program will be staffed, what services will actually be provided, what fees (if any) will be charged, and how eligibility for services will be delivered (Mickelson 2013).

While more expansive than for many laws, a particularly complex law like the 2010 Patient Protection and Affordable Care Act (ACA) required multiple federal agencies to be involved in implementing regulations. Each agency had a role in how the law was implemented, meaning there were substantial opportunities for specific details to be determined long after the bill was signed into law. Furthermore, the ACA required a significant amount of state-level implementation decisions,

creating opportunities for additional shifts to the original policy intent. From 2011 to 2014, 3702 bills and resolutions were proposed across the country related to the ACA. In 2015–2016, there were 400 relevant laws and resolutions passed across all 50 states, the District of Columbia, and Puerto Rico (National Conference of State Legislators 2017). When President Trump took office in January 2017, federal agencies substantially changed how they implemented the law (White House 2017), while legislative efforts focused on replacing it.

How a policy is ultimately carried out and communicated to clients is not just impacted by regulatory policy-making or policy-making at other levels of government. Implementation is also affected by how agency employees responsible for service delivery ("front-line workers") manage the challenges that arise in policy implementation. As Meyers et al. (1998) describe in an extensive study of the implementation of the federal Temporary Assistance to Needy Families policy, employees at the front lines working directly with welfare recipients rarely communicated to them elements of the policy that were policy-makers' priorities. This did not appear to be intentional, but rather the result of insufficient training, resources, and additional expectations being placed on already overburdened workers. Similarly, resource restrictions, large caseloads, and poor organizational culture led social workers in the UK to delay or avoid investigating allegations of elder abuse, despite enacted policy that sought to increase adult protection (Ash 2013). While political social workers may not be able to monitor all of these subsequent steps of policy implementation, we must be aware of the importance of monitoring what happens after a law is passed. Social workers are particularly well suited to see how policy implementation affects the populations we work with. Connections and networks between social workers in direct service and those engaged in policy change are a critical way to communicate problem and concerns back to policy-makers and into the policy process.

While it is beyond the scope of this chapter to go into detail about advanced policy evaluation designs and methods, we want to acknowledge the range of policy evaluation approaches that exist. These include policy content evaluation, case studies, quasi-experimental designs, and cost-benefit analyses (Centers for Disease Control n.d.). We provide some additional resources in the Resources section for readers interested in further exploring these approaches.

APPLY YOUR SKILLS: Exploring Policy Implementation

Find a bill that passed within your state within the last 2 years. Try to find information on how it is being implemented. Have any regulations been proposed related to the bill yet? Read through any proposed or final rules. In what ways do they seem consistent, or not, with what the law was originally designed to do? If the public comment period is still open, what would you want to recommending adding or modifying?

Review of Key Terms and Concepts

Benchmarks: observable, measurable standards used to measure how a campaign is progressing.

Capacity: an organization or a community's ability to achieve its goals in future efforts.

Conversion rate: the percentage of recipients who respond to a campaign's e-mail to complete a donation.

Debrief interview protocol: brief data collection process used to capture real-time information about how a campaign is proceeding and what is happening behind the scenes in the effort.

Efficiency (of data collection): the extent to which data collection methods are burdensome.

Formative evaluation: measurement of the processes occurring within an advocacy or electoral campaign and/or within the organization(s) that is implementing the campaign.

Inputs: the resources thought to be accessible during a campaign.

Intense period debrief: a very brief opportunity for advocates to pause and reflect on their campaign's progress.

Legislative tracking: monitoring how bills or ordinances are progressing through the policy-making process.

Media tracking: counting occurrences of your campaign, issue, or candidate being covered in various media sources.

Outcome indicators: measurements of success in policy changes as a result of your efforts; may be quantitative or qualitative.

Output measures: evaluation of how a campaign is proceeding. See "process indicators."

Playing defense: policy work that focuses on keeping bad things from happening.

Policy implementation: the process of moving a policy from an idea to actuality.

Policymaker Ratings: evaluating the extent of support for a specific advocacy issue among relevant decision-makers.

Process indicators: assessment of the activities a campaign is implementing and its efforts to elicit change. See the definition of output measures above.

Public polling: interviews of stakeholders at random to assess their attitudes and/or behaviors.

Relevance (of data collection): assessment of whether research methods will collect data that are able to inform our strategic decisions.

Summative evaluation: measurement of the outcomes of a political campaign.

Timeliness (of data collection): Assessment of whether research methods can be administered and analyzed fairly quickly so that we can respond and adapt our strategy in a timely manner.

Vote deficit: the gap between the number of people who are definitely supporting a campaign and the number needed to win.

Win number: the number of votes a candidate needs to win an election.

Resources

Advocacy Evaluation Resources

Alliance for Justice's Bolder Advocacy website (all free):

Main website: http://www.bolderadvocacyorg

ACT Quick: http://www.bolderadvocacy.org/tools-for-effective-advocacy/evaluating-advocacy/act-quick!

Advocacy Capacity Tool: http://www.bolderadvocacy.org/tools-for-effective-advocacy/evaluating-advocacy/advocacy-capacity-tool

International ACT: http://www.bolderadvocacy.org/tools-for-effective-advocacy/evaluating-advocacy/international-advocacy-capacity-tool

Power Check: http://www.bolderadvocacy.org/tools-for-effective-advocacy/overview-of-evaluating-community-organizing/powercheck

Book

Alliance for Justice and the Council on Foundations. (2008). *Words to Give By.*—a book based on interviews with 23 funders about funding and evaluating advocacy. Also available at https://www.bolderadvocacy.org/wp-content/uploads/2012/01/Words_to_Give_By.pdf

Other Resources

Advocacy & Social Movements: http://www.innonet.org/index.php?section_id=3&content_id=601#resources

Calculating your win number: https://blog.ngpvan.com/running-for-local-office-you-need-this-number-to-win

Evaluation Exchange, especially volume 13, issue 11: http://www.hfrp.org/evaluation/the-evaluation-exchange/issue-archive

Evaluating Initiative: http://ctb.ku.edu/en/evaluating-initiative

Federal regulations site: https://www.regulations.gov/

http://www.hewlett.org/library/grantee-publication/elusive-craft-evaluating- advocacy

Office of Information & Regulatory Affairs: https://www.reginfo.gov/public/jsp/Utilities/faq.jsp

The Elusive Craft of Evaluating Advocacy:

Vote Deficit Calculator: http://www.wellstone.org/resources/vote-deficit-calculator

Policy Evaluation Resources from the Centers for Disease Control and Prevention

Evaluating Policy Content: https://www.cdc.gov/injury/pdfs/policy/Brief%203-a.pdf

Overview of Policy Evaluation: https://www.cdc.gov/injury/pdfs/policy/brief%201- a.pdf

Evaluating Policy Impact: https://www.cdc.gov/injury/pdfs/policy/Brief%205-a.pdf

Evaluating Policy Implementation: https://www.cdc.gov/injury/pdfs/policy/Brief%204-a.pdf

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