Advocacy Capacity Training Assessment:
An Overview of the Field

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HEADWATERS
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Introduction

Growing support for policy advocacy from private foundations and other philanthropies has concomitantly increased demand for: 1) appropriate advocacy evaluation tools; and, 2) advocacy training and capacity building. Due to sustained interest and support from several foundations, a set of advocacy evaluation tools now exists. These robust field-tested tools give funders and advocacy organizations clear ways to understand their advocacy contributions. Less well studied or documented is the field of advocacy capacity training tools and pedagogies. This report, prepared by the Headwaters Group Philanthropic Services (Headwaters) for the Atlantic Philanthropies (Atlantic), offers an overview of advocacy capacity training efforts.

The report originated from the experiences of Atlantic's Child and Youth Programme, including Headwaters' evaluation of its support for the reauthorization of the State Children's Health Insurance Program (SCHIP). An aspect of that evaluation and a subsequent deeper assessment focused on the advocacy capacity of Atlantic's SCHIP grantees and the state and local groups with whom those grantees worked. These assessments found that while overall there were sufficient advocacy skills within the Washington, D.C.-based groups (though not necessarily enough staff), advocacy skills within state and local groups were mixed. None had sufficient staff to maintain any consistent, sustained advocacy effort either within their locality or in support of federal policy efforts.

Informed by these evaluations, and committed to supporting state and local advocacy efforts in support of its own and federal policy initiatives, Atlantic asked Headwaters to provide the following overview of advocacy capacity training—who does it, how is it done, what appears to be effective, how it is evaluated, and what are any key barriers or opportunities. The report provides key findings and recommendations to Atlantic on ways it could optimize its support of advocacy capacity training. It also provides an overview of advocacy capacity trainers and (see Appendix C).

Methodology

The findings in this report were informed by interviews with training practitioners and funders engaged in supporting advocacy capacity building efforts as well as a review of relevant literature. Interviews were conducted with 26 trainers and 13 funders from around the country. (See Appendix A for interview questions and Appendix B for a list of interviewees.) Interviewees were identified through Headwaters' network of contacts in the funder and advocacy communities, from Atlantic staff, and other interviewees.

Findings

The following findings come primarily from our interviews with supporting content from our additional research. The findings are divided into three sections: 1) defining advocacy capacity building; 2) themes and lessons around advocacy training; and, 3) themes and lessons that cross-over from training to advocacy-related grantmaking.

Defining Advocacy Capacity Building

Interviews and the literature review presented varying definitions of advocacy capacity building. One interviewee compared it to the classic story about people touching different parts of an elephant—everyone has a somewhat different description based on their perspective. Following is a sampling of definitions from our conversations and research, separated into a few key themes.

- **Sustainability.**

  - "Advocacy capacity building means improving the ability of a nonprofit to sustain effective advocacy over time. Examples of advocacy capacities for effectiveness include strong flexible organizations that work well with others and know the systems."[1]

  - "A tool to build strong, sustainable organizations that have the knowledge and know-how to connect with their constituents and accomplish their advocacy goals. It needs to be built-in within the organization, not just have outsiders come in."—Interviewee

- **Strategic and systemic actions; ability to be adaptive.**

  - "Advocacy is trying to address root causes of problems—working to solve a social problem through direct strategy on one hand but also by more broadly influencing rules and policy on the other hand. It is understanding those factors and being able to influence them systemically."—Interviewee

  - "Our way of thinking about advocacy capacity building is about how the organizations strategically respond to feedback from their environment. Our assumption is that building a good advocate is about building their responsiveness to the external forces around them."—Interviewee

  - "The most critical but often overlooked dimension of capacity for a nonprofit organization is adaptive capacity—the ability of a nonprofit organization to monitor, assess, and respond to internal and external changes."[2]

Advocacy Capacity versus Organizational Capacity

Advocacy capacity is difficult, if not impossible, to separate from overall organizational capacity. As one interviewee noted, "A well-run advocacy organization is an organization with a strong core. It has a functioning and cohesive board of directors, effective strategic plans, solid fundraising strategies, good personnel management, and sound financial management. These core competencies give an organization the strength it needs to carry out its mission."[1]

Measurements of organizational capacity and advocacy capacity generally fall along the same lines, as detailed below.

◆ Elements of well-run organizations that generally have considerable advocacy capacity include:[1]
  - A full time executive director.
  - A functional board of directors.
  - A strategic plan.
  - Fundraising competence.
  - Skillful staff management and a commitment to making the organization an attractive place to work.
  - Sound financial management.

◆ An effective nonprofit organization generally has the following characteristics:[1]
  - A vital mission.
  - High-quality, relevant, well-regarded programs.
  - Capable and motivated leadership, management, and staff.
  - Clear communications and accountability.
  - A well-organized and able board.
  - Efficient operations and strong management support systems.

◆ **Building skills.**

  - "Helping organizations develop the skills they need to move forward an agenda. There are several aspects of that—communications/media, grassroots organizing, policy, etc. Fundamentally, it is about developing an organization's skills, capacity, and confidence in those key areas."—Interviewee

  - "Generally speaking, advocacy capacity building is a bunch of tools in a tool box that helps state organization with financial resources and best practices of operating to be as effective and impactful as they can."—Interviewee

◆ **Leadership.**

  - "Capacity is often defined too narrowly as a set of technical skills of an organization. We would define it more broadly. In addition to an organizational lens, we also need to use a leadership capacity lens."—Interviewee

Themes and Lessons: Advocacy Capacity Training

Themes and lessons emerging from the interviews and literature clustered around two aspects of advocacy: 1) training; and. 2) grantmaking . For the training cluster, t en themes and key lessons were identified.

Scope of Capacity Building –Individuals, Organizations, and the Field

There was a range of responses from interviewees when asked about the ideal scope of advocacy capacity building efforts—whether focusing on the individual, organizational, or field/movement level is the most effective to achieve desired policy changes.

◆ **Individual capacity building is usually done in conjunction with organizational capacity building.** Most interviewees supported building the advocacy capacity of both individuals and organizations simultaneously. Many recognized that while individuals generally carry the important knowledge and experience, their departure can leave a considerable hole in the capacity of the organization. Those that focus their training on individuals have various methods for ensuring that knowledge gained by the individual is also transferred back to the organization.

- **Train individuals with the power to make change within their organization.** Selecting the "right" individual to train can have a substantial effect on how or whether capacity is also built at the organizational level. Some of the trainers we spoke with stressed the importance of working with executive directors because they have the power to implement changes.

- **Involve more than one organizational representative in trainings.** In an effort to expand trainings even more beyond the individuals attending, some trainers encourage multiple representatives to attend. Committed individuals are essential to take what they learned from a training and implement change in their organization. When two or more staff return to the organization with the same knowledge base and shared excitement, they are better able to apply what they learned to the organization and often to get other staff members on board with new ideas.

> *Example:* Voices for America's Children takes the view that training and capacity building efforts need to be focused on both the individual and the organization. The organization encourages this by including more participants at its yearly conference. Previously, Voices had targeted only the executive director of the member groups. Voices has begun giving scholarships to enable more staff from each group to attend meetings together.

- **Engage the board of directors.** An organization's board of directors is a critical, but often ignored, target for organizational capacity building. The Johns Hopkins Listening Post project pointed to the importance of boards in the creation of institutional change and growth of an organization.[3] Board

members often have key contacts and can be a tremendous pool of advocates. Involving the board is one way to build the culture of engagement in advocacy at the organizational level.

> *Example:* Spitfire Communications has several methods to help organizations more fully engage board members. Sometimes board members participate in trainings along with staff. Spitfire also sometimes leads a separate training session with an organization's board as part of its technical assistance. Spitfire can provide an organization with training on how to use their board effectively.

- ◆ **Building capacity of the field/movement can be more challenging than working at the individual or organizational levels.** In many ways, it is more difficult to address capacity building for an entire movement or within the whole "ecosystem."

    - • **Building the field requires coalition building and a commitment to collective problem solving.** In the process of building coalitions, special attention is required for strategic coordination and the division of labor among organizations. Trainers need an understanding of the whole system and how groups involved take on different roles to have a collective impact.

    - • **When building the movement, it is important to be grounded in "local."** Some interviewees that favored capacity building at the movement level also stressed the need to build capacity locally. It is important to maintain a local constituency accountable to the issue that is being supported. The local voice is often most accountable and cannot be overlooked when focusing on the broader field.

> *Example:* The Center for Community Change (CCC) is a strong supporter of using a broad lens to focus on what is most important for the whole ecosystem, and what has the most collective impact. In its work, CCC believes the necessary first step is to bring groups together to have a collective conversation to define problems and determine what they need to move forward. Rather than viewing capacity building in a traditional provider/consumer context, allowing groups to collectively define their needs increases their commitment and accountability and results in a greater impact.

Advocacy Capacity Building for Social Service Organizations

Engaging social service organizations in advocacy work can be valuable, as they often bring an understanding of an issue from an on-the-ground perspective that larger advocacy groups may not have. However, their limited advocacy experience often translates into capacity building needs that differ from more established

advocacy organizations. Interviewees discussed some of the particular challenges and lessons learned from their experience working with social service organizations that want to engage in more direct advocacy efforts.

- **Direct, Long-term Support is Necessary.** Interviewees generally agreed that it can take a considerable amount of time and effort to move service organizations toward effectively engaging in advocacy. Funders supporting these organizations and trainers need to be prepared to work closely with them, provide ongoing technical assistance, and nurture their growth over the long-term.

- **Strong Organizational Capacity Must Be in Place First.** Before organizations can effectively transition into building advocacy capacity, it is imperative that their general organizational capacity is solid. Funders should either make strong organizational capacity one of their criteria for funding, or if supporting start-up organizations, plan to support the organization's organizational capacity building before moving on to building advocacy capacity.

- **Organizations Need to Build Skills and Confidence.** While focusing on the hard skills is clearly necessary to build an organization's advocacy capacity, for inexperienced organizations, a lack of confidence in doing the work can be a major barrier to success. Service-oriented organizations that have previously kept their activities removed from policy and advocacy work tend to be particularly intimidated by engaging in advocacy.

> *Example:* Through its trainings, Wellstone Action has found that the best way to build confidence is to make sure trainings are equal parts exercise and practice. Participating in simulations and actually learning by doing are powerful strategies to enable people to envision themselves doing the work.

- **Building Partnerships and Networks is Critical.** The benefit of creating and supporting networks and peer-to-peer learning among organizations is a key theme mentioned by many interviewees (to be discussed further in the following section). However, this is viewed as being of indispensable importance for service-oriented groups. The key to success is helping groups intersect and connect with the broader environment of social change advocates. However, as one interviewee observed, it is important to wait to bring in established advocates until the newer groups have received some training and are ready so that they are not overwhelmed from the beginning.

> *Example:* Liberty Hill Foundation's Environmental Justice program networks individuals who have gone beyond local campaigns in their own backyards and have worked together on broader issues and develop common strategies and solutions. In this way, capacity is built simultaneously at the level of the individual, the organization, and the field as a whole.

- **Involvement of the Whole Organization.** For social service organizations just beginning to expand into advocacy work, it is particularly important to engage the whole organization. All staff need to be on the same page in terms of what it means to do advocacy work and how it fits within the overall mission of the organization. Trainings or technical assistance provided to these organizations should include orientation for the board and the entire staff, and not just those who are actively engaged in the advocacy work. Often, an organization's executive director may be an active advocate, but if the broader organization is not involved, and no one else in the organization understands the advocacy work being done, opportunities for success are limited to the abilities of the individual.

Sufficient Resources

As one interviewee aptly put it, "there's nothing like money." Advocacy work requires time and resources, and because many nonprofit organizations are already stretched thin in both budgets and staff time, funders interested in advocacy capacity building need to provide advocates sufficient resources.

- **The Value of Unrestricted Resources.** Often, funds nonprofit organizations receive come with limitations on activities they can undertake or with other "strings" attached. As noted in a report by the Urban Institute, "the task of raising unrestricted resources for advocacy and of allocating those sparse resources to activities that advance policy goals is an ongoing organizational challenge."[4] By providing multi-year general operating grants, funders can best support the building of grantees' advocacy capacity.[5]

- **Resources Beyond Training.** Both trainers and funders stressed that truly supporting capacity building means going beyond training through funding follow-up technical assistance and providing the monetary assistance they need to put the training to use. Providing an organization with training but not sufficient additional resources can be viewed as an unfunded mandate that may ultimately fail to achieve the desired capacity building. Funding staffing is one good example—without stable funding to hire and maintain staff, it is difficult to sustain capacity building over time.

   Example: The League of Conservation Voters' program is unique because before doing trainings or mentoring, the League focuses on giving grants to member organizations. These grants are considered a critical aspect of the program and essential to the success of their trainings.

- **Making Deeper Investments.** At a time when money is short for many funders and nonprofits, some attempt to cut back by providing more web-based trainings or scaling back capacity building investments in other ways. But some interviewees expressed the need for funders to make deeper investments to provide organizations with the skills and mentorships they need to succeed.

> *Example:* The U.S. Human Rights Fund supports a deep investment in some of its grantee partners by funding more expensive capacity-building opportunities. The Fund has in-depth programs that teach advocacy over a 3-month or year-long course. In some cases, the Fund has supported the cost for a representative of an organization to travel to spend time with another, more experienced organization to learn directly.

Content of Trainings

Generally, the funders with whom we spoke encourage grantees to participate in trainings to help build their advocacy capacity. In some cases funders are the driving force behind organizing trainings for their grantees, particularly cohort trainings through which a group of grantees or community of practice are trained together. Others take a more hands-off approach and allow grantees to determine their training needs and how to best fulfill those needs.

◆ **Get Input from Organizational Partners.** Regardless of the funder's level of involvement in organizing trainings, organizational partners need to have real input into the content of trainings. Actively soliciting ideas from participants can maximize the relevance of trainings.

> *Example:* National Community Development Institute (NCDI) considers what it calls "co-design"—working closely with participating organizations in advance to help inform the training—to be a vital aspect of a successful training. NCDI works with organizations to identify key issues and recurring problems that can be addressed in their trainings.

◆ **Utilize the Experience of the Trainer.** While is necessary to gain input from participating organizations, the experience of the trainer is important, particularly for less experienced groups.

◆ **Customize Content of Training.** A common theme among trainers was the importance of customizing training content as much as possible to their audience. Even for more general "Advocacy 101" type trainings that may have a broad audience, trainers stress the value of incorporating specific examples or case studies that are relevant to participants into the training content.

> *Example:* In this regard, the assessment process Wellstone Action uses with organizational partners involves a lot of listening and asking direct questions about their work. For example, the organization has learned to ask organizations "what are you trying to achieve" rather than "what do you need to learn" because often groups don't know what they need to learn.

Types of Trainings

Trainings are delivered in a wide variety of ways. From an hour-long webinar to a multi-day in-person training, different types of trainings can meet the specific needs of an organization or group.

◆ **In-person Trainings are Most Effective.** Generally, interviewees felt that in-person trainings are the most effective. As one trainer observed, "Participants are better able to soak everything in and trainers are better able to gauge the understanding of the audience and adjust as necessary because participants are right there in front of them."

◆ **Web-based Trainings are Best as Supplemental Training.** Web-based trainings have become popular because they are convenient and can have a broad reach. Additionally, they are considerably less expensive than in-person trainings, which makes them appealing as funders and nonprofits are looking for ways to cut costs and keep their budgets down. However, interviewees stressed that web-based trainings are not a replacement for in-person trainings. Instead, they generally felt that webinars and other web-based trainings are best-suited as supplemental training or as refresher courses.

◆ **Amount of Resources Available can Influence the Type of Training Done.** Generally, interviewees recognized that even if it is clear that a long-term, multi-level training series is most effective and impactful, that is not an option for every organization. Clearly, even when an organization's training needs are considered, the amount of resources available for training influences the type of training done. This is true both of monetary resources allocated to training and of other resources, such as staff time to attend multi-day trainings.

◆ **Cost of Trainings is Generally Low or Supplemented by Funders.** Interviewees offered some mixed feelings regarding the cost of trainings. While they do not want trainings to be cost-prohibitive, some feel that charging participants a nominal fee can increase their sense of investment in the training. Some trainers address this issue by offering free or low-cost trainings while asking participants to cover the cost of travel so that there is some level of buy-in. Trainings for groups of foundation grantees are often paid for by the funder, so that there is little or no cost to the organizations.

◆ **Follow-up Technical Assistance Adds Value to Trainings.** Several trainers and funders mentioned the benefits of providing technical assistance in addition to trainings. This could come in the form of online technical assistance such as that provided by Alliance for Justice (AFJ) free of charge to all organizations seeking assistance. Or it could be individualized, one-on-one coaching and technical assistance provided by trainers such at TCC Group or Innovation Network. While individualized technical assistance, tailored specifically to the needs of the organization is highly valuable, it clearly requires additional resources.

Example: AFJ provides trainings through a variety of media. Generally, while the organization feels its longer, in-person workshops are the most effective form of training—allowing participants to sink their teeth into the subject and come away with a deeper level of understanding—it recognizes that time and resources play a role in determining the type of training available to various organizations. AFJ also conducts web-based trainings that have a broader reach due to frequency and minimal cost. Additionally, AFJ offers free online technical assistance that serves the dual purpose of adding value for training participants who use it as a follow-up supplement to their training, and as a resource for anyone seeking information who may not have been able to participate in a formal training.

Context of Trainings

There were mixed opinions from trainers and funders regarding the ideal context of trainings—either trainings around a specific issue area or campaign, or more general advocacy trainings.

◆ **Trainings Around an Issue Area.** Generally, interviewees feel it is most effective to tailor trainings to the organization or group receiving the training, most often by organizing the training around a specific issue area or campaign. Several interviewees noted the benefits of a programmatic or issue-related grouping of organizations in providing participants with a context for the training as well as acting as a binding agent for the organizations involved.

◆ **Other Ways to Tailor Trainings.** While interviewees most commonly organized trainings by issue area, some mentioned other commonalities they focus on to tailor trainings to their audience, including grouping organizations that are at a similar skill set level.

◆ **General Trainings.** Although more general trainings appeared to be offered less frequently, some trainers and funders preferred them under certain circumstances.

  ● **Opportunity for Cross-fertilization Across Issue Areas.** A few funders did support more general trainings, especially when their grantees spanned a wide range of issue areas. One funder shared that most of its grantees say they have ample opportunity to meet with other groups in their issue area, but don't have the opportunity to meet with others about advocacy and capacity building. Some found that bringing together organizations working on a diverse set of issues often led to the creation of partnerships and coalitions of groups that previously would not have considered working together toward a common goal.

  ● **Grouping Organizations by Skill Set Level.** General trainings were also utilized by some when training relatively inexperienced groups in a concrete skill.

◆ **Avoid Training for the Sake of Training.** Regardless of whether trainings are general or specific to an issue, several interviewees stressed that it is important not to oversell or over-utilize trainings. As one trainer remarked, "We hear a lot from people that they can be trained to death. More important is applying training to real needs—determining the organization's specific needs and how to integrate that with training to be the most effective."

Peer-to-Peer Learning and Network Building

Interviewees frequently mentioned peer-to-peer learning and networking as being perhaps the most valuable element of trainings for participating organizations. While people respond to a knowledgeable trainer, they also want to learn from each other, and may even be more likely to pay attention to and believe peer-to-peer trainings.

◆ **Networks Help Local Groups Engage More Regionally and Nationally.** One challenge for many smaller, locally-oriented advocacy organizations is the difficulty of engaging with more established groups on a national level. By participating in broader networks, these groups can build capacity to effect change while maintaining critical local engagement.

◆ **Support Differing Needs of New and Established Advocates.** Understandably, organizations newly engaged in advocacy efforts are generally the most interested in peer-to-peer learning opportunities to build their advocacy capacity. While established organizations can also achieve considerable learning from their peers, they may be less inclined to engage with inexperienced groups.

> *Example:* The Colorado Trust found this to be true with a group of their grantees—newer advocacy groups were desperate for peer-to-peer learning opportunities, while some of the more established groups saw it as mission drift, taking time away from urgent work. The Trust is looking at other ways groups can benefit from each other to encourage more interaction among the groups. For example, newer groups tend to be located in rural Colorado and have access to constituencies that the more established, Denver-based groups want to reach. The established groups typically have more contacts and experience in the state legislature, from which the less experienced groups can benefit.

◆ **Broad-Based Coalitions can Lead to Unexpected Relationships.** While there is a more obvious benefit to bringing together groups that are involved in similar work to learn from each other, some funders also saw considerable value in building broad-based coalitions. Bringing together a mixed group of organizations can result in strong and diverse alliances across issue areas.

Cultural Competency

Several interviewees identified cultural competency as an important component of trainings. Cultural competency trainings focus on helping people better understand their own cultural lens and how that influences their work in the community, how they engage others, and even what strategies they may be comfortable pursuing. This understanding can help organizations better determine how to bridge cultural gaps, building a stronger, more diverse group of people working toward a common goal, and how to create spaces were all participants feel valued and their input is respected.

◆ **Cultural Competency in Trainers is Important.** Interviewees felt that trainings are most effective when there is a cultural competency component and trainings are tailored to meet the needs of the trainees. Particularly important for smaller organizations is to have trainers who understand cultural differences and how they may affect their advocacy efforts.

◆ **Cultural Competency Should Not be a Stand-Alone Training.** Rather than simply receiving a separate training in cultural competency, organizations and funders should learn how to infuse the principles into everything they do. In addition to trainings, organizations need to be supported with follow-up technical assistance.

◆ **All Advocates Can Benefit from Cultural Competency Training.** Even after the advocacy capacity of people of color (POC)-led organizations has been built, they often still have challenges "getting to the table." It is critical to interject the framework of understanding racial/ethnic differences into all trainings to help ensure that the role of POC-led organizations is genuinely inclusive and not the result of tokenism. Training POC-led groups exclusively changes only one side of the equation and can lead to frustration.

> *Example:* The Kellogg Foundation asked NCDI to help facilitate a training of community leaders around the issue of community engagement. NCDI found that the groups most needed support in figuring out how to make advocacy efforts more inclusive and bring new people to the table, working through tensions around race, gender, and other differences. NCDI helped them to understand how culture influences individual thinking about advocacy and how to create inclusive strategies by building on the assets of the community, rather than creating a potentially divisive plan.

Qualities of Effective Trainers

In addition to the courts I the processes around advocacy training, another factor interviewees identified were the trainers.

◆ **Trainers Should Have Advocacy Experience.** Looking at training not as a goal in and of itself, but as a tool to help organizations to get to their goals, trainees need to take what they learn from a training and apply it. Trainers with a history

as advocates and experienced in the work, not just in training, add relevance to training. While a history of advocacy is important, effective trainers should be real trainers, not current advocates. By no longer actively engaging in advocacy, trainers can be dispassionate and able to focus on the educational aspects of the training.

◆ **Trainers Must be Familiar with the Issues in the Local/Regional Context.** To be most effective at the state or local level, trainers need a deep understanding of the area's particular issues and the underlying political and social context. In the case of CLPI, trainers always come from the regions where they do the trainings to ensure that they have relevant on-the-ground advocacy and policy experience. For groups using outside trainers, special attention should be paid to learning as much as possible about organizations and working closely with groups to understand their individual circumstances. In any case, trainers should take their lead from the organizations they are working with rather than swoop in thinking they have all the answers.

> **Common Qualities of Effective Trainers**
>
> A study of organizations engaged in capacity building found that the most effective capacity builders share some common qualities:[1] They:
>
> ◆ Address a basic level of adaptive and leadership capacities.
>
> ◆ "Leave something behind" by transferring their technical expertise to the client.
>
> ◆ Create incentives for nonprofits to follow through.
>
> Usually require a monetary commitment from the nonprofit to pay for capacity building services.

> *Example:* In 2007, the Packard Foundation initiated a new multi-year grantmaking strategy, "Insuring America's Children: States Leading the Way," in support of state-based groups working to expand children's health insurance coverage. A primary element of the program is highly customized technical assistance and training for each grantee. Spitfire Communications and Georgetown Center for Children and Families (CCF) provided grantees with policy research and implementation expertise. Both organizations made it a priority to learn about each state's specific needs so that they could offer advice directly applicable to each state. While outside groups offering advice often meet with skepticism by locals, Spitfire and CCF respected the grantees' knowledge of the dynamics within their states and worked closely with them to learn about key issues, what the groups needed, and who local decision makers were. In this way, Spitfire and CCF were able to provide critical, highly relevant technical assistance without being viewed as "D.C. outsiders."

Evaluating Advocacy Capacity Training: Measures of Progress and Impact

Across the board, interviewees recognize the value of evaluation. However, there is considerable variation in the degree to which they collect evaluative data regarding the impact of advocacy capacity trainings. Following are findings pertaining specifically to evaluation of advocacy capacity trainings. (See Appendix D for a summary of findings regarding advocacy evaluation, in general.)

◆ **Rigorous Evaluation of Trainings is Uncommon.** Most trainers incorporate some type of pre- and/or post-training surveys of participants. However, more rigorous evaluation of trainings was not common among those we interviewed. As one trainer explained it, "pinpointing what aspects of our training or work has led to the success of organizations is virtually impossible, so we don't spend a lot of time trying to get this answer." Because it is hard to measure to what degree trainings actually affect participating organizations, evaluation of trainings often relies on qualitative data and anecdote.

◆ **Interviewees Recognize the Need for More Evaluation.** Regardless of the level of assessment of their trainings, most trainers with whom we spoke recognize they could be doing more. Some mentioned they are in the process of developing additional measuring tools. For example, AFJ is currently working with an evaluator to update its workshop surveys, to include a survey sent out a few months after the workshop to gauge the extent to which participants are able to incorporate the content of the training into their work and how it has made an impact. Center for Lobbying in the Public Interest (CLPI) has also expanded its evaluation efforts with a survey sent out to an extensive list of past trainees to help assess how CLPI's trainings impacted the organizations' capacity and mission.

◆ **The Effect of Ongoing Training Relationships is Easier to Measure.** Several trainers mentioned they are typically able to get a better handle on their impact on organizations with which they have a long-term relationship. By maintaining regular contact and receiving regular feedback, trainers can get a sense of their impact even if they do not conduct a formal assessment of their work.

Themes and Lesson: Advocacy Capacity Grantmaking

A smaller, second set of themes and lessons clustered around advocacy capacity grantmaking.

Long-term Commitment

Interviewees stressed that advocacy capacity building efforts require long-term support; it can take years and even decades to achieve desired results.

◆ **Patience is Required for Everyone Involved.** Funders need to recognize that a desired impact can take a long time, and consequently, they need considerable stamina (and patience) to support reform over the long haul. The advocacy organizations they support also need to be prepared to engage in a long-term effort. The training and technical assistance they receive should reinforce the understanding that they will experience setbacks and make mistakes along the

way, and that they should not expect to achieve desired outcomes in just one or two years. Likewise, trainers need to be patient and understand it takes time to build an organization's capacity.

◆ **A Strong Partnership Among all Parties is Necessary.** A report prepared for the California Endowment found that policy work requires a stronger partnership among funders, grantees, and evaluators. [6] As the report notes, "the long-term nature of policy work and the risk of failure, combined with the need to continually adjust milestones, means that grantees, funders, and evaluators need a deeper level of partnership and trust to engage in this work. Funders in particular, as holders of the purse strings, have an opportunity to forge new types of relationships between these policy partners."[7]

◆ **Balancing Responsiveness with Long-term Support is Critical.** Some funders mentioned the challenge in wanting to be responsive in their funding while supporting long-term capacity building. Funders need to ask themselves what it really means to say they are in it for the long term, and how and when to decide whether it is time to change course or persist and see what happens.

◆ **Investing in a Dedicated Group of Organizations over the Long Term Is Essential.** As one interviewee observed, "deep capacity building is ongoing sustained work with targeted organizations."

Example: The Jessie Smith Noyes Foundation considers long-term support of its grantees integral to its grantmaking—on average, its grantee partners receive seven years of support. One of its grantees, The Rural Coalition, has received support from the foundation for 17 years. The foundation has provided broad-based support that allowed the organization to spend considerable time doing leadership development, conducting internal trainings of members to be leaders and advocates, and building relationships with key decision makers. The Rural Coalition's work with the Diversity Initiative in development of the most recent Farm Bill resulted in some of the biggest gains in the final product. This success was made possible because the Coalition had already established relationships on the Hill and was respected as a credible organization, and was able to work with other organizations to agree on a priority agenda. In this case, Noyes' long-term support and the Rural Coalition's steady capacity building resulted in a big win.

Clearly Defined Goals

As with any funder/grantee relationship, developing clearly-defined goals early on is critical for the future success of the project. From the outset, funders and individual organizations must have a shared understanding of what they want to accomplish. While some of the following steps could be recommended for all grantmaking scenarios, they are particularly relevant and necessary for successful advocacy capacity building efforts.

- ◆ **Focus on Common Goals.** Even before the grantmaking process begins, both funders and grantseekers need to have a clear understanding of their goals. Funders need to know what they want to accomplish, then seek out organizations that share their interest and meet their criteria. Grantees need to have a clear understanding of how the funder's priorities are relevant to them and make sure that those priorities closely mesh with what the grantee wants to accomplish as an organization. This is particularly true for coalitions engaged in advocacy efforts, in which case "early work done to get all participants on the same page philosophically and strategically seems to be crucially important."[8]

- ◆ **Create a Clear Theory of Change or Logic Model.** Before a project or advocacy effort begins, an organization is usually be clear about its goals and expected outcomes. However, it may not have explicitly identified its theory of change, developed a logic model, or set benchmarks. Good advocacy capacity training can help organizations develop these tools. As one trainer observed, "This in itself is building their capacity to do advocacy work."

- ◆ **Define Specific, Narrow Goals.** Several interviewees felt that the process of defining goals is often most challenging for local and state-level organizations less experienced in advocacy work. These groups often present goals that are too broad, and typically need more assistance on the front end defining narrow goals that focus on specific policy changes. One funder noted that its grantees that were very specific in their goals from the beginning were better able to stay on course through the duration of the grant.

- ◆ **Allow for Adjustments Along the Way.** While it is imperative for organizations to set narrow, well-defined goals and expected outcomes from the beginning, it is also important to allow for adjustments based on learning or new opportunities that present themselves. An organization's theory of change should not be viewed as a static document, but rather reviewed regularly and revised as necessary. Grantees should maintain regular communication with their funders so they can keep them apprised of any changes and adjustments that need to be made.

Recommendation

Many of the findings offer enough for Atlantic and other funders to consider without further discussion or elaboration. However, we offer the following recommendation that builds upon and extends beyond the findings.

Strategy Meeting(s) with Key Funders and Trainers

Several of the trainers and funders interviewed wanted more formal conversations on advocacy training. Thus, we recommend convening a small team of funders and experienced trainers to focus on shared interests. Goals of such meetings would be to identify, discuss, and explore common advocacy training strategies. Strategies could be formed around common issues, geographies, grantees, and funding goals in similar issue areas. Engaging in deeper planning conversations could result in valuable lessons for everyone involved regarding how to use their resources to the greatest impact.

Some of the key funders and issues that could be discussed include:

Who. Funders and trainers could include the Atlantic Philanthropies, David and Lucile Packard Foundation, The California Endowment, Jessie Smith Noyes, W.K. Kellogg Foundation, NCDI, PolicyLink, and Social Policy Research Associates.

What. Interviewees and others suggested several topics, some issue-oriented and some focused on broader practices:

◆ **Health Care**. The issue raised by more than one funder was health care advocacy. As one interviewee noted, "With health care reform there will be even more need for capacity building at the state level to determine how to effectively implement health care reform. What is likely to come out of legislation, there will be a lot for states and state agencies to grapple with. This will be incredibly important over the next few years."

◆ **Practices**. Practices interviewees identified as wanting to discuss included those of ensuring cultural competency and longer-term advocacy development and support.

- **Cultural Competency and Communities of Color.** The findings reiterate the need for culturally competent trainers, and advocacy training for, and about, organizations lead by people of color and for communities of color. Clearly under-addressed issues, they are ones that should only grow as the U.S. demographics change. The experience of some of the individuals and funders interviewed and mentioned above offer a fertile starting point for such discussions.

- **Advocacy Fellows.** A pipeline of younger, culturally competent and ethnically and racially diverse advocates being trained, groomed, and mentored is another potential agenda item. Such advocates may not necessarily bound to one organization, but to the movement. Over their careers, these individuals will most likely move in and out of several advocacy groups, government positions, foundations, and possibly the private sector. However, they may well stay committed to an issue-specific

movement or to other social justice movements. If this were the case, then funders may want to invest its resources in identifying such individuals, and investing in them over time. These would essentially be advocacy fellowships with the funding for them tied to the individual and not to an organization.

◆ **Funder Partnerships**. A third general area of interest was around is building and strengthening funder partnerships on advocacy training and evaluation. As one interviewee noted, "Partnering with other organizations is key—not to do it alone—that has been instructive and informative for us."

Conclusion

Evidence from the field suggests that Atlantic's (and other funders) investment in the development and use of tools and techniques for evaluating advocacy efforts has been successful. Extending its commitment to the upstream end of advocacy— training and capacity building—around its target issues is a reasonable next step for Atlantic. Moreover, it is a ripe opportunity in need of focused resources. This report provides a series of findings and recommendations to guide Atlantic and others in making the most of this opportunity. Using, expanding, critiquing, and refining them will enhance the field of advocacy training, and help bring new, more diverse advocates and advocacy organizations to Atlantic's target issues. As importantly, it could bring more culturally competent advocacy trainers into the field. Strengthening the advocacy community's ability to train, sustain, and expand its capacity is a worthy endeavor for one of the foremost supporters of progressive advocacy.

Notes

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[1] Advocacy Evaluation Advances: Assessing Advocacy Capacity, PowerPoint presentation, January 20, 2009. George Gund Foundation, Alliance for Justice, and Mosaica: The Center for Nonprofit Development.

[2] "Building the Capacity of Capacity Builders: A Study of Management Support and Field-Building Organizations in the Nonprofit Sector." Paul Connolly, Peter York et al. Conservation Company, June 2003.

[3] Salamon and Geller, "Communiqué No. 9. Nonprofit America: A force for Democracy?" Listening Post Project of the Center for Civil Society Studies at the Johns Hopkins Institute for Policy Studies. 2008.

[4] "Organizational Factors Influencing Advocacy for Children." A report prepared for the Foundation on Child Development. Urban Institute. January 2004.

[5] "Voices From the Field: Strengthening Human Rights and Social Justice Advocacy in the United States." A Report for the U.S. Human Rights Fund and Atlantic Philanthropies. February 2008.

[6] "The Challenge of Assessing Policy and Advocacy Activities: Moving From Theory to Practice." Prepared for the California Endowment. Blueprint Research and Design. October 2006.

[7] "The Challenge of Assessing Policy and Advocacy Activities: Moving From Theory to Practice." Prepared for the California Endowment. Blueprint Research and Design. October 2006.

[8] "Advocacy for Impact: Lessons from Six Successful Campaigns." A Report Commissioned by Global Interdependence Initiative. Center for Nonprofit Strategies. May 2005.

Appendix A

Interview Questions

Questions for Trainers

1. How does your organization define advocacy capacity building?
2. Who is the target of your organization's advocacy capacity training? (local, state, or national groups)
3. What types of trainings does your organization offer? (content, length, recurrence, etc.)
4. How much do you charge for such trainings?
5. How do you measure progress and impact at individual, organizational (including board as well as staff), and community levels? (What is the unit of analysis, what are your indicators of progress and impact, what evaluation methods do you use, and how often do you conduct the evaluation, e.g. just one pre- and post-training, two or more post-trainings evaluations, etc.)
6. What are relevant themes and lessons you have drawn from evaluation of your trainings?
7. Which funders are key leaders in this area? In particular, who may have specific ideas, recommendations, or lessons to offer Atlantic?
8. Are you aware of other organizations that provide advocacy capacity training that we may want to talk with?
9. Do you have any suggestions regarding relevant literature, reports, and manuals that we should review?

Questions for Funders

1. How does your foundation define advocacy capacity building?
2. What is your foundation's history of funding advocacy and capacity building?
3. Who is the target of your foundation's funding of advocacy capacity building? (types of organizations, issue areas, geographic scope, etc.)
4. Do you encourage or require grantees to receive advocacy training? If so, do grantees receive training individually or as a cohort? Does your foundation select the trainer and/or determine the focus of training, or is that left to the grantee?
5. How do you fund trainings for your grantees? Does the cost of the training come out of grantees' program budgets, or do you provide a dedicated training grant to the grantee or the trainer?
6. How do you and/or your grantees measure progress and impact at individual, organizational (including board as well as staff), and community levels? (unit of analysis, indicators, evaluation tools, and frequency)
7. What are relevant themes and lessons from advocacy capacity building and training efforts you have supported?
8. Are there other funders who are key leaders in this area who may have specific ideas, recommendations, or lessons to offer Atlantic?
9. Are there trainers that you have worked with that provide advocacy capacity training that we may want to talk with?
10. Do you have any suggestions regarding relevant literature, reports, and manuals that we should review?

Appendix B

Interviewees

Experts and Trainers

Organization	Name
Alliance for Children & Families	Peter Goldberg and Linda Nguyen
Alliance for Justice	Abby Levine
Aspen Institute	David Devlin-Foltz and Lisa Molinaro
Center for Community Change	Seth Borgos
Center for Lobbying in the Public Interest	Larry Ottinger
Center for Progressive Leadership	Tracy Sturdivant
Center on Budget and Policy Priorities	Robb Gray and Nick Johnson
Every Child Matters Education Fund	Michael Petit
First Focus	Bruce Lesley
Georgetown University Center for Children and Families	Jocelyn Guyer and Joan Alker
Grantmakers for Effective Organizations	Kathy Enright
Harvard Family Research Project	Julia Coffman
Independent Consultant	Barbara Masters
Independent Consultant	Harry Snyder
Innovation Network	Ehren Reed
League of Conservation Voters	Ed Zuckerman
Midwest Academy	Jackie Kendall
Mosaica	Nicole Robinson and Hilary Binder Aviles
National Community Development Institute	Diana Lee
PolicyLink	Judith Bell
Social Policy Research Associates	Hahn Cao Yu and Traci Endo Inouye
Spitfire Strategies	Kristen Grimm and Gwyn Hicks
State Environmental Leadership Program	Bill Davis
TCC Group	Jared Raynor and Susan Meeser
Voices for America's Children	Marlo Nash, Joe Theissen, and Rennie Dutton
Wellstone Action	Ben Goldfarb

Funders

Organization	Name
Bill and Melinda Gates Foundation	Steve Patrick
California Endowment	Gigi Barsoum
Colorado Trust	Tanya Beer
David and Lucile Packard Foundation	Liane Wong
Funders Collaborative on Youth Organizing	Supriya Pillai
James Irvine Foundation	Latonya Slack
Jessie Smith Noyes Foundation	Kolu Zigbi
Liberty Hill Foundation	Michele Prichard and Margarita Ramirez
Marguerite Casey Foundation	Cynthia Renfro
Rockefeller Brothers Fund	Ben Shute
US Human Rights Fund	Sue Simon
William and Flora Hewlett Foundation	Kristi Kimball
Women's Foundation of California	Judy Patrick

Appendix C
Overview of Trainers

The following table provides a list of organizations providing advocacy capacity building trainings, along with a summary of each organization's target audience, and the type of training offered. As evident in the table, trainers provide a variety of trainings to all types of organizations. Specific findings related to the trainings are included in the Themes and Lessons section of the report.

Training Organization	Target Audience				Content Focus	Type of Training Offered	Other Services	Evaluation	Cost of Training
	Local	State	Nat'l	Type of Organization					
Alliance for Children and Families	X	X		AFCF members.		Mission based advocacy, geared toward senior leaders and board members.	Regranting program.	Pre- and post-training surveys and some interviews.	No fee.
Alliance for Justice	X	X	X		Legal issues surrounding policy advocacy work.	Generally, one-time trainings at conferences or workshops, ranging from 1-2 hours to a full day; also TA for foundation grantees.	Free online technical assistance.	Pre- and post-training surveys.	Nominal fee.
Aspen Institute	X	X	X	Primarily groups lobbying in D.C. on federal issues.		Mostly general training using its Advocacy Progress Planner tool. Typically one-time trainings, but some longer-term work.		Mostly informal review and feedback.	Hourly rate.
Center on Budget and Policy Priorities		X			Fiscal policy trainings; also communications/ media training.	Focus on partnering and general network building. Yearly conference for state fiscal policy group includes training; quarterly conference calls, and internet portal for regular discussions.	Regranting to state groups.	Post-conference survey; regular contact and feedback.	Minimal registration fee for conference.
Center for Community Change	X	X		Smaller, grassroots organizations; mostly low-income or marginalized groups.	Mostly broad trainings; some specific to immigration and health care groups.	A mix of one-time trainings and ongoing trainings; much is embedded in collective work around campaigns and issues.	Considerable regranting for specific campaigns and constituencies.	Oral evaluations and post-training surveys; debriefing with staff.	Mostly free of charge.

Training Organization	Target Audience			Type of Organization	Content Focus	Type of Training Offered	Other Services	Evaluation	Cost of Training
	Local	State	Nat'l						
Center for Lobbying in the Public Interest	X	X	X	Smaller and mid-size nonprofits and national associations of nonprofits.	Moving human/social service organizations toward the social, political, and electoral side of the sector.	Trainings are conducted by a network of fellows who are located in the states.		Survey of trainees from the last few years to determine growth in organizational capacity.	Fees vary based on ability to pay and type of training.
Every Child Matters Education Fund	X	X			Children, youth, and families.	No structured, general trainings. Hands-on "learning by doing" and sharing techniques, always within the context of a specific campaign.		Regular feedback from the groups the Fund works with.	
Georgetown Center for Children and Families		X		Primarily state groups and coalitions.	Increasing health coverage for children and families.	Focus on federal and state level policy training. Less traditional training and more collaborative work.	Serves as an information resource on policy issues.	Informal feedback after meetings/ trainings.	No fee.
Innovation Network		X		Works with foundation grantees and evaluators; some work with foundation program staff.	Advocacy evaluation	Typically one-time trainings. Standard training curriculum that ranges from 90 minute presentation to a full-day training.	One-on-one consulting with organizations to take the concepts from the training to how to use them.		No fee.
League of Conservation Voters		X		Mostly LCV member organizations.	Environment/conservation.	A broad range of trainings in organizational development and external advocacy training. Also have a mentoring program.	Grantmaking to member organizations.	Conduct an annual assessment, survey, and individual sit-down with each group.	Members pay annual dues; no additional cost for trainings.
Midwest Academy	X	X	X			Variety of trainings: comprehensive multi-day trainings, trainer trainings, intern and fellowship programs, and other trainings for individual organizations.		Daily feedback for multi-day trainings; post-training evaluation.	Hourly rate.

Appendix C- Overview of Trainers *continued*

Training Organization	Target Audience			Type of Organization	Content Focus	Type of Training Offered	Other Services	Evaluation	Cost of Training
	Local	State	Nat'l						
Mosaica	X	X		Organizations that have been more social service - oriented, moving more toward advocacy and organizing.	Advocacy for beginners and advocacy evaluation.	Capacity building training and TA to individual organizations and groups of foundation grantees. Provides tailored assistance to individual organizations; work with groups is usually more general.		Written post-training assessment and informal feedback.	
National Community Development Institute	X	X	X	Social change organizations in low-income communities, communities of color, and other marginalized communities.	Training in a culturally-based way.	Trainings in cultural competency, basics of advocacy, persuading decision makers to act, and how to use the administrative petition, along with other customized trainings.			
PolicyLink	X	X	X		Train on all aspects of policy advocacy.	Provides advocacy training as part of TA to organizations, networks, or collaboratives. Ranges from single event trainings to multi-year trainings.		Currently not much assessment done.	
Spitfire Strategies	X	X	X		Strategic communications.	Multi-day executive program training twice a year. The focus is on communications, but brings in other experts from the field to talk about additional aspects (evaluation, etc.) Also do trainings for foundation grantees.	For the Executive Program, training is combined with one-on-one consultation.	Pre-training assessment, regular check-ins during training, and post-training evaluation.	Cost varies.
State Environmental Leadership Program		X			Environment.	Conduct audit to assess overall capacity, and a power assessment. Grass Tops program incorporates in-person training, webinars, peer-to-peer, etc			

Training Organization	Target Audience			Type of Organization	Content Focus	Type of Training Offered	Other Services	Evaluation	Cost of Training
	Local	State	Nat'l						
TCC Group	X	X	X			Trainings for senior management, peer exchanges, and multi-level trainings. Conducts one-time, modular trainings around specific topics; also multilevel trainings with ongoing coaching.		CCAT pre-training assessment tool is used to generate baseline data, inform training content, and measure progress/impact.	Hourly rate.
Voices for America's Children		X		Voices members.	Very little basic advocacy training; more specific trainings such as strategic communications, etc.	Conducts regular group trainings, do one-on-one work, has a peer-to-peer training program, and do some board leader trainings. Also offers monthly conference call series and webinars.		Post-forum surveys and regular feedback from members.	No fee.
Wellstone Action	X	X			Active in three areas: campaigns/ candidates, public policy advocacy training, and long-term community organizing.	Organizational and individual training over a suite of topics. Provides both one-time trainings and ongoing trainings.		Post-training survey and feedback. Has done longitudinal surveys to determine what skills people have been using over time.	Some trainings free; general public trainings have a sliding-scale registration fee.

Appendix D

General Advocacy Evaluation Findings

While this report is primarily focused on advocacy capacity training, through the course of our research and interviews, we also collected information about advocacy evaluation in general. Following are some of our key findings.

◆ **Advocacy Evaluation is Different from Program Evaluation.** Because the evaluation methods are different, it is important for an organization to be skilled at program evaluation before moving on to advocacy evaluation. Even then, it can be difficult and time-consuming to get organizations to understand and accept how advocacy evaluation is necessarily different.

- **Advocacy Evaluation is a Fluid Process.** Advocacy evaluation has to be reactive, making it a "moving target," as one interviewee described it. Goals, targets, and strategies may need to be updated regularly and even data collection methods may need to be changed throughout the process to adapt to the needs of the current environment. Unlike most program evaluations, advocates can't just revisit their Theory of Change once a year or when their funder asks them to.

- **Advocacy Evaluation Requires Specific Standards and Measures.** One report noted that many nonprofit advocacy groups indicate the need to develop evaluation standards specific to policy advocacy, including an evaluation matrix that includes both quantitative and qualitative measurements and benchmarks.[i]

◆ **Advocacy Evaluation is an Emerging Discipline with Measuring Tools that Need Refinement.** According to the American Evaluation Association (AEA), evaluators believe the following advocacy areas need evaluation development: community organizing, civic participation, collaboratives and coalitions, and local-level advocacy. AEA also lists advancements in evaluation practice that are needed, including: methodological innovations, proven real-time approaches, how to approach advocates on evaluation, and examples of how evaluation makes a difference.[ii]

◆ **Evaluators May Need to be Deeply Involved with Organizations.** Unlike some cases in program evaluation, in which an evaluator's role is limited and well-defined, advocacy evaluators may need to take on a broader role. As cited in a report supported by the Annie E. Casey Foundation, "The role of an evaluator is not likely to solely be to provide guidance or support regarding the implementation of tools. Rather, evaluators may play the role of facilitator of outcome-based evaluation planning and help advocates to identify or clarify purposes for evaluation, focus areas for evaluation efforts, priority measures, capacity for measurement, and useful evaluation approaches."[iii]

◆ **Evaluation Must be Integrated into an Organization's Overall Work.** Evaluation needs to encompass more than just providing a report to a funder. Evaluation should be a source of regular learning integrated into an organization's day-to-day work. The audience for evaluation should also be viewed more broadly to include internal sharing of information and data back to an organization's staff, board, and volunteers.

◆ **Organizations Should be Self-Sufficient in Advocacy Evaluation.** Some interviewees discussed the goal of training organizations to be self-sufficient in conducting their own ongoing advocacy evaluations and taking ownership of their evaluation. In one of its reports, TCC Group described an organization that "created an evaluation framework and an evaluation team to measure the

organization's strategic planning efforts… After building capacity, the organization established a path toward greater self-sufficiency in their evaluation efforts."[iv]

◆ **Advocacy Evaluation Must Measure Interim and Long-Term Changes.** Advocates often have long-term goals to effect policy changes or an impact on people's lives. Advocacy evaluation needs to focus not only on measuring those changes, but also on the interim incremental changes that lead up to them, such as: movement within policies or systems, movement building and coalition building, relationship changes, and the ability to read and react to the environment and adjust strategies and expectations.

> *Example:* The Women's Funding Network has an advocacy evaluation framework which identifies five types of change that contribute to social change:[1]
>
> • Shifts in definitions/reframing.
>
> • Shifts in individual/community behavior.
>
> • Shifts in critical mass/engagement.
>
> • Shifts in institutional policy.
>
> • Maintaining the current position/holding the line.
>
> This framework is associated with an online grantee reporting tool that helps grantees organize and track their data.

◆ **Candor in Reporting on Progress Should be Encouraged.** Partially because advocacy evaluation is such a moving target, it is important to document the work itself—why particular strategies were chosen, what the perceived outcomes were, and why changes may have been made along the way. As one interviewee put it, "advocates can claim success even when nothing has been advanced. Maybe just holding their ground is a success due to the environment." However, as grantees are accustomed to having to show progress to funders, it can be hard to convince them that the foundation truly values their reflection on what worked and what didn't, and that being responsive and changing directions as necessary is a good sign. If the foundation acts as a model and makes transparent its own changes and lessons learned, this may make grantees more comfortable.

> *Example:* NCDI was involved in conducting case studies of groups that have worked with the California Endowment, looking at what they had learned over time. In their review, they found that most groups were not documenting their work well. Often they wanted to present one, unified picture to the funder, to give the impression that everyone was in agreement with the results rather than sharing a variety of perspectives from within the group. They found this to be especially true for groups that were dealing with a great deal of internal tension. To encourage grantee partners to share the hard lessons learned and not just successes, NCDI determined that funders and trainers need to nurture the concept that making mistakes and learning from them is acceptable.

◆ **Using Storytelling to Communicate Impact Can be Useful.** While storytelling is a method that can be used by organizations engaged in all types of work, it can be particularly useful for those engaged in advocacy as a way to clearly communicate the value and impact of their work.[v] This may be an

especially useful method in the period before long-term goals and major policy changes have been achieved. As one interviewee said, "if a grantee can't tell you a story about what they have done, that's a problem."

◆ **Regular Contact with Organizations can Provide Valuable Feedback.** Interviewees frequently mentioned the value of informal, direct regular communication with organizations in informing advocacy capacity evaluations.

> *Example:* Wellstone Action has not developed a specific formal evaluation for organizations, but rather relies on more of a narrative and relationship-based evaluation. Because most of its relationships are long-term and ongoing, the organization just "knows" whether the initiative is going well through regular communication.

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[i] "Voices From the Field: Strengthening Human Rights and Social Justice Advocacy in the United States." A Report for the U.S. Human Rights Fund and Atlantic Philanthropies. February 2008.

[ii] Highlights From American Evaluation Association's 2007 Annual Conference. Advocacy and Policy Change Topical Interest Group. March 2008.

[iii] "Building Capacity for Advocacy Evaluation." Prepared by Organizational Research Services with support from the Annie E. Casey Foundation. January 21, 2009.

[iv] "What Makes an Effective Advocacy Organization: A Framework for Determining Advocacy Capacity." Prepared for the California Endowment. TCC Group, January 2009.
[v] "What Makes an Effective Advocacy Organization: A Framework for Determining Advocacy Capacity." Prepared for the California Endowment. TCC Group, January 2009.