



Measuring the Impact of PSE Interventions: Learning from Evaluation Practice

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Webinar topics



Getting oriented—an evaluation reality check



Learning from evaluation practice—concepts, design, methods



Learning from others—practical tips for overcoming challenges

First, an evaluation reality check



Nonprofit strategies,
tactics. How are
they changing?



Nonprofit
evaluation. Why
evaluate?

Study to Assess Nonprofit Advocate Evaluation Capacity (2019-22)

Partners:

- Annette L Gardner, University of California, San Francisco
- Sue Hoecshtetter, Strengthening Democracy
- Shannon Williams, Alliance for Justice/Bolder Advocacy

2021 Survey:

- 27-item survey distributed in Spring 2021 to ~5,600 unique U.S. nonprofits that engage in advocacy.
- Responses received from 175 nonprofits
- Questions focused on:
 - Organizational advocacy, including changes in tactics
 - Evaluation gaps and strengths, and desired resources.
 - Organizational characteristics (type, budget, location, etc.)

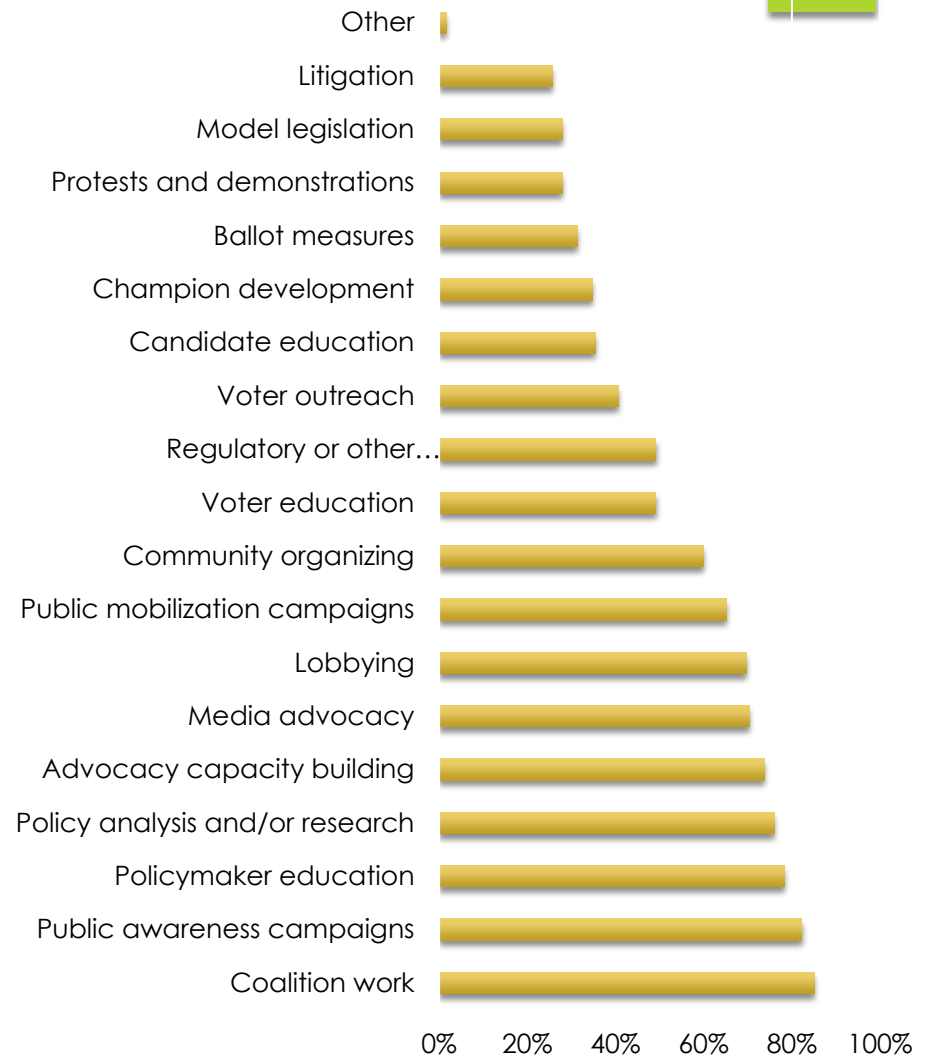


Strategies, Tactics

Many respondents used multiple strategies/tactics over the past 5 years.

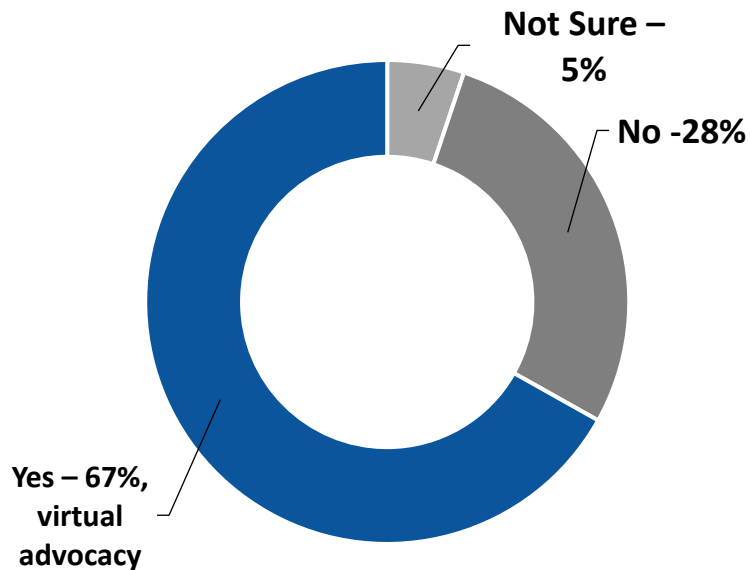
- ▶ Top strategies used: Coalition work, Public awareness campaigns, Policymaker education,
- ▶ Respondents used an average of 9.82 strategies/tactics.

Used in past 5 yrs.



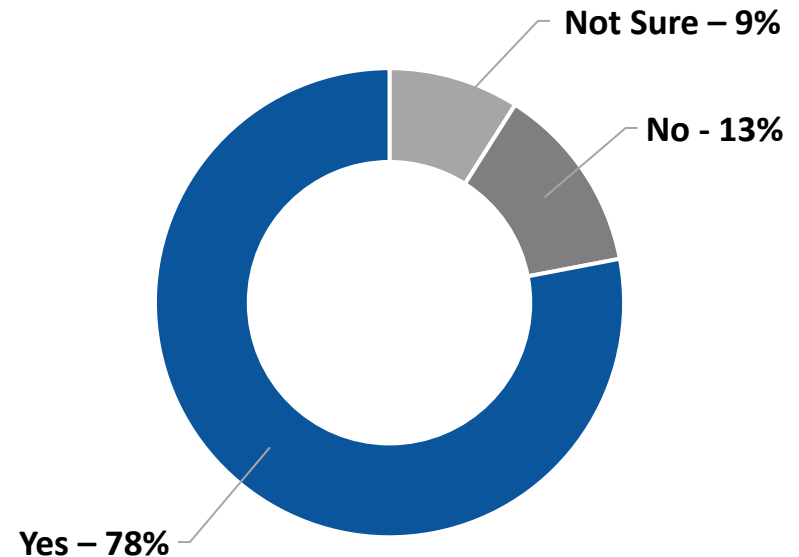
How are nonprofits **ADAPTING?**

Has your organization's advocacy work changed due to the coronavirus pandemic?



(n = 175)

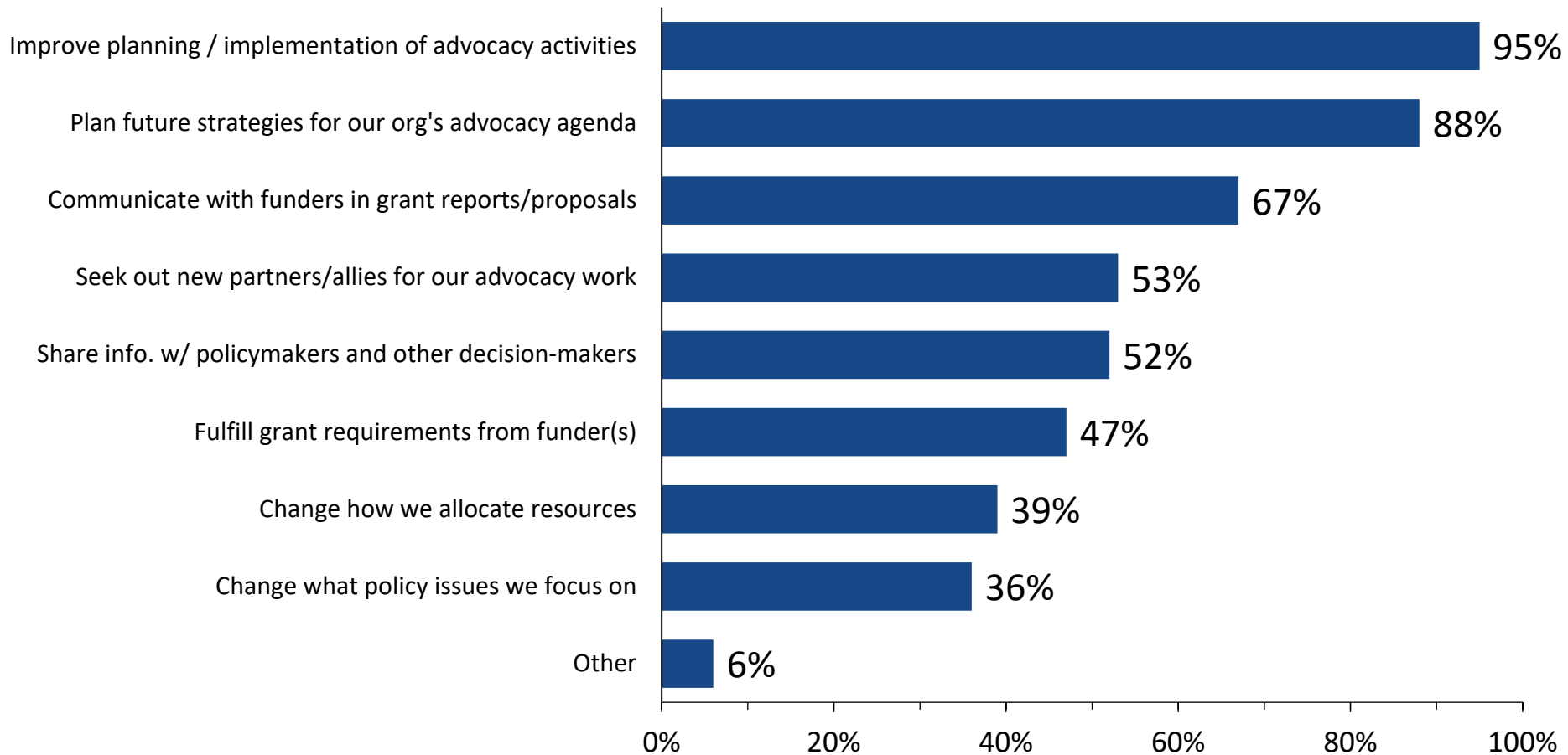
Has your organization adopted a focus on racial equity in its advocacy work?



"The organizations I work with have dramatically changed their goals - from seeking funding increases to defending against cuts. From program expansion to goals such as equitable vaccine access."

Nonprofit use of evaluation

Why does your organization evaluate its advocacy?



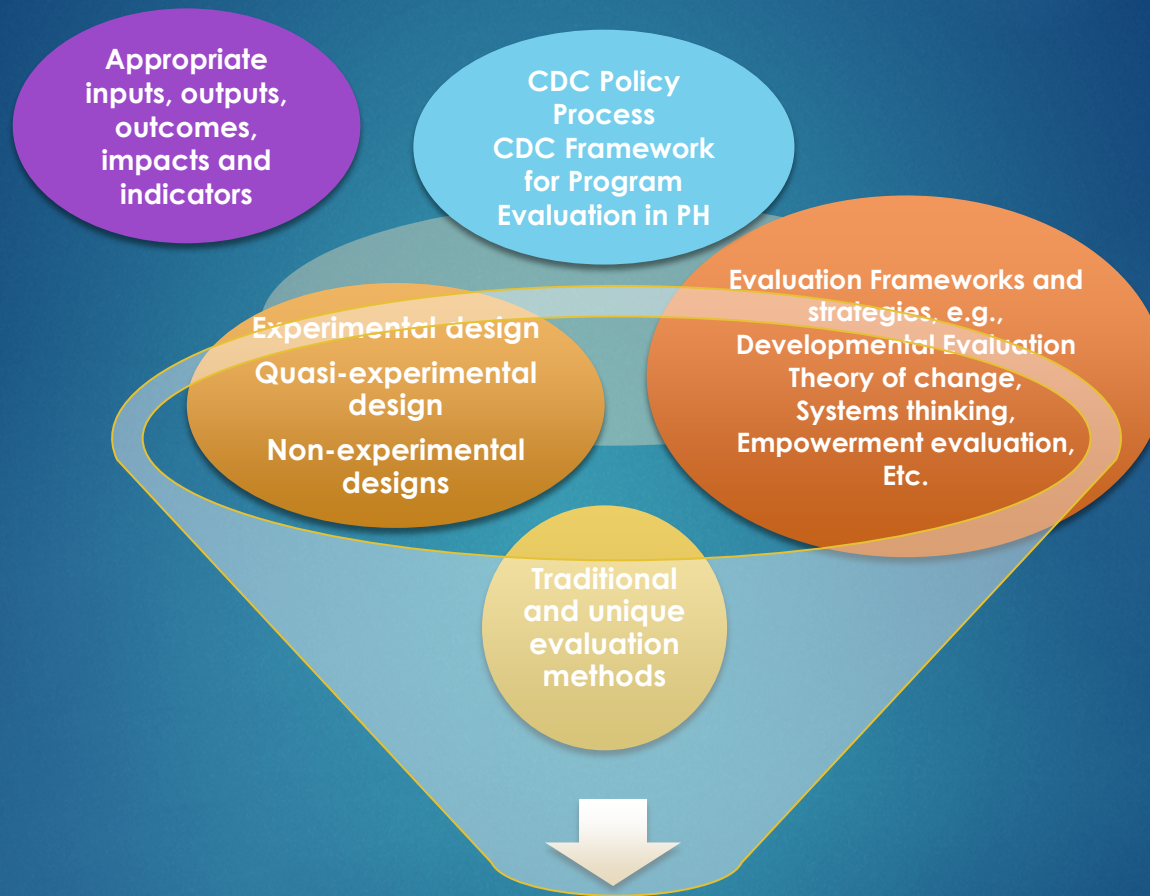
(n = 66)

Helpful concepts

- Curate the field of advocacy and policy change (APC) evaluation to support individual evaluation practice:
 - ✓ 2014 Aspen/UCSF APC Evaluation Survey
 - ✓ Six evaluation case studies
- Strengthen the link between the scholarship on advocacy, public policy, nonprofit management, and evaluation practice—concepts, definitions

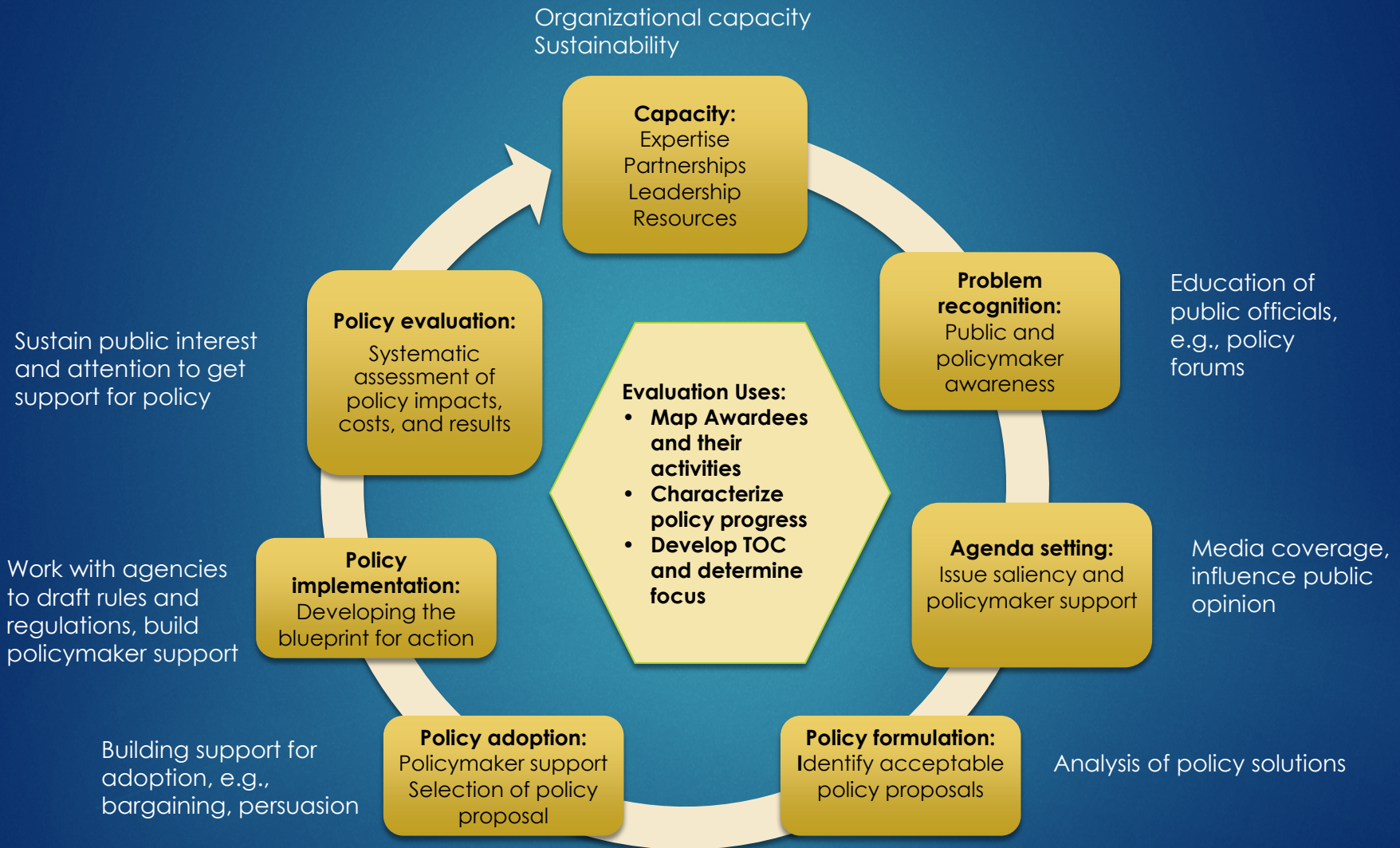


Designing the CCC PSE Evaluation



**Strengthening and Assessing
Effectiveness of CCC Partnerships,
Plans, Interventions.**

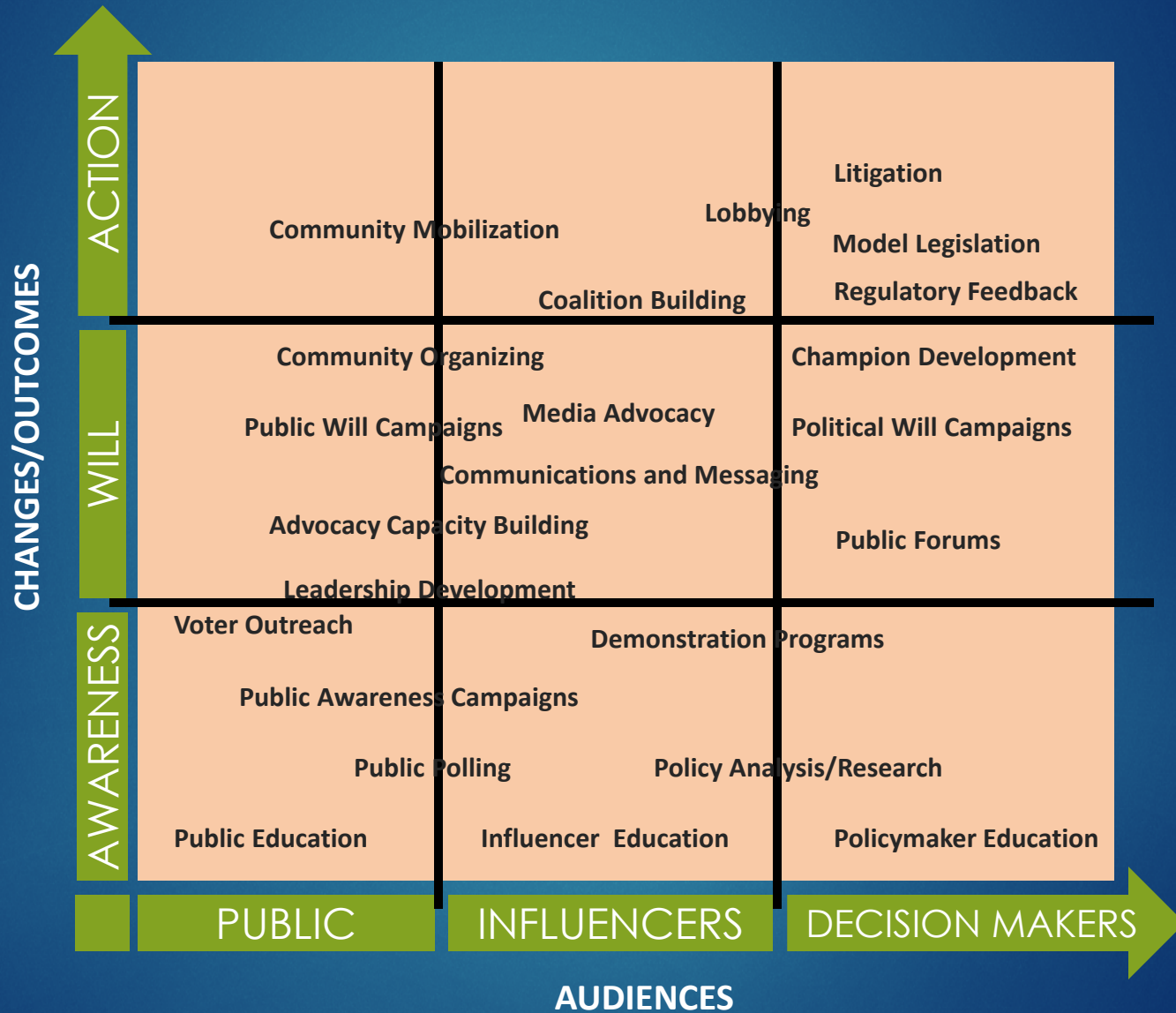
The public policy stage model and evaluation design



Logic model for evaluating CCC PSE Awardee effectiveness, policy change



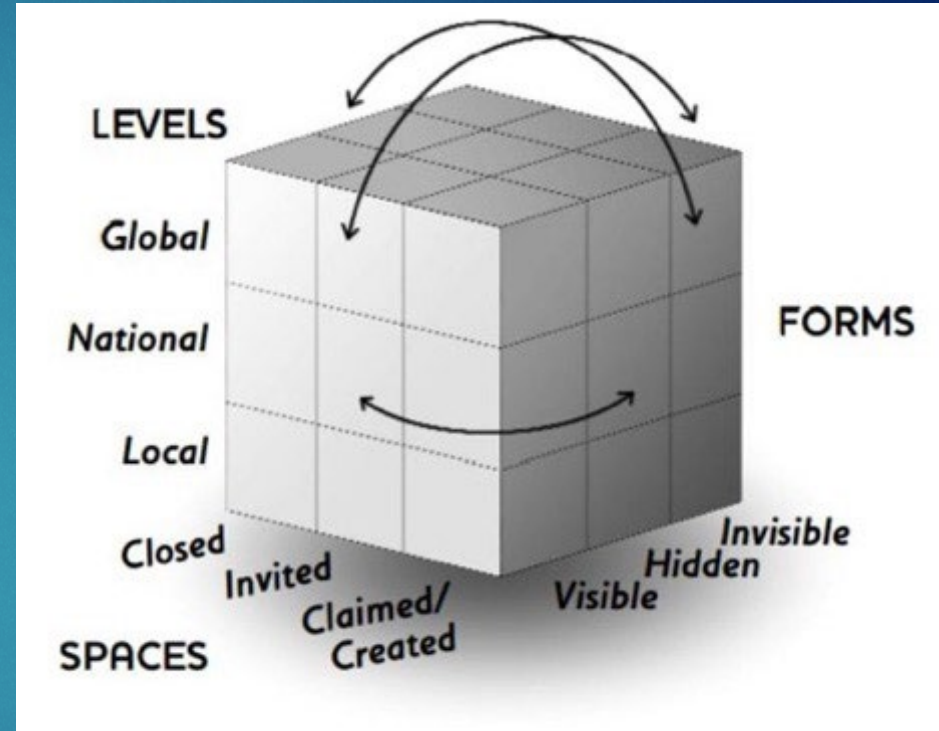
MAPPING TACTICS ACROSS INITIATIVE OUTCOMES AND AUDIENCES



POWER! An elusive, fluid concept

What does it look like and where is it located?

- Examine relationships – or who has power over others?
- Whose voices are being heard and why?
- Who has political power and what is their agenda?



Source: Gaventa, 2006.

Equity Evaluation Framework Principles

Evaluation and evaluative work should be in service of equity:

- Production, consumption and management of evaluation and evaluative work should hold at its core a responsibility to advance progress toward equity.

Evaluative work should be designed and implemented commensurate with the values underlying equity work:

- Multiculturally valid.
- Oriented toward participant ownership.

Evaluative work can and should answer critical questions about the:

- Ways in which historical and structural decisions have contributed to the condition to be addressed.
- Effect on strategy of the underlying systemic drivers of inequity.
- Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.

Source: *Equitable Evaluation Framework* by Equitable Evaluation Initiative (2017). <https://www.equitableeval.org/>

Evolving evaluator role

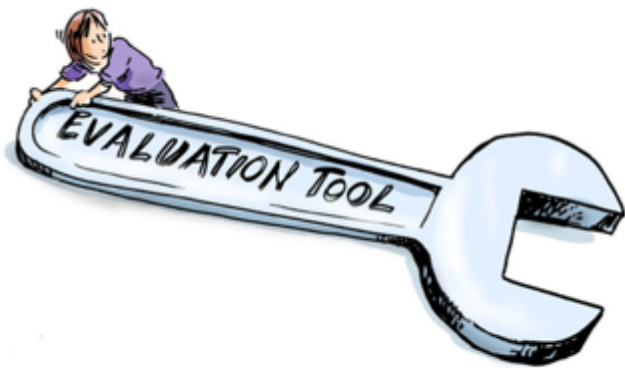
Informing awardee, CDC strategic learning to increase PSE program effectiveness

Building an evaluation culture and strengthening awardee evaluation capacity

Informing CDC award-making

Educating decision-makers?

Coach?



Challenge
of having
the right
methods

Conventional evaluation methods

- ✓ **Activity tracking systems**, e.g., media contacts, meeting attendance
- ✓ **Interviews**, e.g., decision-makers, media, partner organizations, advocates, clients
- ✓ **Surveys**, e.g., changes in advocacy capacity
- ✓ **Financial analyses**, e.g., ROI
- ✓ **Case studies** on policy change



Inputs: Capacity Building	Outputs: Tactics	Outcomes, e.g., Influencing policymakers, community action
Tools to assess organizational advocacy capacity	Advocacy strategies framework	Public opinion polling, Legislative tracking systems
Coalition, network advocacy capacity	Intense Period Debrief protocol	Contribution Analysis
Contextual factors, e.g., Power Analysis	Pol sci rating scales	Policymaker interviews, rating scales
Media tracking forms	Media content analysis	Bellwether Methodology (influential but less directly involved. Policy-focused)
		Champion Tracking (influential, e.g., journalists)

Unique Evaluation instruments

POLICYMAKER RATING SCALE

Rate policymakers as a group or individually. Longitudinal or point in time.

Scale	Rating	Definition
1) Policymaker level of support	1. Not at all supportive	No evidence this person has spoken or taken any action in support of the policy issue (includes opposition)
	2. Somewhat supportive	Has indicated favorable disposition to the policy issues
	3. Supportive	Occasionally takes action either publicly or behind the scenes beyond voting in support of the policy issue
	4. Extremely supportive	Has a reputation for being a champion of the policy issue and regularly takes leadership on advancing it
2) Policymaker level of influence: criteria 1. Majority party member 2. Relevant content expertise 3. Seniority/experience 4. Reputation/respect 5. Key committee member 6. Formal leadership position	1. Not very influential	Meets none or only 1 criterion
	2. Somewhat influential	Meets at least 2 criteria
	3. Influential	Meets 3 or 4 criteria and/or is on a key committee
	4. Extremely influential	Meets 5 or 6 criteria and/or holds a formal leadership position in the legislature and/or chairs a key committee
3) Rater level of confidence in the first two scales	1. Not very confident	Ratings are a guess.
	2. Somewhat confident	Ratings are a fairly informed guess.
	3. Extremely confident	Ratings are based on advocates' direct contact with the individual or information from a trusted and reliable source.
Source: Harvard Family Research Program		

Partnerships

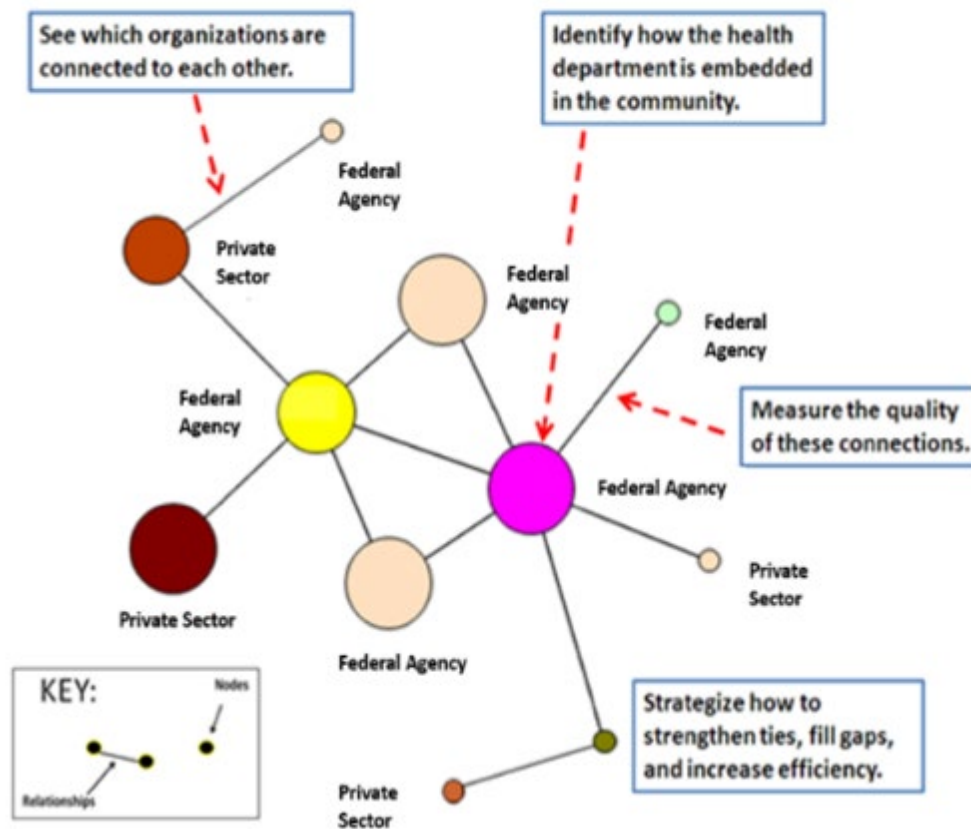
What is PARTNER?

PARTNER is the Program to Analyze, Record, and Track Networks to Enhance Relationships.

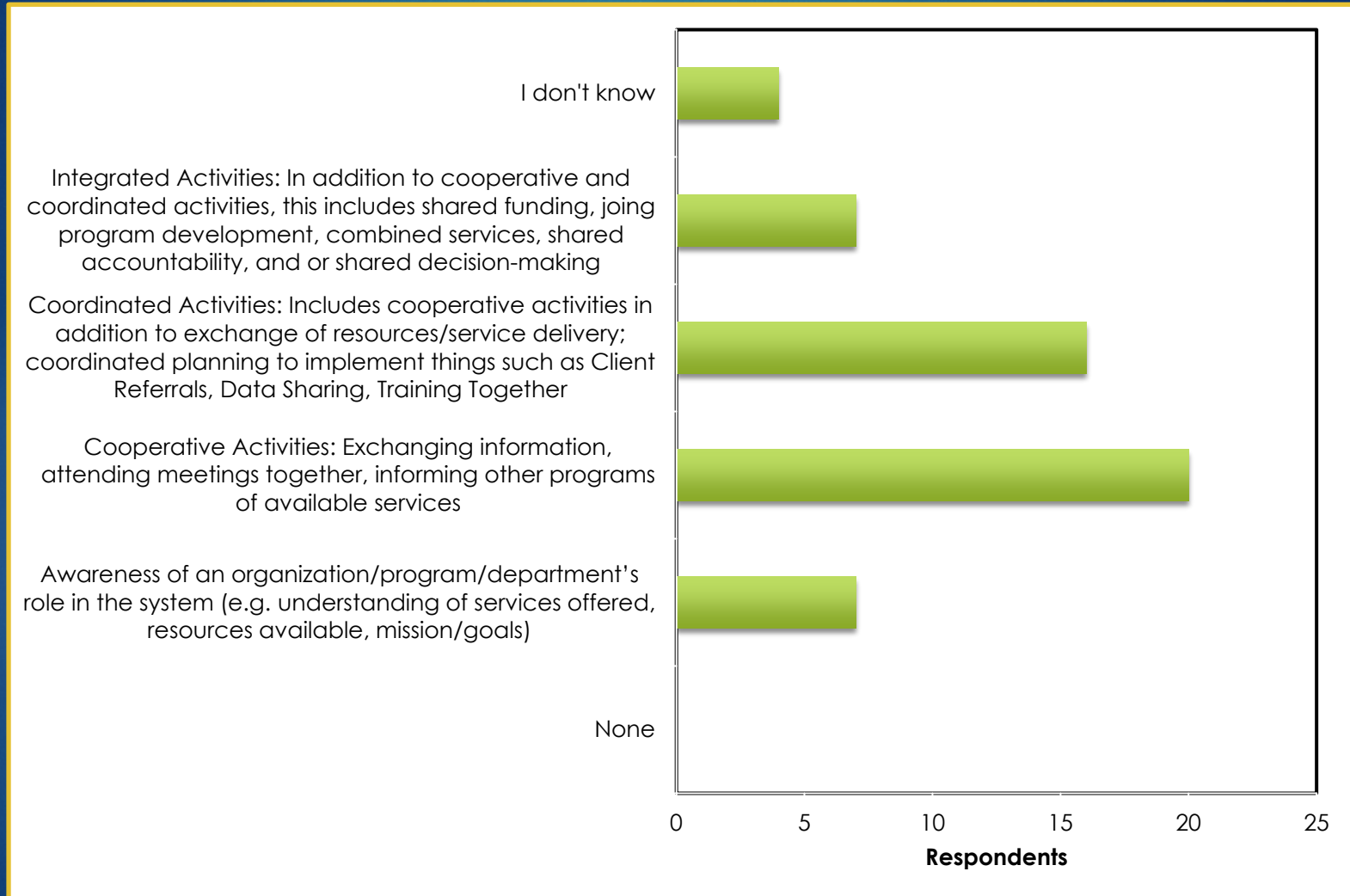
(www.partnertool.net) It was first funded and launched in 2008 by the Robert Wood Johnson Foundation as an online tool with the purpose of building the capacity of the public health sector to measure and monitor collaboration among organizations (Varda et al., 2008). It is used by cross-sector networks to analyze how their members are connected, how resources are exchanged, and the levels of trust and perceived value among network members, and to link outcomes to the process of collaboration. PARTNER includes both a validated 19 question survey and an analysis tool.

For more information:
www.visiblenetworklabs.com/partnertool

Example of What We Can Learn from a Network Map

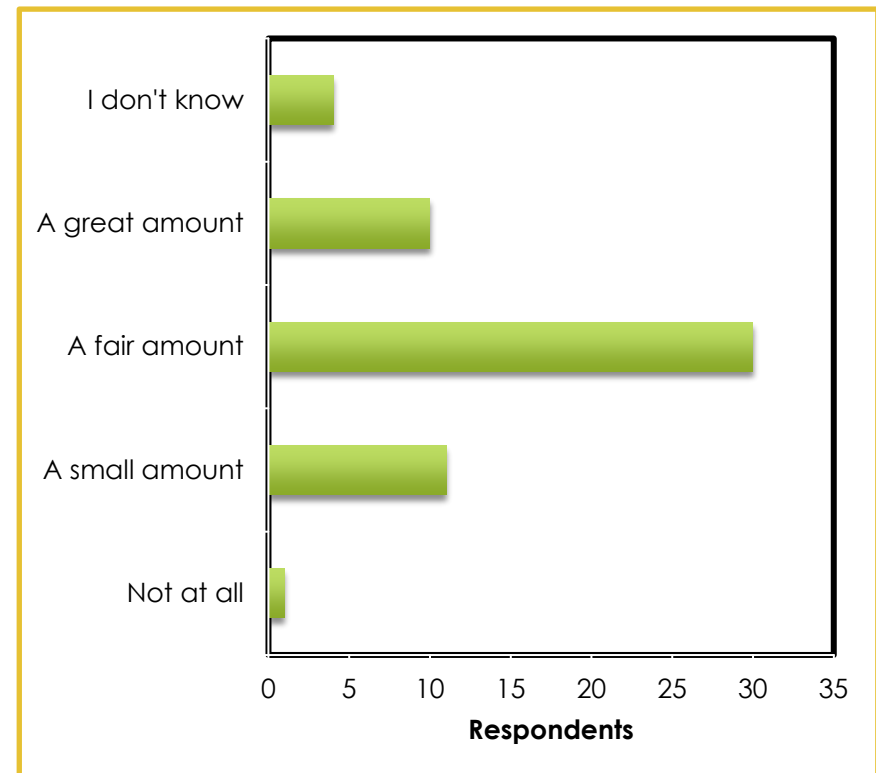


Overall level of system integration that has been achieved by T2020 activities and projects: 'Coordinated' to 'Integrated'



T2020 Partner Collaboration on Care Coordination Activities: Remains mixed, with some gains since 2019

- ▶ A majority of respondents (54%) feel that T2020 partners are able to work together 'A fair amount' to carry out care coordination services that connect multiple services, programs, and agencies.
- ▶ Compared to 2019, more respondents thought T2020 partners could work together 'A great amount' (18% vs. 12%).



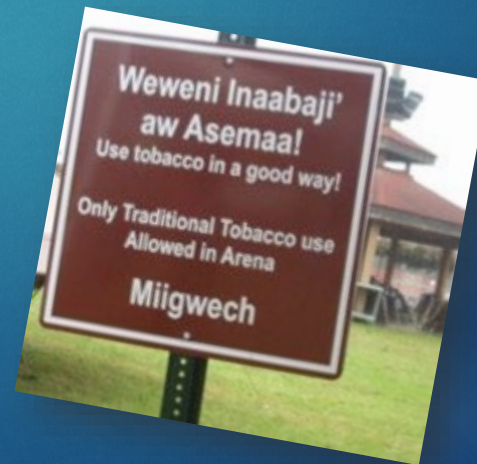
Learning from others: six evaluation cases

Case	Policy Area	Level of Advocacy
The Initiative to Promote Equitable and Sustainable Transportation (2008 – 2013)	Transportation options	Federal, State, Local
The Let Girls Lead Advocacy and Leadership Initiative (2009 – present)	Girls' rights	State, Local, International
The International Lands Conservation Program (1999 – present)	Old growth forests	State, International
The Oxfam GROW Campaign (2012 – present)	Food injustice	International
The Tribal Tobacco Education and Policy (TTEP) Initiative (2008-2013)	Smoke-free policies	Local
Project Health Colorado (2011-2013)	Health care	State

*The Tribal Tobacco Education and Policy
(TTEP) Initiative (2009-2016)*
Sheri Scott, Scott Consulting Partners

A 5+ year initiative to develop capacity of five Tribal Nation grantees to target commercial tobacco through policy and advocacy approaches. Funded by ClearWay Minnesota foundation

Activities included: culturally-based community education, passage of smoke-free policies and promotion of traditional tobacco protocols at five Tribes.



*The Tribal Tobacco Education and Policy
(TTEP) Initiative (2009-2016)*
Sheri Scott, Scott Consulting Partners



Evaluation Design:

A mixed-method, process and summative design that included culturally-based circle program framework (logic model). Used a participatory approach to facilitate co-learning (e.g., “sharing sessions”).

Methods:

- web-based monthly data collection;
- dialoguing sessions;
- Observations;
- Change stories;
- Media analysis;
- TA survey;
- spider diagrams; and
- Adaptations of Aspen Policy Mapping and Harvard Family Research Project tools

Key lessons for evaluation design

- ▶ Methods are a combination of user-friendly data collection activities, typical evaluation methods (such as surveys), and unique methods (such as media analysis)
- ▶ Cultural factors are key and can determine evaluation and program success;
- ▶ Decentralizing evaluation capacity and operations is doable and important to program success.

Group discussion: Overcoming challenges

Balance attribution with contribution. What type of evidence is meaningful and to whom? What is feasible?

Issue of rigor? Mixed-method, triangulation, emerging methods

Navigating complexity and uncertainty with systems thinking tools

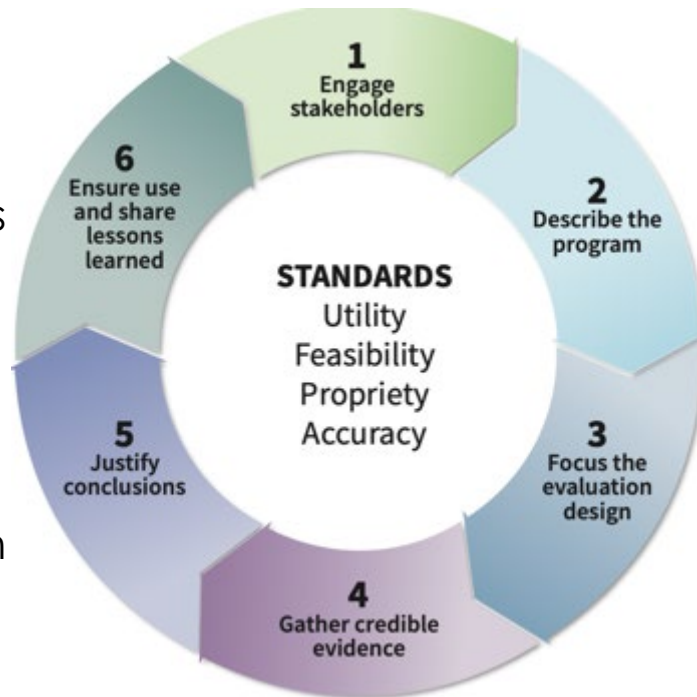
Access to decision-makers? Seek out 'bellwethers,' legislative aids, policy entrepreneurs

Limited or no evaluation expertise? Coaching, tailored tools, e.g., capacity assessment tools

Ensuring CCC PSE Program Evaluation Success

Equitable partnerships

Link to strategy
Tell a good story
Share best practices



Systems thinking tools, e.g., implications

Review with partners
Triangulate

What is meaningful to awardees?

Credible to whom?

The background features a collage of stylized human head silhouettes in shades of blue and white. Some heads contain question marks, while one prominently displays a glowing lightbulb icon, symbolizing thought, inquiry, and ideas.

Supporting an evaluation culture

“Evaluative thinking is defined as critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking, and informing decisions in preparation for action.”
Buckley, et al. (2015)

Acknowledgments

- AEA APC Topical Interest Group (TIG)
- Center for Evaluation Innovation
- Alliance for Justice Bolder Advocacy
- Community of APC evaluators
- Evaluation 'pioneers'
- Advocates and funders

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