




AGENDA

Center for Healthy Communities
The California Endowment
1000 N. Alameda Street
Los Angeles, CA 90012
www.calendow.org/chc/center.html

 = Methodology Track
 = Tactics Track
 = Capacity Track

TUESDAY, January 20, 2009

[From 7:30-11:30 a.m., participants who arrive early can view Inauguration television coverage in Yosemite A.]

11:30 am – 12:00 pm	Registration and Pick Up Boxed Lunches (Yosemite Hall Foyer)			
12:00 pm – 12:15 pm	Welcome (Yosemite A)			
12:15pm-1:45 pm	Introductions and Collaborative Exercise: The Edge (Yosemite A)			
1:45 pm - 3:15 pm	Breakout Sessions 1	Developmental Evaluation (Yosemite A)	Measuring Continuous Advocacy Progress (Yosemite B)	Assessing Advocacy Capacity (Mojave)
3:15 pm – 3:30 pm	Break			
3:30 pm – 5:00 pm	Breakout Sessions 2	Making the Case for Long-Term Impact (Yosemite A)	Evaluating Advocacy Communications (Yosemite B)	Advocacy Evaluation: An Inside Job (Mojave)
5:00 pm – 5:15 pm	End of Day Wrap Up (Yosemite A)			
5:30 pm – 6:00 pm	Reception (Courtyard)			
6:00 pm – 7:30 pm	Dinner (Yosemite A)			
7:30 pm	Shuttle Bus Departs for Hotel Omni Los Angeles Hotel at California Plaza 251 South Olive Street Los Angeles, California 90012			

WEDNESDAY, January 21, 2009

7:30 am	Shuttle Bus Departs Hotel		
8:00 am – 8:30 am	Breakfast		
8:30 am – 8:45 am	Welcome: Dr. Robert Ross, President & CEO, The California Endowment (Yosemite A)		
8:45 am – 10:15 am	Plenary Panel: Foundations on The Field as They Know It (Yosemite A)		
10:15 am – 10:30 am	Break		
10:30 am - 12:00 pm	Breakout Sessions 3	Unique Methods in Advocacy Evaluation (Yosemite A)	Evaluating Community Organizing (Yosemite B)
			Building Capacity for Evaluating Advocacy (Mojave)
12:00 pm – 1:00 pm	Lunch		
1:00 pm - 2:30 pm	Breakout Sessions 4	Retrospective Case Studies (Yosemite A)	Evaluating Public and Political Will (Yosemite B)
			Using Evaluation to Build Advocacy Capacity (Mojave)
2:30 pm – 2:45 pm	Break		
2:45 pm – 3:30 pm	Meet Within Groups (Funders: Yosemite A) (Evaluators: Yosemite B) (Advocates: Mojave)		
3:30 pm – 4:00 pm	Closing (Yosemite A)		



SESSION DESCRIPTIONS

BREAKOUT SESSIONS 1: Tuesday, 1:45-3:15 p.m.

Developmental Evaluation

Michael Quinn Patton, Utilization-Focused Evaluation
Ehren Reed, Innovation Network
Jackie Williams Kaye, The Atlantic Philanthropies
Moderator: Julia Coffman, Evaluation Consultant

Michael Quinn Patton coined the term “developmental evaluation” to describe a new approach to evaluating complex or evolving situations. According to Patton, in a developmental evaluation “the evaluator is part of a team whose members collaborate to conceptualize, design and test new approaches in a long-term, ongoing process of continuous improvement, adaptation, and intentional change.” Since 2005, Innovation Network, with support from The Atlantic Philanthropies, has served as the developmental evaluator for a coalition of local community, immigrant, labor, and policy organizations working to pass progressive comprehensive immigration reform. During this session, the coalition’s evaluator (Ehren Reed) and evaluation funder (Jackie Williams Kaye) will discuss the evaluation methodology, the challenges inherent to this type of approach, and the lessons learned.

Measuring Continuous Advocacy Progress

David Devlin-Foltz, Continuous Progress Strategic Services
Megan Bowman, Initiative for Global Development
Moderator: Astrid Hendricks, The California Endowment

Theories of change and logic models are now part of mainstream evaluation practice, and many, if not most, advocacy evaluations are based on one. During this session, David Devlin-Foltz will demonstrate an online tool (The Advocacy Progress Planner (APP)) developed by Continuous Progress Strategic Services to facilitate model development. Megan Bowman of the Initiative for Global Development was among the first advocates to use the tool for planning and evaluating her own organization's work, over the course of 2008. The APP offers a comprehensive menu of options that might go into an advocacy logic model or theory of change. Advocates or their funders can click through these options, highlighting their policy goal, target audiences, assets, tactics, and benchmarks. Questions prompt users to clarify their strategy and develop meaningful, measurable benchmarks. The finished APP offers a simple logic model that can be printed out or shared electronically with colleagues. Coalition partners, funders, and third-party evaluators can have password-protected access to APPs, permitting lively exchange and consensus-building at the outset of an advocacy effort. Easy online access also facilitates periodic check-ins, evaluation and learning as the advocacy progresses. Examples from other current or potential users, and possible adaptations for non-U.S. contexts, will be highlighted. In addition to Megan's comments and recommendations drawn from her own experience as a user, we will solicit suggestions for other potential applications and modifications from session participants.

Assessing Advocacy Capacity

Jared Raynor, TCC Group

Hilary Binder Aviles, Mosaica

Jo Ann Jaffe, Second Chance

Moderator: Barbara Masters, The California Endowment

Recent advocacy evaluation approaches have recognized the critical importance that organizational advocacy capacity plays in determining the effectiveness of an organization's social change work. To provide the field with a better understanding of what comprises organizational advocacy capacity and how to measure it, in recent years Alliance for Justice and Mosaica, as well as the TCC Group, have developed advocacy capacity assessment tools. At this session, presenters will discuss these two tools and how they are being used. They will describe how a broad capacity framework for advocacy is utilized based on their field experiences. Session participants will have an opportunity to discuss why, when, and how to use organizational capacity assessment as part of a broader advocacy evaluation.

BREAKOUT SESSIONS 2: Tuesday, 3:30-5:00 p.m.

Making the Case for Long-Term Impact

Lisa Ranghelli, National Committee for Responsive Philanthropy

Marcela Diaz, Somos Un Pueblo Unido

Dave Beckwith, Needmor Fund

Moderator: Sue Hoechstetter, Alliance for Justice

Measuring the long-term impact of social change work challenges the patience and resources of those involved, often requiring many years and dollars to determine even a portion of the eventual effects of the work on people's lives. This session will examine the methods used in the first in a series of local research efforts by the National Committee for Responsive Philanthropy to document the 5-year impact of community organizing, advocacy, and civic engagement on the lives of low-income people, people of color, and other disadvantaged groups. Lessons learned from the impact measurement findings from the first site, New Mexico, of the *Grantmaking for Community Impact Project* will be presented from the viewpoint of an evaluator (Lisa Ranghelli) advocate (Marcela Diaz), and funder (Dave Beckwith) involved in the project.

Evaluating Advocacy Communications

Edith Asibey, Asibey Consulting

Bruce Trachtenberg, Communications Network

Karen Matheson, M+R Strategic Services

Moderator: Catherine Crystal-Foster, Consultant

Communications and advocacy are closely linked. Communications tactics are an essential part of all advocacy efforts, and many communication campaigns are in fact advocacy efforts with policy change goals. This session will focus on how to evaluate both communications tactics and communications campaigns. First, Edith Asibey and Bruce Trachtenberg will describe a tool for evaluating communication campaigns and programs that was created for the Communications Network, a network of foundation communication practitioners. The tool is designed to make the evaluation process approachable, doable, and useful for foundations and their grantees, and to ensure continuous learning. Then, Karen Matheson will present groundbreaking research on evaluating nonprofit electronic advocacy efforts. She will cover the kinds of metrics nonprofits should use to examine e-advocacy efforts, and offer benchmarking data that nonprofits can use to interpret and judge their performance.

Advocacy Evaluation: An Inside Job

Ann Krumboltz, The Brainerd Foundation

Paul Beaudet, Wilburforce Foundation

Gideon Rosenblatt, ONE/Northwest

Moderator: Jane Reisman, Organizational Research Services

This session will provide a close-up view of how three organizations have been developing thoughtful and resource-effective approaches to evaluating the effectiveness of advocacy efforts. Each organization focuses on conservation goals; two presenters are funders (Ann Krumboltz and Paul Beaudet) and the third represents a capacity building organization (Gideon Rosenblatt). Presenters will share their unique experiences as well as common themes that include:

- Integrating outcomes and indicators into strategic planning and program development processes
- Creating logic models and theories of change that help tie outcomes to data collection strategies
- Looking for synchronicity between partners (funder/grantee or capacity builder/advocacy organization)
- Developing cost-effective and practical evaluation processes that rely on real-time data collection
- Viewing evaluation as an opportunity for reflection
- Allowing programs and their evaluation strategies to adapt to changes in organizational, social or political contexts.

PLENARY PANEL: Wednesday from 8:45 a.m.-10:15 a.m.

Foundations on The Field As They Know It

Astrid Hendricks, The California Endowment

Tom Kelly, Annie E. Casey Foundation

Jackie Williams Kaye, The Atlantic Philanthropies

Susan Fairchild, Social Venture Partners

Moderator: Barbara Masters, The California Endowment

This convening is a three-year follow up to the initial California Endowment-sponsored meeting on advocacy evaluation in March 2006. That meeting took place just as interest in this field was starting to grow, and in many ways was a watershed event as it kicked off a tremendous amount of new collaboration and field building. As the convening's agenda demonstrates, a great deal of work has been accomplished during the last three years, and the time is now right to come together again to talk about where we are and what we've learned from our work so far.

This panel will feature an interactive conversation among funders (and audience members) about their experiences with advocacy evaluation and what they've learned from their investments in this area. It also will focus on their needs as they look to the future. The plenary will feature panelists with a range of advocacy evaluation experiences. Astrid Hendricks, Tom Kelly, and Jackie Williams Kaye have invested in this field for several years, but have different experiences given their different foundations. Susan Fairchild is newer to the field and is now considering her organization's future direction.

BREAKOUT SESSIONS 3: Wednesday from 10:30 a.m.-12:00 p.m.

Unique Methods in Advocacy Evaluation

Julia Coffman, Consultant/Harvard Family Research Project

Ted Lempert, Children Now

Ehren Reed, Innovation Network

Moderator: Anne Gienapp, Organizational Research Services

Real-time evaluations aim to support ongoing learning and strategy development. They emphasize *flexibility* and *timing*; evaluators must monitor how a strategy is evolving and identify ways to provide relevant data in a timely manner to inform strategy decisions. While real-time evaluations sound good in theory, particularly for advocacy efforts in which strategy constantly is evolving, they can be difficult to achieve successfully in practice. Methods must both provide useful strategy-level data for advocates and be implemented and analyzed quickly. During this session, two evaluators (Julia Coffman and Ehren Reed) and an advocate (Ted Lempert) will describe a series of real-time methods developed for an advocacy context. Methods discussed will include opposition tracking, system mapping, intense-period debriefs, bellwether interviews, and policymaker ratings.

Evaluating Community Organizing

Catherine Crystal Foster, Consultant

Justin Louie, Blueprint Research and Design, Inc.

Mike Kromrey, Metro Organizations for People

Janis Risch, Good Schools Pennsylvania

Sue Hoechstetter, Alliance for Justice

Moderator: David Devlin-Foltz, Continuous Progress Strategic Services

While evaluation of community organizing efforts has much in common with the evaluation of other advocacy and social change efforts, there are distinct differences, such as a greater focus on leadership and democratic decision-making. In this session, evaluators for Blueprint Research and Design (Justin Louie and Catherine Crystal-Foster) will describe their evaluation approach and present data collection methods used to assess community organizing by Communities for Public Education Reform (CPER). The evaluators will do so within the framework created by the Alliance for Justice's new *Resources for Evaluating Community Organizing* electronic compendium, which will be outlined. Directors of community organizing groups involved in the CPER evaluation in Denver (Mike Kromrey) and Philadelphia (Janis Risch) will discuss ways in which the evaluation has affected their strategies, internal dialogues, relationship with funders, and capacity to assess their own work.

Building Capacity for Evaluating Advocacy

Tom Kelly and Don Crary, The Annie E. Casey Foundation

Jane Reisman and Anne Gienapp, Organizational Research Services

Gaye Smith, Georgia Family Connection Partnership

Robin Christian, Children First For Oregon

Jim Horan, Connecticut Association for Human Services.

Moderator: Jane Reisman, Organizational Research Services

The Annie E. Casey Foundation has invited several of their KIDS COUNT grantees to participate in a pilot project to develop evaluation strategies for their advocacy and policy change work. Each of these projects initiated their work (or is currently initiating work) with the development of an outcome map for one or more of their strategies. The process of identifying outcomes and their linkage to strategies calls into question a host of strategic questions, including consensus within the organization, transparency, real-time relevance,

belief in the value of evaluation, and the interconnectedness among organizational strategies. This session will offer a candid look at this approach and lessons learned for developing evaluation capacity in advocacy organizations from the perspective of funders (Tom Kelly and Don Crary), evaluators (Jane Reisman and Anne Gienapp) and advocates (Gaye Smith, Taifa Butler, Robin Christian, Jim Horan, and Helen Figueroa).

BREAKOUT SESSIONS 4: Wednesday from 1:00-2:30 p.m.

Retrospective Case Studies: A Tool for Learning

Michael Quinn Patton, Utilization-Focused Evaluation

Colin Knox, University of Ulster

Moderator: Gail Birkbeck, The Atlantic Philanthropies

While the emphasis in advocacy evaluation generally (and in this convening) tends to be on prospective evaluation that occurs while the advocacy effort is being implemented, retrospective evaluation also can be extremely valuable. Retrospective case studies take place after an advocacy effort has occurred and the outcome already is known. They look backward and examine the factors that led to or affected that outcome, and therefore are extremely useful for learning purposes. This session will feature two retrospective case studies presented by two evaluators. Colin Knox will discuss his work in Northern Ireland—a series of seven case studies—on how to influence policy agendas that are very resistant to change. Michael Patton will discuss his case study of a judicial advocacy effort to influence a Supreme Court decision, and his use of the *general elimination method* to determine whether a plausible and defensible case could be made that the advocacy effort in fact had an impact.

Evaluating Public and Political Will

Craig Charney, Charney Research

Peter York, The TCC Group

Paul Harder, Harder + Company Community Research

Moderator: Julia Coffman, Evaluation Consultant

Many advocacy theories of change include the outcome *public will*, or its cousin *political will*. While these terms are now part of our common advocacy vocabulary, we lack clarity on what they mean, what it takes to achieve them, and how we should measure them. The panel of evaluation experts for this session will tackle these challenges and discuss their experiences operationalizing and assessing public or political will. This session also will discuss what it takes to actually move public and political will and how to ensure our expectations around this outcome are realistic.

Using Evaluation to Build Advocacy Capacity

Hilary Binder Aviles, Mosaica

Yuki Kidokoro, Communities for a Better Environment

Beth Rosen, Humane Society of the US

Moderator: Sue Hoehstetter, Alliance for Justice

Evaluating advocacy work provides opportunities for organizations to build their capacity to engage in sustained, effective advocacy. This session will describe recent examples of that process in both large and small organizations. Panelists will discuss lessons learned from an assessment of the Environmental Support Center's programs to support advocacy capacity of small organizations, as well as from The Humane Society of the United States' internal development and usage of a new advocacy evaluation framework. Topics addressed will include: a definition of advocacy capacity; building, communicating, and integrating a new evaluation framework throughout an organization; measuring improvements in policy change efforts and in the impact of their work; and development of capacity for evaluation.