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Advocacy and evaluation: national organizations as advocates

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Introduction

Building evaluation capacities at the national level is a multifaceted endeavor. It involves building the supply side for evaluation, including the skills for conducting evaluations, developing and adapting the technology and tools for effective evaluations, and supporting the institutional framework. It also involves building the demand for evaluation – for example, raising awareness of or sharing knowledge about the use and purpose of evaluation (Picciotto & Weisner, 1998). Another dimension of evaluation capacity is the development of an institutional ethos (Lusthaus et al., 1995) at the national level, whereby a culture of evaluation is developed, and where incentives and rewards encourage the use of and demand for evaluation.

Much has been said about the role of evaluators as advocates (Stake, 1997), the future of evaluation and evaluators (Chelinsky, 1997a, 1997b) and the role of evaluation (Vedung, 2000). However, there has been little discussion of associations as advocators of evaluation or their role in enhancing the status and use of evaluation in various politico-economic environments. Evaluation associations, in addition to providing services to members, have played a role in the creation and development of evaluation cultures. Many evaluation associations have endorsed a proactive approach in social movements aimed at changing the law, customs, the structures of institutions, the hierarchy of status or challenging the social order (Tarrow, 1994; Touraine, 1995).

Since evaluation associations are to some extent responsible for influencing or even creating the conditions in which evaluation and evaluators develop, there is a definite need for national associations and their suborganizations to share their knowledge, analysis of their environments, advocacy strategies and assessments of outcomes. The sphere of evaluation is not limited to the experience of particular nation-states or national associa-

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tions. Our singular or mutual actions all have a definite influence on the global state of evaluation.

The Canadian Evaluation Society (CES) recently acknowledged that advocacy is one of its primary goals and has begun to formulate a national strategy and action plan for its role in evaluation advocacy in Canada. This paper presents some of the initial steps taken by the CES in shaping its role as an advocate for evaluation. The steps include defining advocacy, identifying the aspects of evaluation the CES would support and clarifying how advocacy fits into the mission and goals of the CES. The paper concludes with a summary of some of the results to date and some lessons for other evaluation associations as they reflect on their advocacy role.

The Canadian Evaluation Society

The CES is a bilingual national organization founded in 1980 and governed by a National Council that represents its constituent chapters, located in each province and territory. The CES has approximately 1500 fee-paying members from the public and private sectors, non-profit organizations and academia, who share an interest in pursuing its mission and goals.

The CES is a professional organization dedicated to the advancement of evaluation for its members and the public. Its goals are as follows:

- **Leadership:** To establish and maintain the CES as a recognized national organization that represents the evaluation community.

- **Knowledge and education:** To provide a forum for the advancement of theory and practice of evaluation.

- **Professional development:** To develop competencies, ethics and standards to improve the practice of evaluation.

- **Advocacy:** To advocate high-quality evaluation with practitioners and local chapters, nationally and internationally.

- **Promotion:** To promote the use of evaluation in society.

Adopting a common understanding of advocacy

A crucial first step for any association or group engaging in advocacy is to agree on the definition of advocacy. In the light of the CES's mission, the first objective was to establish, and then obtain consensus on, a working definition of the concept. Both the National Council and the CES chapters have quite varied ideas of what advocacy means and what range of actions an advocating association should take. In many cases, differences in definition are the result of differences in resources and the political contexts in which the groups work.

Advocacy, in the most general sense, means to carry out a social action in support of something. The action taken will depend on what is advocated (a belief, attitude, value, organization, claim, practice, idea, product, cause, even an ideology); who is advocating (an individual or organization); and the purpose of the advocacy (to champion, defend, legitimize, promote, develop, publicize, etc.).

To reach a consensus, the CES examined and combined two interrelated traditions of advocacy action to create a working definition of advocacy. In the legal tradition, to "advocate" means to defend, plead for, vindicate, or overcome an opponent (whether the opponent is an individual, organization or idea). In the organizational tradition, advocacy means taking social actions that "champion" something. Both traditions, however, espouse the notion of advocacy as legitimization – the social action is taken to establish, reinforce or protect the legitimacy of a claim, a cause or even a position. The CES went beyond these two traditions by also considering advocacy as an act of promoting something – acts ranging from encouraging, developing, improving and nurturing, to publicizing, selling and even propagandizing.

The CES summarized these three dimensions by recognizing that advocacy inherently involves a claim and/or an act of legitimization that can be enacted through any of the traditions described above. The CES agreed upon the following working definition of advocacy: "Advocacy is a range of planned social actions intended to elevate, protect and promote evaluation and its use by individuals or organizations. Any form of advocacy is based on a claim and the need to establish and/or protect the legitimacy of evaluation as an essential societal action."

Developing a common vision and strategy for advocacy

Creating an effective vision for advocacy is an exercise involving both the head and the heart and is a difficult process; it requires numerous and varied resources, time, and the involvement of stakeholders. In short, it requires a major organizational commitment on the part of an evaluation association.

At the CES, the first draft of the advocacy vision came from a background paper that drew on past organizational experiences to create a framework that was both analytical and practical. In successive transformations, the guiding coalition, the CES Council and chapters discussed these ideas at length. They modified the initial thoughts by eliminating, adding and clarifying elements. The CES has now begun to articulate its advocacy vision around the following areas that can be a useful guide to associations in search of their own advocacy vision:

- **Defining how advocacy fits into the mission of the CES:** How does the external and internal context affect the association's ability to advocate? What are the goals and objectives in both the short and long term?

- **Deciding what will be advocated:** Will it be an issue, theme, topic, idea, value, cause, product or service?

- **Determining the means and resources for advocacy action:** This involves the plan for implementation and the method of social change. How good is the match between the target and the action to be taken? What resources are required and where will they come from (internally or externally)?

- **Clarifying the outcomes and the methods of measurement:** What should the identifiable outcomes or results of the actions be? What is success? What type of social change is anticipated? How will the advocacy actions be monitored and evaluated?

Initial requirements of a national plan

The CES's objective was that every advocacy action would be aligned to a strategy that supports the advocacy vision. Implementing an advocacy action assumes that the association has identified an inventory of resources, has a satisfactory understanding of its environment, and has a good sense of how it is perceived by others, both individuals and organizations. Most importantly, the implementation of an advocacy action required the CES to develop a fairly concise conception of what would be changed by the advocacy activity and over what period of time, as well as a sufficiently valid set of indicators of change for measuring the effectiveness and effects of the actions undertaken. Experience tells us that most advocacy initiatives fail owing to the lack of a well-devised plan and the continuous assessment of actions and results.

The creation of an advocacy vision can be difficult for at least four reasons:

- First, although a good vision has a certain elegant simplicity, the data and synthesis required to produce it are usually anything but simple.

- Second, an advocacy vision must be grounded in sensible values and analytically sound thinking. At the CES, those values had to be acceptable to the Councilors of the Society, who represent the values and understand the different political realities of their respective chapters. There is no doubt that a vision of evaluation advocacy in one region of Canada, such as Newfoundland, differs from the vision of, for example, Ontario, given their differences in political climate, membership, their access to different bases of power and sources of legitimacy and/or credibility. To be effective, a national plan has to account for and address these many differences. In short, it is necessarily complex.

- Third, without teamwork, parochialism can turn the creation of an advocacy vision into an endless negotiation. Quite often, when a group attempts to achieve a common vision, few individuals are actually trying to achieve that goal. Instead, some are protecting their subgroup's narrowly defined interests. Ultimately, national associations create some of the conditions in which evaluation either thrives or fails in constituent parts.

- Finally, as with any organizational exercise, especially those of a voluntary nature, if advocacy is not given significant and constant priority, the process (which should be continuous) will never be completed or will eventually fail.

How advocacy fits into an association's mandate

The most common purposes of advocacy fall into three general but overlapping areas. The first is to procure resources (human, material, financial or ideological) and ensure an adequate flow of these resources. The second is to advocate evaluation and the evaluation association as a means of gaining an advantage or a position of influence within an environment. The third is to gain approval or legitimacy for evaluation and/or the association.

Ultimately, an organization's efforts at advocacy should generate results that contribute to the survival of the organization and the benefit of its members. The CES understands that, to be implemented effectively, its advocacy of evaluation should be aligned with the organization's mandate and should take into consideration the multiple environments within which it operates. Organizational research reveals that some organizations regularly analyze, enact and even try to construct their environments; others only react to their environments, never realizing that inaction is, in effect, a form of action. Typically, those organizations are troubled by the consequences of environmental events that were unnoticed or unforeseen.

Before developing a strategy for advocacy, the CES is undertaking an exercise to assess its internal environment (its capacities, strengths and weaknesses, and needs) and its external environment, to understand clearly what it does and whom it serves. The initial steps of the exercise are set out below.

Step 1: Assessing the organization

What are our products and services? Who are our clients? How do we identify them? Who do we compete or collaborate with? What are our strategies? How successful are they?

Step 2: Identifying significant environmental conditions

Which environments do we work in (social, cultural, economic, political, technical, technological) at both the national and chapter levels?

Step 3: Analyzing the environment

What is the capacity for evaluation in these environments? Are the resources and abilities rich or limited? Is the environment homogeneous or heterogeneous in terms of similarity or differences between organizations? How concentrated is it in terms of clients, members or audiences? How stable or turbulent is the environment? How much consensus is there about the domain of evaluation in general? Are the CES's services recognized or disputed? Is the value of the organization questioned?

Step 4: Assessing the image of evaluation

How would we generally characterize the organization's image at the chapter level, nationally and even internationally? How is that image of the CES perceived by the different components of our environment?

Step 5: Monitoring the environment

How well do we monitor the environment? What kinds of information do we collect and is it adequate?

Defining the aspects of evaluation to advocate

The effectiveness of an advocacy plan depends on an adequate match between what will be advocated, the purpose of the advocacy, and the means employed. The CES created a long list of specific elements of evaluation to be advocated, and then grouped them into the following major categories:

- **Advocating for professionalism of the evaluation function:** It is important that evaluators are recognized as a society of trained professionals who follow a code of professional ethics and who are certified in accordance with recognized standards.

- **Advocating to improve the quality of evaluation:** We must continually review and update our methodologies, practices and theories of the various types of evaluation, and the values we reflect when conducting an evaluation. It is important that we constantly compare our activities with what is happening around us to ensure we are meeting the changing needs of our clients.

- **Advocating to promote the role of evaluation in society:** A significant challenge facing us is advocating the public role that evaluation plays in society and how we, as evaluators, fulfill that role. Does society understand what our role is? Is our work seen as important? Where is the accountability, and to whom? Do attitudes need to change so that evaluation becomes an essential part of society?

Evaluations take place everywhere. In highly developed or least-developed countries, evaluators are working in research, gender issues, human rights, education, organizational performance and government realignment. There are no areas where evaluation is not needed.

Evaluation is a critical function, required by many, but not necessarily understood. One of our tasks is to advocate the promotion of the role of the evaluator or the evaluation association. We have a set of resources that are available to society in general. Our ultimate challenge is to address or even confront parts of our politico-economic environments by informing them about what we do and how we do it, and demonstrating the public benefits of evaluation.

Some lessons learned

The CES National Council held an initial meeting on advocacy and another with chapter representatives in May 2000 to discuss advocacy and a national plan. It became clear at the meetings that the chapters and Council operate in very different environments and face a variety of different constraints. It was agreed that any national plan would need to

address these realities and that a jointly led approach would be the best way to proceed – probably advised and led by a National Committee of Council and Chapters.

During the summer of 2000, the National Council began to align itself with other organizations that have similar interests in evaluation in Canada. In October, the National Council will begin to refine some of the elements and define the resources required for the initial phase of a national advocacy plan. In the interim, CES chapters have enacted their own advocacy initiatives with varying degrees of success. The following are some of their thoughts about what worked and what did not when they became advocates for evaluation.

Alberta

Over the past two years, Alberta has done some work in raising awareness of evaluation by reviewing and targeting various departments and people and/or positions (federal, provincial and municipal). In a series of luncheon discussions, we brought together evaluation practitioners and other interested people to discuss their approaches, evaluation issues and innovations. We then asked some of these people to present their work at subsequent luncheons. This type of proactive targeting works well in raising awareness among departments and increasing their commitment to evaluation. On the other hand, presentations on evaluation to large departmental groups do not seem to work well – no one seems to take ownership or responsibility for follow-up.

North-West Territories

There is good acceptance of evaluation in the North-West Territories because there is a strong central agency presence. The chapter is highly visible because it is tied into the business planning cycle; it provides training and sponsors workshops in evaluation; it supports policy, with an emphasis on the word "support" – is does not intrude; it offers assistance to non-profit organizations; and it has a 12-year association with the CES.

This organization is built on volunteers and it advocates by doing: performing good evaluations, doing good outreach or pro bono work, participating in volunteer activities and organizing events. We advocate by building working relationships, and take a soft sell approach. The atmosphere is very informal and there is an open-door policy. As a result, we have more requests than we can handle.

Quebec

La Société Québéçoise d'Evaluation de Programme (SQÉP), the Quebec chapter of the CES, has 275 members and advocates for evaluation through several types of activity. First, the SQÉP promotes exchanges among individuals and organizes five to seven workshops per year on different themes related to program evaluation. Second, it has developed a website that acts as a center of reference and links members to other evaluation sites. Third, it organizes an annual conference that focuses on a subject of interest in

the area of evaluation. Finally, the SQÉP takes positions on major evaluation issues facing the Quebec government and civil society. In 1999, for example, the SQÉP presented a concept paper to the Quebec government outlining a framework for managing evaluation in the public sector. A copy of this paper can be found at http://www.evaluation-canada.ca/sqep/.

The SQÉP has made advocacy for evaluation part of its mandate. This is a new area in which there is not a great deal of literature or research, and the SQÉP is learning by doing. We have experimented and are striving to learn from our own experiences and those of others. There is a great deal more to be done and to learn about successful advocacy for evaluation.

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