A: getting the basics in place

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Who this book is for

This book is for campaigners and managers who are thinking of introducing monitoring and evaluation approaches within their campaign, or who are looking at ways of improving an existing approach.

The book draws on our own experience as campaigners and evaluators, and the experiences of others. We use examples from different sources and hope the book is relevant for campaigners working in international, national and local organisations.

Campaigners are often passionate and action-orientated, and frequently under-resourced. For many, assessment, monitoring and evaluation may seem like an unaffordable luxury or an unwelcome mechanism of control. These fears are not completely unfounded; if implemented badly, monitoring and evaluation can divert time and resources away from campaigning, and become a bureaucratic straightjacket. But simple and effective monitoring and evaluation can, if implemented well, become a powerful tool for social and political change.

Monitoring and evaluation can help support campaigners at all levels by:

- providing vital political intelligence
- empowering the communities and individuals with and for whom they campaign
- enabling them to give an account of their effectiveness and impact, and so maintain and increase political and public support for their campaigns.

The guide has a layered structure. The different parts are designed to be self-standing and complementary.

‘This book is aimed at campaigners who want to strengthen their effectiveness and impact.’

Part 1 provides an overview of the key elements of monitoring and evaluation, and suggests some simple approaches. Small organisations with limited resources need only read this chapter, along with the Appendices; Some more thorough approaches are outlined in Part 2; and in Part 3, we make further suggestions about how to deepen the approach.
The Appendices provide a simple step-by-step guide to help you design your own assessment framework, as well as providing further examples of information and practical tools you can use.

Definitions

When we talk about campaigns and campaigning we mean organised action to achieve a desired social, political, economic or environmental change, often involving tackling underlying power relations.

By monitoring we mean the regular tracking and assessment that goes on during the lifetime of the campaign. By evaluation we mean a retrospective assessment of the campaign overall.

Why monitor and evaluate?

If you are a campaigner, the chances are that you want to change the world and make it a better place. Monitoring and evaluating your campaigning can help you do a better job of it.

There is no one approach to monitoring and evaluating campaigns – what you do will depends on what you want to know and why, and your resources and expertise. A local NGO (non-governmental organisation) fighting a school closure, for example, might use monitoring and evaluation in very different ways compared to a large international NGO.

But in all cases, monitoring and evaluation can help strengthen campaign effectiveness and impact, empower people and communities, and promote wider learning.

Monitoring and evaluation can be a valuable part of your campaign:

- in the development and planning stages, to check that the assumptions on which the campaign is built are sound and take into account the challenges you are facing
- during implementation, to measure progress against expectations and allow you to adjust your approach accordingly
- at the end, to draw out the learning for future work.

Political intelligence

Through monitoring and evaluation, you can gather vital intelligence as you battle powerful opponents (most of whom are likely to have highly sophisticated political intelligence systems of their own in place). This intelligence can help improve a campaign's effectiveness throughout its lifetime. Problems can be dealt with as they occur, rather than leaving it to the end of a campaign when it is too late, and they can be dealt with collectively rather than leaving it to individuals to struggle alone.

Evidence

Effective monitoring and evaluation can also provide powerful evidence that can be used to influence policy makers, motivate campaigners and support fundraising efforts to push for further change. If you can provide regular and plausible information about the problems people are facing, you can galvanise supporters and policy makers into action. If you can convincingly show that campaign actions are resulting in policy change, your supporters will be encouraged to do more. Or, if you can demonstrate that certain policies are improving people's lives, you have a greater chance of convincing policy makers to listen to you. And the more credible and reliable your information, the more convincing your case will be.

Monitoring as a campaign tool

Information gathered through monitoring can be used to put pressure on decision makers. This can be particularly important in what sometimes tends to be seen as the post-campaign period, following the enactment of a desired policy change. Implementation is key, and invariably demands vigilance. Campaigners need to keep a watchful eye on how things progress through ongoing monitoring of the situation on the ground.

Indeed, it may make sense to build into your policy recommendations a mechanism for assessing progress: Oxfam's Cut the Cost campaign, for example, called on GlaxoSmithKline not only to develop a cost reduction strategy (for essential drugs used by poor communities), but also to provide annual reporting on how it was being implemented. Depending on the target and the viability of self-monitoring, it may be more appropriate to include within the text of any proposed policy change an agreement to allow independent monitoring. Companies who have joined the Ethical Trade Initiative, for example, commit to openness to independent verification visits.[1]

‘A participatory approach to monitoring and evaluation can promote vital learning and empowerment of staff and communities for and with whom you are campaigning.’

Learning
As well as improving performance in individual campaigns, monitoring and evaluation is crucial for supporting wider organisational learning. The right information can help you determine the choice and design of future campaigns and assess your organisation’s analysis of development, power and change. This can help an organisation replicate success and avoid failures.

A participatory approach to monitoring and evaluation can promote vital learning and empowerment of staff and the communities for and with whom you are campaigning. By assessing achievements and problems, participants involved in monitoring and evaluation enhance their analytical capacity and critical awareness. It can also increase their motivation to participate in planning and implementing future activities and take responsibility for their own lives.[2]

Accountability
Participatory monitoring and evaluation can also be used as a mechanism to promote accountability to stakeholders, as it provides important opportunities for them to feedback on your performance. Accountability is the means by which individuals and organisations report and are held responsible for their actions to their various stakeholders. It is important because it helps keep power under control, prevent its abuse, and subjects it to certain procedures and rules of conduct.[3] It is also increasingly necessary because of the increasing scrutiny and questioning of NGOs’ roles and effectiveness.

NGOs generally have multiple accountabilities including to communities/individuals, donors, partners, and supporters. In principle, their main accountability should be to the communities and groups with, and for whom, they campaign, as it is the quality of their lives that are at stake. But in practice there is often more pressure to ensure accountability to powerful donors, who have the power to cut funding.

Balancing these demands is part of the challenge of ensuring accountability, and monitoring and evaluation can provide a useful tool to help do this.

If a government or company performs badly they may lose an election or suffer reduced profits. Similarly, if a membership organisation performs badly, the members can vote for new directors/trustees or withdraw from membership[4].

However NGOs often lack formal mechanisms for their stakeholders to signal dissatisfaction, and disadvantaged groups may lack the resources and power to demand accountability. Establishing participatory processes for monitoring and evaluation can help fill this accountability gap and rebalance power towards communities/individuals.[5]

Increasingly donors want to know whether the support is having the desired effect. If campaigning organisations take the initiative on how to monitor and evaluate, they can ensure that it helps strengthen campaigning, rather than being a bureaucratic mechanism of control. They can also use the information to help justify the allocation of scarce resources to campaigning.

Impact

The ultimate goal of campaigning is to contribute to a fairer, more equitable and sustainable world in which people live better lives. But even those organisations that have a reasonably good assessment of how they're doing in terms of their campaign objectives – for example to what extent they have helped contribute to specific policy changes – often fail to track their impact, the difference the campaign has made to people's lives.

There are some good reasons for this, not least because impact often lags behind policy change and is the result of a whole range of factors, many of which are beyond the reach of the campaign. But where it is possible, tracking and assessing a campaign's impact is important. It forces us to keep our eyes on the ultimate goal and to periodically re-assess whether our campaign objectives and activities are the best means of achieving our desired impact.

For example, securing commitments from rich countries to increase overseas aid may represent a great campaign victory, but it is only a meaningful victory if it makes a positive difference to people's lives. This may require international campaigning to help build Southern advocacy capacity, to help ensure that Southern governments use and spend the money wisely, for example.

Campaigns that focus only on the achievement of the campaigning objectives without looking to see the subsequent impact – whether policy commitments translate into practice and whether that practice delivers the changes desired - may be falling at the final hurdle in the bid to make a real difference to people's lives.

Information and communications

Monitoring and evaluation, especially when it is participatory, can help increase the communication between different stakeholders by exposing them to each other's perspectives on an intervention. This may extend to those who have no direct influence on the implementation of the project. Communities may learn something about the donor agency, and public audiences may learn more about the reality of the people they are supporting (either through donations to an NGO or their taxes). To succeed in this, monitoring and evaluation should be carried out in such a way that the different stakeholders do not feel threatened, so they can openly discuss successes and problems faced by the project.

Whether a campaigning organisation actually reaps these benefits will depend on the approach you adopt. An approach based mainly on control is unlikely to help improve campaign effectiveness and impact. And a poorly designed or overly cumbersome approach may actually create problems, rather than solve them.

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'Social and political change is complex. All kinds of factors come into play, so it can be very difficult to determine cause and effect.'

Some starting points

Some of the challenges in monitoring and evaluation

Monitoring and evaluating campaigning is not always a straightforward or simple undertaking; three constraints in particular can make it quite problematic for campaigning organisations.

Constraint 1:
change is complex
Social and political change is complex. All kinds of factors come into play, so it can be very difficult to determine cause and effect. Campaigns tend to produce effects on many different levels, often unintended, and sometimes evolving in different directions to those initially anticipated.

These kinds of challenges generally hold true of evaluation of pretty much all social change processes (including programme work for example). But for campaigners, these difficulties are compounded by the fact that campaigning is often fundamentally a conflictual process. Absolute victory is exceptional and compromise the norm so notions of success are often contested. One person's integrity-based compromise is another's irresponsible sell-out.

Change tends to occur incrementally, with results often only apparent in the long term, and even then not definitively, because advances can be reversed. And impact – the difference you've made to people's lives – often lags significantly behind policy change, if it is linked at all.

In other words, there tend to be some fundamental unanswered questions in any campaign about now effective you are, or what impact you are having, both because it's hard to track the eddies and flow of influence, and because coming to a settled view about the nature and extent of campaigning success can be difficult too.

Constraint 2: absence of clear objectives

The obvious way to review any project is to assess progress against objectives. But campaigners can be unclear, or are at least rarely explicit, about what they actually want to achieve.

In many cases, campaign objectives are unrealistically over-ambitious. There is clearly a place in campaigning for bold aspiration, but when it comes to setting objectives this needs to be tempered with some hard-headed reality. Without this, the danger is that resources are used in ways that don't end up delivering meaningful change. In some other cases, campaigns are too cautious, too reactive, and fail to recognise and exploit opportunities for more radical change.

Both cases highlight the need for clearer thinking in planning.

In fact, problems attributed to evaluation are often problems of planning. Given the complexities involved, it can be very difficult in any campaign to be clear about what you are trying to achieve; once you are, finding ways to track and assess your progress can be comparatively straightforward.

That's why, in this Guide, we make the case that campaigns should be underpinned by a sound rationale based on good understanding of power dynamics and the opportunities and obstacles to change, and that campaign objectives should represent this in some way (see chapter 9).

Constraint 3: lack of capacity for reflection

Learning from experience happens best when the campaigning organisation is committed to constantly gathering and analysing information, and changing and improving. Some campaigners are aware of this, but others see this as an unaffordable luxury, that diverts attention away from real action.

Either way, there tend to be a set of internal constraints that make the possibility of (a) gathering relevant information (b) sharing it (c) learning from it and (d) applying the lessons in the future, often very difficult.

Senior managers have a critical role to play here, by ensuring that monitoring is used strategically to strengthen campaigning, and building links where appropriate to organisational performance management systems.

Learning from experience also requires a capacity for self-criticism and reflection within individual campaigners and within organisations. Evaluation generally involves gathering different perspectives, so you need to accept that others have legitimate and useful viewpoints, even if they differ from yours. For all practical purposes, the capacity for critical thinking is at least as important as methodological rigour as a factor in effective monitoring and evaluation.

Some key principles

That is a brief summary of some of the constraints, and there is a lot of debate about the best way to deal with them. The approach you take to assessing your campaign will depend on your view of social change and the role of campaigning, the reasons why you want to monitor and evaluate your campaign, and the resources available to you. However, it is possible to set out some key principles:

Some information is better than none

Assessing campaigning is complex. However, the most sensible starting point is that some information is better than none at all. Taking some tentative steps towards enhancing learning and bolstering accountability is better than saying it's too difficult so there is no point trying. It's not the purity of the process that's most important, it's the quality of the thinking.

Measure the right things

The starting point is to know what you want to know. The key principle is to be guided by your change pathway and campaign plan. Usually this will mean focusing your monitoring on the changes that happen as a result of your work. If you just record what you do, this may not tell you that much. It won't make it easy for you to point to your achievements. So measure the important, not the easy things.

As change can be unpredictable you will need to balance predictability with flexibility. So make sure your monitoring includes open-ended questions to capture unintended changes, as well as tracking anticipated changes.

As we note in chapter 10, encouraging the participation and ownership of front-line campaigners will help ensure that the information collected from monitoring and evaluation is relevant and timely.

Establish the link to action

Monitoring and evaluation needs to produce relevant, action-oriented findings. The idea of monitoring and evaluation as a mechanism of control (eg as a means to satisfy the requirements of donors or senior managers) has its place in some circumstances, but, in our view, organisational learning should be one of the overarching goals. And this means ensuring that use is made of information generated by monitoring during campaign implementation, not just at the end.

For this to work well, it's important that information produced is relevant and useful in campaign planning and implementation. This requires a light, simple and flexible approach that forms part of a continuous cycle of action reflection action, which seeks to continually improve campaign effectiveness.

Apart from any other reason for this, all the evidence is that if the information is not useful to the people being asked to collect it, then it's likely that any system will fall into disrepair and not actually work.

Create a learning culture

Effective monitoring and evaluation requires internal leadership, clarity over roles and responsibilities, and a learning culture that promotes critical thinking and recognises information about both success and failure as valuable information. In particular, there needs to be someone who takes responsibility for ensuring that information is being gathered and the opportunities to reflect on the findings are created within the day to day life of you're the campaign. These opportunities can sometimes be merged into existing processes such as one-to-ones between staff and managers, or planning meetings with staff or partners.

‘Campaigns generally swim about in seas of conflict and cooperation between many diverse interests.’

Importance of critical thinking in monitoring and evaluation

Campaigns generally swim about in seas of conflict and cooperation between many diverse interests. Issues tend to be resolved when there is a shift in the balance of forces rather than through outright victory over opponents. In this context, with so much in the balance, and so many actors involved, understanding others’ viewpoints is campaigning gold dust. That is why it’s important to take external views seriously even when - especially when - they diverge from your own. In fact, it is the areas of disagreements between different stakeholders around the interpretation of events that are perhaps the most fruitful areas to learn from.[6]

Even when you think others’ views are objectively wrong (a) they’re not likely to be, more likely they represent a different way to interpret events and information and (b) it’s useful to know what they think so you can incorporate this as appropriate in your future work.

The important thing is to be able to create space where reflection can take place in a considered manner, and disagreement is neither seen as destructive nor ignored. This requires a supportive environment where openness to criticism is fostered by a genuine spirit of enquiry. This means understanding and responding to power dynamics in ways that encourage participation, paying attention to the need for good preparation and information sharing.[7]

Gather multiple perspectives

In many cases the most sensible approach to monitoring and evaluating campaigning is to build up an understanding of change from a range of perceptions and understandings, rather than seeking to provide an objective truth. The most effective approaches gather both internal and external perspectives. Internally, this may involve getting campaigners to systematise their knowledge, and holding periodic internal reviews with staff and constituents. Externally, this can be done through document review and periodic surveys or interviews with those with an involvement with, or interest in, the campaign.

As we discuss later, this means considering questions of participation and involvement: who gathers the information? Who has access to it? Who assesses it? Whose opinions count?[8] You must be sensitive to power relations/imbalances among stakeholders and beneficiaries, considering the need to disaggregate information by gender, class, ethnicity, etc and not simply assume that those who respond to a survey, for example, are necessarily representative of others who may be harder to reach (see chapter 10).

Devise a realistic approach

There is no single, best method for monitoring and evaluating. It depends on what you want to know and what your circumstances are. Generally it will be important to gather a mix of quantitative and qualitative information from a range of sources, using data gathering tools that are appropriate to your resources and skills. Remember that you are looking for reliable evidence of your effectiveness and/or impact, rather than seeking proof. The key is to do a few important things well: given that the approach must be realistic, in most cases it makes sense to aim for an approach that is minimal and user friendly.

Whatever the scale, you will need to dedicate and ring-fence resources to monitoring and evaluating your campaigns and campaign programme, and to link it with and into wider organisational performance management systems.

> ‘There is no single, best method for monitoring and evaluating.
> It depends on what you want to know and what your circumstances are.’

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The basic elements

This chapter outlines the basic elements involved in developing a useful, action orientated and participatory approach to monitoring and evaluation.

Clear campaign design and planning

A fundamental element is to have a clear campaign design and plan. You need clear and well thought out campaign goals, objectives and activities. These should be based on a plausible hypothesis of how you anticipate that change will occur. Without this, it will be difficult to assess your progress and achievements, and understand what is or isn't working well.

Below we outline some ways of thinking about campaign design and how change occurs, which we return to in greater detail in Chapter 9.

Campaigners seek to make the world a better place through challenging the status quo and taking on vested interests in order to secure social and political change that improves people's lives.

In its most simple terms,
the process looks like this:

the campaign → social and political effects and changes secured → improvement in people's lives

The same process can be represented in the following terms

ACTIVITIES → OUTCOMES → IMPACT

(Note: for the sake of simplicity we are not drawing a distinction between activities and outputs which is generally made in an 'impact chain' of this type. The important distinction is between measures of effort (what tasks have been undertaken and what gets produced), and the outcomes and impact that occur (what is different) as a result)

For example, this could break down as follows:

Activities	Consumer research to identify clearest labelling scheme Lobby government departments Lobby, media and email actions directed at companies
Outcomes	Government issues clear guidelines on food labelling Major companies adopt clear food labelling
Impact	People's health improved by having access to clear information about food

Obviously the latter loses something in terms of representing campaigning as political, vital, contentious and passionate. But evaluators tend to find it helpful to describe the process in these terms as it makes the various elements of the campaign easier to articulate and consider. Although that sounds a bit technocratic, it can in fact be essential to the success of the campaign: the quality of the thinking underpinning the campaign – and the soundness of the rationale for the approach adopted – is a key factor in its likely success.

The sounder your analysis is in the design stage, the more well-founded your assumptions about how your campaign can best influence events are likely to be. And the more plausible your assumptions are, the more likely it is that your campaign will be effective in delivering the change you seek.

And whatever terms are used, the basic idea is the same: campaigning is a purposeful activity, with an underlying logic – that well-organised activities will contribute to outcomes and outcomes will contribute to impact. The exponential power of this simple formula lies at the heart of campaigning as a force for wonderful and startling change.

Of course, change does not happen in a linear fashion. Different factors and influences interrelate in complex and sometimes unpredictable ways. And the further along the chain you go, from activities, to outcomes to impact, the more likely it is that external factors intervene, unexpected events occur, and so the influence that your campaign exerts on events is lessened.

We consider these complexities and their implications further in later chapters. But even though the world is a complicated place in practice some kind of simplification is needed in order to act. So the key point for now is that most campaigns are constructed along an expected 'change pathway' which expresses the changes you would like to achieve.

You act in certain ways because you anticipate that this will deliver certain results. This can be most simply expressed as a 'so that' chain[9]:

[campaign seeks to] Increase media coverage on the lack of health insurance for children

so that …

public awareness increases

so that …

policymakers increase their knowledge and interest

so that …

policies change

so that …

more children have health insurance.

There are of course many implicit assumptions underlying this description. For instance, that vested interests do not prevent increased awareness translating into increased investment in health. If the assumptions do not hold, your campaign may well deviate from this path, or follows an entirely different one, or get stuck. Monitoring and evaluation can then help you assess the soundness of your change pathways and assumptions, and your campaign design and strategy. In chapter 10, we look further at ways to help you decide how best to focus your efforts by considering which change factors are, and are not, important in any given situation.

Defining activities, outcomes and goals

As mentioned above, a key element of a sound campaign design is having well thought out campaign activities, objectives and goal.

Throughout the book, we use these terms to mean the following:

The campaign goal is the ultimate aim of the campaign – the desired impact you want the campaign to have on people's lives.

Campaign outcomes are the changes amongst audiences and institutions that help you on your way to achieving your campaign goal. The specific outcomes you seek in your campaign will generally be made explicit when you establish your campaign objectives. As discussed later, these will relate to some or all of the following:

- changes to policy/institutional practice
- strengthened civil society
- shifts in power relations
- changes in individuals' attitudes/beliefs/understandings, etc
- changes in individuals' behaviour.

Campaign activities are the actions you undertake to achieve your campaign objectives. These include research and analysis; lobbying; alliance building; media work, etc.

It is important in any campaign:

- to define clear goals and objectives;

and

- to ensure that there is a clear and solid relationship between the planned activities, objectives and goal.

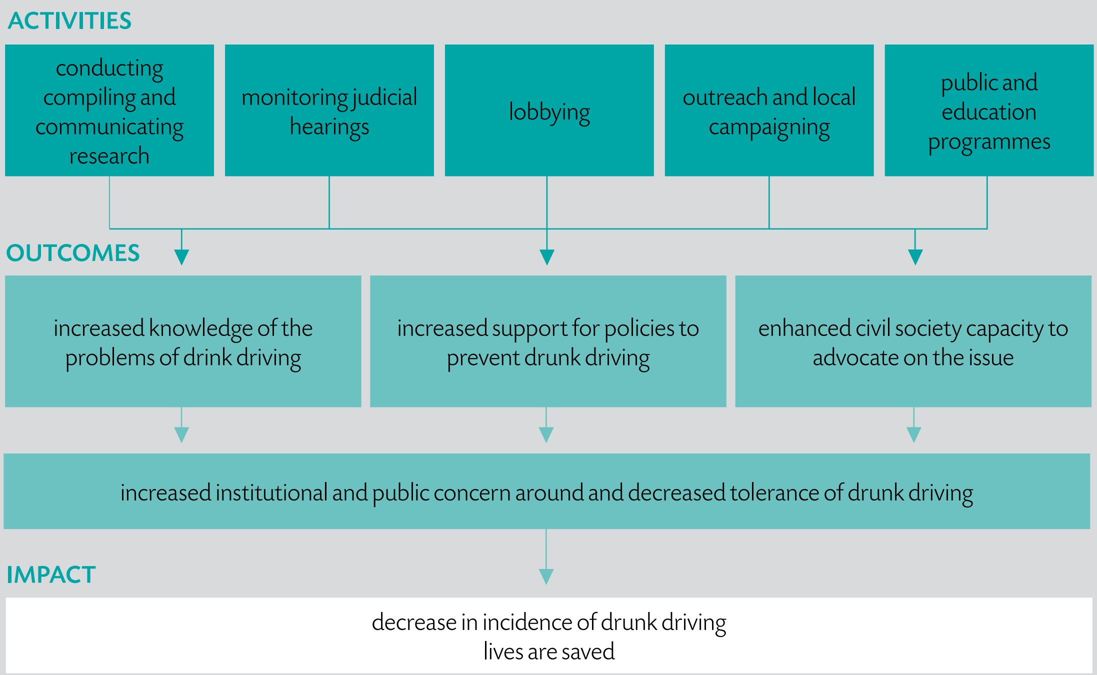
When you identify your activities and desired outcomes you are essentially laying out a campaign pathway towards your ultimate goal. The box to the right gives an example of such a pathway.[10]

Change pathway for campaign on drunk driving

Mothers Against Drunk Driving [MADD] is a US advocacy organisation with a mission to stop drunk driving, support the victims of violent crimes and prevent underage drinking.[11]

A review of the organisation's influence has suggested that evidence supports the case that "MADD campaigning has contributed to... changes in public knowledge, changes in public concern for the issue of drunk driving, changes in public will to address the issue through public policies, change in the support of policy makers and increased capacity to advocate for policies that would prevent drunk driving"[11].

The expected change pathway is summarised below. This example also illustrates the way that different elements and approaches and routes towards impact combine and inter-relate in powerful and important ways.



Assessing the campaign would generally then involve:

- assessing campaign progress against the change pathway
- checking that the rationale behind the change pathway (the campaign design) is sound.

We return to the issue of change pathways in chapter 5, and show how they can help you identify the information you want to monitor.

A summary of the key steps

Below we provide a summary of the key steps in designing a framework for monitoring and evaluating campaigns. These involve:

- identifying the purpose
- deciding who should be involved
- deciding your focus
- deciding what information you want to monitor
- determining how you will collect the information
- deciding how the information will be used.

Identifying the purpose

The first thing is to be clear about the purpose of monitoring and evaluating your campaign; as introduced in chapter 2, this could be, for example, to:

- improve decision making and impact
- promote learning
- ensure accountability to stakeholders
- influence targets
- motivate campaigners.

While it is possible for your monitoring and evaluation to fulfil various functions, it can be a different balancing act. Learning and accountability are two very different things, for example, even though they are often thrown together as if they are naturally complementary.

Learning and/or accountability

Ideally, monitoring and evaluation can help promote both learning and accountability. But it can be difficult to balance these two needs. If you are gathering and reporting on information with a donor in mind, for example, this may limit the prospects of real learning occurring. There are different possible approaches to this problem.

Some argue that you should be upfront about what is important and that 'sometimes the need is not to determine whether the [campaign] definitively caused later effects, but to learn how to do the work better'.[12]

Others recommend that the difficulties should be faced head on, and assessments of performance and impact should be negotiated and agreed by the key stakeholders, in other words between beneficiaries, staff, donors and others. [13]

Another possible approach is to ensure that you collect information relevant for both learning and accountability, but use a differentiated system to report to staff, constituents and donors.

You should be clear from the start about who and what the monitoring and evaluation is for. You should identify what you want to know, and why you want to know it before you start thinking about how to do it.

Deciding who should be involved

Being clear about the purpose should help you decide who should be consulted and/or involved in designing and implementing the approach, although you may need to keep coming back to this question as your thinking develops. We strongly recommend that beneficiary groups are involved at key stages. This is because a campaign cannot be judged to have been a success or failure if the criteria, perceptions and judgement of those whom the intervention aims to benefit are not taken into account, or if they diverge seriously from the views of campaign staff and/or evaluators.[14] However, effective participation requires careful planning which we address in greater depth in chapters 9 and 10.

Deciding your focus

A key step is to identify what you want to assess or investigate and to decide the key issues and questions you want to address. In this Guide, we suggest that this normally involves focusing on some or all of the following:

Investigating ways of working

- are our ways of working consistent, appropriate to our goal and objectives, and efficient?
- are we collaborating effectively?
- what has worked and what hasn't worked?
- what changes, if any, do we need to make to our ways of working?

Investigating social and political changes (campaign outcomes)

- are we achieving the social and political changes that we set out to achieve?
- what were the key factors in bringing about or blocking change, and what role did our campaign play in bringing about change?
- what has worked and what hasn't worked?
- what changes, if any, do we need to make to our campaign design, strategy and understanding of power and changes processes?

Investigating impact on people's lives

- are we making a difference to people's lives?
- what are the key factors/actors that contributed to these changes, and what contribution did our campaign make?
- what has worked and what hasn't worked?
- what changes, if any, do we need to make to our campaign design?
- what wider lessons are there for other campaigns, policies, civil society etc.?

The choice then is whether to seek to monitor and evaluate all of these areas, or whether to prioritise, and focus your attentions on a specific area. This decision will depend on the context, and every context is different. It's a question of balancing information needs and available resources.

However, generally speaking, it is an assessment of how your campaigning has achieved social and political changes – the outcomes – that will be most pertinent. Your activities are a means to an end and if you focus too much attention on measuring what you're doing, it's easy to lose sight of the critical question: what difference are you actually making?

Deciding what information you want to monitor

What you want to know will be determined by your purpose and focus.

For example:

- if you have decided to assess campaign outcomes you will need to collect information relating to who and what you are trying to influence. This will be specific to the campaign but could include, changes in policies, institutional practice, levels of support for your campaign amongst key audiences
- if you have decided to focus on campaign impact, you will need to collect information that helps you track and interpret changes in people's lives
- if you have decided to focus on ways of working you will need to collect information about how well you are set up, deliver of activities, and/or collaborate.

Generally speaking you will need information to help you:

- track (and measure) changes – ie to assess what has and hasn't changed since the start of the campaign
- interpret changes – ie. to understand why and how change occurred (for example, who or what were the main drivers and obstacles to change), and how far can the changes be attributed to your campaign
- assess perceptions/attitudes – ie what key stakeholders feel about what has changed and what has/hasn't worked well.

The specific pieces of information you monitor to track and interpret progress are generally referred to as 'indicators'. These can be either qualitative or quantitative.

If you are assessing campaign outcomes and/or impact, you will be able to derive many of your indicators from you change pathway (See chapters 5 and 8 below). But because change can be unpredictable, it is also important to ask more open-ended questions to help you interpret different outcomes, and capture unintended ones. We go into the development and use of indicators and questions in various situations in more depth in chapter 10.

Determining how you will collect the information you need

Once you have determined what you want to know, you then need to decide where this information is going to come from and how you will collect it. What are the sources of information, and what are your data gathering tools?

The general advice, valid for any situation, is that you should be looking to gather evidence from a range of internal and external sources, using a mix of different techniques.

In chapters 5 and 8 Appendix 13 we outline a variety of practical tools that you can use to collect data. The tools categorised as 'simple' are generally easier to use and less resource intensive, and therefore appropriate for those seeking a simple approach. The 'complex' tools are more appropriate for larger, better resourced, organisations wanting to try a more ambitious approach. Whatever tools you choose you will need to adapt them to your own needs, and test them.

In our view, the simplest and most cost-effective approach in most cases is to:

- produce a simple baseline assessment so that changes over time can be more easily tracked
- set up some kind of light internal reporting system based on campaigners' own personal knowledge and insights, and supported by secondary sources wherever possible
- periodically collect information from key internal and external informants (such as constituents, allies and targets) through interviews and/or simple surveys
- hold periodic group reviews/ discussions of campaign progress with relevant staff, partners and constituents to analyse the information, discuss campaign progress, and modify campaign strategy and plans accordingly. Where possible these can be integrated with existing management and planning processes.

Case study: Disability Rights Commission (DRC)

The Disability Rights Commission (DRC) was an independent body established in 2000 by Act of Parliament to stop discrimination and promote equality of opportunity for disabled people. It was closed on 28 September 2007 and its responsibility for securing civil rights for disabled people have been transferred to the new Equality and Human Rights Commission which October 2007.

The DRC had limited baseline information, but made use of existing data. They often used large-scale surveys such as the Labour Force Survey, National Census, and the General Household Survey, to track changes over time. For example, employment statistics were used in order to understand what the gap was between the employment rates of disabled and non-disabled people. *"Where this wasn't possible, and the campaign is very specific, we commissioned our own baseline data and repeated the survey after the campaign. This is our ideal model and was undertaken as part of the GOJO [transport campaign]."* In addition to accessing large annual surveys, the DRC collected data from opinion polls, thinktanks and regular news sources.

For collecting qualitative information the DRC sometimes used themes, which arose from their Helpline calls - their Helpline received a large volume of calls every day and information from these calls was collated quarterly. For example, one quarterly theme considered was the way in which callers had already looked at the DRC's website to find out information relating to an area the DRC was campaigning on (such as disability rights at work). By understanding what sources of information callers were using, the DRC was able to understand where best to target its resources.

The DRC also tracked and shared intelligence on campaign progress through the DRC Campaigns Forum. They invited other organisations working in the same policy areas to quarterly meetings to discuss and share work and ideas. When the DRC launched the GOJO transport campaign they were able to inform people of the campaign and what they aimed to achieve. *"Having other organisations ask us more detailed questions about exactly how we were planning to engage with young people basically slapped us with a bit of reality and made us evaluate our progress so far. That helped us go back to the drawing board and make sure we weren't cutting corners or missing anything out".*

Rich Watts, former Planning and Delivery Manager, Disability Rights Commission

'Information is only useful if it is used in a timely manner'

Deciding how the information will be used

Information is only useful if it is used in a timely manner.

In campaigning terms, while there is an important role for evaluation – for looking back over the campaign and drawing lessons from this – the key use for any intelligence and evidence being gathered is to support quality decision making as you are delivering the campaign.

In order to make maximum use of the available information, you will need to consider how best to:

- summarise and present it
- share and interpret this analysis with others
- draw out and apply the learning in the current campaign
- adapt campaign strategy and plans accordingly
- draw out the wider learning for future/wider practice[15].

And in all these stages, you need to give due consideration to whose opinions count, how levels of participation can be enhanced, and how critical thinking can be encouraged.

The Appendices show you how to pull the key elements together. Appendix 11 provides a step-by-step worksheet to help design your approach, and Appendix 12 gives an example of an overall framework.

Case study: Citizens Advice Success Stories

The Citizens Advice service helps people resolve their legal, money and other problems by providing free information and advice from over 3,000 locations, and by influencing policymakers. Each Citizens Advice Bureau is a registered charity.

Citizens Advice publishes an annual report outlining the outcomes and impact of their social policy work. In addition to this, they produce two-page summaries of their campaign Success Stories; each outlining a specific campaign, setting out:

- What was the issue?
  - identifying the problem
  - the impact this was having on people's lives

- What action was taken?
  - the action taken by Citizens Advice Bureau across the country
  - the types of activities undertaken; eg evidence gathering, lobbying, media
  - linking activities to particular external factors eg Bills debated in the House of Commons

- What were the results?
  - setting out what has been achieved so far

- What still needs to be done?
  - setting out future focus of the campaign and what they still aim to achieve
  - sign-posting to further information on how bureau across the country can take the campaign forward.

These 'Success Stories' seek to communicate how actions taken by individuals and bureaux are contributing to wider policy and practice change. They form part of Citizen Advice's attempt to ensure that impacts of their work are visible to key stakeholders, including their clients and local authorities.

Reviewing the campaigns can also be helpful for planning purposes; the guidance issued to bureaux emphasises that achieving change can be a long term process, for example, noting that *"...winning protection for tenants' deposits took ten years of campaigning"*.

This guidance also provides a framework for measuring progress, including:

- a table outline of the typical stages in social policy processes with indications of what can be measured
- a workflow (flowchart) diagram of the same process
- tables with examples of milestones
- notes on how this work can feed back into the overall impact document.

Success Stories, Social policy action in the CAB service, September 2007

Measuring and reporting on social policy outcomes, Citizens Advice

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Some simple approaches

In this chapter we present a brief overview of some simple steps that can be relatively easily adopted.

The simplest approach

This simple approach merely involves creating occasional spaces of reflection within the campaign where relevant staff and actors can sit down together to discuss key questions and identify clear and achievable recommendations for future working. It relies on internal perspectives gathered through discussion and reviews, and does not require systematic monitoring or collecting of information/evidence. It is important that the pauses for reflection happen at key stages in the campaign, not just at the end.

Below are some questions you could ask, looking at outcomes, impact and ways of working. You can choose one you think will work best, mix and match, or develop your own.

Question set 1[16]

- What are we doing well and what should we continue doing?
- What are we doing 'okay' or badly and what can we improve?
- What strategies or tactics do we need to expand, modify or discontinue?
- How should we be responding to any changes amongst our key target audiences?
- How will we make the necessary changes? Who is responsible? What are the timelines?
- Has any issue come up that we need to evaluate in greater depth?

Question set 2[17]

- What was supposed to happen? What actually happened? Why were there differences?
- What worked? What didn't? Why?
- What should we do differently in the future?

Question set 3[18]

- What changes have we got so far and how well do they match those we sought?
- In what ways has our understanding about the situation deepened or changed?
- In what ways might we have been more effective in our selection of strategies and tactics?
- Did we succeed in carrying out the planned actions? If not, why not?
- How well are we including others in our planning, reflections and actions?
- How well are we addressing the ways that power operates on this issue to prevent positive change?
- What should we do differently in the future?

Case study: Cancer Research UK

Cancer Research UK is the world's leading independent organisation dedicated to cancer research. They support research into all aspects of cancer through the work of more than 4250 doctors, scientists and nurses. In addition to supporting cancer research, Cancer Research UK provides cancer information and works with politicians and policy-makers to make sure that cancer stays at the top of the health agenda.

Cancer Research UK holds 'lessons learnt' meetings bringing together people involved in the campaign from a range of disciplines (including campaigning, press, parliamentary, policy, fundraising and marketing) to discuss and reflect on how the campaign is progressing.

The campaigning team is responsible for evaluation and write a report after each 'phase' of the campaign, incorporating feedback from others, performance against metrics and a summary of policy change. Reflecting on the campaign as it progresses enables Cancer Research UK to refine their approach, including their ways of working, and adapt their strategy if required, as campaigns progress.

Jon Spiers, Cancer Campaigns Manager, Cancer Research UK

A basic multiple intelligence system

The following approach takes things one step further in that discussion/review is based on collecting evidence from different sources. This allows you to see whether different sources of information corroborate each other, and to investigate further if they do not.

Gathering multiple perspectives through multiple means, even in this pared down way, embeds external perspectives more systematically in the process and should result in the evidence base being more secure and more roundly based.

The basic approach is to identify 3 key audiences and then for each of these audiences to identify 3 different sources of information/methods of collection.

The outline framework might look something like this:

audience	technique 1	technique 2	technique 3
targets	email/phone survey	documentation review	framing analysis
allies	interview key allies	survey of wider potential and actual partners	documentation review
internal	hold periodic discussions/reviews with staff involved in the campaign	review of internal plans & reports	group discussion

Whilst you could call this 'triangulation' – or cross checking – (see chapter 10), all this boils down to is:

1 Interviews and simple surveys conducted with different audiences, most likely covering broadly the same ground with each, for example:

- is the research robust?
- is the policy analysis persuasive and credible?
- is there a convincing case that the campaign goal will deliver benefit to its intended beneficiaries?
- have campaign strategies and activities been effective?
- is the campaign engaging with the right audiences?
- has the campaign had any influence on the various audiences it is seeking to engage with?
- what is the target's current stance and interest in the issue?
- has this changed?

2 Reviewing relevant internal and external documents in order to seek traces of evidence that campaign evidence, messages, arguments, policy recommendations, etc have made it into others' thinking and practice.

This approach can be extraordinarily helpful if conducted in a timely manner, the information critically discussed and assessed, and serious efforts made to draw out and apply lessons.

If you decide to adapt this approach, it may also be useful to refer to details in appendix 13 about some of the data collection tools suggested above.