A USER GUIDE FOR FUNDERS:

STRATEGIC PLANNING & ASSESSMENT OF ADVOCACY ACTIVITY IN ISRAEL

CONTENTS

INTRODUCTION

Over the past decade, there has been increased philanthropic support for NGOs in Israel that include an advocacy component in their work, i.e. work that advances changes in social, political, or policy outcomes. To date, this shift in strategy on the part of funders has not been accompanied by a clear and comprehensive articulation of how to incorporate advocacy assessment to capture progress toward the desired public policy goals.

Given the significant investment of the Israeli Judaism Committee at UJA-Federation of New York in advocacy for Jewish pluralism in Israel, the committee reached a decision in Winter 2019 to professionalize strategy development and assessment of advocacy through the creation of a tool and pilot process with four grantees. Toward this end, UJA partnered with Zofnat Consulting to create a tool that would create a shared language to describe advocacy which would allow for systematic comparison; allow for monitoring and assessment of activities, outputs, and outcomes both per grantee and across grantees; and identify of strategic directions in advocacy.

This initiative is among the first attempts to create a template for evaluating advocacy in Israel across domains and issues in order for funders to make informed decisions both on the level assessing individual grantees and on the level of allocation committees' portfolios.

The user guide presented here is an outgrowth of this process, with the aim of sharing lessons learned and best practices with the field. We hope that the tool can be of use to other funders grappling with similar issues and to organizations seeking to strengthen their capacities in assessing their advocacy work in a systematic manner, backed with tangible outcomes.

In the process of creating the tool, several grantees and experts were consulted. In addition, at various stages of development, the tool was presented to forums of funders and advocacy organizations across domains and issues of advocacy with the aim of both sharing our insights and gaining additional feedback. We thank all those who assisted in this process.

> This tool is intended to be of use for other funders and NGO's grappling with issues of advocacy planning and assessment.

Finally, we see the tool presented here as a work in progress and welcome continued discussion on the topic in order to collectively strengthen our capacities to build effective strategies for advocacy and to assess their outcomes over time. In this vein, this user guide is an invitation for continued collaboration to develop a shared language around advocacy for the benefit of funders and organizations seeking to advance social and public policy goals.

NEED FOR A FUNDER'S TOOL FOR ADVOCACY STRATEGY AND ASSESSMENT

Advocacy assessment is a relatively new domain, emerging in the past decade in response to the routine use of advocacy as a major strategy by many NGOs. Though the present tool focuses on the Israel landscape, the trend is global. Advocacy assessment is often contrasted with evaluation of programs that deliver services or run training programs, which in general function with more linear logic models and in more predictable contexts. The implementation of advocacy strategies presents unique challenges, which make their assessment particularly difficult.[1]

🏔️ Advocacy Hurdles

01 Advocacy takes place in a complex, non-linear, and dynamic environment over which organizations have very little, if any, control. Some may claim that the Israeli political environment is particularly unstable and unpredictable. This makes long-term planning extremely difficult.

02 Achieving change through advocacy often requires a long time. This period may exceed the typical life span of a grant. Moreover, it may often seem that nothing is actually happening during this time as tangible outcomes are not always present.

03 Advocating usually involves a clash with adversaries who resist the change promoted by advocates, often because they benefit from the status quo. Like advocates, these adversaries may also learn and develop their capabilities and "fight back."

The complexity of assessing advocacy efforts has often left both organizations and funders frustrated in an attempt to ensure partnership that advances relevant and sound advocacy strategies that have a clear measure of progress, if not success, during a grant cycle period often averaging 1-3 years.

[1] For reviews of the challenges of advocacy evaluation, see for example: Devlin-Foltz, D. Fagen, M.C., Reed, E. Advocacy Evaluation Challenges and Emerging Trends. Health Promotion Practice, 2012. Teles, S., Schmitt, M. The elusive craft of evaluating advocacy. Stanford Social Innovation Review, 2011. Devlin-Foltz, D. & Molinaro, L. Champions and "Champion-ness": Measuring Efforts to Create Champions for Policy Change. Center for Evaluation Innovation, 2010. Schiffrin, A. & Zuckerman, E. Can We Measure Media Impact? Surveying the Field. Stanford Social Innovation Review, 2015.

The following quotation captures what seems to be the sentiment of many NGOs when seeking support for their work in the advocacy space:

> Progressive funders constantly ask advocates and organizations to prove that our work results in policy change. They'd like us to draw a straight line between our activities and the change we seek, year after year, and they'd like us to walk down that line quickly. The fact that social movements that feed truly large-scale policy change don't work that way wouldn't be so unfortunate if progressive elites weren't so attached to that idea, forcing the flow of resources into very narrow channels.

Quoted in Measuring Advocacy and Policy. Annie E. Casey Foundation, 2007

Concomitantly, the need for funders to ensure that their dollars are going toward goals and strategies that have impact is clear and must be maintained at a high standard. While several attempts have been made to inform the field of best practices and tips for evaluating advocacy[2], there is yet no standardized language and/or tools to assess a broad definition of advocacy that's attuned to the Israeli landscape and focuses on some form of tangible outcomes.

> Successful advocacy efforts are characterized not by their ability to proceed along a predefined track, but by their capacity to adapt to changing circumstances. The most effective advocacy and idea-generating organizations are not defined by a single measurable goal, but by a general organizing principle that can be adapted to hundreds of situations. Rather than focusing on an organization's logic model (which can only say what they will do if the most likely scenarios come to pass), funders need to determine whether the organization can nimbly and creatively react to unanticipated challenges or opportunities. The key is not strategy so much as strategic capacity: the ability to read the shifting environment of politics for subtle signals of change, to understand the opposition, and to adapt deftly.

Steven Teles & Mark Schmitt, 2011. The Elusive Craft of Evaluating Advocacy

[2] See for example A Handbook of Data Collection Tools: Companion to "A Guide to Measuring Advocacy and Policy" funded and prepared for the Annie E. Casey Foundation by Organizational Research Services; Tracking Progress in Advocacy: Why and How to Monitor and Evaluate Advocacy Projects and Programs by the International NGO Training & Research Center; Advocacy Impact Evaluation by Michael Patton.

GOALS OF THE TOOL
AND OF THE USER GUIDE

This tool was built from a funder's lens for strategic planning and assessment of a portfolio supporting advocacy activity in Israel. There are three overarching goals for the tool:

01 **Monitoring and assessment of progress per grantee and per domain** including reporting on activities, outputs, and outcomes over the life cycle of each grant (longitudinally) and across grants that function in the same domain and which have similar indicators (latitudinally).

02 **Development of a shared and standardized conceptualization and language of advocacy assessment,** allowing for comparison of advocacy strategies and activities in a systematic way across advocacy grantees within the portfolio.

03 **Identification of strategic directions in advocacy based on the results,** contributing to the foundation's understanding of the advocacy landscape that the grantees function within and to identify strategic directions moving forward.

The aim of this user guide is to share the core aspects of the tool and its rationale to fulfill a wider aim of creating a shared language around advocacy across fields for the benefit of funders and organizations alike, thereby easing reporting for multiple funders and clearer communication with multiple stakeholders.

GUIDING PRINCIPLES FOR ADVOCACY PLANNING AND ASSESSMENT

Scholars and practitioners have developed several concepts and principles to help guide advocacy assessment and address the challenges that advocacy presents. These guiding principles serve as the foundation for a shared language about advocacy strategy and assessment. The key principles, described below, were adapted where needed to the Israeli context and served as the basis on which the advocacy planning and assessment tool was predicated.

Defining the Domain(s) of Advocacy

In an advocacy strategy, an organization can choose three central domains to focus its efforts. These domains are best described through the lens of a target audience — i.e., who is the organization reaching out to in order to effect or spiral change?

Policy makers

Politicians, state clerks, municipal level officials, courts, etc.

Influencers

Journalists, civil society leaders, bloggers, etc.

Public

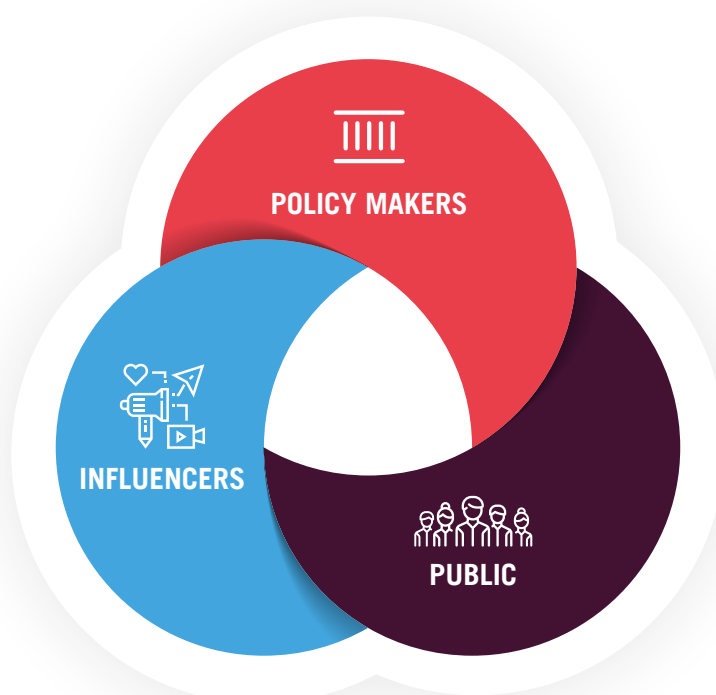Students/youth groups, sectors, localities, society in general, etc.

Figure 1 // Three domains of advocacy

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These domains are deeply connected. Yet, working with each target audience requires different organizational capacities and skills (e.g., working to change legislation would require a team of lawyers and experts working within the political sphere, while working to change public opinion would require a team of community organizers and possibly social media expertise.) Some organizations may choose to engage in all three domains, while others may be more specialized with a particular target audience.

There is no all-around best strategy for advocacy.

Already at the planning stage, engaging potential grantees in a discussion of strategy, goals, and target audiences in a systematic and standardized way is vital. This structured logic model for advocacy will then accompany the partnership through the life cycle of the grant from strategic planning to evaluation.

Funders must evaluate a grantee's strategy at the initial stage of collaboration to identify if an organization has the right plan in place with the most appropriate target audience, given the social and political climate related to the issue at hand.

Defining Desired Changes in Advocacy

Alongside mapping the domains of advocacy, grantees and funders should also focus on the main desired change that the advocacy aims at effecting. Specifically, changes in knowledge and awareness, changes in attitudes and positions, changes in policy and behavior.

KNOWLEDGE & AWARENESS

Advocacy efforts can make policy makers, influencers, and the public better informed about a social issue and its consequences.

For example, a government official or journalist can be informed about discrimination against members of a certain community when receiving government services; residents of a local municipality can become aware of environmental pollution in their locality.
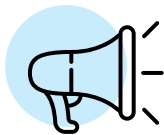
ATTITUDES & POSITIONS

Advocacy efforts can help shift where policy makers, influencers, and the public stand on certain issues and make them more supportive of or opposed to certain policies. These efforts may not only change their opinions on certain issues, but also make them feel more strongly about these opinions and believe that action is relevant and urgent.

For example, a government official may be persuaded that increasing public transportation services in marginalized communities is critical to providing access to employment centers; a campaign can show the diversity of public health workers to exemplify social cohesion and its benefits for Israeli society at large. Very often, change in knowledge or awareness doesn't lead to change in policy or behavior. A change in attitudes and positions may be perceived as "middle ground" that links a change in knowledge to a change in behavior.

POLICY & BEHAVIOR

Advocacy efforts can ultimately wish for a change in public policy or behavior of policy makers, influencers, and the public.

For example, a member of Knesset can be lobbied to promote legislation on a certain issue or to increase public funding to certain cause; the public can be campaigned to get vaccinated against Covid-19 or to recycle.

Setting the Strategy: Combining the Desired Changes and Domain of Advocacy

Once desired changes are defined for each domain of advocacy, they can be visualized on a matrix to derive strategies to achieve them. Figure 2 presents such a matrix of the three levels of desired changes by the three domains of advocacy (shown in Figure 1). This matrix chart is based on the Coffman and Beer Strategy and Outcome Mapping Tool[5] with adaptations for the Israeli NGO landscape. The chart depicts typical categories of advocacy activities (strategies) that aim to achieve desired changes among one or more domains (target audiences).
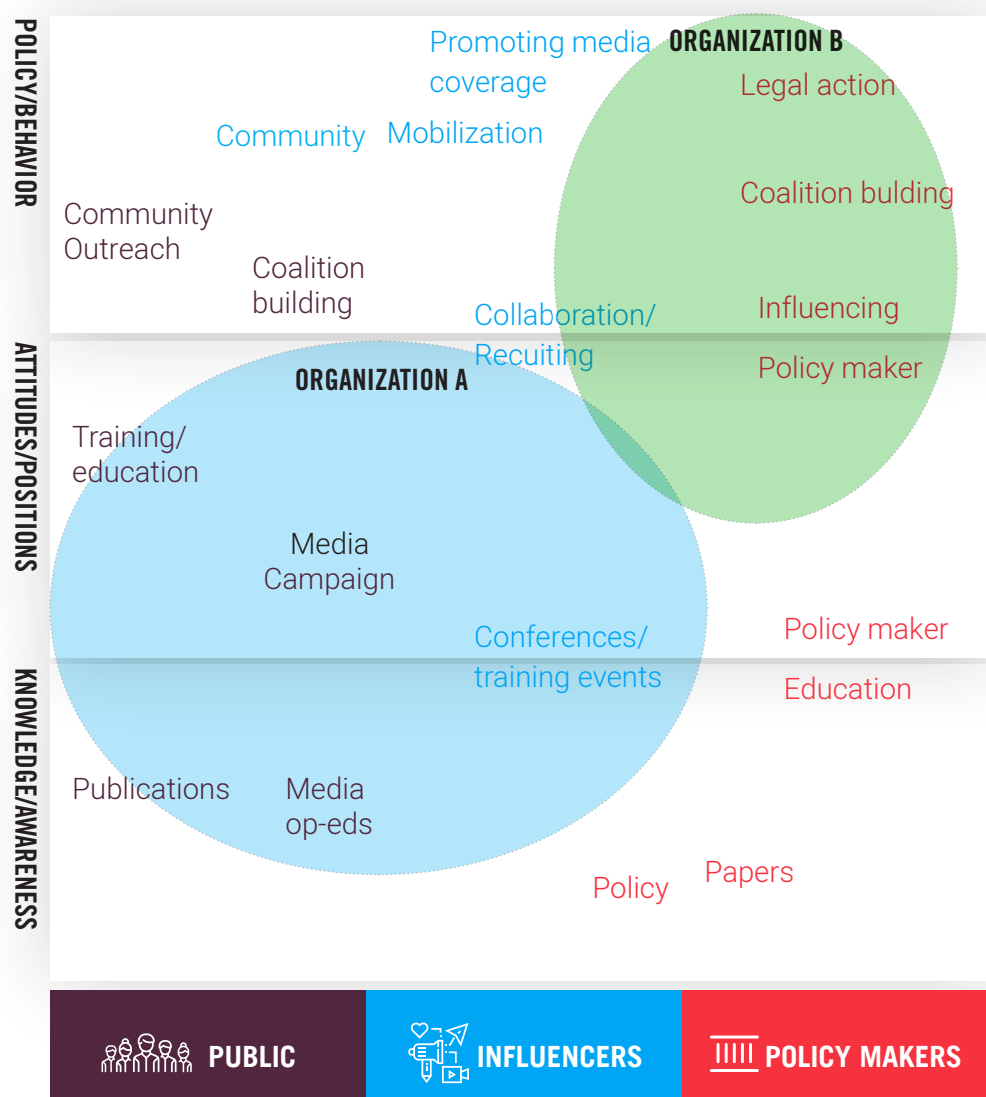

Figure 2 // Mapping Advocacy by Domain and Desired Change – Typical Activities

Figure 2 presents two hypothetical organizations as examples. Organization A (in blue) aims to achieve its goals by focusing on two domains — the pubic and influencers (x axis) — and by focusing on two desired changes — increased awareness and change in attitudes (y axis). For this purpose, organization A makes use mostly of media and social media, campaigns, and conferences.

Knowing where an organization falls in its advocacy strategy is critical to systematic planning across a portfolio and subsequent monitoring of achievements and setbacks per domain and per desired change.

Organization B (in green) aims to achieve its goals by focusing on two domains — policy makers and influencers (x axis) — and by focusing on the desired change of directly effecting policy (axis y). For this purpose, it files lawsuits in courts, builds ad hoc coalitions of relevant policy makers and influencers, and encourages policy makers to take action.

Of course, bringing about the desired changes in each domain requires different sets of skills. As a funder assessing the skills of these hypothetical organizations, Organization A would be expected to have expertise with social media campaigns and the ability to devise public events that can draw large crowds, while Organization B would be expected to rely more on expertise working with government officials and formal Knesset policies. Organization B should be able to present a track record and staff expertise in this area..

Indeed, an organization may possess multiple skill sets and work in various domains. Yet, given that funders often offer targeted grants, knowing where an organization falls in its advocacy strategy is critical to systematic planning across a portfolio and subsequent monitoring of achievements and setbacks per domain and per desired change.

Identifying Interim Outcomes and Tangible Outcomes

Achieving visible change in public policy takes time! Therefore, advocacy efforts take time and require patience. Additionally, as advocacy often takes place in complex and dynamic environments, achieving their desired change(s) depends on a variety of factors, some of which aren't under the control of the organization. Two examples typical of the Israeli context are recurring general elections and periods of military escalation.

To address these challenges, advocacy evaluators, as well as advocates, must address interim outcomes, and not only long-term outcomes and

goals. Interim outcomes are meaningful milestones relevant to the overall strategy. Defining specifically what these are will vary, depending on the activity of the grant. But, in general, these should be outcomes that can be tracked over time, during the lifespan of the grant. Clearly defining and monitoring interim outcomes is essential not only for funders, but also for the organizations themselves. By tracking progress systematically, the teams are able to begin seeing short term wins and how their work has an impact on their mission, even in the unpredictable and non-linear environments they work in.

> Interim outcomes are meaningful milestones relevant to the overall strategy.

> Tangible outcomes are visible, actual changes in behavior of policy makers, influencers, the public. As funders, it's important that some of the interim outcomes be tangible.

A related challenge that often characterizes advocacy is the lack of clearly defined tangible (interim) outcomes that can be tied to a particular advocacy strategy. Achieving tangible outcomes in public policy takes time and achievements aren't always noticeable. Therefore, advocates and funders often refrain from clearly defining tangible outcomes that are expected to result from the advocacy work. Tangible outcomes are visible, actual changes in behavior of policy makers, influencers, the public, or changes in policy. As funders, it's important that some of the interim outcomes be tangible.

Identifying Contribution Rather than Attribution

In advocacy assessment, it's important to focus on assessing an organization's contribution to outcomes, rather than expecting to be able to attribute outcomes solely to the organization's activities. In complex systems, it's virtually impossible to attribute success directly and exclusively to an effort made by a single organization. Even in rare instances where this is in fact the case, policy makers will be reluctant to admit it and credit an advocacy organization with success. Assessing contribution rather than attribution is more realistic in the case of advocacy. It also has a side benefit in helping maintain coalitions.

Assessing Capabilities of the Organization

In addition to evaluating change in each domain or target audience, advocacy assessment must also consider the capabilities of the organization itself. An advocacy organization should constantly engage in strategic learning to improve its capabilities. These capabilities include, among other things, strategy making — that is, the ability to choose the most effective ways to address the problem, based on research and evidence; coalition building, and the ability to work with different audiences; and making use of traditional and social media. The organization should maintain its capabilities and be ready to use them in changing circumstances. Specific strategies may differ across advocacy efforts, and efforts may unfortunately fail due to circumstances beyond the organization's control. Yet, with each attempt it is anticipated that the organization is also strengthening its skills and learning as it proceeds. This makes it important to assess an organization's ability to be agile and act strategically in a changing environment.

In light of the above, we suggest that funders consider the entire advocacy "investment" of an organization, and not just individual projects. This is because effects may spill over across projects. As an example, we can consider Israeli Judaism advocacy organizations — organizations that seek to effect change in the status quo of the Orthodox monopoly over religious services. Some organizations may run a project that aims at influencing policy makers on certain religion and state issues, such as Shabbat, Kashrut, or conversion (project A), and at the same time a parallel project that educates organized groups about the same issues (project B).

Advocacy assessment must consider the capabilities of the organization itself, including strategy making, research, coalition building and use of traditional and social media.

Furthermore, some organizations may also run a project that provides alternative religious services to the general population (project C), in addition to their advocacy work. Because of the unique character of advocacy, an assessment of the project aimed at policy makers (project A) should not be conducted in isolation. It should also consider how projects B (education) and C (service providing) were deliberately used to promote advocacy work with policy makers (project A), and vice versa.

A different example is where an organization develops advocacy capabilities in the form of access to policy makers on a certain issue (for example, conversion to Judaism), and uses these capabilities to promote other issues on their agenda (for example, Shabbat). Both examples point to the spillover effect in advocacy within an organization and the need to avoid siloing strategy and impact assessment for advocacy organizations.

Funders should consider the entire advocacy "investment" of an organization, not just individual projects.

Likewise, funders should consider the overall advocacy portfolio in a particular area across organizations, as it may be the result of collaboration between organizations, and success on one issue may promote success on a related issue for another organization. For this reason, funders should look for progress with target groups on issues across grantees' work and not just per activity of specific grantees. For example, in the case of advocacy against the status quo in Kashrut, collaboration among organizations in the field led to a court ruling that forbids hospitals to stop visitors from carrying chametz with them on hospital premises during Passover. Taking the advocacy portfolio level perspective allows for reflection on the principle above that calls for recognition of each organization's contribution, rather than attributing the credit only to a single organization.

Likewise, funders should consider their own overall advocacy portfolio in a particular area across organization, as it is often the result of collaboration.

This facilitates strategic decision making based on a wider perspective of where and how the investment is having its greatest effect. Indeed, this is one of the important reasons the evaluation tool was constructed for the committee.

Altogether, the above guiding principles point to the complex nature of advocacy which requires assessment sensitive to context, process, and organizational strategic learning.

PLANNING AND PROPOSAL PHASE

In this section we present the underlying framework of the tool for the planning and proposal phase. The tool focuses on clear and concise descriptions of the expected changes and activities designed to achieve them, classified according to the matrix of domains by level of desired changes shown above in Figure 2.

This stage is the most critical in creating a shared conceptualization and language around advocacy strategy and evaluation. Hence, funders who use this tool or parts of it should work closely with the grantees to ensure they're developing a shared understanding of the proposed strategy as it relates to the wider conceptualization of advocacy domains and desired changes.

Figure 3 below shows the basic outline of the tool for the planning and proposal phase with short explanations for why specific questions are included in the tool. As illustrated, the first step in planning a targeted grant in advocacy with an organization is to first have them articulate the major changes they wish to achieve within a three-year period. Subsequently, the organization should be able to place this strategy within the appropriate domains (policy makers, influencers, the public) that will help them achieve these changes ('Domains'). Depending on the familiarity of the organization with this conceptual framework, the funder should work with them so that a shared language is developed from the beginning. Once the domains have been identified, the organization can begin to articulate the planned activity ('Activities') and how it's expected to lead to the desired change ('Theory of change'). Finally, the took asks grantees to specify any relevant organizational capacities (see Figure 4 — note that Figure 3 shows only the outline of the tool; the full version of the form appears in appendix I.)

VISION

Organizational vision – what is the overarching vision of your organization in the realm of advocacy?

EXPECTED CHANGES

What are the major outcomes (changes) that can be accomplished toward reaching your vision? I.e., what will be different in policy or public behavior as a result of the contribution of your actions within a three-year period?

Organizations must be able to articulate a clear, accurate definition of outcomes (what will be different) at this stage to serve as a compass for the organization, in addition to allowing funders to make comparisons across organizations.

DOMAINS

Which domain(s) (policy makers, influencers, public) do you primarily focus on to achieve expected outcomes?

The tool is structured based on three widely accepted domains of advocacy (policy makers, influencers, and the public) rather than issue (for example in the context of religion and state issues such as Shabbat or kashrut). Organizing by domain allows for better assessment of necessary organizational skills across contexts.

ACTIVITIES

What activities do you plan to carry out in each relevant domain to achieve the expected outcomes?

THEORY OF CHANGE

What is the rationale for why this strategy/approach will lead to the expected outcomes?

Organizations should be able to articulate their rationale for the suggested course of action. Consideration should be given to how they are relying on previous experience, research, and solid analysis of opportunities in the field.

ORGANIZATIONAL CAPABILITIES

A. Organizational experience and skills relevant for achieving outcomes
B. Planned collaborations with other organizations to achieve outcomes
C. Use of research/data to inform strategy
D. Identifying and coping with unexpected events

Due to the dynamic and complex nature of the advocacy environment, advocates should constantly engage in strategic learning to improve their capabilities and be ready to use them in changing circumstances. Collaboration and use of research are two capabilities that are particularly important for advocates, and therefore for assessment of advocacy.

Figure 3 // Outline of the Tool for the Planning and Proposal Phase

FRAMEWORK OF THE TOOL:

ASSESSMENT AND REPORTING PHASE

In this section we describe the underlying framework of the tool as used for grantees' reporting. The framework for this phase follows the same logic as the framework for the planning phase, using the same standardized language but now incorporating more specific indicators for progress and focusing on tangible interim outcomes.

Figure 4 below focuses on each domain, by providing a conceptual framework that allows for standardized data collection across three fields: target audiences, activities, and outcomes. For the full version of the form, see appendix II.

To maintain standardization across grantees, the form includes lists for each of these three categories: lists of policy makers/influencer/public groups, lists of typical categories of activities, and lists of typical categories of tangible outcomes. Grantees are requested to mark the relevant category on the list, followed by elaboration in a short description. An open field is provided in the form for this. For example:

- ☑ An advocate may mark the category of "National government" category under the "policy makers" category and specify in the open field that their work targeted three senior officials in the Ministry for the Protection of Environment.

- ☑ Under activities, advocates can mark the "Influencing/recruiting policy makers to promote an agenda" category and specify that they conducted a series of meetings and one field visit dedicated to enforcing pollution regulations.

- ☑ Under outcomes, they may mark the "Change in actual implementation of policy/or progress toward it" category and specify that the Ministry has initiated or intensified the monitoring and enforcement of pollution regulations.

The ability of organizations to respond to unexpected events and leverage them is a clear indication their strategic capabilities.

A FRAMEWORK FOR REPORTING ON TARGET AUDIENCES, ACTIVITIES, AND OUTCOMES
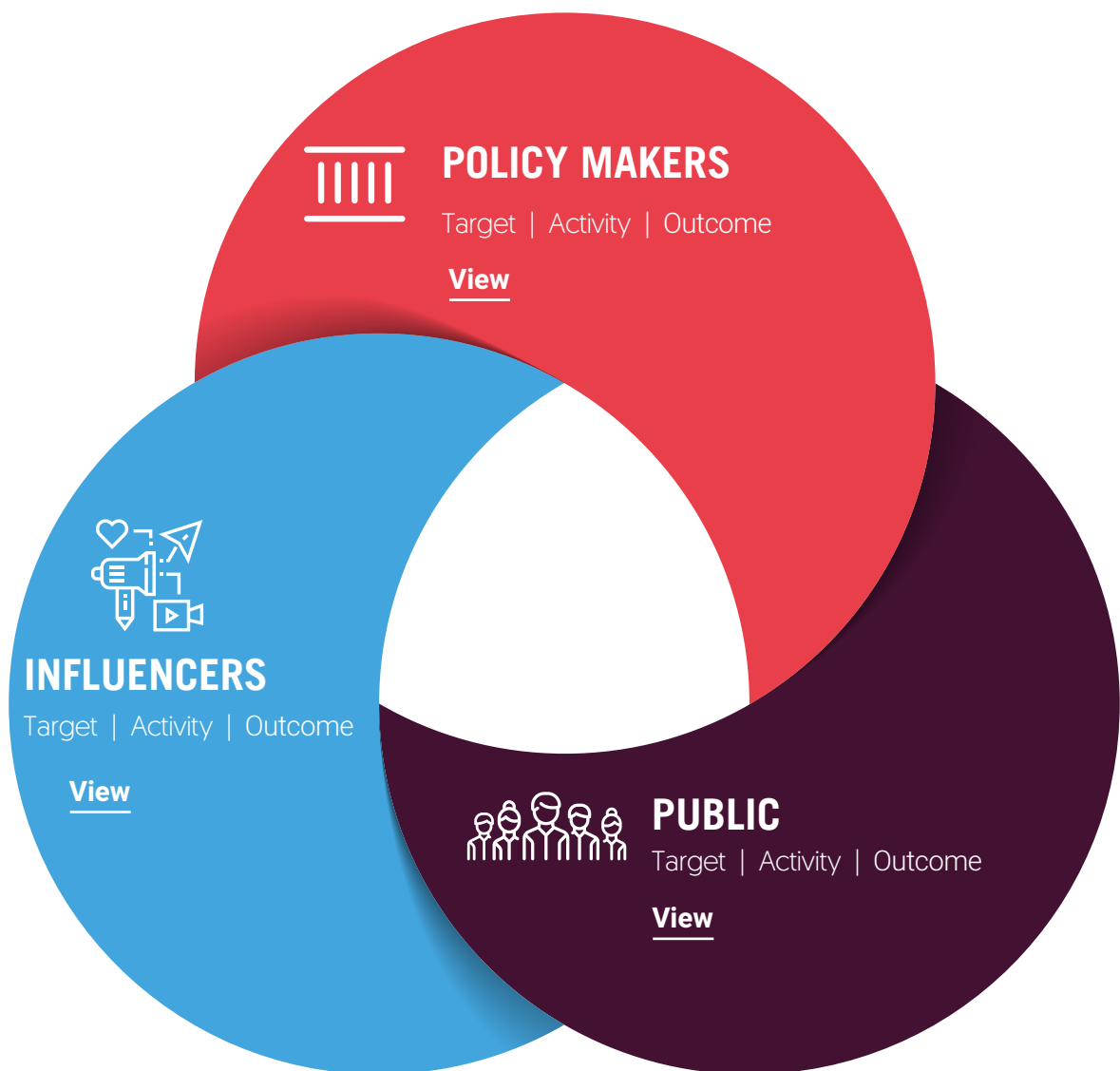
POLICY MAKERS

Target | Activity | Outcome

View

INFLUENCERS

Target | Activity | Outcome

View

PUBLIC

Target | Activity | Outcome

View

Figure 4 // Outline of tool for the reporting and assessment phase

A FRAMEWORK FOR REPORTING ON TARGET AUDIENCES, ACTIVITIES, AND OUTCOMES

POLICY MAKERS

TARGET

› Knesset (MKs and advisors)

› National government
  (Ministers, officials, advisors)

› Judicial system

› Local government

ACTIVITIES

› MK education

› Influencing/recruiting MK to promote agenda

› Legal action

› Coalition building (among NGOs)

TANGIBLE OUTCOMES

› Change in policy/official decisions or progress
  toward it

› Change in actual implementation of policy/or
  progress toward it

› Increase of public funding for an activity/issue area

› Favorable court ruling or progress toward it

› Policy maker officially supports a favorable position

In the reporting tool, grantees are asked to mark the relevant categories and elaborate on them
[see Appendix II for full reporting tool].

Figure 4 // Outline of tool for the reporting and assessment phase

A FRAMEWORK FOR REPORTING ON TARGET AUDIENCES, ACTIVITIES, AND OUTCOMES

INFLUENCERS
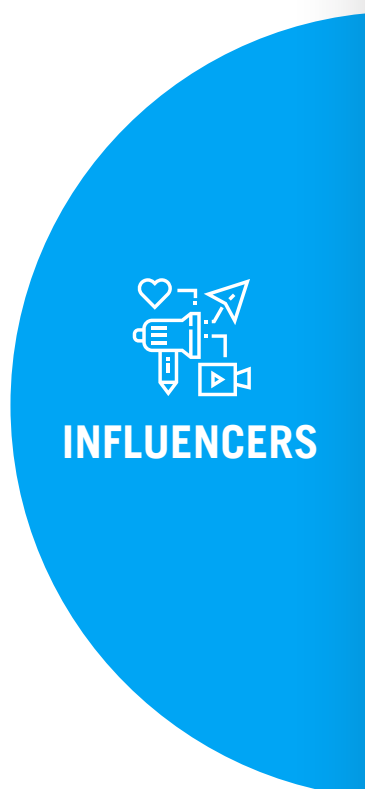
TARGET

› Journalists, bloggers
› Civil society leaders
› Religious leaders
› Intellectuals, educators
› Celebrities

ACTIVITIES

› Training for groups
› Op-eds/media
› Social Media campaigns publications
› Community outreach/mobilization
› Coalition building

TANGIBLE OUTCOMES

› Target increases their knowledge and/or changes attitudes

› Target shares the message/(actively) supports or promotes a position

› Target changes actual behavior

› Policy maker acknowledges public support for issue

Figure 4 // Ou

In the reporting tool, grantees are asked to mark the relevant categories and elaborate on them (see Appendix II for full reporting tool).

A FRAMEWORK FOR REPORTING ON TARGET AUDIENCES, ACTIVITIES, AND OUTCOMES

TARGET

› Organized groups (youth, students)
› Sectors
› Specific localities
› Israeli society in general

ACTIVITIES

› Training for groups
› Op-eds/media
› Social Media campaigns publications
› Community outreach/mobilization
› Coalition building

TANGIBLE OUTCOMES

› Target increases their knowledge and/or changes attitudes
› Target shares the message/(actively) supports or promotes a position
› Target changes actual behavior
› Policy maker acknowledges public support for issue

In the reporting tool, grantees are asked to mark the relevant categories and elaborate on them (see Appendix II for full reporting tool).

PUBLIC

nent phase

The framework in Figure 4 combines checking boxes for standardized categories typical of advocacy work and open-ended questions for grantees to describe the specific work that was carried out. In this way, **the framework allows for standardization and systematic comparisons (across grantees and over time), but at the same time allows the grantees to insert their own content within this framework in a way that can be more easily and concisely analyzed.**

In the final part of the form, advocates are asked to report any use of **research**, and **unexpected events** they dealt with, as **indications of organizational capacity.** These capabilities are relevant and important beyond specific advocacy efforts which may fail because of the nature of politics. In addition, the tool should include critical incidences — unexpected events — and the reaction to them. Unexpected events are common in politics. The organization's ability to respond and leverage them for its purpose is clear indication of its strategic capabilities. As one of our interviews noted in reference to unexpected events, "That's your time to shine."

> It is important to focus on assessing an organization's contribution to outcomes, rather than expecting the attribution of these outcomes solely to the organization's activities.

While the tool includes activities and outcomes, it does not assume a direct link between them nor a clear time frame for achieving interim goals. This contrasts with logic frames of programs that provide services, which assume a direct link of causality and function within a clear time frame to achieve results. In advocacy assessment, neither of these components can be determined accurately. Hence, in the tool, grantees report on outcomes that they contributed to achieving and that may have taken place outside the strict boundaries of the reporting period of the grant. This allows for funders to see progress being made on the issue at hand through the grantees' general capacities and is an important factor in assessing organizational capabilities in advocacy.

IMPLEMENTATION GUIDELINES

The tool proposed in this document is based on basic underlying principles for assessment of advocacy work. These principles are relevant to funders and organizations alike. Of course, funders may often use the tool to plan and assess a certain domain and portfolio from a broad perspective. In contrast, organizations may use it to plan and assess their ongoing progress in finer resolution, though more elaboration on the tool would be necessary to make it a dynamic one that organizations can utilize. In this section, we suggest how funders and organizations may use the tool. We first discuss funder's internal work with this tool, and then suggest how grantees organizations may benefit from using the tool as a starting point to develop their own internal tracking system. We conclude with suggestions how funders can assist in integrating the tool for ongoing interaction with organizations.

> Funders can use the tool's framework and terminology to engage in dialogue with grantees to systematically address questions regarding the organization's strategy and theory of change.

Implementing the Tool as a Funder
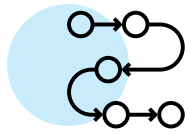
DURING THE PLANNING PHASE

Map each organization in the portfolio according to the domain and level of desired changes, according to the matrix that appears in Figure 2.

Assess each organization's theory of change and relevant capabilities (using the proposal form from each organization as a guide).

Create a portfolio-level/aggregate matrix, placing each organization in this matrix (see for example, organizations A & B in Figure 6 below).

Assess the portfolio-level/aggregate strategy, including identifying areas of focus, gaps and overlaps, and extent of alignment with funder's strategy

DURING THE REPORTING PHASE

List each organization's outcomes and activities according to domain and categories provided in the tool.

Compare each organization's actual activities and outcomes in this list to the ones in the proposal and past performance as reported in previous years, if available.

Use this comparison to assess the organization's progress and to assess any changes or trends in its capabilities.

Create a portfolio-level/aggregate matrix, placing each organization in this matrix domain by level of change; only this time, insert outcomes (rather than activities). Compare the outcomes, activities, and capabilities of different organizations.

Assess the outcomes achieved the portfolio-level/aggregate level and use the matrix to assess extent of alignment with funder's strategy and identify areas of focus, gaps, and overlaps.
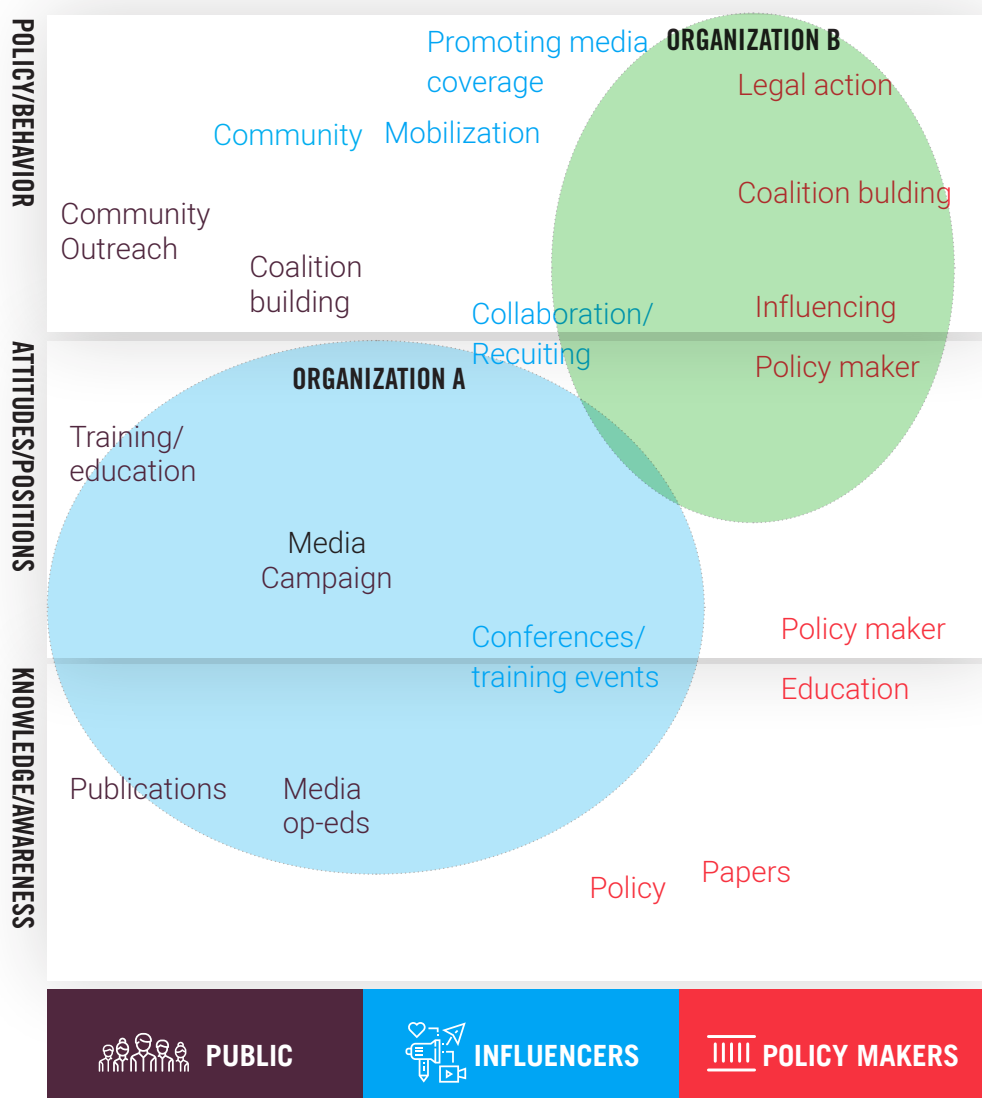
Figure 6 // Mapping Advocacy by Domain and Desired Change – Typical Activities

The chart axes (left, top to bottom): POLICY/BEHAVIOR, ATTITUDES/POSITIONS, KNOWLEDGE/AWARENESS

ORGANIZATION B
- Promoting media coverage
- Legal action
- Community Mobilization
- Coalition bulding
- Community Outreach
- Coalition building
- Collaboration/ Recuiting
- Influencing
- Policy maker

ORGANIZATION A
- Training/ education
- Media Campaign
- Conferences/ training events
- Policy maker
- Education
- Publications
- Media op-eds
- Policy
- Papers

PUBLIC   INFLUENCERS   POLICY MAKERS

Funder's Work with Grantee Organizations for Planning and Reporting

As with all new tools that help funders better monitor progress of grantees' work, the Advocacy Planning and Assessment Tool will require that funders work closely with organizations to make sure that the rationale of the tool is clear, that the way it will be implemented is clear, and that expectations are clear. Without these aspects in place, getting grantees on board will be significantly more challenging and the quality of the material will likely be less compelling. By and large, we suggest showing the beneficial use of the tool and overcoming the challenges of initial implementation in the following ways:

☑ From the outset, use the tool's framework and terminology to engage in funder-organization dialogue to systematically address questions regarding the organization's strategy and theory of change. Such questions may include, for example: what are the changes that the organization wishes to achieve? What domains does the advocacy work

take place in? What are the desired changes? Why is the proposed strategy best suited to achieve the goals? What evidence can the organization provide that supports the need for their intervention to target the public on awareness or attitudes? Does the organization have the skill sets to work in this domain and with the target audience identified?

☑ Encourage organizations to use the tool for their internal planning and ongoing monitoring in a way that works best for them.

☑ Do not wait until the reporting period for the grantee to see the reporting form. Share the framework for the tool at the planning stage so that they can see the various standardized categories and use this as they think of their activities and outcomes.

☑ Facilitate assimilation of the tool by using its standardized language and providing assistance and feedback to grantees on an ongoing basis.

> By encouraging organizations to use the tool internally and not just for reporting to funders, a more standardized language will evolve that advances the field more broadly and strengthens communication about advocacy across all stakeholders.

Advocacy Organization Implementation of the Tool for Internal Monitoring of Activities

While there is overlap between what a funder requests for monitoring and the data that an organization collects internally, there is a clear distinction, and therefore while the tool designed here can be used as an initial framework, additional work will need to be done by the organizations to turn it into a working tool to plan their activities, carry them out, and reflect and learn from their outcomes in a systematic way.

☑ Organizations using the tool for planning will be required to define the changes they wish to achieve, as well as the activities and expected outcomes, in greater detail than as articulated for funders — a way that is both more precise and strategic. Additional components may be added, such as the form in Appendix III for organizations to reflect on after meeting with relevant policy makers and stakeholders.

☑ To use the tool for ongoing monitoring, organizations will need to build within the tool a place for gathering documentation and data on a regular basis. While this may require some effort by grantees, it may develop their internal capacities of strategic thinking and planning, and evaluation. Overall, to use the tool for purposes of ongoing internal monitoring, organizations will need to get to a deeper resolution of data collection and analysis in order to track activities and progress.

By encouraging organizations to use the tool internally and not just for reporting to funders, a more standardized language will evolve that advances the field more broadly and strengthens communication about advocacy across all stakeholders.

CONCLUSION

The tool presented in this user guide seeks to be of use to funders of advocacy activity in Israel. It is a tool to help map strategies and assess outcomes in a standardized and systematic way across grantees. We anticipate that funders and advocacy organizations may find different parts of this user guide meaningful to their work, including insights into the framework of advocacy strategy, the challenges and limitations of advocacy, the need to define tangible interim outcomes, or suggestions for data analysis. Most of all, we see this user guide as a basis for continued development of advocacy assessment in Israel in a way that resonates with both funders and grantees to create a shared language and metric, thereby facilitating communication and reporting processes.

This user guide is a basis for continued development of advocacy assessment in Israel

ACKNOWLEDGMENTS

APPENDIX I. TEMPLATE OF TOOL FOR THE PROPOSAL PHASE

Organizational vision

200 characters max.

_____

What are the major changes on the issues you're trying to achieve through the grant? Please focus on changes that you hope to see within a three-year period — what/who will be different (Note: this is not your long-term vision)

600 characters max.

_____

In which of the following domains do you plan to work to achieve your goals? (Check those that your grant will work with)

☐ Policy makers – politicians, state clerks, municipal level officials, courts, etc.

☐ Influencers – journalists, civil society leaders, bloggers, etc.

☐ Public – students/youth groups, sectors, localities, society in general, etc.

For each domain checked in the question above, please describe the major activities you plan to carry out to bring about the desired changes in this grant. Note: There is NO expectation that grantees will work within all domains. It is important therefore to consider the right domain and strategy you believe will have the most relevant impact based on your articulated goals.

If your strategy involves policy makers, please answer:
What activities do you plan to carry out with policy makers to advance your goals? Please refer in your response to such activities as policy maker education, influencing, and recruiting PM to promote agenda, legal action, and coalition building.

If your strategy involves influencers, please answer:
What activities do you plan to carry out with influencers to advance your goals? By what means will you reach this target audience?
Please refer in your response to such activities as promoting media coverage, collaborating with and recruiting influencers, conferences and training events, and coalition building.

If your strategy involves direct public outreach, please answer:
What activities do you plan to carry out with the public to advance your goals? By what means will you reach the target audience in the public?
Please refer in your response to such activities as training for groups, op-eds and media or social media campaigns, publications, community outreach and mobilization, coalition building.

Theory of change:
Please provide the rationale/explanation for why you think this strategy/approach will lead to achieving expected outcomes. You may refer to research, experience, or other sources of knowledge to explain.

Please describe your organization's experience and skills in carrying out the strategy you have in place. Be sure to include names and relevant experience of staff for the domains in which you are mainly functioning.

Are there organizations or other bodies that you can identify as worthy of collaboration to advance your goals? If so, please list a few and your existing relationship with them.

Have you conducted research/do you plan on conducting research as a basis for your activities in any way? If so, who has conducted/will conduct it (your own organization or someone else)? What is the topic and how does it relate to your work?

400 characters max.

GENERAL INFORMATION

Organization name:

_____

What are the major changes in the issues you are trying to achieve through the grant? Please focus on changes that you hope to see within a three-year period — what/who will be different (Note: this is not your long-term vision)

_____

600 characters max

In which of the following domains have you worked to achieve these changes? You may choose more than one domain. For each domain, you will be asked to report on your activities and outcomes separately. **Reporting should be for activities carried out in the grant for UJA specifically.**

☐ Policy makers (e.g.., national and municipal government officials)

☐ Influencers (e.g., opinion leaders, journalists, rabbis, civil society leaders, intellectuals, educators)

☐ The public (e.g.., direct outreach through social media/ op-eds/public gatherings/ campaigns)

POLICY MAKERS

Q1

Below is a list of national and municipal policy makers in the area of advocacy. Please select the categories of policy makers most relevant to your advocacy work.

☐ Knesset: members of Knesset, advisors

☐ National government: ministers, advisors, officials in ministries

☐ Judicial system/Courts (including religious courts): officials

☐ Local government: mayor, deputies, members of municipal council/ religious council

☐ Other:

Q2

Please list the name/position of policy makers for each policy maker category. If there are policy makers you wish to keep anonymous, please just note their area of involvement (e.g. senior official in Ministry of interior)

Knesset

National government

Judicial system/Courts

Local government

Q3

In the box below is a list of advocacy activities that target policy makers. In the next set of questions, for EACH policy maker category you selected above, please:
1. Select the relevant activity/activities you held for these policy makers from the list of activities.
2. Explain briefly what was done.

Advocacy Activities:

Type of activity	Check if relevant	Explanation*
1 **Policy maker education** (briefings, meetings, dissemination of information, etc.)	☐	

Advocacy Activities:

Type of activity	Check if relevant	Explanation*
2 Influencing policy maker promote favorable agenda/recruiting policy-makers (encouraging/convincing policy makers to publicly endorse a favorable position, to promote favorable agenda/policy or block unfavorable policy, etc.)	☐	
3 Legal action (appeals to courts, Freedom of Information Act requests, enforcement letters, etc.)	☐	
4 Coalition building (building a group of policy makers to collaborate in promoting an agenda/position)	☐	
5 Other	☐	

*Explain what was done and with which target audience in 1-2 sentences (e.g. Knesset, national government, judicial system/courts, chief rabbinate, local government).

Q4

Below is a list of possible tangible outcomes (clear and visible changes) in the domain of advocacy targeting policy makers. Please check any that describe the results of your activities.

- ☐ Change in legislation/regulation/official decisions made or progress toward this change
- ☐ Change in actual implementation of policy/actual conduct/ enforcement or progress toward this change
- ☐ Increase of public funding to activity
- ☐ Favorable court ruling or progress toward it
- ☐ Policy maker officially supports a favorable position
- ☐ Other

Q5

For each of the tangible outcomes you marked in the list above please briefly explain what was achieved.

800 characters max

Q6

If available, please provide links to relevant documentation/news coverage in English/Hebrew supporting the above.

Q7

Please list the collaborations with other organizations that helped you achieve these outcomes. Include names of the partnering organizations.
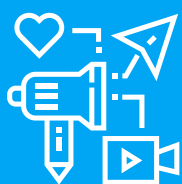
Q8

Not all activities in advocacy result in tangible outcomes, but they are important. Please list any additional activities in the domain of policy makers that may not have resulted in immediate tangible outcomes but were significant to your advocacy work.

800 characters max

INFLUENCERS

Q1

Below is a list of influencers in the area of advocacy. Please select the categories of influencers most relevant for your advocacy work

☐ Journalists, bloggers

☐ Civil society leaders

☐ Religious leaders

☐ Intellectuals, educators

☐ Celebrities

☐ Other:

Q2

Please list the name/position of influencer for each influencer category.

Journalists, bloggers

_____

Religious leaders

_____

Civil society leaders

_____

Intellectuals, educators

_____

Celebrities

_____

Q3

Below is a list of advocacy activities that target influencers. In the next set of questions, for EACH policy maker category you selected above, please:
1. Select the relevant activity/activities you held for these influencers from the list of activities.
2. Explain briefly what was done.

Advocacy Activities:

Type of activity	Check if relevant	Explanation*
1 **Promoting media coverage** (work with journalists that promote media coverage - news article/ story/TV appearance, etc.)	☐	

Advocacy Activities:

Type of activity	Check if relevant	Explanation*
2 Collaboration/recruiting influencers (relations/dialogue with influencers that promote a specific action, e.g. statement, article, event)	☐	
3 Conferences/training events (meetings/events that bring together several influencers)	☐	
4 Coalition building (building a group of influencers to collaborate in promoting an agenda/position)	☐	

*Explain what was done and who the target audience of influencers were (e.g., journalists/bloggers, religious leaders, civil society leaders/educators, intellectuals, celebrities (1-2 sentences)

Q4

Below is a list of possible tangible outcomes (clear and visible changes) in the domain of advocacy targeting influencers. Please check any that describe the results of your activities.

☐ Journalists/bloggers/media channels publish favorable coverage/ provides public recognition to your work

☐ Influencers publicly endorse favorable position (statement, article)

☐ Influencers publicly act to promote favorable position (organize an activity, appeal to policy makers, etc.)

☐ Influencers privately/behind the scenes appeal to policy maker to promote an issue

☐ Other

Q5

For each of the tangible outcomes you marked in the list above please briefly explain what was achieved

800 characters max

Q6

If available, please provide links to relevant documentation/news coverage in English/Hebrew supporting the above

Q7

Please list the collaborations with other organizations that helped you achieve these outcomes. Include names of the partnering organizations.

Q8

Not all activities in advocacy result in tangible outcomes, but they are important. Please list any additional activities in the domain of influencers that may not have resulted in immediate tangible outcomes but were significant to your advocacy work.

800 characters max

PUBLIC

Q1

Below is a list of public target groups in the area of advocacy. Please select the category/categories of public groups most relevant for your advocacy work

- ☐ Organized groups: students, youth, etc.
- ☐ Specific sectors in Israeli Society: Orthodox, Russian speaking, secular, Mizrachi, etc.)
- ☐ Specific localities: towns, areas
- ☐ Israeli society in general
- ☐ Other:

Q2

Please list the specific identity of each target group.

Organized groups
_____

Specific sectors in Israeli society
_____

Specific localities
_____

Israeli society in general
_____

Q3

Below is a list of advocacy activities that target public groups. In the next set of questions, for EACH policy maker category you selected above, please:
1. Select the relevant activity/activities you held for these policy makers from the list of activities.
2. Explain briefly what was done.

Advocacy Activities:

Type of activity	Check if relevant	Explanation*
1 **Training for groups** (courses, conferences, lectures)	☐	
2 **Op-eds/media by your org** (Op-eds/media stories written by members of your organization in national/local/sectorial newspapers and news sites)	☐	

Type of activity	Check if relevant	Explanation*
3 Social Media campaigns/posts (Facebook, Twitter)	☐	
4 Campaigns/publications (ads, billboards, clips, policy papers, publications)	☐	
5 Community outreach/ mobilization (events, demonstrations, community activities, petitions)	☐	

*Explain what was done and with which target audience, include summary of number of events/campaigns/posts in relevant descriptions (1-2 sentences)

Q4

Below is a list of possible tangible outcomes in the domain of advocacy targeting the public. Please check any that describe the results of your activities.

☐ Target increases their knowledge and/or changes attitudes

☐ Target shares the message/(actively) supports or promotes a favorable position

☐ Target changes actual behavior

☐ Policy maker acknowledges public support for issue and/or changes policy accordingly

☐ Other

Q5

For each of the tangible outcomes you marked in the list above please briefly explain what was achieved

800 characters max

Q6

If available, please provide links to relevant documentation/news coverage in English/Hebrew supporting the above

Q7

Please list the collaborations with other organizations that helped you achieve these outcomes. Include names of the partnering organizations.

Q8

Not all activities in advocacy result in tangible outcomes, but they are important. Please list any additional activities in the domain of public outreach that may not have resulted in immediate tangible outcomes but were significant to your advocacy work.

800 characters max

GENERAL ORGANIZATIONAL CAPACITIES

Did you use research as a basis for your activities in any way? If so, who conducted it (your own organization or someone else)? What was the topic and how did it relate to your work?

600 characters max

Throughout the grant period, did you identify unexpected events (challenges or opportunities)? If so, what were the unexpected events and how did you respond?

750 characters max

If there are other activities or achievements in advocacy that you would like to share outside the specific grant of UJA, please describe briefly below (optional)

750 characters max

APPENDIX III. ORGANIZATIONAL CHECKLIST FOR MEETINGS WITH POLICY MAKERS

(for organization's internal use)

Date: _____

Length of meeting: _____

Setting: _____

Attendees:

1. How was the meeting arranged/who on your team initiated?

_____

2. What were the main issues discussed during this meeting?

_____

5. To what extent would you say the policy makers at the meeting were receptive to your suggestions/position? Elaborate.

_____
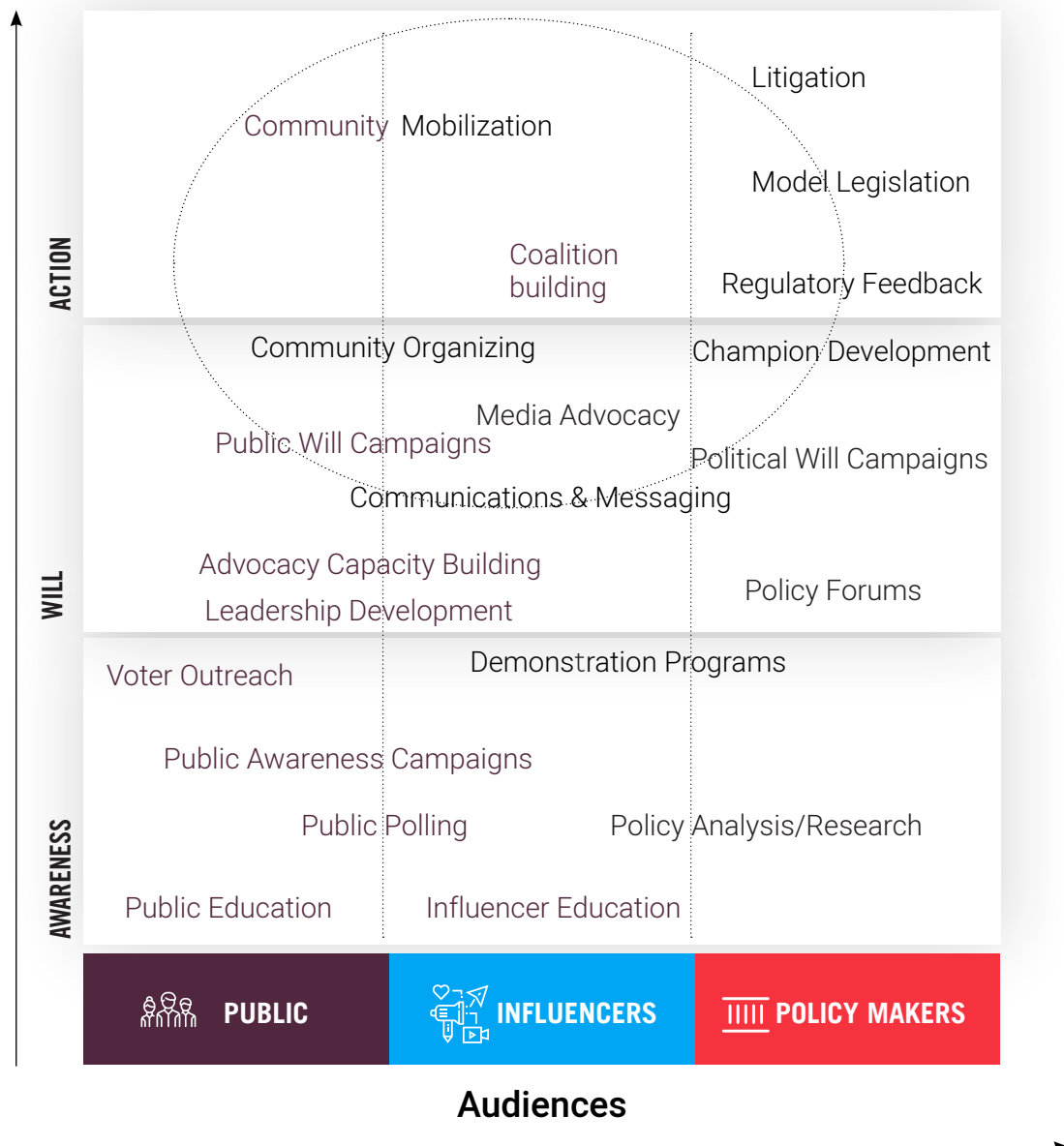
3. Was an agreement or next steps reached in the discussion?

☐ yes   ☐ no

4. If yes, elaborate:

_____

Additional Notes or Comments

_____

APPENDIX IV: MAPPING AND ADVOCACY STRATEGY CHART, COFFMAN AND BEER 2015

Mapping an Advocacy Strategy

Audiences