

The Advocate's Evaluation Toolkit

BELLWETHER INTERVIEWS OVERVIEW

PURPOSE

Bellwether interviews are a research method for determining where your issue is positions in the policy agenda, how influential leaders think about your issue, and how likely they are to act on it. The method was developed by the Harvard Family Research Project.ⁱ *Bellwethers* are individuals who are seen as influential people in the public and private sectors, whose jobs require they are politically informed and track a broad range of policy issues. These individuals are thought leaders in your state – often innovators, and always individuals whose opinions about policy issues carry substantial weight and predictive value.

Bellwether interviews have a unique approach to interviewing leaders. The interviewees are unaware prior to the interview what the focus of the questions will be. This ensures they are able to answer authentically, unprompted, and without knowledge of your expectations. The information that results from bellwether interviews is useful for understanding where your issue stands in a broader policy agenda and how to leverage other issues or credible partners to build visibility.

IMPLEMENTING THE TOOL

Creating your questions: A sample protocol with relatively standard questions is included in the toolkit. As you adapt the questions, make sure to avoid leading your interviewees toward your issue. You want to have questions that create the opportunity to learn about their views without being prejudiced by your expectations or priorities.

Identifying your bellwethers: You may want to select from among policymakers (legislative and executive branch), advocates, academia and/or think tanks, media, business/private sector, and funders. Seek diversity across your bellwethers on such things as the content expertise (within and outside of your issue area), gender, racial/ethnic background, political affiliation (including moderates), geographic area (ensure some urban, some rural, if relevant to your state), and public vs. private experience. Ideally, you want at least 8-10 bellwethers involved in your interviews, so you may want to select 12-15 bellwethers to consider calling.

Recruiting your bellwethers: Bellwethers should be recruited by someone who can honestly introduce themselves as from an organization generally seen as credible and neutral. For example, you may want to recruit a local foundation, a think tank, an academic department, or other neutral partner to assist you in completing the interviews.

Conducting the interviews: These brief phone interviews should take no more than 10-20 minutes. The person making the call should have the bellwether script in front of them and either be prepared to take careful, verbatim notes; have a note taker on the call who can do so; or tape record the call and transcribe. If

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you choose to record the call, it is advisable to inform your bellwether the call will be recorded for transcription purposes only and the recording will be deleted.

Analyzing the data: Bellwether interviews are analyzed by pulling common themes in responses to the questions, generating lists of key points in the bellwether's responses to specific questions, and highlighting information most relevant to your advocacy strategy.

Using the Information: The results of the bellwether interviews should be shared with the leadership of your policy and advocacy efforts, to explore how to better align your policy priorities with other priorities in the state, how to increase your visibility, and what you need to problem-solve.

ⁱ For detailed information on the method from the Harvard Family Research Project, please visit:

<http://www.hfrp.org/evaluation/the-evaluation-exchange/issue-archive/advocacy-and-policy-change/evaluating-an-issue-s-position-on-the-policy-agenda-the-bellwether-methodology>

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