

The Advocate's Evaluation Toolkit

PRE-MORTEM EXAMPLE: A FUNDING STRATEGY

Below is an example of the types of insights generated during each part of the dialogue. This example represents how notes are assembled after the fact. The dialogue itself will be a bit messier, with elements from Parts 1, 2, and 3 not aligning in as organized of a fashion as can be constructed after the fact.

Framing Statement: It's four years from now. The advocacy funding strategy that represented a significant new approach for the foundation failed spectacularly. It not only failed to achieve its outcomes, it has affected the reputation and credibility of the foundation.

Part 3: What can we do decrease the risk of failure?	Part 2: Why did it happen?	Part 1: What does failure look like?
<ul style="list-style-type: none"> • High quality and participatory monitoring of environment • Strategies/timeline for actively questioning level of adaptation with internal and external partners 	<ul style="list-style-type: none"> • Grantees and foundation misinterpreted the environment – went after the wrong wins • The strategy adapted too much or only paid lip service to adaptation – at either/both the grantee and foundation level 	<ul style="list-style-type: none"> • Limited or no policy wins • Policy opportunities/windows that failed to be leveraged • Low value policy wins that don't advance the overall policy targets
<ul style="list-style-type: none"> • Ongoing re-education of leaders among grantees and the advocacy field more broadly • Building multiple supporters of the strategy within each advocacy organization 	<ul style="list-style-type: none"> • Grantees never bought into the new approach • Grantees didn't trust the foundation's focus on adaptation and learning • Turnover of key leaders that support approach from within the advocacy field 	<ul style="list-style-type: none"> • Grantees push back on the approach and never fully participate
<ul style="list-style-type: none"> • Intentional steps to institutionalize the new approach within the foundation • Ongoing engagement and re-education of leaders in the foundation • Multi-disciplinary Core Team within the foundation to lead the strategy 	<ul style="list-style-type: none"> • The foundation failed to integrate the different approach into current practice, leading to it being an ongoing complication/burden to staff • Turnover of key leaders that support the approach from within the foundation 	<ul style="list-style-type: none"> • Foundation changes course – failed to keep the strategy moving forward as intended

Are you interested in more tips and tools for advocacy evaluation?

Spark Policy Institute's (www.sparkpolicy.com) interactive Advocate's Evaluation Toolkit is available at www.sparkpolicy.com/tools/aet. Please share your stories about advocacy evaluation, share your tools, and access tools and ideas from other organizations.



This work is licensed under the [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/).