Advocacy Champions!

MERL Handbook for Advocacy Champions

Everything you need to know about Monitoring, Evaluation, Results, and Learning (MERL) for effective advocacy

COMPASS

THE COALITION TO BUILD MOMENTUM, POWER, ACTIVISM, STRATEGY & SOLIDARITY IN AFRICA

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PANGAEA ZIMBABWE AIDS TRUST

Acknowledgements

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About this handbook

This handbook has been put together from various training materials that have been utilized to build the MERL capacity of partners in the Coalition to build Momentum, Power, Activism, Strategy and Solidarity in Africa (COMPASS); between 2018 and 2021.

The purpose of this book provides easy to read reference material for anyone conducting advocacy; in order to enable them to monitor and track the effects of their work. Advocacy is a complex, non-linear, often a long-term effort involving many actors that cannot be controlled or predicted. Change can emerge in unexpected ways. The COMPASS MERL approaches recognize these unique and collaborative characteristics of advocacy, and allow us to track processes, outcomes and improve impact along the way.

The overarching aim of this handbook is to enhance the impact of campaigns; by empowering you with tools to monitor, evaluate and learn from your advocacy. This is a simple guide to understand advocacy MERL!

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First things First;
What do you have to show for your advocacy efforts?

You have been doing a lot of work for some time now, alone and with others. Think about the number of meetings you have attended; speeches you have made; marches you have been part of; letters you have written; agendas you have driven; voices you have represented; songs you have sung; conferences you have attended; papers you have presented; trainings, dialogues, community discussions and even webinars...

It is clear you have been busy and in many ways, you still are. Your passion remains unshaken and you are still pushing and fighting. Though you sometimes feel tired you keep on doing, acting, attending, showing up!

Yet, you still feel like "they" don't quite get it. You feel like nothing is changing; you feel like the progress is slow; you feel like there is still more you can do. It feels as though you have been going around in circles and that light at the end of the tunnel is so near, yet so far.

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Dear Advocate

It is time to take a pause, take a step back and ask some important questions. Questions that will lead you to answers that will make you see where you truly stand and help you to prove that everything you have been doing has been worthwhile!

1. After everything I have done, what changed?
2. What difference has my work made thus far?
3. Of what benefit has my effort been? To who?
4. What else do I need to do to reach my goal? How? With who?
5. It clearly has not been working, so what can I start doing differently?
6. Should I really continue doing things in the same way I have been doing them till now?
7. I need help, who can I reach out to? Who can partner with me? Who can strengthen me?
8. How can I convince my community, my colleagues, my government, my country, my partners, my funders; that what we are doing is worth the time, the energy, the money and the recognition?

Monitoring, Evaluation, Results and Learning will help you to answer these questions and to move ahead fearlessly; with direction and hope for triumph in your advocacy!

MERL Handbook for advocacy champions.

Meet the MERL team

Throughout this handbook, little dialogue boxes, like this one, will pop up from our MERL team. This is to help you find your way around the content. We're excited to share this journey with you!

MERL Handbook for advocacy champions.

Hey there! So our MERL journey begins here. What better way to start, than by looking at some of the important things you need to know about MERL!
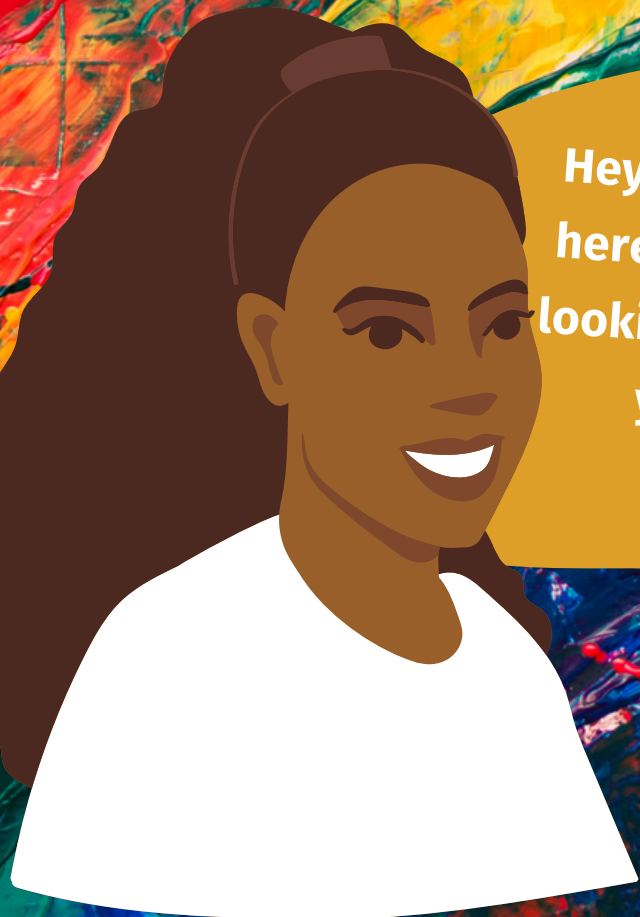
1. An overview of MERL

MERL is an acronym that stands for Monitoring, Evaluation, Results and Learning. It is an approach that we utilize to keep track of our progress, to document our experiences and to learn from our results. It is the core of all advocacy work because it ensures that we have a full view of where we are going, where we are and where we are coming from. In this way, as advocates, we are empowered to make the right decisions and implement actions that make sense based on the information we gather through MERL.

Why is MERL important?

MERL helps implementers of advocacy projects to;

Ø Make informed decisions regarding project operations and service delivery based on objective evidence

Ø Ensure the most effective and efficient use of resources

Ø Objectively assess the extent to which the project is having or has had the desired impact, in what areas it is effective, and where corrections need to be considered

Ø Meet organisational reporting and other requirements; and convince donors that their investments have been worthwhile or that alternative approaches should be considered.

Who should be involved in MERL?

MERL is for everyone. It is not the responsibility of the MERL officers [BN1] alone to conduct MERL. Advocates, community members, funding partners, implementers of activities and beneficiaries of any project must be involved in tacking stock of the work. We all have an important part to play to ensure accountability and delivery of tangible, verifiable results. Our involvement and participation in MERL enables us to prove our effect and improve our approaches for greater impact. As an advocate, MERL is a key that will help you to unlock more focused, evidenced based and sustainable advocacy. MERL is definitely for you too!
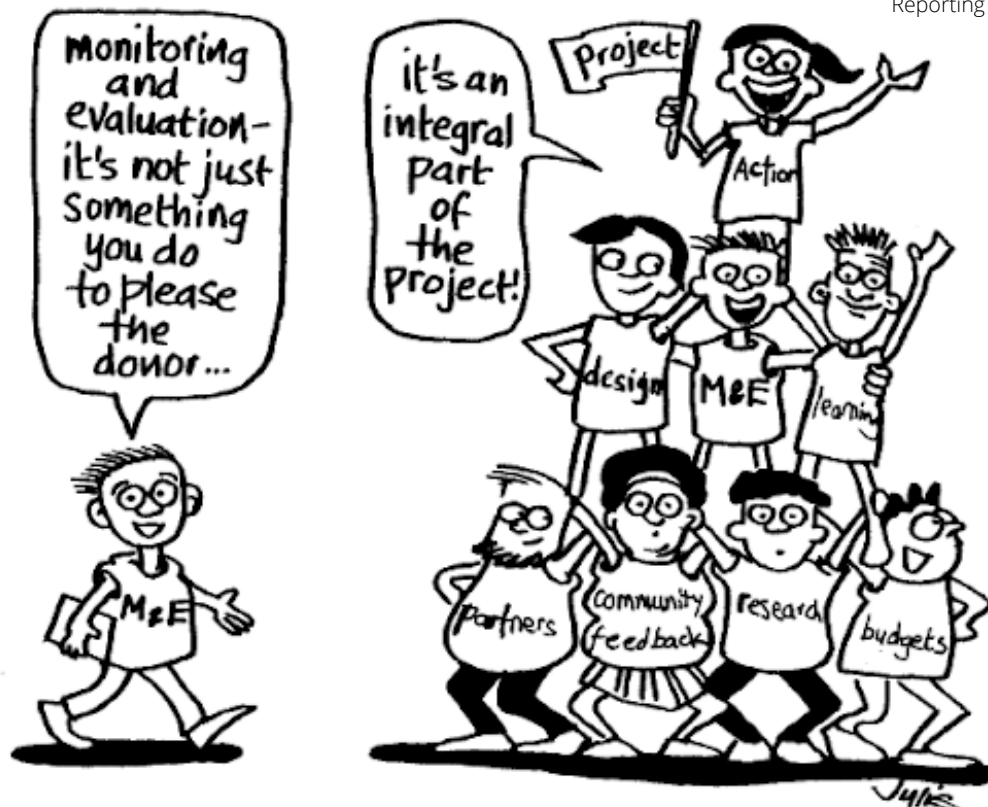
Monitoring and evaluation is not just something you do to please the donor. It is an integral part of the project! We will now break down the basic MERL concepts.

What is MERL?

a) Monitoring

Monitoring is the routine process of collecting data This can be done monthly, quarterly or annually. The purpose of monitoring is to measure whether the program is doing what it set out to do. This information can be factual information based on measurement. It can also be information collected about opinions and views which is called qualitative data.

Monitoring helps you to track your activities to in order to answer the following questions;

o What activities are we doing/ have we done?

o Where?

o With whom?

o When?

o How many?

b) Evaluation

Evaluation is the systematic investigation of whether an intervention or campaign is effective. It helps us to understand whether the activities implemented have achieved the desired effect.

Evaluations are carried out periodically; either midway through the project or at the end. Some evaluations are conducted at the beginning of a project. These are called baseline assessments. A baseline measures the conditions at the start of a project. This information will be used to assess the progress we have made after implementing our activities. A baseline also helps us to understand the situation which our campaign seeks to change.

When we evaluate our activities, we use the information we have collected during monitoring. It helps us to answer the following questions:

o How well are we doing?

o Are we doing the right things?

o What difference are we making?

c) Results

Results are the consequences or effects of our activities. They are the reason why we do the things we do. Results help us to answer the question; "why"? We implement different activities in order to achieve a desired result. Our advocacy seeks to produce wins, which are the result of our collaborative efforts.

Results are key to the work that we do. Unless we foresee what we are working towards, we are simply doing the same things repeatedly with no gain or benefit. Essentially, unless we focus on results, our campaigns are futile. We are simply making noise or busy looking busy!

The importance of focusing on results is summed up in the following statements;

o If you do not measure results, you cannot tell success from failure.

o If you cannot see success, you cannot reward it.

o If you cannot reward success, you are probably rewarding failure.

o If you cannot see success, you cannot learn from it.

o If you cannot recognize failure, you cannot correct it.

o If you can demonstrate results, you can win support and continue winning.

d) Learning

Learning is the process by which we gain new understanding or knowledge based on observations, experiences or teachings. Learning is a core component of MERL because it helps us to become better in our advocacy and to implement activities that yield worthwhile results. However, it is not enough to simply implement activities and be stuck on the results. We must learn from both good and bad outcomes; and even from those things that happen unexpectedly. Through learning, we become more efficient advocates; we can improve our strategies, influence behaviours and deliver quality.

Why do we emphasize the "L" for learning? So that we LEARN from successes and challenges, and adapt activities if necessary.

a) If we are successful in something, let's tell others about it.
WHY? To demonstrate that our skills and methods are useful!

b) We also need to share the challenges we have faced and what we have done to address them.WHY? If we don't, others may struggle with the same challenges.

In a campaign to increase uptake of PrEP amongst adolescent girls and young women, a group of advocates decided to hold road shows in a remote community called Senga. The purpose of the road show was to raise awareness of PrEP, generate demand for HIV prevention services and to reach as many young women as possible; who typically did not seek services at the health facilities.

There was a high turnout of adolescent girls and young women at the road shows, as shown by the numbers who attended and received fliers and referral cards for accessing PrEP services. An average of 60 AGYW attended the road shows. However after the 4th road show, the advocates realized that only 9 AGYW had actually gone to the health facilities after the road shows. This was less than a tenth of the total number of AGYW reached.

After close consideration of the resources used to conduct road shows and the actual results compared to their expectations; the advocates decided to put road shows on hold and instead use a peer to peer model to motive AGYW to take PREP. After a few weeks, there was an increase in the number of AGYW accessing PrEP at facilities in Senga.

2. Having a clear sense of direction when implementing your advocacy activities

> To determine where you are and what is important, you must understand the problem. Let's figure out how best to identify the problem

It is important to be sure that indeed there is a problem. There must be some form of evidence that points to the existence of that problem. What may appear to be the urgent problem to address, may actually be a symptom of a much bigger situation requiring action. In order for advocacy to be effective; you must be clear about what you want to change, why and how you will do it, right from the onset. In short;

o Determine where you are and what's important (vision, priority issues)

o Define what you must achieve (objectives and actions to address priority issues)

o Define how you will win--what activities and actions will influence people who have the power to give you what you want?

o Divide tasks in your team - be clear about how you will allocate time and other resources to achieve your objectives (strategies, action plans, budgets, M&E)

o Review progress regularly

a) Identifying the problem

There are two important questions that need to be asked in order to establish the context and the depth of the problem;
o what is the current situation?
o what is the situation that we desire or hope for?
The gap between the current situation and the desired goal, is what we define as the problem.

Current Situation → **Desired. Goal**
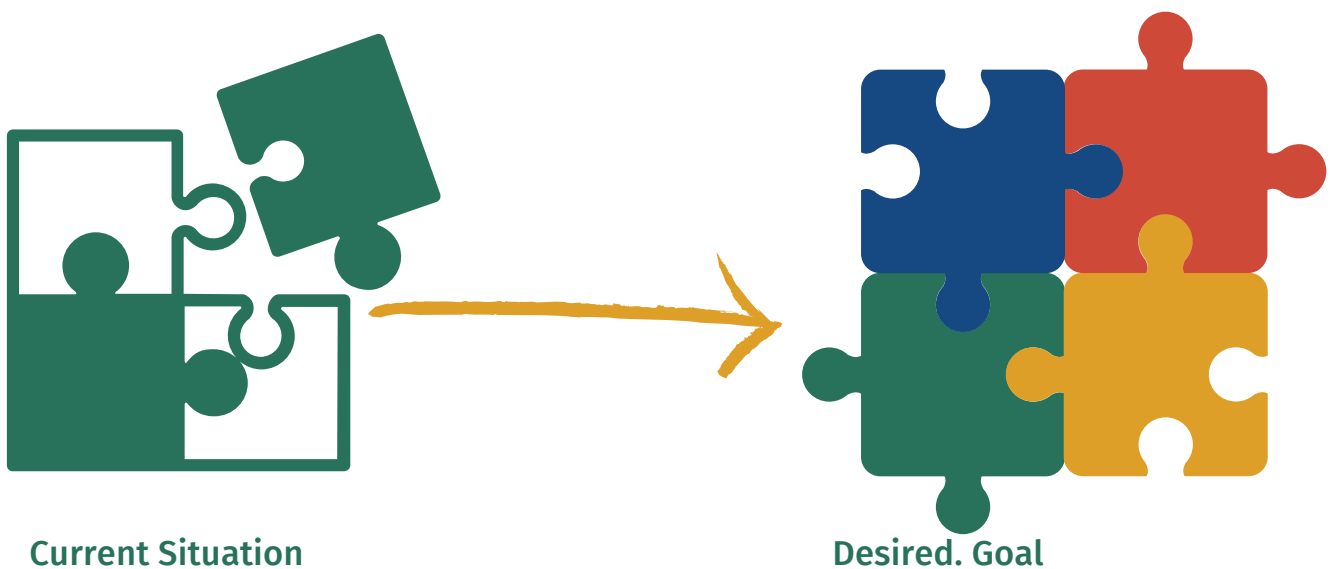
Describing a problem involves conducting a process which advocates usually refer to as a landscaping analysis. Others may call it a context analysis. Regardless of the term you may decide to use, this process is an opportunity to paint a detailed picture of a chosen situation and it can focus on an issue or overarching context that influences an issue. Your analysis may comprise of social, political, governance, economic, health and legal factors. Conducting a landscaping/ context analysis helps us to identify gaps, opportunities, threats, key stakeholders, priorities and emerging themes based on what we are trying to win

Image: Water & Sanitation Program (WSP) Gender in Water and Sanitation

Failing to fully identify and understand the problem may lead to serious delays in achieving advocacy goals; which can further compound existing problems. In order to understand a problem fully, it is important to look deeply into its causes as well as its effects. A single problem can have several root causes.

There are many factors to consider such as; the context of the problem, the people influencing and or benefitting from the existence of the problem and the source of the problem. Major causes of any problem can be categorised as following; People, Policies, Equipment/ skills and Procedure/ methods.

A useful tool for identifying and understanding a problem is the fish bone analysis diagram. It can help you to organize thoughts about what factors are contributing to the problem. The diagram places the problem at the "head" that is supported by a skeleton of major causes. Sub-causes that fall within each category form smaller bones. This tool enables teams to group causes of a problem by category, see commonalities between the causes, and consider what major cause may be of the greatest significance to an outcome.
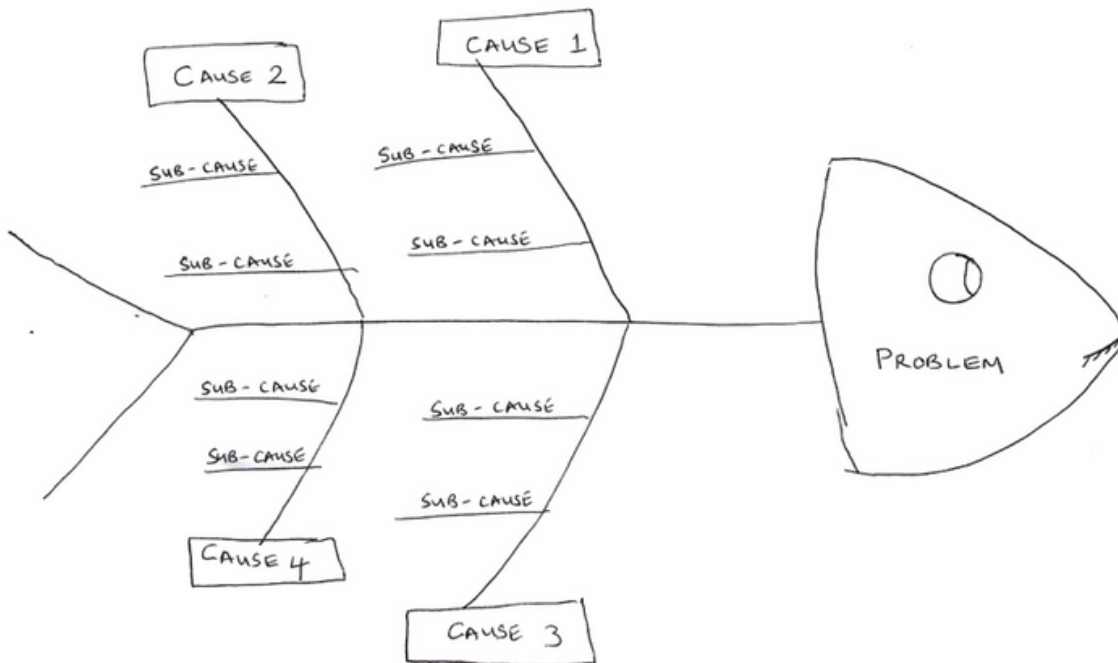
REFLECTION & PRACTICE

Using the fishbone template below; identify the causes and sub causes of the following problem:

Pregnancy and HIV rates are going up among adolescent girls and young women since covid-19 lock-down.

FISHBONE DIAGRAM
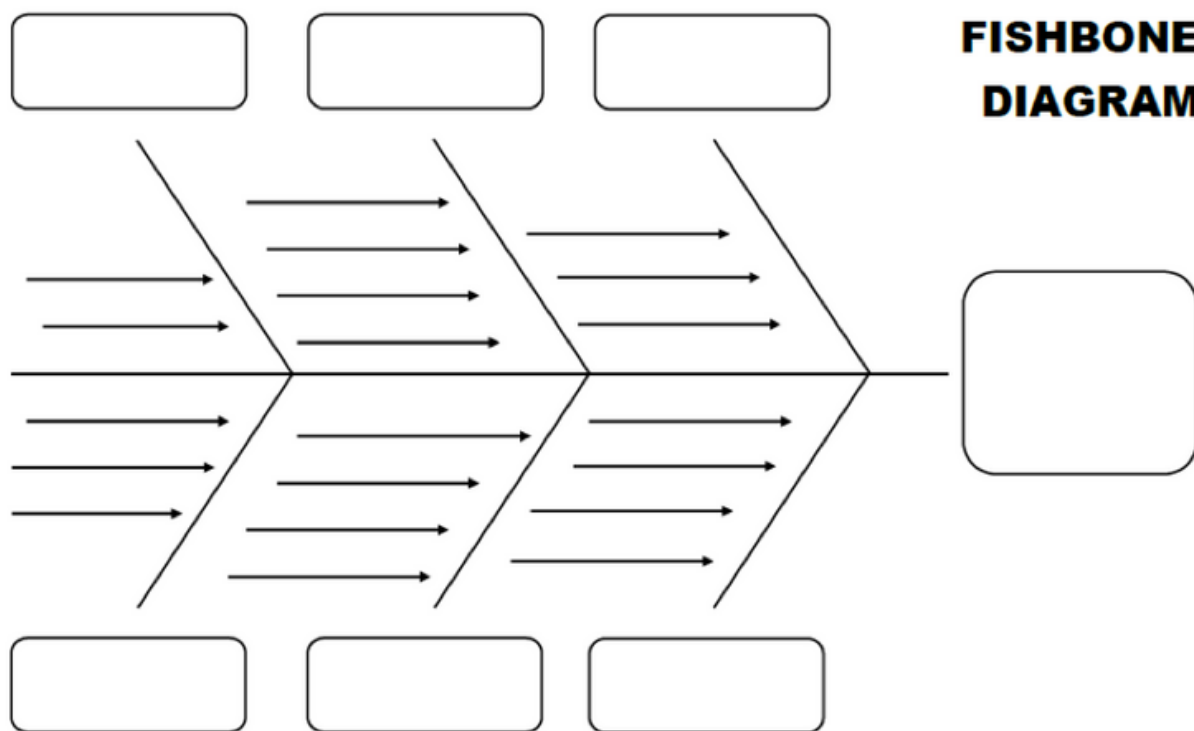
You can use the space on the next page to arrange your ideas before using the template

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b) Cutting an Advocacy Issue

Now that you have identified the problem, what's next? Well, it is important to understand that addressing an advocacy barrier or challenge requires us to look at an entire issue rather than just the problem we have identified. In this way; we are able to develop a clear strategic plan, with relevant tactics directed at the right targets.

So what is an issue?

An issue is a description of the problem you have identified, which encompasses the possible solution to that problem as well as the person or people who can provide that solution. A problem on its own is not considered an issue. The diagram below shows us the elements that make up an issue. Cutting out an issue is important because it helps you to conduct your MERL effectively by allowing you to see the full picture of your advocacy campaign and the specific focus areas requiring attention or action.

A problem or topic.

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Solution to that problem
(Be very specific)

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Target
(Person or people who can. give us that solution)
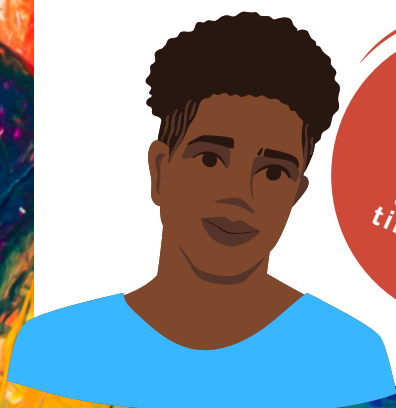
Can you cut out the issue using one of the main problems you identified using the fishbone diagram above? Take some time to put this into practice

c) Framing your problem statement

After you have identified the problem and you have cut out the issue; it is important to come up with a clear problem statement. A Problem Statement is a succinct, clear, and concise statement that describes the scope and impact of a problem. In other words, how big or deep it is and its effect on your outcome.

A Problem Statement includes:
o A brief description of the problem
o Data about where the problem is occurring, its time frame, and size
o Barriers and or effects of that problem
o Solution and targets

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Now let's see if you are able to come up with a problem statement using the information you have written down when you cut out the issue in the previous section

REFLECTION & PRACTICE

Below is an example of a problem statement:

In the last six months, waiting times for HIV test results at the Murambinda district hospital have increased to more than four hours on average. This has led to crowded waiting rooms and an increase in the number of clients who leave without their HIV test results. As a result, the program is missing opportunities to provide effective prevention, care, and treatment services.

Consider:

o   What aspects have been included in the statement?

o   What else can be added to make it even more clearer?

o   In what way is this statement useful? To who?

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d) Setting SMART goals and objectives

Think about an advocacy campaign you have heard of; or participated in. Why do you think this particular campaign was started? What did it seek to achieve? Did it yield the desired results? Remember that an advocacy campaign is a set of actions taken targeted to create support for the CHANGE. Effective advocacy begins with knowing what you want to win and why this is important. This involves setting clear goals and objectives.

What is a goal?

A goal is a general statement that describes the hoped-for result of a campaign. It is the desired result of any advocacy activity. It will usually be a long-term result, and it may take three to five years of advocacy work to bring about the desired result. It is unlikely that your advocacy network can achieve a goal on its own; it will probably require other allies to bring about the required change.

A strong campaign goal is clear in as many ways as possible and relevant to what you are trying to achieve—resource amounts, geographies, specific policies that need to be written or amended. It is what you want to change, who will make the change, and when the change will take place.

Things to remember about setting your goal;

o A goal a broad statement of what you are trying to do.

o It often refers to the benefit that will be felt by those affected by an issue.

o It is long term and gives direction — it helps you know where you are going. It needs an accompanying route map or strategy to show you how to get there.

o Without a campaign goal, it is possible to lose sight of what you are trying to do.

What is an objective?

An objective is a precise action or measurable step than an individual or group takes to move closer to the goal. It is a specific, operationalised statement detailing the desired accomplishment of the campaign. A properly stated objective is action-oriented, starts with the word "to," and is followed by an action verb. Objectives address questions of "what" and "when," but not "why" or "how."

An objective is the intended impact or effect of the work you are doing, or the specific change that you want to see. When you set objectives for your advocacy campaign, always consider or keep in mind that they must be SMART. This acronym is unpacked below.

SMART

(S)pecific. The more specific you can be about what action you want to do to achieve your goal and by when, the better.
Instead of, "We'll hold a meeting," your objective should be: "We'll hold a meeting for parents of teenage children in Arusha community Hall to invite input on the initiative."

(M)easurable. Put your objective in measurable terms. The more precise you are about what you want to get done, the easier it will be to see what and how much you have accomplished.
Instead of saying: "Smoking in our community will be reduced," consider framing it this way instead: "The percentage of smokers in our community will decline by 30% by the year 2000."

(A)chievable. It's great for you to be ambitious, but you should also remember to set realistic objectives that you know you can actually achieve. Real change takes time and resources. If you bite off more than you can chew, the community you want to influence may become prematurely disappointed or discouraged if they do not see change.

(R)elevant (to your goal). You should be setting objectives that will start you on the path to successfully accomplishing your goal. If you stray too much from that path, you may lose sight of what it is you're trying to accomplish.

(T)imed. A date for completion should be set. Even if circumstances change and your date must be altered later, it's much better to start off knowing when you can expect to achieve your objectives, so you will know when it may become necessary to make adjustments.

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Can you think of more characteristics of good objectives?

REFLECTION & PRACTICE

Below is an example of a campaign goal and the corresponding objectives. Take some time to read and reflect on what you have just learnt about goals and objectives.

GOAL:

Increase access to SRH services for adolescents and young people in Zimbabwe by 2022

OBJECTIVES:

1. To reduce the age of Consent for accessing SRH services for adolescents and young people from 16 to 12years.

2. To increase the number of Adolescents and young people demanding the reduction/harmonisation of the age of consent from policy makers.

3. To advocate for a policy (temporary or permanent) that enhances the access to SRH services of adolescents under the age of 16.

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Think about what else you can add or subtract from the statements in order to make them even clearer!

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e) Putting in place clear indicators and targets

How will you know whether you are making progress? This may be difficult to see or tell unless you set clear indicators from the onset. For example, if you are driving in a car and the petrol gauge shows you are low on petrol, it is not actually the petrol you are looking at, but rather you are looking at an "indicator" of the amount of petrol you have.

Similarly, when implementing advocacy, an indicator is a specific, observable and measurable characteristic that can be used to show changes or progress a campaign is making toward achieving a specific outcome. Indicators are clues, signs, and markers. They show us how close we are to our path and how much things are changing. Indicators also tell us if we are going in the right direction and whether we have arrived.

Below are some examples of indicators;

o Reduction in stigma against KPs in Meru district.

o Number of health facilities with trained HCW to provide KP friendly services

o Proportion of women of child bearing age initiated on DTG in 2019

o % Adolescent girls and Young women reporting condom use at last sexual encounter

Indicators are closely linked to targets. A target is the specific planned result which you intend to achieve in a specific timeframe. Targets are measurable and are used to monitor outputs. Examples of targets include; 1 policy brief per quarter; 2 meetings with policy makers per month or 50 journalists reached per year through media workshops. Indicators provide a way for us to judge whether we have succeeded or failed at meeting our targets.

Below is an example of an indicator and the related target;

Indicator: Number of health facilities with trained HCW to provide KP friendly services

Target: HCW in 4 facilities trained in the 1st quarter of 2022

Indicators can also be used as a measure of the effectiveness of advocacy activities. In this case, such indicators are qualitative and in many instances can't be stated as numbers. However, they still need to be measurable in the sense that, we must be able to prove them. Below are some examples of indicators that may be used for advocacy campaigns;

INDICATOR	METHOD OF COLLECTING EVIDENCE /DATA ON INDICATOR
Strengthened CSO network, working to address barriers to health identified through Community Led Monitoring	Survey to assess whether relationships & communications with all partners implementing Community Led Monitoring are running smoothly.
Adoption of a budget line to address health priorities of Adolescent girls and young women.	Document reviews; media monitoring; legislative monitoring; budget monitoring
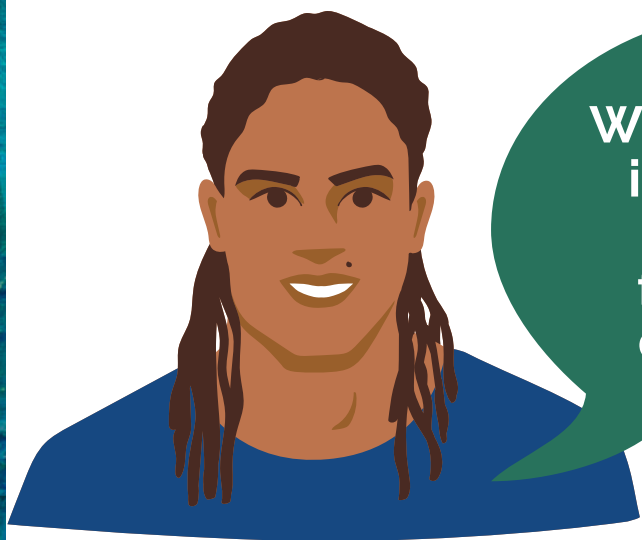
Well crafted indicators have the following qualities;

Valid: the indicator is an accurate measure of the expected output or outcome of the activity

Reliable: the indicator can consistently be measured over time, in the same way by different observers. It is so clear that there is no doubt what is being measured and how!

Precise: the indicator defined in very clear terms; it measures something specific and in way leaves you wondering what you are looking for. A precise indicator measures only one thing and not multiple components in a single indicator.

Measurable: the indicator is quantifiable using available tools and methods. In other words it is verifiable even when measures which don't include counting are involved.For example; the perception of sex workers on the quality of health services in public health facilities is an indicator which can be measured using score cards; or qualitative assessments like interviews and focus group discussions.

Timely: the indicator provides a measurement at time intervals relevant and appropriate to your campaign goals and activities.

Important to your advocacy work: the indicator must be linked to your advocacy work or to achieving the campaign objectives.

A summary of the key concepts

A Goal is	a general statement that describes the hoped-for result of a campaign, or the desired result of any advocacy activity; in the long term
An Objective is	a precise action or measurable step than an individual or group takes to move closer to the goal.
An indicator is	a specific, observable and measurable characteristic that can be used to show changes or progress a campaign is making toward achieving a specific outcome
A Target is	a specific, planned result which you intend to achieve in a specific time frame.

REFLECTION & PRACTICE

Niseme project is a peer education project for female sex workers in Chegutu District. Activities include the training of peer educators and supervisors (one-on-one and through group education), distribution of Behaviour Change Communication materials, and referrals for STI treatment.

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Read the scenario above and Come up with one Goal and three SMART Objectives. Go a step further and set some indicators for the project.

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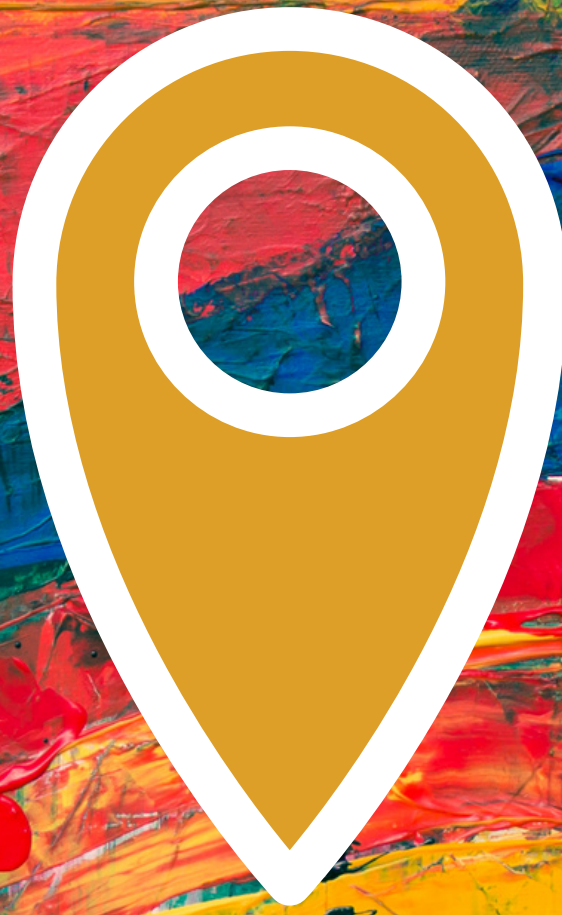
How is your journey going so far? Well, if you remember, we gave you an overview of MERL, then we went on to look at the implementation of your advocacy activities. Now, we want to move on to the results. Remember, the result is what remains after the work has been done, so this is really important. See you soon!

3. Moving from activities to results

Can you think of a situation where your passion got the better of you? How did you manage to produce results afterwards?

Too often as advocates, we get caught up in implementing our day to day activities. Our passion overtakes us and we continually do the same things over and over again. We get busy with meetings, workshops, developing and disseminating advocacy materials with our messages, participating in protests and many other things that consume our time and energy. This is all good, except that it is of no use unless we can see and yield the benefits of all our hard work. All these efforts will only make sense if there are results to show for it! But unfortunately we get so busy implementing that we lose track of what we are actually achieving. Results are a core component of MERL, because they are the evidence of the value of the things we do every day in our advocacy work. It is critical for us to begin to move beyond activities, and to begin taking stock of our results.

As you jump into this next chapter, keep in mind the key lessons from the previous sections; that indicators may be used to measure the outputs or outcomes, and that our results will tell us if we have addressed the problem and achieved the goals/ objectives.

Components of an intervention

In order to answer the questions of what we are going to achieve and how; we need to understand the different components of an intervention and how they are linked to each other. For advocacy work, campaigns are the vehicles we utilize to reach our goals. Below is a summary of what it takes to achieve our desired results;

o   Firstly, we need resources that are dedicated to the campaign. This can take the form of money, people to implement the work, facilities, equipment and supplies. Resources are also usually referred to as inputs. We need inputs to produce results.

o   Inputs are utilized to fulfill the objectives of a campaign. How? This is achieved through implementation of planned activities.

o   The direct products of your campaign activities are called outputs. For example; the workshops and meetings you held; or the position papers, policy briefs and other documents you developed.

o   The benefits that are realized during or after a campaign are called outcomes. These benefits may include new knowledge or skills, changes in attitudes or behaviours, as well as improved conditions. In other words, outcomes are the results of our actions.

o   The overall effect of achieving specific results is called impact. In some situations it comprises changes, whether planned or unplanned, positive or negative, direct or indirect, primary and secondary that a campaign helped to bring about. Impact is the ultimate win that a campaign seeks to achieve.

Process Flow

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┌─────────────┐    ┌─────────────┐    ┌─────────────┐    ┌─────────────┐    ┌─────────────┐
│ Resources/  │ →  │ Activities  │ →  │  Outputs    │ →  │  Outcomes   │ →  │   Impact    │
│   Inputs    │    │             │    │             │    │             │    │             │
└─────────────┘    └─────────────┘    └─────────────┘    └─────────────┘    └─────────────┘
     (1)                (2)                (3)                (4)                (5)
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Your Advocacy Efforts (The work) | **The Results of your Advocacy (The effect of the work)**
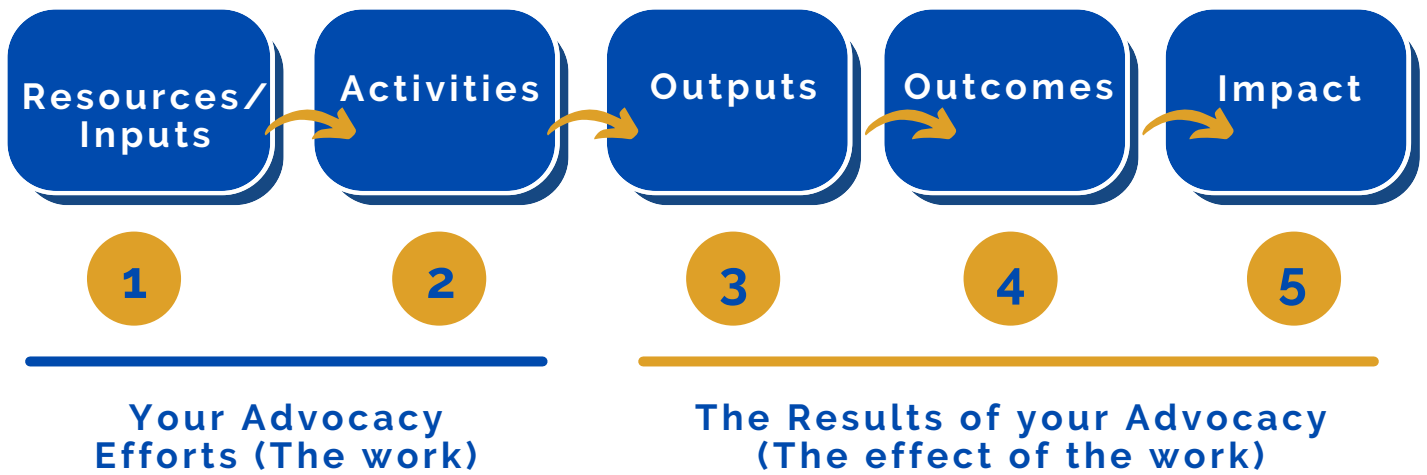
Making sense of our results

Outputs are those results which are achieved immediately after implementing an activity.

On the other hand, outcomes can be considered as mid-term results. They are not seen immediately after the end of the project activity. An outcome is a change that we see after some time as a result of the project activity. Outcomes can be changes in actions, relationships, policies or practices that are influenced by an intervention or campaign.

As advocates, we must aim to influence change, cause shifts and address barriers to achieving our goals. Focusing on outcomes is key! Below are some important questions to ask, that will help you to see and understand the results of your campaign;

o   What difference has our output made? E.g what difference has our meeting/ workshop/ position paper/ protest made?

o   We did this –SO WHAT?

o   What changed?

Keeping track of your advocacy results starts with having clear campaign objectives that should be linked to policy change and existing evidence. The questions you should ask are; Do our actions lead to the desired change? Are we doing those things that will enable us to achieve what we have set out to win? Are we making any difference through the activities we are implementing?

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Can you think of any other questions you might ask in order to keep track of your results?

Methods of collecting and measuring results

There are so many ways of tracking results and we use these methods so many times without thinking about it. How you collect and measure results depends on what you plan to use them for, as well as how practical and appropriate the approach is within your context. As outlined in the previous sections, results can be tracked at any point in the campaign; right from the implementation of activities right up to the point where there are changes that have occurred due to the campaign. Below are some examples of ways in which results can be collected and measured;

o   Records keeping e.g. Registers, Receipts, Log books, Reports
o   Surveys
o   Focused group discussions
o   Interviews
o   Community Score cards
o   Photographs
o   Direct observation
o   Case studies
o   Most significant change stories
o   Mapping
o   Ranking
o   Reviewing documents

Building a case for advocacy

∅   Numbers tell a story e.g. uptake of services such as HIV testing, PrEP, Contraceptives etc.

∅   Experiences strengthen the story e.g. drug stock outs, health worker attitudes, client satisfaction

∅   Photographs convey the message

∅   Evidence makes your advocacy case legitimate e.g. pulling together verifiable information into a position paper or policy brief.

REFLECTION & PRACTICE

CAMPAIGN RESULT	OUTPUT OR OUTCOME?
Number of SRHR trainings/workshops carried out	
Number of parliamentarians who attended policy dialogue	
Increase in knowledge among KP about PrEP	
Number of men who have successfully been able to seek for HIV treatment	
Increased rate of Voluntary Counselling and Testing among AGYW.	
Number of condoms dispensed	
Number of community awareness meetings	
Women are satisfied with the services they received while in shelter	
Number of PLHIV attending support groups	
Decreased incidence of HIV/AIDS	

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From the given list of results, show which ones are outputs and which ones are outcomes.

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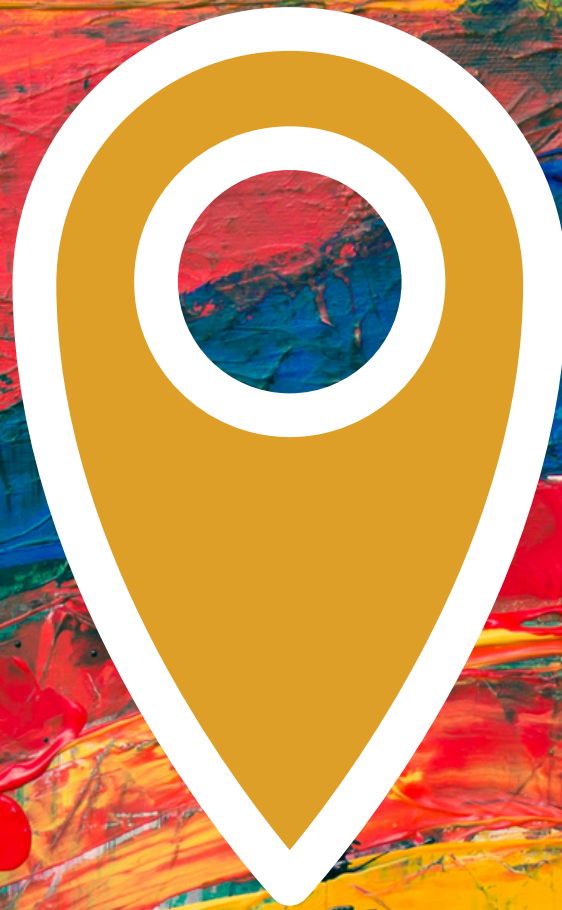
Hey there! Im back again to help you figure out where we are on our learning journey. In the last chapters, we looked at implementation and results. Now it is time to consider the effectiveness of our advocacy efforts. This also helps to assess our advocacy methods, and consider improvements where necessary.

4. Assessing the effectiveness of advocacy efforts

It is important for advocates to understand how MERL relates to the advocacy work we are doing on COMPASS. MERL is not just about demonstrating and showcasing positive results; it also involves taking stock of our losses and addressing challenges or barriers to the achievement of our campaign objectives. Accountability is key; do what you said you would do. Be responsible for the outcomes of your actions. There is also the issue of contribution versus attribution which advocates must considered when assessing their progress. We must give credit where it is due. Be honest about what you have achieved and be clear about the extent of your influence.

It is generally not an easy task to assess the effectiveness of advocacy. When results cannot be quantified or physically counted, we may feel like we have not made a difference, and yet our advocacy is actually yielding valuable outcomes. In order to help you measure the effect of your advocacy campaigns; you can utilize the COMPASS Campaign Advocacy Assessment Tool, which is usually referred to as CCAAT in short. The next sections will help you to understand what it is and how you can use it!

Although we have highlighted several ways of measuring results in the previous chapter, it is generally not an easy task to assess the effectiveness of advocacy . When results cannot be quantified or physically counted, we may feel like we have not made a difference, and yet our advocacy is actually yielding valuable outcomes. In order to help you measure the effect of your advocacy campaigns; you can utilize the COMPASS Campaign Advocacy Assessment Tool, which is usually referred to as CCAAT in short. The next sections will help you to understand what it is and how you can use it

Diagram developed by MERL team as part of CCAT orientation.

What is the CCAAT and why do it?

The COMPASS Campaign Advocacy Assessment Tool (CCAAT) helps to identify, describe, and analyze the progress of COMPASS campaigns. It encourages participatory reflection, engagement, evaluation and planning. The CCAAT also promotes learning and fine-tuning of strategies and tactics.

The CCAAT is divided into two parts:

Part 1: Verify campaign goals and objectives and Identify "wins"

Part 2: Rate the significance, influenceability and durability of "wins"

Step 1: Refine your campaign goals and objectives

Start by going through the Strategic Action Plans (SAPs) for each campaign

o   What were the stated goals and objectives of the campaign at the time the SAP was developed?

o   Have these evolved or is there a need to evolve them based on progress over the last 6 months?

o   How would you state the goals and objectives of the campaign now?

o   Record these newly stated goals and objectives on the C-CAAT form

Step 2: Identifying your wins

Just like outcomes, "wins" are short-term results that contribute to the achievement of a specific campaign. They can be:

o   full (achieving goal) or

o   partial (getting a step closer to the ultimate goal)

We also record wins that were hoped for but not achieved or any change that is detrimental to a campaign. These are called "setback outcomes"

When we are describing wins:

o   Wins can be expected or unexpected;

o   Wins can be pivotal (a partial win that changes the course of a campaign, or without which the ultimate goal would not be realized); or

o   Wins can "hold-the-line" (keeping a campaign goal from sliding backwards).

Once you have agreed on your wins, list them in the column labelled outcomes on the CCAAT form; and proceed to assess the progress you have made towards achieving each one of them. Below is an example of Part A of the CCAAT tool.

This part of the tool will ask you to rate as a group the progress of your campaign towards achieving the "wins" to date? Use your SAP as reference. Please mark the appropriate color cell.

Outcomes: Code "E" for Expected and "U" for Unexpected after each statement.	No Win	Partial Win	Full Win	a) If coded yellow (partial win) or green (full win), describe the observable attitudes, behaviors, and practices of your target stakeholders that may signal a positive shift or change ("win") that could contribute to your goal achievement? b) If coded red (no win/setback), describe the current conditions that impede or setback the achievement of the desired "win."	Identify follow-up actions to help improve, intensify, or sustain the attainment of the "win" or overcome a setback and negative outcome.
1.					
2.					
3.			`		

Step 3: Rating your wins

We rate our wins on three things:

o   Significance – the relative importance this win has on achieving the ultimate goal

o   Influenceability – how influential COMPASS partners were to achieving the win

o   Durability – how likely it is that the benefit from the win will be maintained.

How are you doing so far? I know that we have shared a lot of information so far. However, I'm sure you are managing!

Our scores for each category range between 0 to 4, where 0 is the least and 4 is the most you can score yourself. The descriptions for each score are also provided in the CCAAT form and enable you to select the most appropriate score. Remember these ratings are somewhat subjective and "squishy" i.e. they are an approximation, close to the actual, but not necessarily exact. But that's ok, because the idea is to get a general sense of how this win ranks compared to other wins and the overarching goal of your advocacy campaign.

You will also be required to substantiate your scores, by providing a brief explanation why you have chosen a particular score. In this way, you are able to demonstrate as clearly as possible the progress of your campaign.

Copy the full wins and partial wins you have recorded in part A of your CCAAT form; then list them in the outcomes column in Part B. Proceed to rate each win using the scales provided in part B of the CCAAT form. Below is an example of Part B of the CCAAT tool.

This part of the tool will ask you to rate the significance, influenceability, and durability of the "wins." Please use the numerical codes below and substantiate the rating through a brief explanation or evidence.

List of outcomes (partial and full "wins" only) from Part 1.	Significance of "wins" How important is this targeted outcome to advancing coalition goals and objectives OR the barrier? 4: Essential: No progress on the issue was possible without progress toward this "win". 3: Critical: Important part of a constellation of outcomes that all must be addressed. 2: Important: Plays a supporting role in advancing progress but alone will not make a significant difference. 1: Relevant: Of some limited importance or with minor influence on the problem. 0: Not relevant: No direct link to the goals, objectives, or barrier.		Influenceability by advocates How susceptible was the targeted outcome to influence by COMPASS partners and other advocates? 4: High influence: The focus of our influence was susceptible to change and we have direct access to the barrier and we helped address/remove it. 3: Moderate influence: The focus of our influence was susceptible to change and we helped move it to some extent. 2: Partial influence: Some aspects of the focus of our influence were susceptible to change that we contributed to. 1: Very limited influence: There was very indirect or limited, if any, influence by us or other NGOs on the focus of our influence. 0: Uninfluenceable by NGOs: While the focus of our influence may be important, it has not been possible for us or NGOs to influence or change it.		Durability of "wins" Once this targeted outcome is achieved, how likely is the benefit to be maintained? 4: Once the outcome is achieved, change is stable. 3: Change is somewhat stable and can be maintained with limited but continued and sustained effort. 2: Change will only be maintained with continued attention. 1: Change is highly contested and will require vigorous efforts to address new forms of the same barrier. 0: No durability at all.	
	Rating	Substantiation	Rating	Substantiation	Rating	Substantiation
1.						
2.						
3.						

How to use the CCAAT data

o   Celebrate wins! – take stock of what you have accomplished and celebrate the achievements

o   Refine your campaigns - Identify barriers and set-backs, and put in place changes in tactics or strategies to overcome them

o   Share learnings – share what you have learnt from this exercise across the Coalition and beyond

o   Feed your CCAAT data into required reporting and save yourself some time and energy

Remember to ask yourself the following important reflection questions;

o   How factual, valid (i.e., captures the outcome that truly happened) and reliable (i.e., identified outcome could be verified by multiple sources) are the outcome ratings and substantiation?

o   How can we ensure that the ratings we provide are verifiable?

REFLECTION & PRACTICE

COMPASS Advocates have been working to reduce the age of consent for access to health services by minors from 16 to 12 years to increase access to health services. Tactics have included meeting with MOH officials and parliamentarians, and the MOH had recently agreed to reduce the age from 16 to 12 for HTS and HIV treatment, and to convene a task force to look into the possibility of lowering the age of consent for SRH services too.

Questions:

o   Would you consider this a "win?" Why or why not?
o   If so, is it a full win? Partial win?
o   Is it Pivotal? Hold-the-line? Setback?
o   Is it expected? Unexpected?
o   If not a win, or as big as hoped for, what barriers stood in the way of achievement?

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Read the scenario above and answer the questions that follow.

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REFLECTION & PRACTICE

The story continues..

Just as the task force was about to be convened, a number of faith-based organizations got wind of the fact that these changes were taking place, and they reacted immediately by opposing these changes worried that such changes would increase sexual activity among young people. They went to the media with their messages, trying to turn people against the idea and creating challenges for MOH to institute these changes.

Questions:
o **Using part B of the CCAAT tool, how would you rate the overall wins of this campaign and why?**
o **What are the important lessons from this campaign?**

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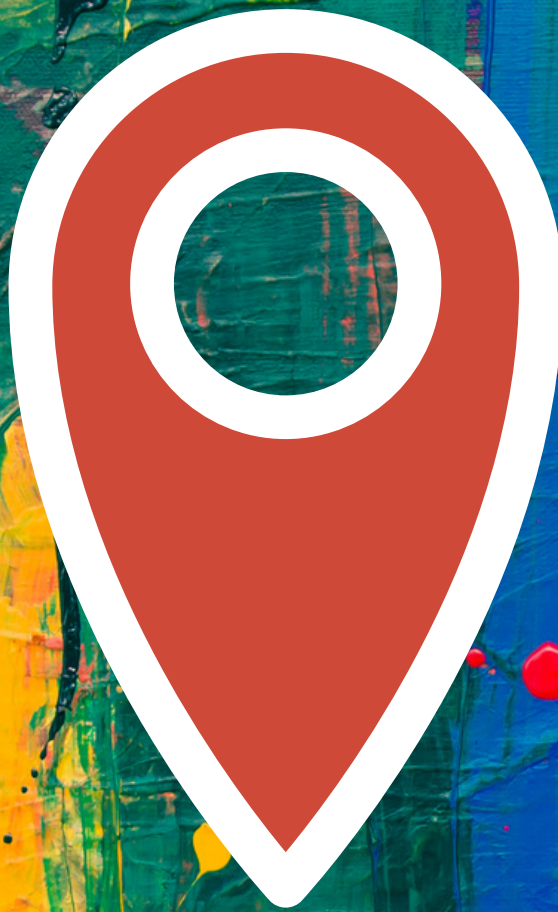
Our journey together is coming to an end, and I'm feeling a little sad. However, the next chapter looks at the celebration of our successes and learning from the challenges too. This is very important because celebration fuels greater advocacy efforts. Whereas, learning from our challenges ensures that we come up with solutions for the future.

4. Celebrating successes and learning from challenges

Telling the story of our campaigns helps us to reflect on the lessons we have learnt and gives us an opportunity to share our progress with the world. Sometimes, this is not easy because so many things are happening at the same time and we may struggle to decide on our most valued achievement. In this chapter, we introduce you to another tool which you can utilize to prioritize your wins and write compelling stories about the changes that have come about as a result of your advocacy. This approach is called SPARC in short; but the acronym stands for Simple Participatory Assessment of Real Change.

What is SPARC

SPARC is a participatory approach to documenting and learning from evidence based stories of change. It is a response to a need to capture the richness and range of changes in complex advocacy environments. It is a participatory evaluation approach, which draws from efforts perfected over the years by evaluators and practitioners who were trying to understand and document changes in environments that are constantly changing and diverse. SPARC has been designed to draw on the principles and steps of an evaluation approach called Outcome Harvesting, but modified it to reflect the realities and needs of people implementing advocacy projects such as yourself.

SPARC is aimed at helping partners collectively identify what has changed in the field or among stakeholders and whether and how we have individually or collectively contributed to those changes. In other words, SPARC helps us to tell the story of our most significant outcomes.

What do we mean by outcomes again?

o   What a social actor did, or is doing, that reflects a significant change in their behavior, relationships, activities, actions, policies or practice, which in turn may have implications for your campaign goals and objectives

o   Outcomes are not about what a project did (i.e., activities) but about the effects of those actions on its   stakeholders and the field it seeks to influence.

o   An outcome might describe an action that reflects a demonstrated change in awareness, commitment, engagement, collaborative action. They might also be changes in policy, funding or implementation of programs.

The emphasis on contribution versus attribution

SPARC recognizes that no one actor can achieve a full win without the support or input of other stakeholders in the advocacy field. It collects evidence of what has changed in the environment or among stakeholders; and helps you to determine whether your intervention has contributed to those changes and how

Image: All posters stock photo.

	Starting Point	Ending Point	Focus of Evidence
Traditional M&E	What we did	What changed as a result of our actions	Proving we were effective
SPARC	What our target actors did or how their position, convictions changed	How we may have influenced that change	Supporting that the observed change happened

The table above describes the difference between the traditional ways of assessing results and SPARC.

So how exactly do you conduct a SPARC process?

The first thing you must keep in mind is that SPARC is not an individual process but must involve all partners and stakeholders who have participated in or contributed to the implementation of your campaigns. It is a group exercise which requires full participation of everyone who is involved. The sections below summarize and describe the steps involved in SPARC.

Step 1: It starts with a picture

On a piece of paper, each member of the group must draw a picture which shows what they have achieved from the campaigns. The following question can be used to guide group members as they draw their pictures; What do you think have been the most significant signs of progress related to your organization's/ coalition's goals and objectives in the last year? This is an individual exercise and participants are free to be as creative as possible in their art pieces. Once everyone has completed drawing their picture, participants can take turns to describe to the group what they have drawn.

Step 2: Create a story collage

In your group, create a collage of all your drawings. Take time to reflect and discuss the following questions:

o   What is the big picture that your collage is showing?

o   If you were to describe the big picture in a sentence or two, what would it be?

o   Are there other views or interpretation?

Step 3: Deepening of outcomes

As a group, write at least three separate outcome statements on a sheet of paper. They may be positive, negative, expected, unexpected.Your outcome statements must respond to the question; what happened? In other words, your statement must provide a basic description of the outcome e.g. change in the behavior, relationships, activities, actions, policies or practice of the target actors, including where and when it happened.

The objective of this step is to develop a full list of potential positive and negative outcomes. In this step, participants "download" their lists of outcomes. It is more like a brainstorming session, rather than a process to scrutinize outcomes.

Tell your outcome stories

Once the group has clearly listed their outcome statement, it is time to write SPARC stories for each of the outcomes. Use the questions below to guide you as you develop your stories. Each story should not exceed 1500 words.
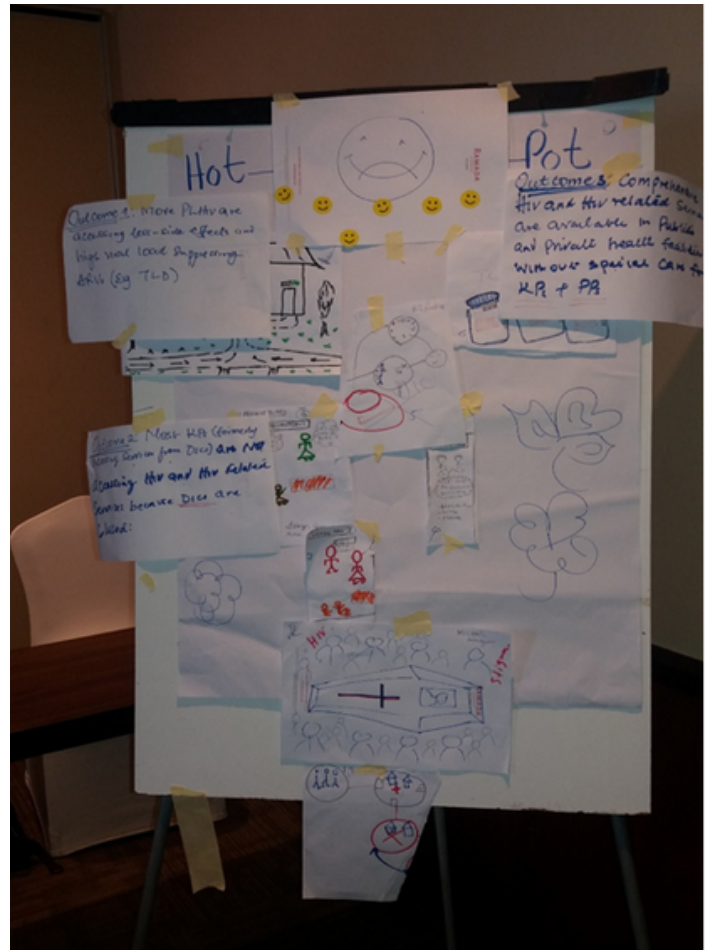
What Happened?

o   what changed? who was involved?

o   where and when did this happened?

Highlight why this change is worth noting

o   Did it push you closer to your goal?

o   How did this change affect your environment, a policy, service delivery or behaviors, etc?

What is your evidence to support your outcome story?

o   Press statements/news story? Policy documents? Program data?

What was your organization's or Coalition's contribution to this outcome?

o   "This couldn't have happened without us" or "We helped but others were the key actors" or "We had nothing to do with it"

Step 4: Agree on the most significant outcome story

The next step requires group members to categorize their results. Consider each of the outcome stories you have developed, to be a "leaf" in an "Outcome tree". See example of outcome tree in the picture below.

Adding the leaves to the Outcome Tree
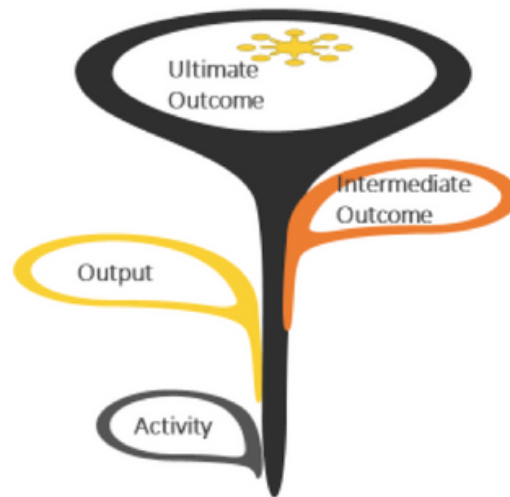
o   Where would you place each of your outcome stories?

o   Could certain results be upgraded into an outcome? If so, what are the missing elements that would make it into an outcome?

o   What else do we need to do to as a coalition to ensure that we harvest more outcomes?

o   Discuss and agree on the ultimate outcome story of your advocacy. This becomes your most significant SPARC story, which you can refine further to make it clearer before sharing with others.

Why tell stories?

o   People enjoy telling and listening to stories; it is a part of our way of life

o   Stories are memorable; people remember stories

o   Stories can be used to convey difficult messages or matters that are not usually discussed

o   Stories paint the picture of complex situations or contexts.

Elements of a good story

It is important to write your SPARC story in a way that is captivating and compelling. Below are a few things to keep in mind as you are writing your story;

o   Your story must have a clear background

o   It must be Descriptive; clearly spell out what happened, where, how, who, to achieve what and what changed

o   Show clearly why the change is important. Your story must show significance of the outcome.

o   Use simple language that is easy to understand. Acronyms must be unpacked and by all means try to avoid jargon!

o   Be specific; your story must leave the reader with answers, not more questions

o   Reflect voices of actors in the story by including powerful quotes that help the reader to understand context and emotions

o   Include a photograph that clearly tells the story; even without caption

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Can you think of more elements of a good story?

Photographs: a powerful tool for advocacy

We are often drawn to stories in magazines and newspapers, not just by the headlines, but also by the accompanying image. People tend to remember what they see more than what they read. It is therefore useful to add a photograph to your SPARC story so that readers have a visual to keep to memory. A story with a picture makes it more appealing. Remember that your photograph must tell us what we can expect even before we read your story.

Here are a few good reasons why you should prioritize including a photograph when you tell your SPARC story;

o   Images have power to connect with people on an emotional and subconscious level

o   Images provide the explanation for the numbers; the story behind the story

o   People are drawn to images. Eye-tracking studies show people spend longer looking at images on a website than reading text.

o   Our brains process images faster – up to 60,000 times faster than text

o   Images are a universal language. They can be understood regardless of language differences.

o   Images are shared more often than text only posts. Visual content is more than 40X more likely to get shared on social media than other types of content according to research

REFLECTION & PRACTICE

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How do we distinguish between felt outcomes and actual reality? Write down possible ways to ensure that the outcomes we are reporting on in our SPARC stories are verifiable?
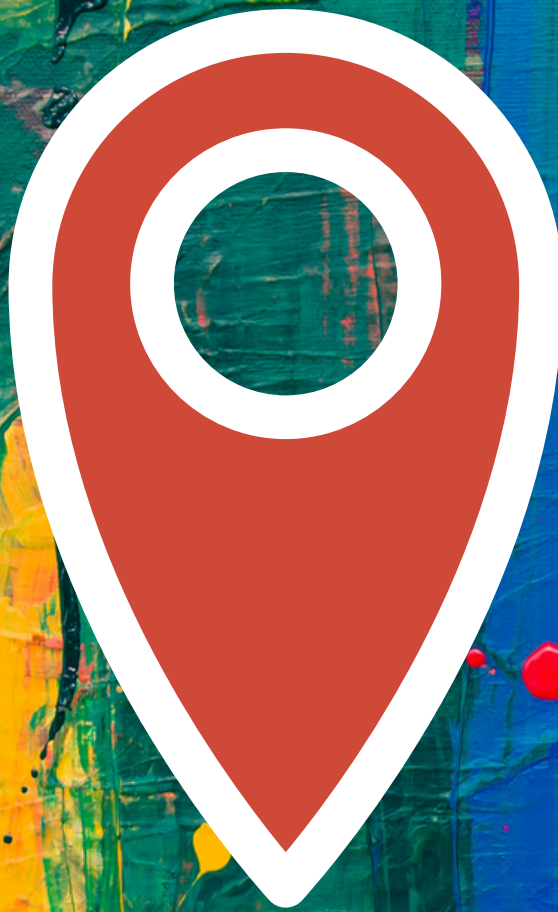
We are done! I have enjoyed sharing this journey with you. The last chapter highlights some of the key take-aways from this learning journey. We share some of the important things you need to keep in mind when conducting MERL. I hope you go on to do amazing work in your community as an advocacy champion!

5. Finally, what you must keep in mind when conducting MERL

After all is said and done, MERL remains a core component of advocacy work. It is not something that is done by one person who is trained to organize results. It is not done only when writing reports to funding partners. It is a day to day process, that we must deliberately engage with so that we strengthen our campaigns. MERL enables us to improve the performance of our campaigns. It also strengthens accountability and helps us to make strategic decisions. It is time for advocates to embrace MERL, to own it, use it and benefit from it! We hope that this handbook has removed any negative feelings you may have had about MERL; and replaced them with a deep desire and confidence to track your results and learn from them!

Involve everyone

Assessing advocacy progress and achievements requires the perspectives and inputs of many people. Everyone who has played a role in your campaign, be it big or small, can make a meaningful contribution when it comes to understanding advocacy results. Never be tempted to tell the advocacy story on your own. Effective advocacy MERL is everyone's business, so make sure to include and involve everyone who needs to be part of the review and planning processes for your campaigns.

Data quality

As we implement advocacy activities, it is important to pay attention to the quality of data we are gathering. This applies to both qualitative and quantitative data. Remember that data is the evidence we use to make a case for our campaigns.

We must always seek to uphold a standard of excellence and integrity when collecting and using MERL information. We must try by all means to avoid being biased for personal, political or any other reasons. Reliable data which has not been manipulated is believable. We stand to get more wins if we ensure that our advocacy evidence is accurate, complete, up to date and ethically mobilized.

MERL information is only useful when it is used

There is no point in spending so much time collecting information, through consultations, conversations, community monitoring, scrutinizing reports and many other ways; if the information will not add value to your advocacy efforts. At the centre of MERL is the understanding that data is important because it provides a basis for our arguments and forms the foundation of our advocacy asks. In other words, why bother doing the many activities if the information you gather will not be useful? Always remember that MERL information is key to improving the quality of our advocacy and strengthening our campaigns.

Image: Cartoon stock, via brain study.info
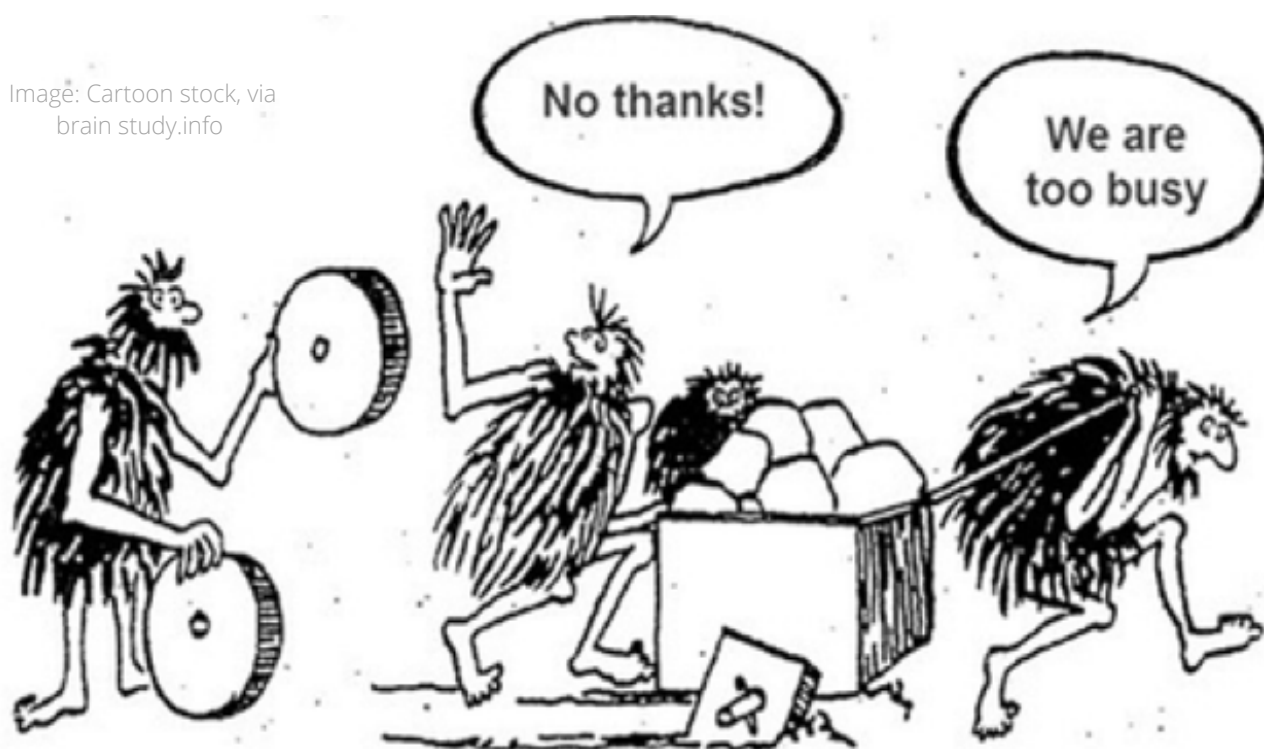
Fall in love with MERL!

Contrary to the beliefs of many people, MERL is actually easy and interesting. It makes our work meaningful and helps us to figure out solutions to problems that hinder our advocacy. It's time to fully utilize and optimize on the benefits of MERL. Hopefully after going through this handbook, a love for MERL has been ignited in you! So go ahead and tell someone about MERL, help a fellow advocate and set yourself up for tangible advocacy wins!

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CCAAT TOOL

COMPASS CAMPAIGN ADVOCACY ASSESSMENT TOOL (CCAAT)

Partner Guidance:

This tool is designed to help you identify, describe, and analyze the progress of your campaign. You should complete it in consultation with other campaign advocates in your organization/coalition to ensure a comprehensive and reliable review. This assessment should be completed semi-annually as a complement to the route finder, and it will help feed into your semi-annual reporting. You will need to complete one separate assessment for each of your campaigns.

The primary focus of this tool is on the outcomes or "wins" of a particular campaign. These "wins" are short-term or intermediate results that contribute to the achievement of the campaign goal (i.e. long-term outcome). "Wins" are normally construed as positive – although we are also interested in recording those wins that were hoped for but not achieved and why they were not achieved. Wins may be expected/predicted (i.e. based on your Strategic Action Plan or SAP where you have identified them) or unexpected/unpredicted. There are different levels of wins – and we are interested in you thinking about and recording all types of wins. For example, they may be a "true win" that represent a key policy, process, or behavioral change; a "pivotal win" that have affected follow-up decisions in major ways; or a "hold-the-line win" where a threat was averted, such as a harmful action, decision, or policy or something that was expected to happen but did not. To minimize bias towards uncovering only positive outcomes, the tool also encourages a critical discussion of "setback outcomes" that may have stalled or blocked the achievement of a campaign goal. These categories are by no means exhaustive but are aimed at allowing you to think about all the possible types of wins your campaign has achieved.

Campaign Title, from Strategic Action Plans	
Goal	
Objective/s	
Assessment Date	
Assessment Member Names	

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This part of the tool will ask you to rate as a group the progress of your campaign towards achieving the "wins" to date. Use your SAP as reference. Please mark the appropriate color cell.

Outcomes: Code "E" for Expected and "U" for Unexpected after each statement.	No Win	Partial Win	Full Win	a) If coded yellow (partial win) or green (full win), describe the observable attitudes, behaviors, and practices of your target stakeholders that may signal a positive shift or change (win) that could contribute to your goal achievement. b) If coded red (no win/setback), describe the current conditions that impede or setback the achievement of the desired win.	Identify follow-up actions to help improve, intensify, or sustain the attainment of the win or overcome a setback and negative outcome.

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This part of the tool will ask you to rate the significance, influenceability, and durability of the "wins." Please use the numerical codes below and substantiate the rating through a brief explanation or evidence.

List of outcomes (partial and full wins only) from Part 1.	Significance of "wins" How important is this outcome to achieving your campaign goals?? **4:** Very significant: No progress on the campaign goals and objectives was possible without progress toward this win. **3:** Significant: Critical to achieving the campaign goals and objectives. **2:** Moderately significant: Plays an important role in advancing the campaign's goals and objectives but alone will not make a significant difference. **1:** Slightly significant: Of some limited important or with minor influence on the campaign goals and objectives. **0:** Not at all significant: No direct link to the campaign goals and objectives.		Influenceability by advocates How influential were COMPASS partners and advocates to achieving the outcomes? **4:** High influence: The focus of our influence was susceptible to change, we had direct access to the barrier, and we helped address/remove it. **3:** Moderate influence: The focus of our influence was susceptible to change, and we helped move it to some extent. **2:** Partial influence: Some aspects of the focus of our influence were susceptible to change, we helped move it in a limited way. **1:** Very limited influence: There was very indirect or limited, if any, influence by us or on the focus of our influence. **0:** Uninfluenceable: While the focus of our influence may be important, it has not been possible for us to influence or change it.		Durability of "wins" Once this targeted outcome is achieved, how likely is the benefit to be maintained? **4:** Very likely: Once the outcome is achieved, change is stable. **3:** Likely: Change is somewhat stable and can be maintained with limited but continued and sustained effort. **2:** Moderately likely: Change will only be maintained with high-level continued attention and effort. **1:** Slightly likely: Change is highly contested and will require vigorous efforts to address new forms of the same barrier. **0:** Not at all likely: No durability at all.	
	Rating	Substantiation	Rating	Substantiation	Rating	Substantiation
1.						
2.						
3.						

SPARC STORY TEMPLATE

SPARC (Simple and Participatory Assessment of Real Change) Outcome Story Form

Partner Outcome Story Form
Directions: Please use this form to record significant campaign outcomes—positive, negative, intended, unintended—that have emerged.
Organization Name:
Date:
Outcome Story #: (Give this story a title, which reflects the clear direction of change)
What Happened?
Significance
Highlight why this change is worth noting, important or significant. We are seeking to record the connection between the context and the change.
To decide if the change is significant:
Is this the first time?
Does it link into our preliminary assessment—stakeholder analysis and mapping (including conflict and gender analysis), theory of change or the baseline survey?
Is it big? Small?
Does it seem to be a systemic change?
Does it seem to be a policy change?
Are there fruits of sustainability in there?

Contribution

What did your organization or coalition do to contribute to this change?
Here you can record the activities, resources that your organization or coalition put into making the change possible.

Evidence Box

Any documentation, data or other evidence that support this outcome or analysis. This may include physical or electronic emails, notes, phone calls, etc., which demonstrate the changes you are referring to. These can be added to the outcome form as pieces of evidence to substantiate claims, by embedding them, or uploading them electronically.

Is the evidence thin or robust? Please describe.

Additional Notes:

Partner Name:

SPARC-BIT TEMPLATE (abbreviated SPARC story)

1.   What have you been up-to these past few months? (What we did, how we did it)

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2.   What has been your most significant campaign outcome? (What we achieved/ changed/ shifted- the effect of our activities.)

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(Attach pictures and any evidence for your win)

3.   What next? (What are the steps we are going to take towards achieving a full win?)

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N.B: Please attach pictures that you may have taken to help tell your story

MERL Handbook for Advocacy Champions