

UNIT 10:

MONITORING AND EVALUATING YOUR CAMPAIGN

ADA Campaign Training Manual

UNIT 10: MONITORING AND EVALUATING YOUR CAMPAIGN



HelpAge International (Cambodia)

This unit will help participants to understand what monitoring is, and how to track the progress of their campaign at different stages. It concludes by encouraging participants to think about how they will use what they have learnt from this manual to get actively involved in campaigning when they go back to their community or organisation.

WHAT IS MONITORING?



In plenary, facilitate a light-hearted brainstorming of all the benefits of monitoring. Have participants throw a ball to each other; the person who catches it should say one good reason why we should monitor campaign work, or pass the ball if they cannot think of one. Keep the pace fast. Next think about the negatives – what are any drawbacks or challenges around monitoring. Begin another round of throwing the ball and brainstorm ideas.



Exercise 1 – What does monitoring mean to you?

Ask participants to work in threes to discuss and agree on a statement. This statement should capture what monitoring means to them. Invite all groups to rotate, leaving their statement at their own base and move on to a new base. Here they read and critique the new statement and add their suggestions and edits. Return to plenary.



In plenary, share the definitions that have been developed and critiqued, and draw out the most common elements. Give the definition of monitoring used by HelpAge International (see Handout Unit 10.1).

HelpAge International’s working definition of monitoring:

Monitoring is the process of continuous and systematic collection, analysis and interpretation and use of primary and/or secondary data to track progress over time against results/targets. It is important to be consistent and collect the same data throughout the campaign cycle.

HelpAge International’s working definition of evaluation:

Evaluation is the periodic collection, analysis, interpretation and use of data in order to determine the work and merit of the intervention(s) or programme(s) in terms of impact, relevance, achievements and sustainability, etc.

Explain that any monitoring process should be organised and continuous. Monitoring requires dedication, involvement, and a desire to learn and act differently based on what you learn as a result of monitoring.



Note: Making the commitment to monitor your activities is sometimes the hardest part of monitoring.

Progress tracking: It is important that people involved in campaigning keep a good record of their activities and policy asks, and any progress there has been, so that this can be monitored over time.

MONITORING DURING YOUR CAMPAIGN



Exercise 2 – How do you monitor?

Invite participants to think about and note down (if possible) what type of thing they could do to monitor a campaign that is underway, and how often. Divide the group into pairs, and ask each to compare their thoughts and discuss recommendations, drawing on their experience. Ask them to write their suggested activities on large Post-its.

Back in plenary, ask each pair in turn to give their recommendations. Add their Post-its to a flip chart to build a list of realistic campaign monitoring exercises. Where an idea is stated more than once, group them together, to show the popularity of that recommendation.

Underline how important it is to embed effective monitoring activities into the campaign for its lifetime. Recall the earlier brainstorm of the benefits of monitoring.



Note: A quick learning review, during the campaign, involving key campaigners, can respond to lessons and gently redirect efforts. Better this than a disappointing evaluation of a failed, unadapted campaign.



Post-campaign evaluation

If, after your campaign has ended, it is judged to have been successful, then its objectives have been fully achieved. But explain to participants that learning does not stop there. Pool ideas about what learning activities might take place after a successful campaign. Invite participants to suggest ideas and have volunteers note them on flip chart paper.



Ensure that you cover the activities in the opposite checklist (Handout Unit 10.2).



Checklist

- Celebrate and recognise the contributions of all those who played a part
- Contact your stakeholders – allies and opponents – as appropriate
- Thank and acknowledge any people or organisations who gave resources to support your campaign
- Record a story of the true events in your campaign
- Conduct a learning review
- Compare the results with your campaign plan – how closely did the activities you had planned fit the events that actually took place? How much did you adjust your plans as the campaign developed?
- Consider how the performance of the campaign could have been improved
- Use and share all your lessons actively to improve the performance of future campaigns – yours and other people's.

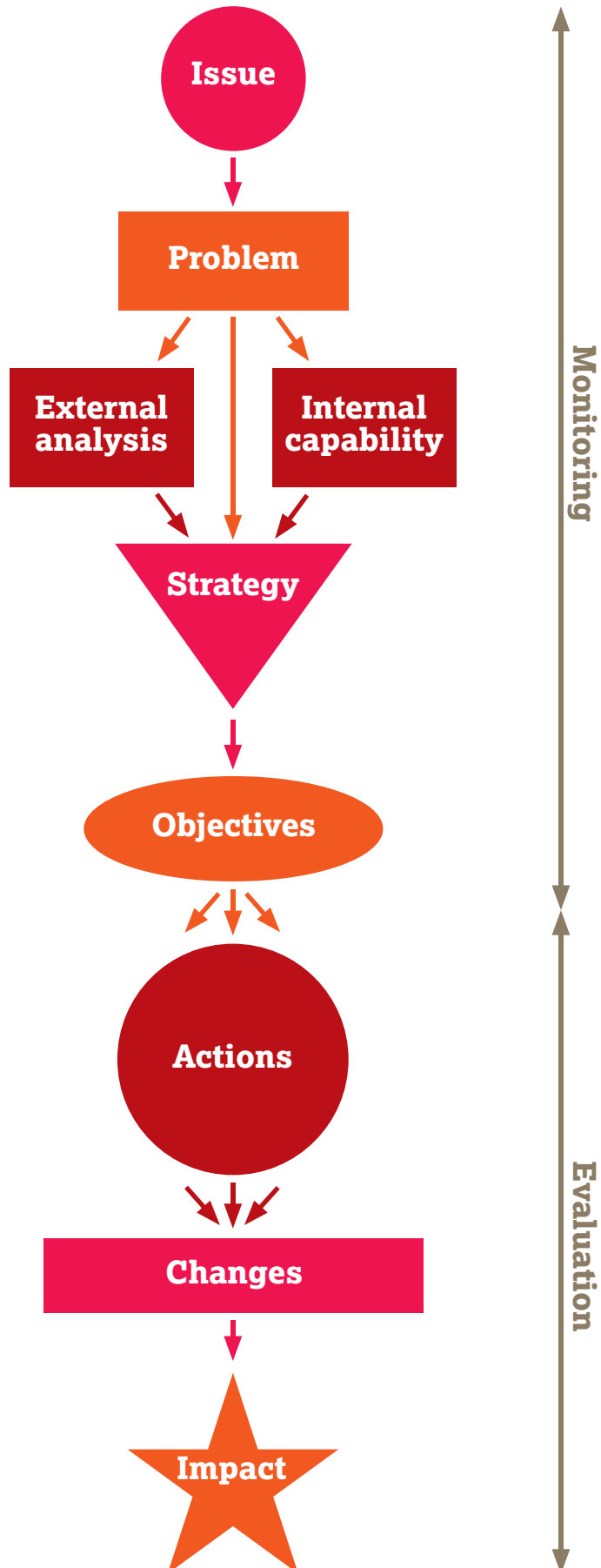
Explain that participants can play a critical role in sharing lessons, based on their real experiences of campaigning on issues that directly affect their lives. These findings are useful to a wider audience of campaigners and activists.

Explain that an evaluation of older people's campaigning work in HelpAge International recommended regular six-monthly joint reviews (and planning meetings) with key players in the campaign. These provide an opportunity for sharing successful strategies and approaches, and enhancing group collaboration and peer review.



The campaign process

In plenary, share the diagram of the campaign process (Handout Unit 10.3). Elicit agreement about when monitoring takes place, and when evaluation takes place.



In plenary, remind participants of how their campaign successes contribute to wider positive changes in society. Invite participants to give examples of local campaigns that link to wider regional or international campaigning efforts.

Results: the direct effect of successful campaigning has immediate results – measurable against the campaign’s SMART objectives.

Outcomes: are the long-reaching results of campaigning.

Impact: is the word normally used to describe what greater effect these combined results are having in the world.

It is helpful to monitor significant shorter-term achievements, expressed in your SMART objectives. Results that can be quite easily monitored include, for example, how your campaign has built the capacity of its supporters.

Large-scale change is rarely immediate and is very difficult to achieve. As you monitor the activities and objectives of your campaign, keep motivated by the prospect of many potential, wider outcomes. The more you have intentions for positive wider outcomes, the more likely you are to achieve results. Invite participants to consider what the potential wider outcomes of campaigns to protect older people’s rights might be.



HelpAge International (Kyrgyzstan)



Exercise 3 – Measuring outcomes

Using Handout Unit 10.4, distribute the descriptions given to participants, one to each small group. Allow the groups to discuss what each statement means. Participants should be prepared to briefly explain the meaning of their outcome statement to the whole group in plenary.



Outcomes: some of the things you can measure

Policy gains: specific changes in policy, practice and/or institutional reforms.

Implementation gains: how stated policies are implemented, how these have changed, and what impact the change has had on the people and communities expected to benefit.

Political and democratic gains: civil society groups gain increasing recognition as legitimate actors; there is greater democratic space in which civil society organisations can operate; there is improved access to governments and other institutions; there is increased respect for human rights (eg, greater freedom of information).

Civil society gains: how the capacity of community-based organisations and NGOs is strengthened; there is better co-operation between civil society groups; community-based organisations and NGOs have the skills needed to successfully hold governments and international organisations to account.

Partnership gains: campaigning leads to the formation of regional and international networks that effectively feed into the work of international institutions; strong relationships are built between groups in developing and developed countries that erode traditional inequalities and dependencies and form the basis for long-term co-operative action.

Organisational gains: campaign groups gain increased profile and respect as a credible source of information, and can secure more resources for future activities.

Please share and examine the following Roadmap to study further the types of campaign monitoring in use – according to the needs and interests of your group.



Example of a “Roadmap for advocacy” – monitoring a longer-term plan

(see Handout Unit 10.5 for the following descriptions)

Year one: assessment of the issue carried out; advocacy strategy developed (stakeholder analysis, policy analysis, etc); advocacy aims and objectives established; plan of action developed; further research and analysis; alliances built.

Year two: dialogue with decision-makers and other key stakeholders begins; relationships built with key stakeholders; publications, media work, seminars to raise awareness; issue is part of public agenda for debate; more communications work and campaigning to highlight the issue; more research to provide the evidence that policy-makers require; lobbying of key influencers; lobbying of decision-makers.

Year three: lobbying continues; major stakeholder seminar convened; decision-makers begin to change their opinions; more research carried out regarding the issue and potential solutions; draft policies produced.

Year four: new policies agreed; new policies resourced and implemented; positive changes in people’s lives.



HelpAge International (occupied Palestinian territories)



PERSONAL LEARNING

At the close of the session, ask participants to think forward. Ask them to decide on first actions towards their campaigning, once they leave the workshop. Ask them to reflect on the questions listed in Handout Unit 10.6 and to draw up their own personal action plan.

10.6

Personal action plan

What are you going to do after this session to...

- share your knowledge within your group?
- put into practice what you have learnt?
- monitor your progress?
- increase your learning?
- get advice and support?



Wrap up: Please refer to facilitators' notes in Appendix A for guidance on monitoring progress and embedding learning.

UNIT 10:

HANDOUTS



Handout Unit 10.1

HelpAge International's working definition of monitoring:

Monitoring is the process of continuous and systematic collection, analysis and interpretation and use of primary and/or secondary data to track progress over time against results/targets.

HelpAge International's working definition of evaluation:

Evaluation is the periodic collection, analysis, interpretation and use of data in order to determine the work and merit of the intervention(s) or programme(s) in terms of impact, relevance, achievements and sustainability, etc.

Monitoring processes should be organised and continuous. Monitoring requires dedication, involvement, and a desire to learn and act differently based on what you learn as a result of monitoring.



Note: Making the commitment to monitor your activities is sometimes the hardest part of monitoring.



HelpAge International (Cambodia)



Handout Unit 10.2

Checklist for learning activities after a successful campaign

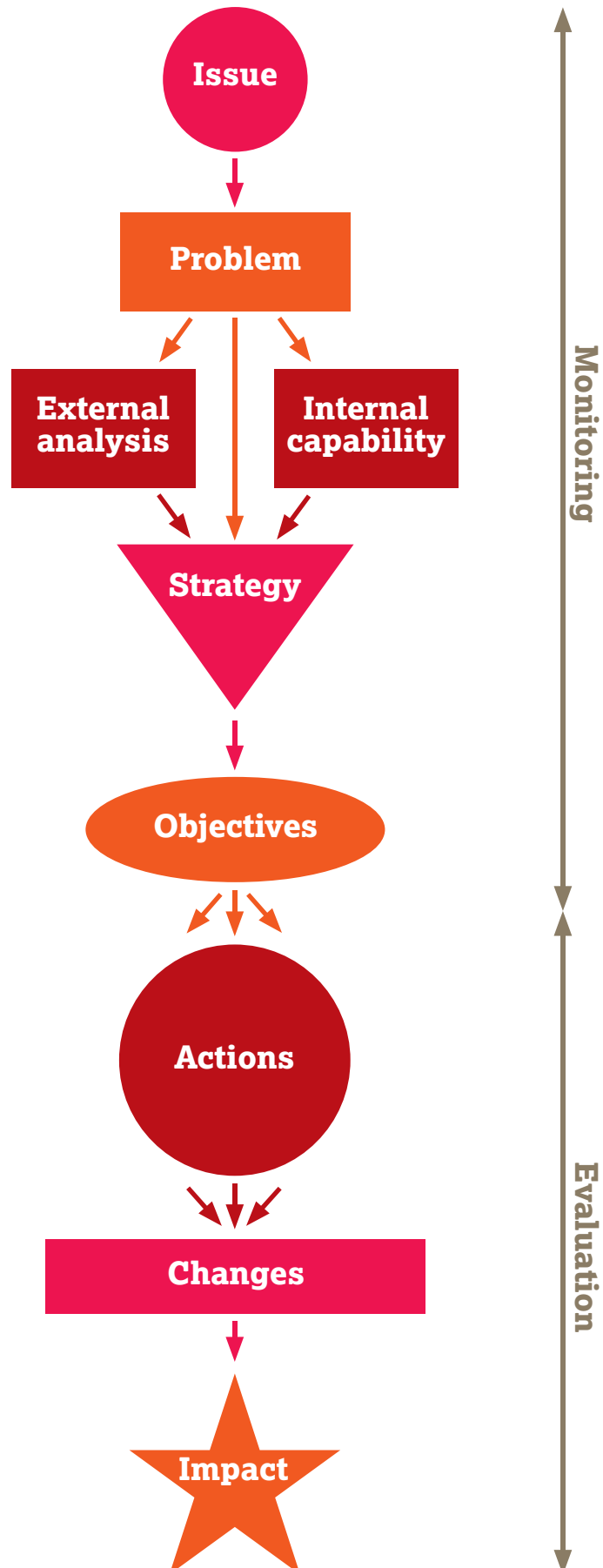
- Celebrate and recognise the contributions of all those who played a part
- Contact your stakeholders – allies and opponents – as appropriate
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- Record a story of the true events in your campaign
- Conduct a learning review
- Compare the results with your campaign plan – how closely did the activities you had planned fit the events that actually took place? How much did you adjust your plans as the campaign developed?
- Consider how the performance of the campaign could have been improved
- Use and share all your lessons actively to improve the performance of future campaigns – yours and other people's.





Handout Unit 10.3

The campaign process





Handout Unit 10.4

Outcomes: some factors to measure

Policy gains: specific changes in policy, practice and/or institutional reforms.

Implementation gains: how stated policies are implemented, how these have changed, and what impact the change has had on the people and communities expected to benefit.

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Civil society gains: how the capacity of community-based organisations and NGOs is strengthened; there is better co-operation between civil society groups; community-based organisations and NGOs have the skills needed to successfully hold governments and international organisations to account.



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RENPERMAE (Ecuador)

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Organisational gains: campaign groups gain increased profile and respect as a credible source of information, and can secure more resources for future activities.



Handout Unit 10.5

Example of a “Roadmap for Advocacy” – monitoring a longer-term plan

Year one: assessment of the issue carried out; advocacy strategy developed (stakeholder analysis, policy analysis, etc); advocacy aims and objectives established; plan of action developed; further research and analysis; alliances built.

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Year three: lobbying continues; major stakeholder seminar convened; decision-makers begin to change their opinions; more research carried out regarding the issue and potential solutions; draft policies produced.

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HelpAge International (occupied Palestinian territories)



Handout Unit 10.6

Personal action plan

What are you going to do after this session to...

- share your knowledge within your group?
- put into practice what you have learnt?
- monitor your progress?
- increase your learning?
- get advice and support?





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Handout Unit 10.7

Older people are at the heart of campaigns work. Through this training and the ongoing engagement of older people, we are growing a global movement of campaigners who will portray the characteristics listed below.

PROFILE OF AN OLDER PERSON CAMPAIGNER

YOU

- ...CAN DIALOGUE AND DEBATE AND PERSUADE AND YOU CAN WIN!**
- ...ARE SURE TO MAINTAIN AND ATTEND TO YOUR GROUP**
- ...HAVE A UNIQUE PLACE TO SPEAK CREDIBLY ABOUT ISSUES – BECAUSE YOU EXPERIENCE THEM**
- ...ARE KEEN TO INFORM OTHERS ABOUT OLDER PEOPLE AND THEIR REALITIES**
- ...HAVE A HEART TO DEVELOP YOUR GROUP**
- ...ALLOW PEOPLE TO SELF-IMPROVE TOGETHER**
- ...ARE STRONG WHEN YOU CONSIDER YOUR OWN VALUES, CULTURE AND HISTORY**
- ...ARE READY TO PARTICIPATE**
- ...ARE A GOOD ANCHOR FOR YOUR GROUP**
- ...UNDERSTAND THE CONTEXT, ESPECIALLY THE POLITICAL CONTEXT**
- ...ARE A VALUABLE SPOKESPERSON FOR THE MEDIA**
- ...CAN SPEAK ABOUT YOUR LIFE AND THE CHALLENGES YOU FACE IN AN ENGAGING WAY**
- ...SHOW EFFECTIVE LEADERSHIP IN THE GROUP OR MOVEMENT**
- ...DEPEND ON THE SOURCE OF POWER WITHIN YOURSELF**

PROFILE OF AN OLDER PERSON CAMPAIGNER

RHODA NGIMA, 77, KENYA



HelpAge Kenya

“We have been removed from a very dark pit and brought to the surface where there is light. ADA has made me an ambassador to spread news about older people. I have learnt that even in older age I am able to do something worthwhile and constructive for my country.”

Rhoda Ngima

Rhoda has long been a pivotal figure in her church and community, where she brings people together, inspiring them to stay strong and keep going through life’s challenges. She’s now bringing her leadership experience and social commitment to ADA, where she’s already made a big impact.

In 2009, she led an ADA delegation to meet the Prime Minister. And the following year, she met the Minister for Gender, Children and Social Development to explain the benefits of increasing pensions. After the meeting, the Government agreed to raise pension payments for all older people in Kenya.

In 2012, Rhoda travelled to Brussels where she met several Members of the European Parliament. In her speech, she spoke about her life in Kenya and the challenges older people face in developing countries, urging the European Union not to forget her generation.

She passionately believes that the world’s older people should unite as one voice.



HelpAge Kenya

This is one unit from a set that makes up the ADA Campaign Training Manual. You can download single units, or the full manual from:

www.agedemandsaction.org

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ADA
Age Demands Action

**HelpAge
International**
global network

Age Demands Action is a HelpAge global network campaign