

# AEA Coffee Break Webinar

## Learning and Evaluation Plans for Advocacy and Policy Change Strategies

*Presenters:*

Jane Reisman, Founder and Senior Advisor, ORS Impact

Anne Gienapp, Senior Consultant, ORS Impact

Amy Arbreton, Evaluation Officer,  
The William and Flora Hewlett Foundation

THE WILLIAM AND FLORA  
**HEWLETT**  
FOUNDATION



[ORSIMPACT.COM](https://orsimpact.com)

## Three Hewlett Foundation Projects Referenced:

1. Evaluation of the Education Program's **Federal Policy Grantees**
2. MLE Consultant to **Lead Policy Cluster Grantee** for Education Program
3. Summative Evaluation of the **Nuclear Security Initiative**

# Five Recommendations *for* Advocacy Monitoring & Evaluation



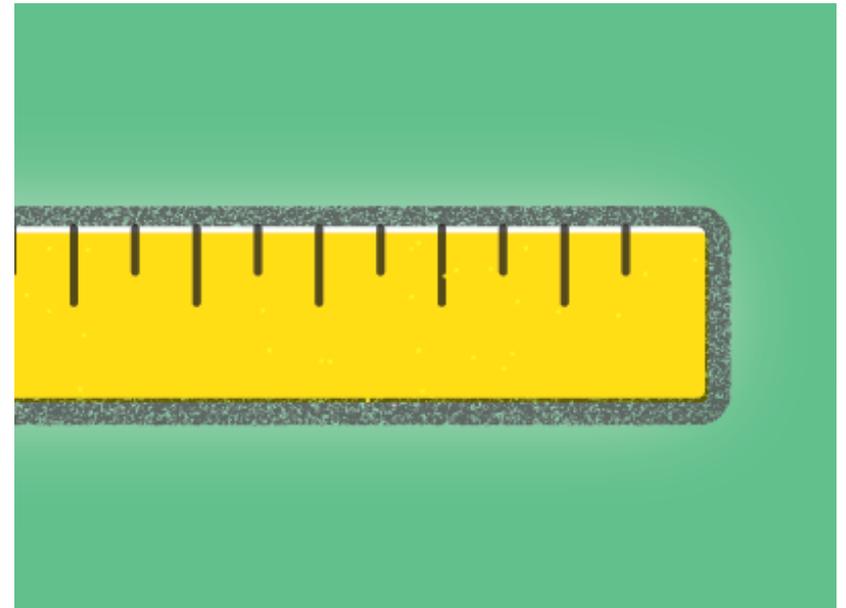
# Questions?

## Five Recommendations:

1. Let go of narrowly defined formative and summative evaluation approaches to M&E for advocacy and policy change work
2. Add “L” to the equation with M&E, and leverage learning
3. Turn monitoring on its head; ask different kinds of questions
4. Develop cross-cutting learning questions with partner stakeholders and engage stakeholders in ongoing learnings
5. Embrace qualitative data as important and valuable, while also keeping an eye on select metrics that signify progress

## Recommendation 1:

- **Let go** of narrowly defined formative and summative evaluation approaches to M&E for advocacy and policy change work



# What are Useful Approaches Across Projects?

- Fit to purpose
- Ask the right questions



## Recommendation 2:

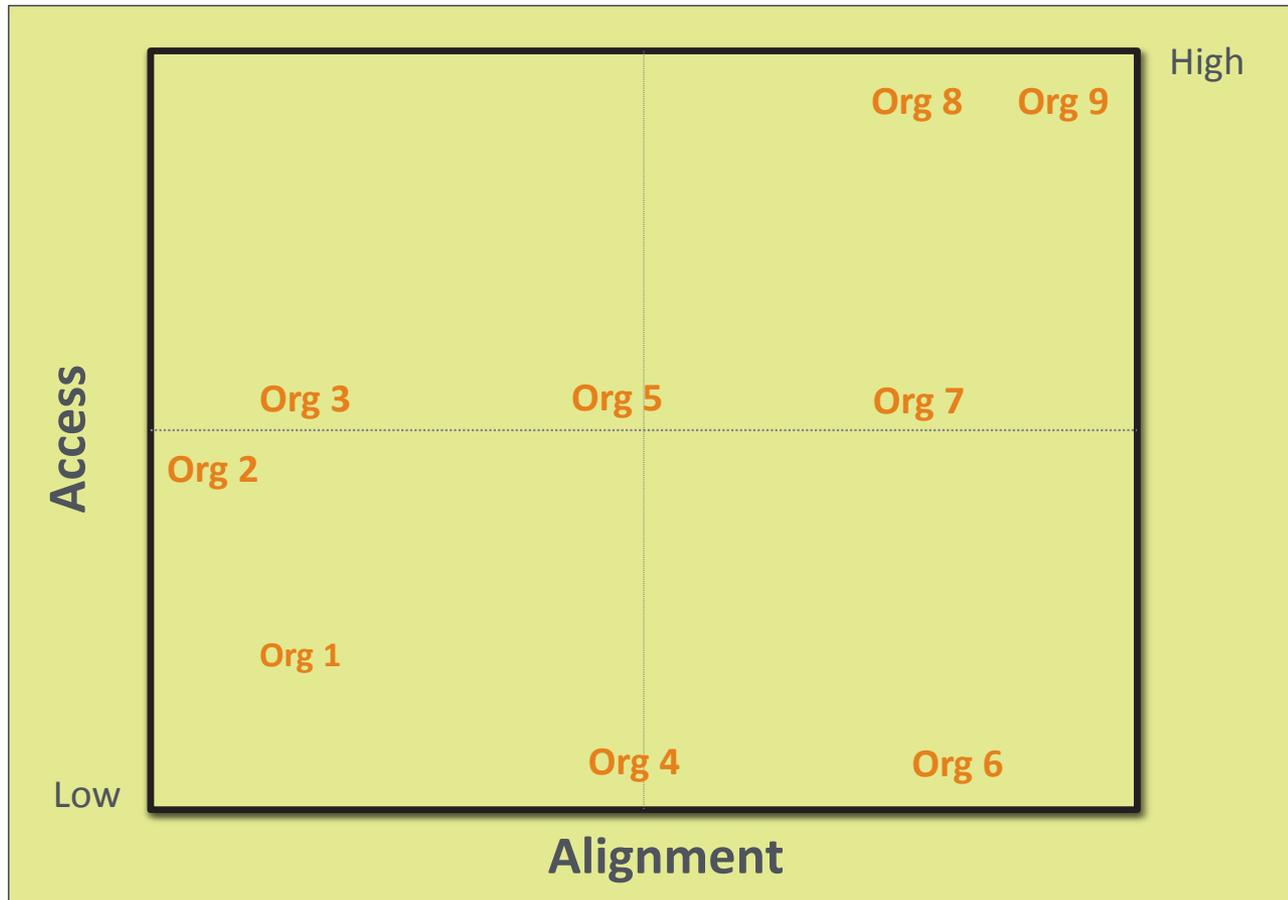
- Add “L” to the equation with M&E, and **leverage learning**



M “L” E  
^

# Hewlett Education Program Lead Policy Cluster Grantee

2x2 Matrix: Grantee Alignment and Access



## Recommendation 3:

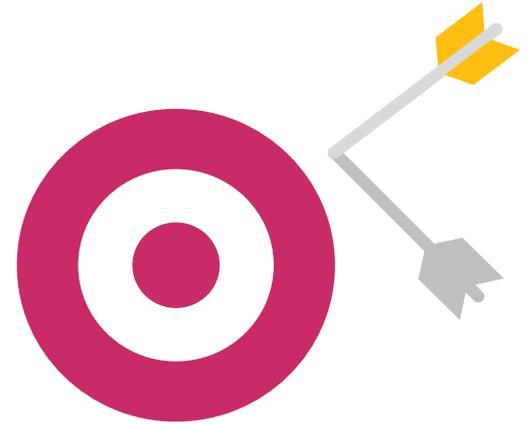
- Turn monitoring on its head; **ask different kinds of questions**



## Nuclear Security Initiative

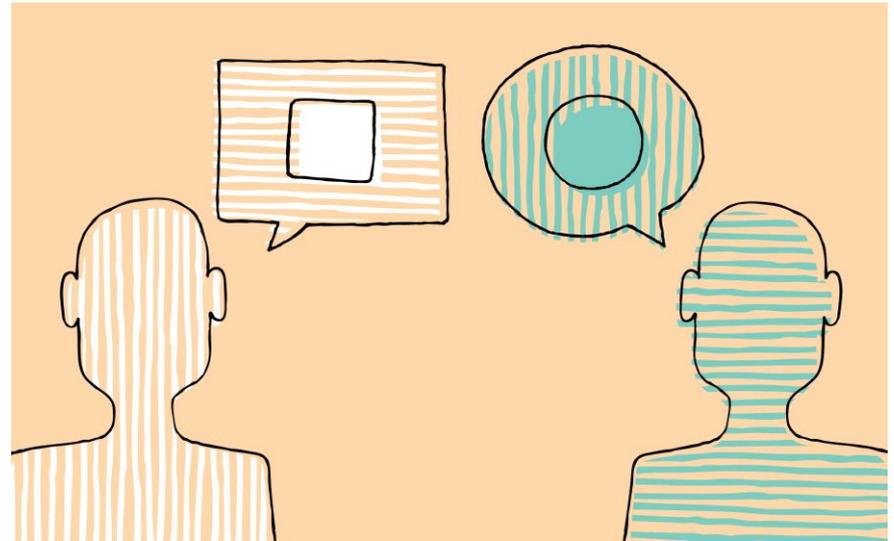
### Too many targets to monitor effectively

- Changes in landscape affected relevance of targets
- Grantee reports provided little info about progress towards targets



## Recommendation 4:

- Develop **cross-cutting learning questions** with partner stakeholders & engage stakeholders in ongoing learnings



## Recommendation 5:

- **Embrace qualitative data** as important and valuable, while also keeping an eye on select metrics that signify progress



# Iceberg | A Metaphor for Policy Change

**MORE  
VISIBLE**

- Adoption of domestic and international policies, agreements or treaties
- Influential champions advocate for key causes
- Enforcement of established policies and agreements
- Visible media/social media coverage

**LESS  
VISIBLE**

- Breadth of expertise in the field
- Common language, shared goals among nations
- Open avenues for effective dialogue and communication among decision makers
- Alignment and coordination among a diverse set of actors, e.g., funders, research, advocates
- Within NGOs and the field as a whole, strong capacity to carry out effective communications and advocacy
- Readiness among NGOs and the field to nimbly and powerfully respond to changes in the policy environment, rising opportunities

# Q & A



For more information and follow up contact

*Presented by:*

**Jane Reisman**, Founder and Senior Advisor, ORS Impact  
[jreisman@orsimpact.com](mailto:jreisman@orsimpact.com)

**Anne Gienapp**, Senior Consultant, ORS Impact  
[agienapp@orsimpact.com](mailto:agienapp@orsimpact.com)

**Amy Arbretton**, Evaluation Officer, The William and Flora Hewlett Foundation  
[aarbretton@hewlett.org](mailto:aarbretton@hewlett.org)