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Learning from mapping MLE capacity for advocacy

This Learning Brief aims to share lessons from an innovative project to support organizations that advocate on behalf of the Global Fund for AIDS, Tuberculosis and Malaria (the Global Fund), and receive funding from the Bill and Melinda Gates Foundation (BMGF), to develop their core Measurement, Learning and Evaluation (MLE) capacities.

Through 2018 and 2019, a dedicated team from Itad is providing bespoke support to the advocacy organizations to develop tailored skills, tools and systems to support their work. This is the first time a portfolio within the BMGF Program Advocacy and Communications team has trialed a project like this. Given the innovative nature of the project, Itad is producing a series of Learning Briefings to document lessons from the project.

The primary audiences are BMGF staff, other funders of advocacy organizations, as well as advocacy organizations and their partners who are interested in optimizing MLE for effective advocacy.

This Learning Brief focuses on the lessons gained from mapping MLE capacity for advocacy – the collaborative diagnostic phase of the project that informed the bespoke design of the support for each advocacy organization. First, we discuss the organizational framework we developed especially for this project to guide mapping MLE capacity in advocacy organizations. We then share findings and insights from the mapping activity, and how these were applied to develop the organization-specific capacity development plans. The Brief concludes with sharing lessons for MLE partners and funders supporting MLE for advocacy organizations

At the time of writing this brief, we are still in the process of developing MLE frameworks for organizations' advocacy work. We are piloting MLE processes and tools with the advocacy partners and will continue to test these through learning-by-doing to draw out more learning on how bespoke and proportional MLE can help organizations improve advocacy effectiveness. Learning Briefing 2, due in late 2019, will draw together these insights and provide a set of guidelines or recommendations for replicating the approach.

The Learning Brief is structured into three parts, as follows:

- 1. Overview:** MLE Capacity Support for Advocacy Organizations
- 2. MLE framework:** Adaptive MLE for strategic advocacy
- 3. What we learned:** Lessons for technical MLE partners and funders supporting MLE for advocacy organizations.

1. OVERVIEW: ADAPTIVE MLE FOR STRATEGIC ADVOCACY

Traditional MLE approaches often are not in line with the resources that advocacy organizations have available and the dynamics of their advocacy strategies. We have responded with a tailored approach that we have termed 'adaptive MLE for strategic advocacy'. Adaptive MLE involves organizations using MLE proactively to critically review and pivot their advocacy strategies in response to shifts in the context and to optimize their effectiveness.

Advocacy initiatives are usually complex and unpredictable, involving many players and influenced by factors which are often beyond the control of the organization. Strategies need to pivot quickly to respond to political opportunities and emerging change. Advocacy actors therefore tend to be constantly thinking about how they are progressing, whether tactics are getting the desired responses, and how to adapt strategy and tactics given changes in the context. This rapid-fire learning is usually done while in the ‘flow’ of a campaign, with advocates using their extensive experience and professional intuition, and exchanging knowledge verbally to adapt plans quickly. MLE can support this learning by providing systematic information, but only if MLE approaches are designed as an integral part of advocacy strategies, and embedded in the organization’s ways of working.

To do this job well, adaptive MLE needs to support:

- **Knowledge capture:** MLE must provide the right strategic information in a timely way to enable rapid course correction and adaptation;
- **Valuing experience and judgment:** MLE must inform professional intuition with good quality data to promote critical reflection; and
- **Rapid application and adaptation:** MLE must be actively used in decision-making to improve strategies.

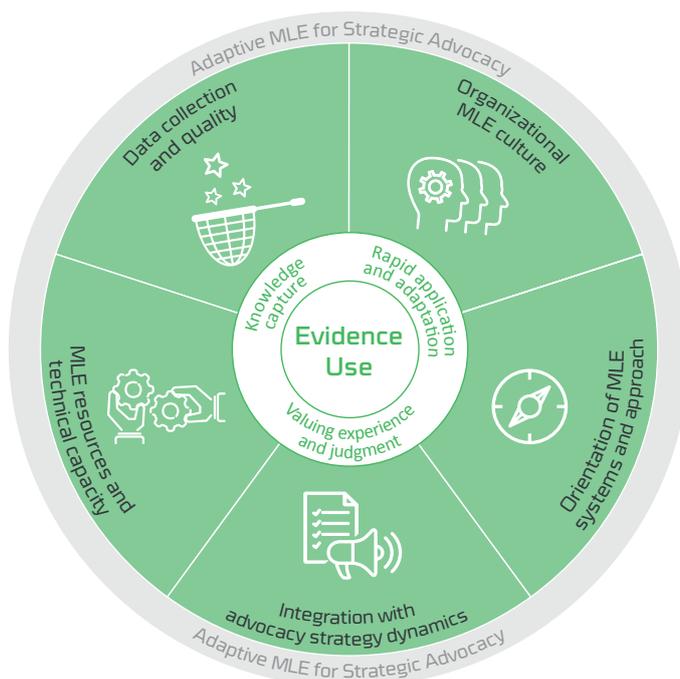
These three principles formed the core of our adaptive MLE capacities framework, which is discussed in the next section (see Figure 1).

2 MLE FRAMEWORK: ADAPTIVE MLE FOR STRATEGIC ADVOCACY

The MLE capacity mapping framework was designed as a holistic frame to help advocacy organizations to analyse their journey towards optimized MLE for effective advocacy. Our experience and research into capacity building (see Box 2) led us to take an organizational lens to first understand key aspects of how each organization works as a whole before looking specifically at MLE capacity. Therefore, we designed the framework to help us explore how advocacy organizations critically reflect on strategies, share insights to improve their work, and the informal and formal processes they have in place to support this. From this adaptive perspective, MLE has to be considered as much more than a set of results frameworks or data collection tools, which may miss important pieces of the picture of what is needed to support use and learning from MLE.

However, we also needed to understand the more structured processes around accountability and reporting. We therefore framed MLE for advocacy as a dynamic organizational system, with five dimensions that span from organizational culture to data quality, captured in a visual as the ‘wheel’ in Figure 1.

FIGURE 1: ADAPTIVE MLE CAPACITIES FRAMEWORK



Source: Itad (2019)

To harness the full potential of an adaptive MLE approach, the dimensions of the framework need to work together across the organization, but how they work will be different and unique to each organization. In the framework, use of MLE is supported by a recognition of how advocates work, summarized in the three principles in the inner white circle.

The framework was positioned in our discussions with the advocacy organizations as a structured way of analyzing MLE capacity in a way that reflects the uniqueness of each advocacy organization, identifying where MLE processes might work better in some dimensions than others, and highlighting where approaches

could be improved. The five dimensions in the green ring that support MLE are further unpacked into 12 sub elements (see Table 1 for the detailed framework).

TABLE 1: THE FIVE DIMENSIONS OF ADAPTIVE MLE FOR STRATEGIC ADVOCACY

Adaptive MLE capacity dimension	Sub-element
<p>1. Organizational MLE culture The formal and informal ways an organization acts to support MLE, encourages critical reflection that challenges and tests assumptions, and values the information produced.</p>	<p>1.1 Our senior leaders value MLE, communicate its importance and ask for evidence to inform their decisions.</p> <p>1.2 Our senior managers as well as advocacy team members are actively involved in regular and systematic reviews of data and reflection on results, and adapt advocacy strategies and plans in response.</p>
<p>2. Orientation of MLE systems and approach The overall orientation, design and quality standards of the MLE approach – i.e. focus, policies, practices, data quality and timeliness – enable the organization to systematically and effectively collect, analyze and use MLE information for learning, planning, decision-making and accountability.</p>	<p>2.1 Our MLE approach fulfils upwards accountability demands to senior managers and funders.</p> <p>2.2 Our MLE approach fulfils wider accountability demands, to partners and constituencies with whom the organization works, including suborganizations.</p> <p>2.3 We use MLE analysis, information for process improvement, strategy decisions, and internal learning.</p>
<p>3. Integration of MLE with advocacy strategy dynamics MLE is explicitly linked to advocacy strategy and planning, reflects an explicit notion of how it is anticipated change will happen, and MLE information is used by staff and managers to critically reflect on strategies, support or challenge whether our advocacy strategies are translating into the intended benefits and impact.</p>	<p>3.1 Our MLE is explicitly linked to organizational advocacy strategies and incorporates various levels of change – activities, outputs, outcomes – and in a way that joins the levels up.</p> <p>3.2 Critical learning moments are built into ongoing implementation of advocacy work and lessons are documented at key moments to inform learning.</p>
<p>4. MLE resources and technical capacity Staff have the appropriate skills, time, management support and budget to deliver MLE for the organization.</p>	<p>4.1 We have proportionate plans and processes in place to develop and maintain support, expertise, and manage MLE for our organization.</p> <p>4.2 Our internal MLE plans are implemented by staff with consistent access to sufficient and appropriate skills, resources, managerial support and authority.</p>
<p>5. Data collection and quality The tools and processes to collect data are fit-for-purpose and aligned with available resources and generate reliable and robust data.</p>	<p>5.1 We collect quantitative and qualitative data at various levels of change (activities, outputs & outcomes) and analyze it using relevant methodologies to create meaningful and reliable information that helps make sense of advocacy work.</p> <p>5.2 We have clear and easy to understand MLE guidelines to assist data collection, analysis, reporting and use, which are shared with staff and kept up to date.</p> <p>5.3 We have the processes in place to ensure quality data is prioritized and we have a clear understanding of the limitations to assessing relationships between advocacy activities and outcomes.</p>

2.1 APPLYING THE FRAMEWORK – A COLLABORATIVE PROCESS

The framework was applied through a collaborative process involving the advocacy organizations and the MLE support team. Every organization is different, and so the process of applying the framework was tailored for each one. Broadly, we conducted a series of face-to-face interviews with senior leaders, advocacy teams, and MLE focal points, as well as a selection of their partners for network organizations. These discussions were structured using the MEL Framework (Figure 1), to guide organizations in reflecting on each dimension and mapping where their organization was currently situated in terms of MLE capacities.

These deep-dive discussions provided a rich and rounded picture of the organizations' strategies, ways of working and current processes. Rather than holding interviews with individuals as we initially planned, most staff preferred to be interviewed in work groups (e.g. advocacy teams together). This positive shift in our plans created opportunities for richer discussions. The face-to-face meetings also provided important opportunities to assuage concerns, build trust and set a constructive tone for meetings.

For each MLE capacity element, we defined levels of capacity against a qualitative spectrum ranging from Beginning to Exemplary. Table 2 shows an example of how this spectrum was defined for one of the sub-elements of the MLE Framework. Marking the spectrum from Beginning to Exemplary three points along the spectrum allowed organizations to make a progressive diagnosis within the respective categories. Most importantly, framing the collaborative mapping as just a snapshot of the organizations' MLE journey allowed us to explore the potential value of changing ways of working, what the barriers to doing so might be, possible priorities and entry points and how much effort might be required to achieve the desired change.

TABLE 2: SUB-ELEMENT 2.3 ADVOCACY TEAMS USE MLE ANALYSIS, AND INFORMATION FOR PROCESS IMPROVEMENT, STRATEGY DECISIONS AND INTERNAL LEARNING

Beginning 	Developing 	Accomplished 	Exemplary 
2.3. Advocacy teams use MLE analysis, information for process improvement, strategy decisions, and internal learning			
MLE processes, data, and resulting analysis are not considered sufficiently reliable, comprehensive, relevant, timely and/or useful to inform internal learning and decision-making needs.	Key issues to give attention to: <ul style="list-style-type: none"> • Advocacy teams consider themselves a primary audience for MLE • Advocacy teams actively use the MLE data or analysis they collect, beyond use for funder reporting or communications. • Advocacy teams consider MLE data and/or analysis to be an accurate representation of their work • Advocacy teams and managers consider MLE to be sufficiently complete, reliable, and accessible for use in decision-making • MLE plans are timed to feed into internal decision-making (vs., for example, timed to funder reports but occurring after follow-up proposals have been developed) • <i>Grantees supporting advocacy through suborganizations: Suborganizations utilize monitoring and reporting data for evaluation and learning</i> 		MLE processes, data, and timely analysis are integral aspects of internal decision-making about advocacy projects and strategy, and internal learning.

2.2 KEY FINDINGS

Through the mapping process, we developed a rich understanding of the ways in which advocacy organizations of different shapes and sizes collect, share, and use information to guide their advocacy. The mapping we did with the organizations identified a range of situations and challenges that we felt would be recognized by other advocacy organizations. We summarize three key findings here.

1. **Existing information sharing practices provide promising opportunities for MLE capacity development.** We found that the advocacy organizations we are working with continually share information to monitor implementation and pivot their advocacy strategies. They do this through update calls, email exchanges and team meetings, in ways that could readily be adapted to support measurement and learning. We started to refer to this kind of information sharing as 'informal MLE'. These are activities that are not consciously planned as MLE; however, they do bear many of the characteristics we would assign to MLE, e.g. sharing intelligence about context and short-term results from specific tactics, and they form

a significant proportion of organizations' MLE processes. Their informal nature, however, means that some of the most valuable lessons are not captured for future use or institutional memory. We felt that these moments offered definite opportunities to instill light-touch approaches that would allow organizations to store these lessons and access them for future use in adapting and setting advocacy strategy.

2. **MLE needs to suit the nimble way that advocacy organizations work if it is to be useful.** Our 'deep dive' conversations brought home to us that MLE for strategic advocacy needs to allow organizations to remain nimble in their approach. The organizations we are working with are skilled political advocates, often operating on the basis of many years of experience and a deep understanding of the landscape they are navigating. This intuitive approach is highly valuable for the work they undertake. It is essential that MLE capacity support takes this into account when designing interventions.
3. **There is an opportunity to streamline reporting to funders, and improve learning and reflection.** Most organizations devoted a fair amount of staff resources to fulfilling their funders reporting requirements. Reporting processes are often resource intensive and don't necessarily support broader learning. However, there is a desire among organizations to reorient reporting processes toward supporting a learning culture. We saw a number of opportunities to improve the effectiveness of reporting practices in order to gather insights to take forward into strategic decision-making. This might be as simple as asking a different set of questions during an annual strategy meeting, changing a reporting template to focus on outcomes rather than activities, or streamlining a reporting process to involve fewer people for more efficient use of time. However, it is still important to be realistic in expectations about the level of information that MLE can reasonably provide. It cannot provide a 'magic bullet' for the ideal blend of advocacy tactics to achieve goals, rather it offers a more nuanced critical reflection to inform decisions about how tactics could be adapted next time.

3 WHAT WE LEARNED: LESSONS FOR MLE PARTNERS AND FUNDERS SUPPORTING MLE FOR ADVOCACY

We found that the mapping process, guided by the MLE Framework, yielded important insights into the dynamics and cadences of how advocacy organizations work. As well as helping us enormously, the advocacy organizations reflected back to us that they appreciated the time taken to understand how they work and our willingness to tailor our approach to their needs, rather than imposing 'blueprint' solutions. They also gained an appreciation of MLE as something that touches the heart of their work, going much further than reporting. The mapping framework can definitely be improved by simplifying the language - but it was agreed that it was broadly useful and engaging as a diagnostic tool. Most importantly, the face-to-face process of mapping, analyzing and discussing MLE helped to build the mutual trust and understanding between us and the partners that has really catalyzed our collaborative approach.

This section shares the lessons we gained from taking a holistic lens to analyze MLE for effective advocacy. Lessons are presented for two different audiences: MLE partners and funders of advocacy organizations.

3.1 LESSONS FOR MLE PARTNERS

Framing organizational MLE

- Taking an organizational lens helped us understand how organizations work and how MLE could fit their unique settings - this was appreciated by organizations.
- Taking an organizational lens helped to link MLE to improving organizations' advocacy strategies – something they really care about.
- Senior leaders from organizations were engaged by framing MLE as a leadership concern, e.g. moving beyond reports and data to organizational culture and effectiveness.
- Our mapping process helped organizations see that they don't need dedicated staff, or formal MLE positions – useful MLE can be seeded and led from different points.

Engaging advocacy organizations

- MLE needs to fit the different ways advocacy organizations work and their unique contexts – a generic approach doesn't work for all.

- Flexibility is needed to encompass diverse and unique organizational structures, sizes, and decentralized locations.
- Trust needs to be built due to the sensitive political nature of the work - understanding the organization's ways of working is a good start.
- Grantees' motivations for engaging with us varied – you can't assume a shared intrinsic motivation to strengthen MLE.

Designing MLE for advocacy

- Responding to a changing political environment limits the opportunity for fixed, long-term MLE planning – but MLE processes and tools can be flexible to deal with this uncertainty. Limited resources are a real constraint – MLE for advocacy needs light-touch approaches that can be layered onto existing planning and information sharing practices to promote utility and use.

3.2 LESSONS FOR FUNDERS

Framing MLE support and modelling good practice

- Funders need to acknowledge that offering top-down MLE support risks being seen by grantees as them falling short in their performance – MLE support needs to be framed positively as a development opportunity for the advocacy community to collectively improve their work.
- If funders are sensitive about how MLE support is framed, organizations may be more willing to open up their organization to external MLE consultants.
- Funders can help foster trust with grantees and a commitment to MLE by modelling an open, learning approach - sharing feedback from evaluations, engaging with reporting and showing how they learn from MLE evidence.

Expectations and resources for MLE

- Funders play a key role in setting MLE expectations with upwards accountability frameworks – funders' MLE tools could be refined to be more appropriate for advocacy organizations by allowing for greater flexibility and a non-linear understanding of how change happens.
- Funders should have clear and realistic expectations about what can be achieved during a period of MLE capacity support – many changes will only emerge incrementally once organizations take up, integrate and actively use new MLE approaches.
- Funders should acknowledge the resources and staff time needed for organizations to design and implement new or redirected MLE approaches - additional resources may be required to review existing practices, design and test new systems, and roll these out.

ABOUT THE PROJECT: MLE CAPACITY SUPPORT

The 2016-17 evaluation of the Bill and Melinda Gates Foundation's (BMGF) Global Fund Advocacy Portfolio (GFAP), conducted by Itad, identified an opportunity to optimize organizations' internal MLE processes. The evaluation found that organizations were at different stages of their MLE journeys, with some being in the process of developing tools and systems, and others not yet familiar with the value MLE could bring to their work. As a result, BMGF commissioned Itad to provide support to six GFAP organizations to ensure they have fit-for-purpose, core MLE capacities in advance of the 2019 Global Fund 6th Replenishment process.

The organizations participating in the project are highly diverse, ranging from two-person secretariats of networked organizations to medium to large-organizations, with various offices across multiple sites and countries. Few have dedicated MLE staff, with most having MLE functions embedded in other roles. In recognition of this, the support provided by Itad aimed to take a collaborative approach to co-develop MLE approaches to pilot, adapt and embed MLE tools and organizational systems that are tailored to advocacy organizations' unique contexts and needs.



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