International HIV/AIDS Alliance

ICASO
INTERNATIONAL COUNCIL OF AIDS SERVICE ORGANIZATIONS

MEASURING UP

A GUIDE FOR FACILITATORS

HIV-related advocacy evaluation training for civil society organisations

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International HIV/AIDS Alliance

Established in 1993, the International HIV/AIDS Alliance (the Alliance) is a global alliance of nationally-based organisations working to support community action on AIDS in developing countries. To date we have provided support to organisations from more than 40 developing countries for over 3,000 projects, reaching some of the poorest and most vulnerable communities with HIV prevention, care and support, and improved access to HIV treatment.

The Alliance's national members help local community groups and other NGOs to take action on HIV, and are supported by technical expertise, policy work, knowledge sharing and fundraising carried out across the Alliance. In addition, the Alliance has extensive regional programmes, representative offices in the USA and Brussels, and works on a range of international activities such as support for South-South cooperation, operations research, training and good practice programme development, as well as policy analysis and advocacy.

For more information about Alliance publications, please go to: **www.aidsalliance.org/publications**

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The International Council of AIDS Service Organizations (ICASO)

Founded in 1991, the International Council of AIDS Service Organizations' (ICASO) mission is to mobilise and support diverse community organisations to build an effective global response to HIV and AIDS. This is done within a vision of a world where people living with and affected by HIV and AIDS can enjoy life free from stigma, discrimination, and persecution, and have access to prevention, treatment and care.

The ICASO network of networks operates globally, regionally and locally, and reaches over 100 countries around the world. The International Secretariat of ICASO is in Canada and its Regional Secretariats are based in Africa, Asia and the Pacific, Europe, Latin America and the Caribbean, and North America.

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MEASURING UP
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HIV-related advocacy evaluation training for civil society organisations

INTRODUCTION TO THE GUIDE

What is the guide and how can it be used?

The guide has two main components:

1. a stand-alone learner's guide for anyone interested in evaluating HIV-related advocacy
2. a facilitator's guide that describes how to run a two-day skills-building workshop to cover the content of the learner's guide and apply the skills learned. Accompanying the learner's guide (the main handout and reference material for sessions), there are ten PowerPoint presentations and a document for facilitators called *Measuring up: workshop supplementary facilitation material*.

Who is the guide written for?

The guide is a resource for leaders, advocacy and monitoring and evaluation staff of civil society organisations (including networks) who are involved in designing, implementing and assessing advocacy projects at different levels – international, national and sub-national. Leaders of networks of key populations are likely to find this guide particularly relevant and helpful.

What is the purpose of the guide?

The overall purpose is to increase users' capacity to evaluate the progress and results of their advocacy work.

The guide aims to:

1. help users to identify and confront the challenges faced by community-based organisations evaluating HIV-related advocacy
2. introduce new thinking for designing advocacy evaluations
3. give users the opportunity to apply some aspects of the evaluation design process to their specific contexts
4. make users aware that advocacy evaluation is a fast-growing and evolving field, with a large number of publications on advocacy evaluation design, approaches and methods available via the Internet and summarised in the resources section of the learner's guide.

Why has the guide been developed?

During the XVII International AIDS Conference in Mexico in August 2008, the Alliance, ICASO and Constella Futures jointly organised a skills-building session on the challenges of monitoring and evaluating advocacy work. There was a high level of interest, and participants wanted to acquire the practical skills necessary to improve their monitoring and evaluation. So the facilitation team agreed to explore different ways of responding to this demand and follow up on lessons learned from Mexico.

Until recently, few resources existed to guide evaluation in this area. However, in the last few years advocacy evaluation has become a burgeoning field, and several approaches and tools for evaluating advocacy and policy work have been developed. Therefore, the Alliance and ICASO decided to invest in producing a guide to evaluating advocacy work, drawing on the different approaches and tools now available.

Who contributed to the content of the guide?

The guide includes numerous extracts from publications developed by leading organisations in the field of advocacy evaluation, including Organizational Research Services, Harvard Family Research Project and Innovation Network. Any unintended misrepresentation of information from these sources is the fault of the guide developers. Other key contributors to the development of the guide were ICASO and Alliance staff, ICASO and Alliance grantees and network member organisations, and consultant Nicky Davies (www.aidsdev.com).

How to use the facilitator's guide

The facilitator's guide suggests activities for a three-day skills-building workshop and one-day learner's workshop that aim to introduce the content and key messages of the learner's guide. The workshop aims to build on the existing capacity of civil society organisation staff evaluating their advocacy work on HIV-related issues in resource-limited settings. We have also suggested an agenda for a one-day workshop that can be customised depending on the needs, interests and expertise of the group.

Before you facilitate the workshop, make sure that you are familiar with the content of the learner's guide and its key messages. Accompanying the facilitation guidance in this document are ten PowerPoint presentations for your use. The content of the PowerPoint presentations mirrors that of the learner's guide and includes suggested presentation points within the session instructions in this guide. The PowerPoint presentations are deliberately dense with information. You should edit them to suit your presentation style and level of confidence. The more text you edit, the more you will need to include this information confidently in what you say to support the slide.

This facilitator's guide provides detailed guidance on how to facilitate a three-day or one-day workshop. The workshop can be adapted to be longer than three days by extending the time for key activities and discussion time after presentations and group work. You could also provide extra time for participants to plan their own evaluations and make presentations to others for feedback. Alternatively, you might want to allocate time for participants to share examples of previous evaluation work, discuss the strengths and limitations of the approaches they have taken, and learn about the data collection methods and data tracking tools that different organisations use. A suggested three-day workshop timetable is on page 4 and a one-day workshop timetable is on page 5.

This guide has been written with 14 to 24 participants in mind. However, if you have more or fewer participants than this, be sure to adapt the facilitation methods and instructions accordingly. We suggest that you invite two people from each organisation to attend a three-day skills-building workshop using this guide. One person should have strong advocacy experience and one person should have strong monitoring and evaluation experience. This will make sure that the group work sessions are well informed. If two people from each organisation are unable to attend the workshop then you will need to amend some of the participatory learning activities for the sessions.

There are a number of publications available to help you to plan and facilitate a successful workshop. If you feel like a facilitation 'refresher' you can review the following publications:

- *A facilitators' guide to participatory workshops with NGOs/CBOs responding to HIV/AIDS* (International HIV/AIDS Alliance, 2001)
- *100 ways to energise groups: games to use in workshops, meetings and the community* (International HIV/AIDS Alliance, 2002)
- *Training and practice manuals 1: how to plan and run a participatory workshop* (Southern African AIDS Trust, 2004)

The *Measuring up* learner's guide should be handed out to participants at the start of the workshop. This will provide important materials for your facilitation. Extra facilitation material is included in the *Measuring up: workshop supplementary facilitation material* document (in Microsoft Word for easy amendment).

You will need the following resources for your workshop:

- *Measuring up* facilitator's guide – one per facilitator and one spare
- *Measuring up* learner's guide – one per participant and facilitator, and a few spare
- ten *Measuring up* workshop PowerPoint presentations
- printed content of the *Measuring up: workshop supplementary facilitation material* as described in the session instructions
- 'Evaluation design framework' flip chart showing the diagram of the seven components of the advocacy evaluation design framework, from page 11 of the learner's guide (see also the facilitator's notes for the intoductory session to Module 3, page 18)
- computer with Adobe Acrobat Reader and PowerPoint packages, projector (check it 'talks' to your computer), projector screen, extension cables and plug adapters
- access to a printer to print off information from *Measuring up: workshop supplementary facilitation material*
- notepads, pens and workshop timetables (one set for each participant's chair at the start of the workshop) – the workshop timetable can be adapted and amended using the template in *Measuring up: workshop supplementary facilitation material*
- sticky labels or name tags with participants' full name and organisation – encourage participants to add or underline the name they would like to be used during the workshop
- flip chart stands (preferably two), plenty of flip chart paper and 30 flip chart pens (mainly black and blue, plus four to five red)
- any props or preparation needed for energisers (red boxes with ideas for an energiser are included at relevant points in the facilitator's guide)
- make a 'car park' flip chart for any questions asked by participants during the workshop that you intend to address later
- refreshments (including healthy snacks and drink options to maintain energy levels and support those taking medication), water available at all times, meals, accommodation and daily allowances for participants and facilitators
- semi-circle of chairs for plenary sessions, with tables and chairs around the edge of the room and breakaway spaces to accommodate all participants for group work.

Important note

If you are facilitating a one-day workshop using the instructions provided in this guide, you will need to add information to some of the existing PowerPoint presentations or create flip charts of information. All the information you will need can be drawn from the learner's guide. Details of when you will need to do this are included in the one-day workshop instructions box at the end of each session described in this guide.

Suggested three-day workshop timetable
Measuring up: HIV-related advocacy training for civil society organisations

	Timing	Activity
DAY ONE	09:00 – 09:30	Ice-breaker and workshop expectations
	09:30 – 10:00	Workshop introduction, ground rules and pre-workshop questionnaire
	10:00 – 10:05	Session 1: Module 1 introduction
	10:05 – 10:30	Session 1.1: Defining advocacy
	10:30 – 11:00	Refreshments break
	11:00 – 12:00	Session 1.2: Defining key elements of monitoring and evaluation
	12:00 – 12:05	Session 2: Module 2 introduction
	12:05 – 12:40	Session 2.1: Understanding why it is important to evaluate advocacy
	12:40 – 13:00	Flexible session
	13:00 – 14:00	Lunch break
	14:00 – 15:05	Session 2.2: Identifying the challenges faced by civil society organisations evaluating HIV-related advocacy
	15:05 – 15:30	Session 2.3: Exploring how evaluating advocacy can be different from programme evaluations
	15:30 – 16:00	Refreshments break
	16:00 – 16:15	Session 3: Module 3 introduction
	16:15 – 17:00	Session 3.1: Determining evaluation users and uses
DAY TWO	09:00 – 09:30	Day one recap
	09:30 – 10:30	Session 3.2(a): Mapping your advocacy work
	10:30 – 11:00	Refreshments break
	11:00 – 12:00	Session 3.2(b): Mapping your advocacy work
	12:00 – 12:05	Energiser
	12:05 – 13.00	Session 3.3: Prioritising what to evaluate
	13:00 – 14:00	Lunch break
	14:00 – 15:05	Session 3.4: Developing your evaluation questions
	15:05 – 15:30	Session 3.5: Deciding on an approach to measurement
	15:30 – 16:00	Refreshments break
	16:00 – 17:00	Session 3.6: Selecting indicators
DAY THREE	09:00 – 09:30	Day two recap
	09:30 – 10:30	Session 3.7: Identifying and choosing data collection methods relevant to advocacy evaluation
	10:30 – 11:00	Refreshments break
	11:00 – 12:00	Session 3.7: continued
	12:00 – 12:05	Session 4: Module 4 introduction
	12:05 – 13:00	Session 4.1: Consolidating learning on how to evaluate HIV-related advocacy
	13:00 – 14:00	Lunch break
	14:00 – 16:00	Session 4.1: continued
	16:00 – 16:15	Session 4.2: Reflecting on the key messages and learning points from the workshop to share with our colleagues
	16:15 – 17:00	Workshop summary, post-workshop questionnaire and workshop close

Suggested one-day workshop timetable
Measuring up: HIV-related advocacy training for civil society organisations

Timing	Activity
09:00 – 09:20	Workshop introduction
09:20 – 09:30	Session 1: Module 1 introduction and Session 1.1: Defining advocacy
09:30 – 09:50	Session 1.2: Defining key elements of monitoring and evaluation
09:50 – 10:00	Session 2: Module 2 introduction and Session 2.1: Understanding why it is important to evaluate advocacy
10:00 – 10:15	Session 2.2: Identifying the challenges faced by civil society organisations evaluating HIV-related advocacy
10:15 – 10:30	Session 2.3: Exploring how evaluating advocacy can be different from programme evaluations
10:30 – 10:50	Refreshments break
10:50 – 11:00	Session 3: Module 3 introduction
11:00 – 11:05	Session 3.1: Determining evaluation users and uses
11:05 – 11:35	Session 3.2: Mapping your advocacy work
11:35 – 11:45	Session 3.3: Prioritising what to evaluate
11:45 – 11:55	Quick energiser
11:55 – 12:05	Session 3.4: Developing your evaluation questions
12:05 – 12:15	Session 3.5: Deciding on an approach to measurement
12:15 – 12:35	Session 3.6: Selecting indicators
12:35 – 13:15	Session 3.7: Identifying and choosing data collection methods relevant to advocacy evaluation
13:15 – 14:00	Lunch break
14:00 – 16:30	Session 4: Module 4 introduction and 4.1: Consolidating learning on how to evaluate HIV-related advocacy
16:30 – 16:50	Session 4.2: Reflecting on the key messages and learning points from the workshop to share with our colleagues
16:50 – 17:00	Workshop summary, post-workshop questionnaire and workshop close

CONTENTS

OPENING SESSION

Ice-breaker and workshop expectations

Facilitator's notes

A simple and quick ice-breaker is to ask participants to move around the room and greet each other, sharing their names, organisation and something different, interesting or silly about themselves (such as a way to remember their name). You can also do this sitting in the plenary chairs, which is quicker but more serious.

Materials

A small piece of paper and a pen, one for each participant

Time

30 minutes

Instructions

1. Welcome everyone to the workshop.
2. Facilitate a 15-minute Ice-breaker to help everyone to get to know each other.
3. Facilitate a 15-minute activity to understand participants' expectations of the workshop. Hand out small pieces of paper and marker pens to each participant. Ask participants to spend five minutes brainstorming their expectations of the workshop and write each one on a separate small piece of paper. After five minutes ask participants to volunteer to read out their expectations. Each participant can offer one expectation at a time until they have all been read out. As each expectation is read aloud, collect the piece of paper and stick it up for all to see. If others have similar expectations, ask if you can collect them and stick them in a group. Once all the expectations have been collected, review them and explain which ones will or will not be addressed during the workshop and why. If realistic and if you feel confident to do so, explain which expectations you will try to add to the workshop sessions or timetable.

Workshop introduction, ground rules and pre-workshop questionnaire

Session information

The purpose of the guide, and therefore this workshop, can be found on page 3 of the introduction to this facilitator's guide, and the suggested workshop timetables for three- or one-day workshops can be found on pages 4 and 5.

Materials

- PowerPoint 1
- Workshop timetable, one for each participant
- Copies of the pre- and post-workshop questionnaire from *Measuring up: workshop supplementary facilitation material*
- Flip charts with workshop aims and ground rules

Time

30 minutes

Facilitator's notes

- You can use *Measuring up workshop PowerPoint 1 – Measuring up workshop introduction* for this workshop introduction. It is also useful to have flip charts with the workshop's purpose, aims and ground rules up on the workshop room walls. Make sure that participants have the workshop timetable on their chairs at the start. You can facilitate developing the ground rules if you think this is necessary and you can accommodate the time needed to do so.
- If you feel that you have time, you could facilitate a brief exercise (5–10 minutes) to gather the expectations of participants. Remember to give participants feedback on which expectations you aim to meet during the workshop and why.

Instructions

1. Give a 10-minute introduction to the training pack and its two components; the workshop purpose and aims; and provide a summary review of the workshop timetable.
2. Spend ten minutes brainstorming and agreeing some basic ground rules for participants and facilitator on flip chart paper and stick them to the workshop wall.
3. Ask participants to spend five minutes completing the first questions on the pre- and post-workshop questionnaire. Explain that the questionnaire will be repeated at the end of the workshop. The data will be anonymous and the questionnaire will be kept safe and not read in the meantime. Then ask them to fold the questionnaire in half and draw a symbol or little picture on the back (not their name) so that they can identify their own questionnaire at the end of the workshop. Collect the questionnaires.
4. Hand out the learner's guide to each participant and ask them to write either their own name or their organisation's name on the guide. Tell them to have this guide always available during session time.

Suggested ground rules for participants and the facilitator during the workshop include:

- Help each other to start and finish sessions and breaks on time.
- Switch off mobile phones or leave them on vibrate (take phone calls during breaks where possible).
- Respect each other by listening actively, providing constructive criticism and participating fully to support collective learning.
- Recognise that there is a lot to learn and share; stay focused on the topic and objectives of the sessions rather than be drawn into the details of broader issues.
- Avoid using too much evaluation jargon – there are differing levels of knowledge and experience of evaluation work among participants and jargon may not be familiar to everyone.

ONE-DAY WORKSHOP

Time

20 minutes

Instructions

1. Welcome everyone to the workshop.
2. Ask the participants and facilitator to say their name and the organisation they are from.
3. Give a 10-minute presentation introducing the guide and its two components; the workshop purpose and aims; the workshop timetable; and basic ground rules for participants and facilitator. (Note you will need to add basic ground rules to *Measuring up workshop PowerPoint 1 – Measuring up: workshop introduction* or make a flip chart.)
4. Hand out the learner's guide to each participant and the pre- and post-workshop questionnaire.
5. Ask participants to spend a few minutes completing the first questions on the pre-and post-workshop questionnaire. Since this will be an anonymous process, ask them to fold the questionnaire in half and draw a symbol or little picture on the back (not their name) so that they can identify their own questionnaire at the end of the workshop.

MODULE 1

Defining advocacy and key elements of monitoring and evaluation – introduction to Module 1

Session information

There is rarely one correct or 'best' definition for different aspects of our work, and there are many definitions of advocacy and monitoring and evaluation. Here we introduce one advocacy definition and important elements of monitoring and evaluation, along with some examples to help clarify key terms.

Facilitator's notes

You can use *Measuring up workshop PowerPoint 2 – Module 1: Defining advocacy and key elements of monitoring and evaluation* for this introduction, although it is also useful to have a flip chart of the module objectives taped to the wall during sessions.

Materials

- PowerPoint 2
- Flip chart

Time

5 minutes

Instructions

Give a brief introduction to this module, explaining the objectives for the session.

Objectives for Module 1

- To provide a useful definition of advocacy.
- To provide 'refresher' information on the definition of monitoring and evaluation, the distinction between outputs and outcomes, and the principles underlying how they can be measured.

SESSION 1.1

Defining advocacy

Session information

A definition of advocacy and an explanation of its key elements or characteristics are included on page 5 of the learner's guide.

Facilitator's notes

You can use *Measuring up workshop PowerPoint 2 – Module 1: Defining advocacy and key elements of monitoring and evaluation* to present the advocacy definition and key elements.

Materials

PowerPoint 2

Time

25 minutes

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Ask participants to brainstorm the key points for defining advocacy.
3. Present the advocacy definition and its key elements or characteristics.
4. Ask participants if they know of other good advocacy definitions.
5. Conclude the session by repeating that there is not one correct definition and that there is further guidance available in the APCASO toolkit.
6. Tell participants that there is now a 30-minute break for refreshments and what time they should be back in their chairs.

ONE-DAY WORKSHOP

Time

10 minutes

Instructions

1. Present the advocacy definition and its key elements or characteristics.
2. Ask participants if they know of other good advocacy definitions.
3. Conclude the session by repeating that there is not one correct definition and that there is further guidance available in the APCASO toolkit.

SESSION 1.2

Defining key elements of monitoring and evaluation

Session information

Section 1.2 of the learner's guide (pages 5 and 6) provides a number of definitions of monitoring and evaluation, the distinction between outputs and outcomes, and the principles underlying how they can be measured.

Materials

- Two flip chart papers with 'Monitoring' written on the top of one and 'Evaluation' on the other
- Tape
- PowerPoint 2

Time

60 minutes

Facilitator's notes

- Write 'monitoring' at the top of a piece of flip chart paper and 'evaluation' at the top of another in advance of the session. Make sure you have tape ready.
- You may want to use or adapt *Measuring up workshop PowerPoint 2 – Module 1: Defining advocacy and key elements of monitoring and evaluation* to present the key definitions and examples from the learner's guide.
- Try not to get drawn into a broader discussion about monitoring and evaluation. If you park ideas, you should say when and how you will address them at a later stage in the workshop (for example, the day two flexible session). If they are beyond the scope of the workshop you will need to explain this, but be as helpful as possible by referring participants to a source of information or by talking over issues at lunchtime or during breaks.

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Tape flip charts with 'monitoring' and 'evaluation' written at the top to a wall or flip chart stand. Ask participants: *"Can you brainstorm the key points for defining 'monitoring' and 'evaluation'?"*
3. Explain that you are going to present some definitions of monitoring and evaluation, the distinction between outputs and outcomes, and the principles underlying how they can be measured. Give the presentation. Read the definitions of monitoring and evaluation slowly, and repeat if necessary.
4. Ask participants if they have any questions about the presentation. Address the questions and add any that you can't answer or that would be better addressed later in the workshop on the 'car park' flip chart.

Brainstorm example: Can you brainstorm the key points for defining monitoring and evaluation?

Monitoring

- Tracking activities
- Process focus
- Documenting what has happened
- Recording activity outputs
- Checking we're on track
- Observing implementation
- Done in house

Evaluation

- Comparison of end to beginning
- Results (outcomes and impact) focus
- Post-mortem
- Assessing what has been achieved
- Finding out what worked
- Learning how to improve
- Best done by an independent assessor

ONE-DAY WORKSHOP

Time
20 minutes

Instructions

1. Explain that you are going to present some definitions of monitoring and evaluation, the distinction between outputs and outcomes, and the principles underlying how they can be measured. Give the presentation.
2. Ask participants if they have any questions about the presentation. Address these quickly or add them to the 'car park' flip chart to address in later sessions, during breaks with individuals or at the end of the day.

MODULE 2

Understanding why evaluating HIV-related advocacy is important, and confronting the challenges – introduction to Module 2

Facilitator's notes
Prepare a flip chart with the objectives for Module 2 and tape it to the wall as the visual aid for your introduction.

Materials
Flip chart

Time
5 minutes

Instructions
Give a brief introduction to this module, explaining the objectives for the session.

Objectives for Module 2

- To share why it is important to evaluate advocacy.
- To identify the challenges of evaluating our HIV-related advocacy.
- To understand how evaluating advocacy is different from programme evaluation.

SESSION 2.1

Understanding why it is important to evaluate advocacy

Session information

The introductory text below has been extracted from page 7 of the learner's guide.

Facilitator's notes

Circulate among the groups to check they are not stuck on the task.

Materials

Flip chart

Time

35 minutes

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Ask participants to form mini groups of three people with their neighbours by adjusting their chairs slightly. Ask groups: *"Can you identify the main reasons for evaluating advocacy work?"* Tell them they have five minutes to consider the question in their groups.
3. After five minutes ask participants to move their chairs back. Tell them you would like to collect their ideas – ask for different contributions from participants. Write the ideas on a flip chart.
4. Check that the main reasons identified below (see page 7 of the learner's guide) have been considered.

There is growing interest in advocacy evaluation, both from advocates and funders. The reasons for this interest may differ between the two groups, but in some cases there may be overlap. The main reasons for evaluating advocacy include a desire to:

- learn how to improve the capacity of advocates
- learn how to adjust advocacy strategies as they are being implemented
- inform the planning of future advocacy work, including funding cycles/proposals
- demonstrate relative worth and specific areas of added value (for example, for networks of key populations [1] that are competing for funding with development non-governmental organisations and academic institutions)
- demonstrate evidence-based approaches to advocacy work (increasingly demanded by funders, influential policymakers and communities to encourage engagement)
- account for funding and demonstrate results
- demonstrate results to mobilise more resources for future advocacy work, including monitoring and evaluation of advocacy.

1. The term key populations refers to groups of individuals particularly affected by HIV, including people living with HIV, sex workers, men who have sex with men, people with disabilities, people who use drugs, prisoners, etc.

ONE-DAY WORKSHOP

Time

10 minutes

Instructions

1. Present the main reasons why it is important to conduct advocacy evaluation, provided in the session information above.
2. Ask if the participants have anything to add.

FLEXIBLE SESSION

Session information

This session can be titled and used as necessary by the facilitator. For example, this could be left blank to allow for session overrun, be titled 'car park' to address any questions that have not be addressed, or be titled 'administration session' and used to hand out per diems, address logistics and any issues concerning participants. Alternatively you could conduct a fun energiser if appropriate.

Time

20 minutes

Instructions

1. To be determined by the facilitator.
2. Tell participants that there is now a one-hour break for lunch and what time they should be back in their chairs.

Idea for an energiser

Simon says

The facilitator tells the group that they should follow any instructions that begin "Simon says". If the facilitator does not begin an instruction with the words 'Simon says' then the group should not follow the instruction. The facilitator begins by saying something like, "Simon says clap your hands", while clapping her hands. The participants follow.

The facilitator speeds up the actions, always beginning with the words "Simon says". After a short while the words "Simon says" are omitted. Those participants who continue to follow the instructions are out of the game. The game can carry on for as long as it remains fun.

Source: 100 ways to energise groups: games to use in workshops, meetings and the community (International HIV/AIDS Alliance, 2003)

This session is not relevant for a one-day workshop.

SESSION 2.2

Identifying the challenges faced by civil society organisations evaluating HIV-related advocacy

Session information

Key challenges identified by guide contributors can be found on pages 7 and 8 of the learner's guide.

Materials

One set of the below for each group:

- Challenges from the learner's guide, printed off from the *Measuring up: workshop supplementary facilitation material* and cut into strips (make sure you cut the blank ends off the strips so that they can fit side by side on the scale)
- Tape (Stickie Stuff or Blu-Tak etc.)
- A few ordinary (not flip chart) pens
- 20 spare strips of paper the same size as the challenges (enough for additional challenges and ways to avoid or overcome challenges)
- Instructions for the activity printed off from the workshop supplementary facilitation materials
- Flip chart paper with the sliding-scale presented horizontally at the top and across the full width of the paper so that the challenges can be placed to the right

Time

65 minutes

Participants conducting this activity at the Measuring up field-test workshop, India 2010

Facilitator's notes

- Prepare resources for group work in advance – don't leave this to break-time.
- Prepare group work spaces in advance, including tables and correct number of chairs, to avoid wasting time during the session.
- Circulate among the groups to help them be productive, focused and not get stuck.
- Keep to time, even if participants haven't completed all the activity instructions.
- The learner's guide notes that challenges that are more within our control are easier to overcome than those more out of our control. This could be a useful point of discussion after the activity.

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Explain to participants that the learner's guide lists challenges identified by training pack contributors to evaluating HIV-related advocacy work in resource-limited settings. Some of these challenges are specific to HIV; others to the capacity of civil society organisations and the context of resource-limited settings. The list is not exhaustive or in any particular order.
3. Explain that you would like participants to work in groups of approximately four people from any organisation. Read out the instructions on the next page and ask each group to collect from you a flip chart, pens, a set of strips of challenges, spare strips, tape and activity instructions printed off for each group. Indicate where the group work spaces are.

Sliding scale

1	2	3	4
Although perceived as a challenge it can be easily avoided or overcome			A challenge so great it means that evaluating advocacy is almost impossible, meaningless or damaging

Group work instructions

- You have 35 minutes to complete this activity.
- Read through as a group the challenges identified by the guide contributors.
- Write any other key challenges on additional strips of paper (don't spend too long on this or go into detail; you can always add challenges later).
- Organise the challenges on the flip chart using the sliding-scale at the top of the page, sticking the challenges along the sliding-scale. Where you disagree among yourselves, you will need to average the score when placing the challenge, or use your own rule such as 'how most civil society organisations working on HIV would feel'. Remember, this is a tool to facilitate discussion, so complete the activity rather than get stuck. Note: please write the names of your group members on your flip chart.
- If you have time, write down on spare strips of paper ways to avoid or overcome the challenges that you have put in or near this end of the sliding scale.

4. After 35 minutes ask the groups to place their group work flip charts together on the central area of the floor.
5. Facilitate a discussion for the remainder of the session time around the outputs from the groups, noting additional challenges, placement of challenges and ways to avoid or overcome challenges if there are any. Draw some conclusions about which challenges are easier to overcome and why, and which are more difficult to overcome and why.

ONE-DAY WORKSHOP

Time

15 minutes

Instructions

1. Ask the participants to form 'buzz pairs' with the person sitting next to them. Ask them to spend a couple of minutes sharing a few challenges they face in evaluating their HIV-related advocacy.
2. Present a flip chart or PowerPoint presentation with the challenges faced by civil society organisations evaluating HIV-related advocacy from pages 7 and 8 of the learner's guide (you will need to prepare this flip chart or PowerPoint presentation).
3. Ask the participants to share any additional challenges they identified in their buzz pairs.

SESSION 2.3

Exploring how evaluating advocacy can be different from programme evaluations

Session information

Information for this session can be found on pages 8 to 10 of the learner's guide.

Materials

PowerPoint 3

Time

25 minutes

Facilitator's notes

- You may want to use or adapt *Measuring up workshop PowerPoint 3 – Module 2: Exploring how evaluating advocacy work is different from programme evaluations* to give this presentation. You will need to know the page number of box 3 in the learner's guide.
- If the discussion is productive for this session, you could break for refreshments late or continue the discussion after refreshments, as session 3.1 can be shortened (see the facilitator's notes for session 3.1).

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Explain to participants that you will be giving a presentation exploring how evaluating advocacy work is different from evaluating programmes. Give the presentation.
3. Ask if participants have any questions about the presentation and facilitate a discussion.
4. Tell participants that there is now a 30-minute break for refreshments and what time they should be back in their chairs.

ONE-DAY WORKSHOP

Time

15 minutes

Instructions

1. Present how evaluating advocacy can be different from evaluating programmes.
2. Ask if the participants have anyg questions or comments about the presentation. Discuss these.

MODULE 3

Introducing a framework for designing evaluations of HIV-related advocacy – introduction to Module 3

Session information

Information for this session can be found on page 11 of the learner's guide.

Facilitator's notes

- You can use *Measuring up workshop PowerPoint 4 – Module 3: Module 3 Introduction* to give this presentation.
- Prepare an 'Evaluation design framework' flip chart showing the diagram of the seven components of the advocacy evaluation design framework from page 11 of the learner's guide.

Time

15 minutes

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Give a brief introduction to this module, explaining the objectives, the seven components of the framework represented by the topic headings, and why it is important not to consider these components as steps. Highlight the information used to develop this section of the learner's guide and suggest that they might find it helpful to refer to these sources in the future.

Objectives for module 3

- To provide information and tools for the seven key components of a framework for decision-making on how to evaluate HIV-related advocacy.
- To practise developing a theory of change, developing evaluation questions and identifying indicators.

ONE-DAY WORKSHOP

Time

10 minutes

Instructions

1. Present *Measuring up workshop PowerPoint 4 – Module 3: Module 3 Introduction.*
2. Ask if the participants have any questions or comments about the presentation. Discuss.

SESSION 3.1

Determining evaluation users and uses

Session information

Information for this session can be found on page 12 of the learner's guide.

Facilitator's notes

If more discussion time was needed for session 2.3 you can miss out instruction 3.

Materials

Flip chart

Time

40 minutes

Instructions

1. Introduce the name of the session and its place in the evaluation design framework flip chart.
2. Use the flip charts developed during session 2.1 (and/or page 7 of the learner's guide) to review the main reasons for, or uses of evaluations.
3. Ask participants to identify the main audiences for evaluations. Write them on a flip chart. Make sure that they include the main audiences identified in the learner's guide.
4. Place this flip chart next to the flip chart developed during session 2.1 and briefly facilitate participants to match the main reasons for evaluations with these different audiences. Comment on the extent of the overlap.
5. Explain the importance of considering who the primary audience for the evaluation will be, and the value of working with other audiences (particularly funders) to develop design evaluations.
6. Close day one of the workshop by reminding participants what time they should be back in the workshop room tomorrow morning. Tell them about evening logistics, and that they should remember to bring their learner's guides with them in the morning.

ONE-DAY WORKSHOP

Time

15 minutes

Instructions

1. Use the flip charts developed during session 2.1 (and/or page 7 of the learner's guide) to review the main reasons for, or uses of evaluations.
2. Ask participants to identify the main audiences for evaluations. Write them on a flip chart. Make sure that they include the main audiences identified in the learner's guide.

DAY TWO

Recap of day one

Facilitator's notes

It is useful to use a combination of the workshop timetable and flip charts from output or plenary brainstorms to review key points from the previous day.

Time

30 minutes

Instructions

1. Facilitate an energiser.
2. Provide a recap of the previous day's sessions.

SESSION 3.2

Mapping your advocacy work

Session information

Information for this session can be found on pages 12 to 17 of the learner's guide.

Materials

One set of the following for each group:

- Approximately 30 rectangles of blank paper (about an eighth of the size of a piece of A4; i.e. fold completely in half three times, unfold and cut)
- A few ordinary (not flip chart) pens
- A piece of flip chart paper
- Tape (Stickie Stuff, Blu-Tak, etc.)
- Instructions for the activity printed off from the workshop supplementary facilitation material

Time

2 hours

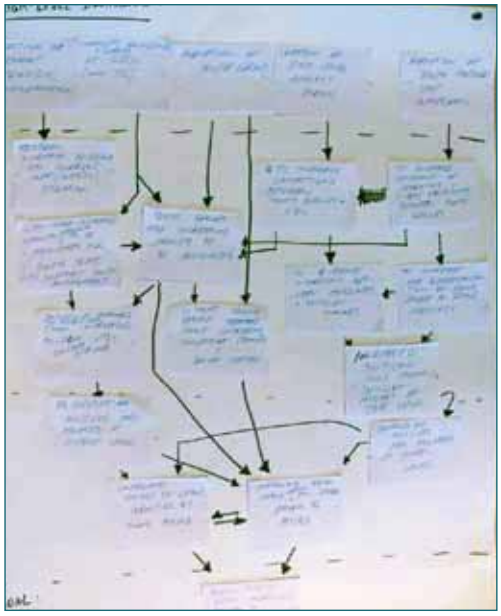
Facilitator's notes – session 3.2(a)

- You may want to use or adapt *Measuring up workshop PowerPoint 5 – Module 3: Mapping your advocacy work* to give this presentation. You have a maximum of 30 minutes.
- Leave plenty of time for the group work activity.
- Prepare the group work resources in advance and ensure there is space to work, with a table and correct number of chairs (or floor, if appropriate).
- Make sure that all facilitators are constantly moving from one group to another to provide support and answer questions. It is a good idea to allocate specific groups to individual facilitators so that only one facilitator works with each group. Share any problems you are having (as group support facilitators) with each other and support each other as necessary.

Instructions – session 3.2(a)

1. Introduce the name of the session and its place in the evaluation design framework flip chart.
2. Explain to participants that the aim of this activity is to familiarise them with the content of the learner's guide, which tells them how to map their work and provides three frameworks to help them do so. The aim is also to allow them a chance to internalise the information and practise using it. Explain that a strategic view of our advocacy work, which breaks the goals down into interim outcomes or incremental measures, helps to address the challenges and differences concerning HIV-related advocacy evaluation made in Module 2.
3. Ask participants: "How many of you, or your civil society organisation colleagues, have developed a theory of change for your advocacy work?"

Theory of change map



4. Explain to participants that you will give a presentation on how to develop a theory of change, including a set of instructions, a completed example and list of example advocacy outcomes that they can use to help develop their own theory of change for their advocacy work. Explain that this is a fairly long presentation that covers the information in section 3.2 (pages 12 to 17) of the learner's guide. Tell participants they will need to refer to their learner's guide during the presentation. Give the presentation.
5. After the presentation, consider how much time you have left for this session before the refreshments break. Adjust the timings for the remainder of this session as appropriate.
6. Explain that for the following learning activity you will ask them to work with colleagues from the same organisation. Explain that they should follow the instructions that will be handed to them.

Activity instructions:

- You have 70 minutes to complete this activity.
- Identify one real advocacy goal or impact statement from your advocacy work.
- Using your learner's guides, have the following three frameworks for developing a theory of change open for reference:
  - Six steps for developing a theory of change visual map (box 3, page 14)
  - an example theory of change (figure 3, page 15)
  - Categories and menu of outcomes for advocacy and policy work (table 2, pages 16 and 17).
- Develop a theory of change outcome map similar to figure 3 using the blank rectangles of paper and an ordinary (not flip chart) pen. You can place the rectangles on a piece of flip chart paper to create a transportable map. Don't be tempted to copy figure 3; instead use the tools to develop your own map. You do not necessarily need to finish mapping; the activity aims to familiarise you with the content of the three frameworks and to practise using them. For example, you may only develop a 'so that' chain for one strategy on your outcome map. Remember to focus on outcomes in your 'so that' chain' – don't end up listing activities or strategies.

7. Ask participants to share what they are learning from developing their theory of change.
8. Break for 30 minutes for refreshments.

Time

90 minutes

Facilitator's notes – session 3.2(b)

- Make sure that all facilitators are constantly moving from one group to another to provide support and answer questions.
- At the end of the session, or when convenient, collect together all the maps and store ready for session 4.1 on day three.

Instructions – session 3.2(b)

1. Explain to participants that because it is so important to have a good theory of change to be able to design an advocacy evaluation, we will continue to map out the theories of change and also add some assumptions.
2. Introduce the activity instructions below.

Activity instructions:

- Continue to work on your theory of change for the next 80 minutes.
- Before the end of the group work time, stand back from your outcome map and identify assumptions you have made about the context of the advocacy work. Some examples are given in Figure 3 on page 15 of the learners' guide.
- Save at least ten minutes to reflect on the process of developing the theories of change. Use the opportunity to reinforce the key benefits of mapping out a theory of change (both of the process itself and of the resulting map), particularly if participants have found the activity difficult. A summary of the key benefits of a theory of change includes:
  - important for agreeing high-level strategies and outcomes, and common agreement about impact for your evaluation work
  - an opportunity to learn what others are doing inside and outside of the organisation, from the different perspectives of mapping participants
  - a useful decision-making tool for ongoing learning and improvement of strategies
  - a visual map to include in fundraising proposals.

ONE-DAY WORKSHOP

Time

30 minutes

Instructions

1. Explain to participants that you will give a presentation outlining some tips for developing evaluation questions and some examples.
2. Ask participants if they have any questions. Discuss as necessary.

SESSION 3.3

Prioritising what to evaluate

Session information

Information for this session can be found on page 18 of the learner's guide.

Facilitator's notes

You may want to use or adapt *Measuring up workshop PowerPoint 6 – Module 3: Prioritising what to evaluate* to give this presentation.

Time

55 minutes

Instructions

1. Conduct an energiser for five minutes.
2. Introduce the name of the session and its place in the evaluation design framework flip chart.
2. Give a presentation covering why it is important to prioritise what to evaluate and provide some guidance in making this decision.
3. Ask if there are any questions and discuss as necessary.
4. Ask participants to go back into their organisation groups and decide who would be the end users for an evaluation of their advocacy work and what they would prioritise for evaluation.
5. Ask participants if they found this a straightforward exercise.

ONE-DAY WORKSHOP

Time

10 minutes

Instructions

1. Explain to participants that you will give a presentation on how to prioritise what to evaluate.
2. Ask participants if they have any questions. Discuss as necessary.

SESSION 3.4

Developing your evaluation questions

Session information

Information for this session can be found on page 15 of the learner's guide.

Facilitator's notes

You may want to use or adapt *Measuring up workshop PowerPoint 7 – Module 3: developing your evaluation questions* for the presentations during this session.

Time

65 minutes

Instructions

1. Introduce the name of the session and its place in the evaluation design framework flip chart.
2. Ask participants to share their experience of setting evaluation questions. Write on a flip chart any points that will be useful to refer back to later.
3. Explain to participants that you will give a presentation outlining some tips for developing evaluation questions and some examples.
4. Ask participants if they have any questions. Discuss as necessary.
5. Ask participants to work in their organisation groups to brainstorm what their evaluation questions might be.
6. Bring the groups back together to share what they have learned from the activity.
7. Facilitate an energiser or give the participants a short break.

Idea for an energiser

Fruit salad

Choose five fruits (for example, apple, orange, pear, pineapple and banana). Point to the first person in the plenary line of chairs and say "apple", move to the second and say "orange" and so on until you are back to "apple" for the sixth participant. Repeat until everyone has an assigned fruit.

Tell the participants to swap places with others with the same assigned fruits when you call out the name of their fruit. Shout "apples" and everyone must run to swap places with someone else. Repeat for all fruits randomly. The participants can then form five groups based on the five fruits.

ONE-DAY WORKSHOP

Time

10 minutes

Instructions

1. Explain to participants that you will give a presentation outlining some tips for developing evaluation questions and some examples.
2. Ask participants if they have any questions. Discuss as necessary.

SESSION 3.5

Deciding on an approach to measurement

Session information

Information for this session can be found on pages 20 and 21 of the learner's guide.

Facilitator's notes

You may want to use or adapt *Measuring up workshop PowerPoint 8 – Module 3: Deciding on an approach to measurement* for the presentations during this session.

Time

25 minutes

Instructions

1. Introduce the name of the session and its place in the evaluation design framework flip chart.
2. Explain to participants that you will give a presentation outlining five practical and strategic approaches to measurement put forward by Organizational Research Services for advocacy evaluation. Give the presentation.
3. Ask participants if they have any questions about the five practical and strategic approaches to measurement.

ONE-DAY WORKSHOP

Time

10 minutes

Instructions

1. Explain to participants that you will give a presentation outlining some different approaches to measuring.
2. Ask participants if they have any questions. Discuss as necessary.

SESSION 3.6

Selecting indicators

Session information

Information for this session can be found on pages 22 and 25 of the learner's guide.

Materials

For each pair of participants:

- an Indicator selection worksheet and copy of the Example indicators from the *Measuring up: workshop supplementary facilitation material*
- have some extra copies of the worksheet available in case participants ask for a clean sheet

Time

1 hour

Facilitator's notes

- You may want to use or adapt *Measuring up workshop PowerPoint 9 – Module 3: Selecting indicators* for the presentations during this session. You have a maximum of 30 minutes.
- Prepare resources for each pair of participants in advance.

Instructions

1. Introduce the name of the session and its place in the evaluation design framework flip chart.
2. Remind participants that they will need their learner's guide during the presentation. Give the presentation.
3. Explain to participants that a quick learning activity will follow to help familiarise them with the indicators in the learner's guide and give them practice in writing tailored indicators. The activity will be done in 'buzz pairs' (people from different organisations). Hand each pair an indicator selection worksheet and a copy of the example indicators from the *Measuring up: workshop supplementary facilitation material*. Ask the buzz pairs to complete the table with examples of output and outcome indicators. Ask them not to cheat by looking in the learner's guide! Tell participants they have 20 minutes to work in pairs.
4. Circulate around the pairs to help and also to identify good examples to share in plenary. Point out these good examples to the pairs so that you can draw on them in the plenary.
5. After 20 minutes ask everyone to stop writing indicators and share some examples. Encourage those with the good examples you identified to contribute. Look at the examples in table 5 on page 25 of the learner's guide.
6. Hold a brief discussion or ask for any questions.

ONE-DAY WORKSHOP

Time

20 minutes

Instructions

1. Explain to participants that you will give a presentation on selecting indicators.
2. Ask participants if they have any questions. Discuss as necessary.

DAY THREE

Recap of day two

Facilitator's notes

It is useful to use a combination of the workshop timetable and flip charts from output or plenary brainstorms to review key points from the previous day.

Time

30 minutes

Instructions

1. Facilitate an energiser.
2. Provide a recap of the previous day's sessions.

SESSION 3.7

Identifying and choosing data collection methods relevant to advocacy evaluation

Session information

Information for this session can be found on pages 26 to 36 of the learner's guide.

Materials

- PowerPoint 10
- Copies of the contents from *A handbook of data collection tools: a companion to 'A guide to measuring advocacy and policy'* from the *Measuring up: workshop supplementary facilitation material*. One copy for each participant and the facilitator.

Time

2 hours (not including the refreshments break)

Facilitator's notes

- If participants were not already aware of the seven data collection methods before the workshop, they may have read the learner's guide overnight and now be familiar with these approaches.
- You may want to use or adapt *Measuring up workshop PowerPoint 10 – Module 3: Identifying and choosing data collection methods relevant to advocacy evaluation* for the presentations during this session.
- Keep an eye on the time and make sure that you stop for the refreshments break.
- Participants are likely to ask where to access more information about these methods. There is limited information available at the moment, but they should keep searching the Internet as this situation may change quickly. Recommend that participants who wish to track the work of key authors subscribe to *The evaluation exchange periodical*, which is free of charge (google 'The evaluation exchange'). This is a forum for sharing new and innovative data collection methods, including for advocacy and policy evaluation.

Instructions

1. Introduce the name of the session and its place in the evaluation design framework flip chart. Explain that the session will be divided by a refreshments break.
2. Explain that data collection methods are the processes or approaches used for collecting data to measure our indicators.
3. Ask participants: *"Can you identify some common data collection methods? Let's brainstorm them."*

ONE-DAY WORKSHOP

Time

40 minutes

Instructions

1. Ask participants: *"Can you identify some common data collection methods? Let's brainstorm them."*
2. Ask participants: *"Do you know of any new data collection methods designed for advocacy evaluation?"*
3. Explain to participants that you will give a presentation outlining seven data collection methods for advocacy evaluation.
4. Ask participants if they have any questions. Discuss as necessary.

4. Ask participants: *"Do you know of any new data collection methods designed for advocacy evaluation?"*
5. Explain to participants that you will present data collection methods for advocacy work. This will include an introduction to publications that include relevant tools, an overview of common data collection methods and an explanation of seven data collection methods useful for advocacy evaluation. Tell them that all the information for this presentation can be found in the learner's guide in section 3.7, on pages 26 to 36, except for the contents of *A handbook of data collection tools: a companion to 'A guide to measuring advocacy and policy'*, which will be handed out now. Explain that we will be looking at the seven data collection methods in more detail in group work, so participants should write down any questions they have during the presentation. Give the presentation.
6. After the presentation, facilitate a discussion with the participants about the seven evaluation methods based on the following kinds of questions:
   - *"Has anyone in your group used this data collection method before?"*
   - *"What do you think are some of the key strengths of this method?"* (Don't forget to point out any particular strengths for evaluating HIV-related advocacy)
   - *"What aspects of this method may be challenging?"* (Don't forget to point out any particular challenges for evaluating HIV-related advocacy.)

Additional examples of the use of specific methods*

Bellwether methodology can be used at the national level in southern African countries

"International HIV/AIDS Alliance partners is Southern Africa were interested in whether the Bellwether methodology is appropriate for evaluating advocacy for treatment access. The answer is 'it depends' – on the context, method and indicators. For instance, if there was political and health system support for access and advocacy was directed around pricing and suppliers, then the best indicator would simply be the number of people enrolled in treatment, which could be verified from clinic data. However, if there was an affordable treatment supply, but problems of stock-outs and lack of commitment from the health system or health minister to address this, the advocacy intervention might be to try to raise awareness of the consequences of stock-outs among other influential people who could persuade the minister to act. Then bellwether could be a helpful evaluation technique". – Measuring up contributor.

The intense period debrief method can be used at the national level in Kenya

See the example provided for the partnership analysis tool (learner's guide, page 33).

KANCO and its partners could ask the following intensive period debrief questions:

- What events triggered the need for this intense period of advocacy?
- How would you describe the political context of this period concerning the HIV and AIDS Prevention and Control Act?
- What was the general public mood concerning the HIV and AIDS Prevention and Control Act when the advocacy action began?
- What did KANCO do well? What did not work well and could have been improved?
- What aspects of the advocacy partnership worked well and what did not? How could such an advocacy partnership be improved in the future?
- Which advocacy strategies employed were the most and least effective in achieving change?
- As a result of this intense period of advocacy activity, what new opportunities have arisen for the legislative campaign for the HIV Act going forward?
- What insight will you take away from the experience that could inform advocacy strategy development in the future?

* Not included in the learner's guide or PowerPoint presentations

MODULE 4

Putting it all into action – introduction to Module 4

Time
5 minutes

Instructions
1. Introduce the name of the session and its place in the workshop timetable.
2. Give a brief introduction to this module, including the title and objectives.

Objectives for Module 4
- To practise using the seven key components of the advocacy evaluation design framework for decision-making on how to evaluate HIV-related advocacy.
- To reflect on the key messages and learning points from the workshop to share with colleagues.

SESSION 4.1

Consolidating learning on how to evaluate HIV-related advocacy

Session information
Information for this session can be found on page 37 of the learner's guide.

Materials
- Participants' previous group work activity outputs from sessions 3.2 and 3.3
- A copy for each participant of the group work activity instructions on page 29
- Flip chart paper, flip chart pens and tape (Stickie Stuff, Blu-Tak, etc.)

Time
3 hours (not including the lunch break)

Facilitator's notes
- Make sure that you read through the example theory of change carefully before facilitating this session.
- Keep an eye on the time and make sure that you stop for the lunch break
- Prepare resources for each group and ensure there is a space to work, with a table and correct number of chairs (or floor, if appropriate). Make sure you do this in advance.
- Circulate around the groups to help them get started with the activity and then monitor their progress periodically to help them keep time and address any questions they might have.
- Identify which group you would like to present their work and warn them in advance.

Instructions
1. Introduce the name of the session and its place in the workshop timetable.
2. Explain to participants that they will work in their organisation group using their previous work on developing a theory of change to help them practise designing an advocacy evaluation in line with the last four components of the advocacy evaluation design framework. (Use the advocacy evaluation framework flip chart to point to these last four components – evaluation questions, approaches to measurement, indicator selection and selection of data collection methods.)

3. Introduce the group work instructions to participants using a prepared flip chart.
4. Hand out a copy of the activity instructions.
5. After two hours ask participants to return to plenary. Facilitate a 45-minute discussion about the activity by asking one group to present its work. Invite other participants to comment on their experience of the activity, including what they learned from the process.

Group activity instructions:

1. You have two hours to complete this activity.
2. Answer the following questions to help you to practise designing an advocacy evaluation related to your work:
   - What assumptions have been made in the design of your advocacy effort? (Learner's guide, Module 3, section 3.2, pages 12 to 17)
   - What evaluation questions would be informative for this advocacy work? (Learner's guide, Module 3, section 3.4. page 19)
   - What approach(es) to measurement do you think would be appropriate for this advocacy work? (Learner's guide, Module 3, section 5, pages 20 and 21)
   - What would you prioritise for this evaluation and what evaluation questions would be useful for the end users? (Learner's guide, module 3, sections 3.3 and 3.4 pages 18 and 19)
   - What key indicators will allow you to measure the results of this advocacy work? (Learner's guide, Module 3, section 3.5, pages 22 to 25)
   - What are some sources and/or means of data collection for these indicators? (Learner's guide, Module 3, section 3.7, pages 26 to 36.)
3. You may be asked to present your group work, so write the answers to your questions on flip chart paper.

ONE-DAY WORKSHOP

Time

2 hours 30 minutes

Facilitator's notes

- Make sure that you read through the example theory of change carefully before facilitating this session.
- You could use the Lifeboats energiser, see page 34, to create the groups of four people.
- Each group will need the following resources for the group work (make sure you prepare these in advance):
  - one copy for each participant (four copies per group) of the group work activity instructions, case study and example theory of change printed off from the *Measuring up: workshop supplementary facilitation material*
  - flip chart paper, flip chart pens and tape (Stickie Stuff, Blu-Tak, etc.)
  - a space to work, with a table and correct number of chairs (or floor, if appropriate).
- Circulate around the groups to help them get started with the activity and then monitor their progress periodically to help them keep time and address any questions they might have. Identify which group you would like to present its work and warn the group participants in advance.

Instructions

1. Introduce the names of sessions 4 and 4.1 and their place in the workshop timetable.
2. Introduce the objectives for Module 4.
3. Explain to participants that they will work in groups of approximately four people to practise applying the advocacy evaluation design framework to an example.
4. Review the case study example and related theory of change for improved access to harm reduction services for injecting drug users included in the *Measuring up: workshop supplementary facilitation material*.
5. Introduce the group work instructions to participants using a prepared flip chart.
6. Hand a copy of the activity instructions, case study and example theory of change to each participant.
7. Use an energiser to create the groups of four.

Group work instructions

a) You have 1 hour 30 minutes to complete this activity.

b) Read through the case study and example theory of change as a group. Do not debate the design of the advocacy effort. The evaluation will be conducted after three years of this five-year funded advocacy initiative. The primary users of the evaluation will be the advocates themselves and donors, and the secondary users will be other advocates wishing to advocate for harm reduction. The evaluation will be used to (i) demonstrate the effectiveness of the advocacy coalition, which is funded through a lead partner; and (ii) provide an opportunity for the advocates to learn more about the effectiveness of one or more approaches for improved strategy development and evidence-based learning for future advocacy work.

ONE-DAY WORKSHOP (CONTINUED)

c) Answer the following questions to help you to practise applying the information covered during the workshop:

- What assumptions have been made in the design of the advocacy effort? (Learner's guide, Module 3, section 2, pages 12 to 17)
- What elements of the advocacy work would you prioritise for evaluation? (Learner's guide, Module 3, section 3.3, page 18)
- What evaluation questions would be informative for this advocacy work? (Learner's guide, Module 3, section 3.4, page 19)
- What approach to measurement do you think would be appropriate for this advocacy work?' (Learner's guide, Module 3, section 5, pages 20 and 21)
- What key indicators will allow you to measure results of this advocacy work? (Learner's guide, Module 3, section 3.6, pages 22 to 25)
- What are some sources and/or means of data collection for these indicators? (Learner's guide, Module 3, section 3.7, pages 26 to 36)

d) You may be asked to present your group work, so write the answers to your questions on flip chart paper.

Please note that there are no right or wrong answers. We ask that you think back to what has been presented so far, as well as to your experience on the ground.

8. After 1 hour 30 minutes ask participants to return to plenary. Facilitate a 40-minute discussion about the activity by asking one group to present their work and inviting the other participants to comment and suggest amendments, additions, etc. Make sure that you and the participants critique the ideas sufficiently in order to create a good example.

Activity example output: using the people who use drugs case study from the supplementary facilitation materials to consolidate learning on how to evaluate HIV-related advocacy

What assumptions have been made in the design of the advocacy effort?

- The government officials and police authority representatives that are accessible for targeting with advocacy messages and training are those who have enough influence to achieve change.
- Education concerning the public health benefits of harm reduction services will allow individuals from the government, police and public to overcome their prejudices and the barriers/obstacles put in place of access to harm reduction services.

What elements of the advocacy work would you prioritise for evaluation?

- Were the right government officials and police authority representatives targeted with advocacy messages and training?
- Effective joint actions and aligned messaging of the coalition.
- Changes in political will/commitment to adopt policies that are sensitive to the needs of people who use drugs.
- Changes in the position of harm reduction on the policy agenda for HIV prevention.

Activity example output: (continued)

What evaluation questions would be informative for this advocacy work?

- Were the government officials/police authority representatives invited to round-table discussions/training and targeted with coalition messages well selected to affect the necessary change?
- How effective has the coalition been in its message development and targeting for government officials and the police authority?
- Has the coalition been able to contribute to increased political will to support improved access to harm reduction services and policies or legislation that supports this? If so, how? If not, why not?
- Has the coalition been able to contribute to improved policies or legislation that supports this improved access to harm reduction services? If so, how? If not, why not?
- To what extent has the coalition's media campaign contributed to progress to improve access to harm reduction services?

What approach to measurement do you think would be appropriate for this advocacy work?

Approach A: identification and measurement of core outcome areas related to social or policy change.

What key indicators will allow you to measure the results of this advocacy work?

- Number of civil society organisations targeted to join the advocacy coalition.
- Percentage of civil society organisations targeted to join the advocacy coalition that have joined the coalition.
- Number and type of organisations that have joined the coalition.
- Number of incidences that collation key messages are used favourably in the media.
- Number of incidences that collation key messages are used favourably by government officials.
- Number of training events/round tables for government officials/police authorities provided on the issue.
- Number of government officials/police authority representatives attending round table discussions/training events on the issue.
- Improved political will of government officials to improve access and reduce barriers to harm reduction services for those that need them.
- Number of policy proposal documents accepted for consideration by government authorities.
- Increased position of harm reduction services for people who use drugs on the policy agenda for HIV prevention.

What are some sources and/or means of data collection for these indicators?

The following data collection methods can be used:

- Policymaker rating to assess increase in political will for selected government officials (data collection every three months).
- Bellwether methodology to determine the placement of harm reduction on the policy agenda for HIV prevention (data collection every six months).
- Use of a systems map to identify relationships between government officials, police authorities, service providers and the public in terms of the barriers to access of harm reduction services.
- Media monitoring for inclusion of coalition messages in the media.
- Media monitoring, meeting observation checklist and review of documentation of parliamentary committee proceedings to identify use of coalition messages by government officials.

What challenges do you anticipate?

- Turnover of government officials.
- Opposition to messaging from counter-lobbying groups.
- Gaining access to decision-makers within the government and police authority.

Idea for an energiser: lifeboats

Gather everyone into a space. Explain that they are on a boat in a thunderstorm (mime being tossed about by the waves). Suddenly the boat capsizes and they must get to the lifeboats with a specified number of people. Anyone not in the correct-sized group drowns! Shout:"Lifeboats of three" (participants must rush to huddle in groups of three). Then repeat, changing the number for the lifeboats. Finish with the number of people you want in each group for the group work activity.

SESSION 4.2

Reflecting on the key messages and learning points from the workshop to share with our colleagues

Session information

Since we often attend workshops as a single representative, we know that nothing will change unless we transfer the knowledge we now have back to our colleagues at our civil society organisations. It is important that we do not leave a workshop without thinking how to achieve this so that the learning and problem-solving is not lost.

Facilitator's notes

Participants should be able to stay where they are seated to do the task. However, some may prefer to move to the edge of the room or nearby where there is more space to work and think.

Time

40 minutes

Instructions

1. Introduce the name of the session and its place in the workshop timetable.
2. Explain to participants that you would like them to complete a task in the next 30 minutes. They should focus on their own organisation for the task and work alone or with other colleagues from their civil society organisation if they are present. If participants are on their own, they can sit with someone from another civil society organisation to swap notes and get advice and support, but they should focus on their own organisation. Remind participants that this is valuable quiet time for them to think about the future. Read out the tasks and then hand them out to participants.

   Task

   Using your learner's guide and extra handouts, write a detailed bullet-point plan of what information from this workshop you should share with colleagues back at your civil society organisation (or coalition) and how. Consider some of the insights and new ideas you have learned from the workshop and how your organisation can respond to them.

3. With two minutes to spare before the end of the session, call participants back to plenary and ask: *"What kinds of information or key points will you share with your colleagues back at your civil society organisation?"*

Task example: Reflecting on the key messages and learning points from the workshop to share with our colleagues

- Why advocacy evaluation is different and some ways to get around the challenges.
- The concept of the theory of change and its usefulness for:
  - strategic planning of our advocacy work
  - sorting out our strategies, outcomes and goals and how they are related
  - acknowledging our assumptions and considering them seriously
  - prioritising what to focus our evaluation resources on.
- The difference between output and outcome indicators for advocacy efforts at different levels and over different time frames.
- The different kinds of indicators we can use around interim outcomes, such as political will and the placement of issues on a policy agenda. Also the importance of evaluating our own network's ability to respond to advocacy opportunities effectively.
- All the methods of data collection, but particularly the systems mapping and policymaker rating which we can use internally.

  These points will be covered during a special session with our organisation and through quarterly coordination meetings with our local partner organisations.

Source: Measuring up field-test workshop, India, 2010

ONE-DAY WORKSHOP

Time

20 minutes

Instructions

Implement the activity in session 4.2 but only allowing 15–20 minutes for the task.

CLOSING SESSION

Workshop summary, post-workshop questionnaire and workshop close

Time
45 minutes

Instructions

1. Provide a 20-minute summary of the workshop content and how this relates to the content of the *Measuring up* guide as a whole.
2. Thank participants for taking part in the workshop and make other complimentary remarks as relevant.
3. Explain that you have one final task for them before you wrap up the workshop: completion of the post-workshop questionnaire. Ask participants to re-score the pre- and post-workshop questions on the questionnaire and answer the post-workshop summary questions at the bottom. Allow the participants to collect their own questionnaires using the symbols or pictures that they drew on the back of them. Give the participants ten minutes to fill them in. Assign a place for all the questionnaires to be left with the symbol/picture facing down. Make sure all the questionnaires are handed in.
4. Ask participants: *"Can you share a few highlights from the workshop (they can be anything)?"*
5. Close the workshop with any administrative information and thanks.

ONE-DAY WORKSHOP

Time
10 minutes

Instructions

1. Thank participants for taking part in the workshop and make other complimentary remarks as relevant.
2. Explain that you have one final task for them before you wrap up the workshop: completion of the post-workshop questionnaire. Ask participants to re-score the pre- and post-workshop questions on the questionnaire and answer the post-workshop summary questions at the bottom. Allow the participants to collect their own questionnaires using the symbols or pictures that they drew on the back of them. Give the participants ten minutes to fill them in. Assign a place for all the questionnaires to be left with the symbol/picture facing down. Make sure all the questionnaires are handed in.
3. Ask participants: *"Can you share a few highlights from the workshop? They can be anything."*

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