When the Best Offense is a Good Defense

Understanding and Measuring Advocacy on the Defense

June 2019
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When advocates, funders, and evaluators first began working more closely to evaluate advocacy efforts, they initially focused on understanding how new policy achievements occurred: What were strong theories of change, what outcomes mattered along the way, and how could advocates’ contributions to policy results be understood? This was important work, but incomplete. The field has long acknowledged a unique aspect of advocacy, which is that a “win” can mean avoiding a disadvantageous policy or holding the line on past wins. However, there has been less focus on “defense” as evaluation frameworks and tools have been developed.

I guess [defensive advocacy] is so much of a given that we don’t have a term for it, but good to call it out and define it because I think a lot of funders and groups don’t realize how prevalent it is.

To dive into this topic, we talked to advocates and funders to better understand how they thought about advocacy on the defense.

We wanted to understand whether it was a distinct category of work and the degree to which there were useful frameworks and tools for evaluating it. Over several months, we spoke to 20 people from 12 organizations, five foundations and seven nonprofits. They worked in the U.S. at a federal and/or state level on issues including hunger and anti-poverty, education, health, reproductive rights, the environment, and tax policy. We wanted to hear directly from people in the trenches and those supporting them to understand how they talked about this work, how they thought about success, and what would be helpful for evaluators and funders to know. This brief represents our key takeaways from those conversations. We share:

» Categories of defensive work describing how advocates conceptualize five different types of defense, ranging from reacting to changing circumstances to more proactive approaches
» Suggestions for how evaluators, advocates and funders should think about defense-specific outcomes, impact, and evaluation
» Key takeaways for understanding unique aspects of this advocacy work

We hope this piece will continue to inform, refine, and strengthen evaluators’ and funders’ thinking around strategy, measurement, and evaluation for those times in advocacy when the best offense is a good defense.
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Advocate

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No matter what they called it, advocates use one toolbox of strategies and tactics, but the ends they seek differ.

While some described a comprehensive focus on defensive and proactive work as just good advocacy, we heard some distinct categories of types of defensive advocacy work across these conversations. They could be broadly categorized as reactive work and long game or proactive defense (Fig. 1). We also heard that one of the challenges for advocates on the defense is accurately describing and exciting funders about impact that doesn’t necessarily match up well with ingrained ideas of success: i.e. a pronounced and consistent upward trajectory of positive change for certain populations or environments.1

In this section, we further describe these defensive advocacy categories and the different types of approaches that exist within them. In addition to describing the types of defense, we also talk about the kinds of impact expected.

What is “Defensive Advocacy”?

Advocates and funders used many different phrases to describe their defensive work: “holding the line,” “killing a bill,” “maintaining a win,” “using defense to get to offense,” and more simply “stopping bad stuff from happening.”

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1. Note: Impact descriptions may vary based on specific context and audience.

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PROACTIVE IMPACT Fig. 1
Reactive Defense (RD)

Reactive defense is what most of us might first think of when we think about advocacy on the defense: a new bill with negative effects gets proposed, or a prior win’s funding is going to be gutted. Advocates jump into action, rallying their relationships with policymakers, partners, and constituents, ramping up communications and spurring action against something happening. Most advocates we talked to differentiated between three types of reactive approaches.

This type of defense is defined by advocacy to defend or maintain an existing law, act, piece of legislation, etc., from being repealed or changed for the worse. For example, an anti-hunger advocate in Washington state talked about work to maintain a policy for the use of Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) vouchers at local farmer’s markets to buy produce, something that benefited low-income families and farmers in the state. By rapidly engaging community members and the farmers themselves, advocates were able to make a case for the broader value of this program to the community and economy and successfully maintained the program’s funding. Most advocates we talked with spoke of this kind of work, regardless of whether they worked at the federal, state, or local level or whether they focused on issues broadly relevant to a population or a geographic region or a more specific topical issue around which they advocated. The focus of this work seeks to achieve a stabilizing impact by avoiding a potentially deleterious result (Fig. 2). If you don’t consider the alternative effects of a loss, a defensive win that maintains the status quo might appear to be nothing at all.

I think about work I did years ago on paid sick days. It was still kind of a new idea as far as a workplace standard. And it’s challenging to build urgency on the issue if it’s “not going anywhere,” right? Whereas I think on defense you have that urgency. Oftentimes, if it is a big enough threat in front of you, that creates the energy that you can mobilize people around.
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Lessen the blow

This type of defense focuses on modifying or removing disadvantageous aspects of a new policy or reducing the loss of a past win. For example, children and family advocates fought to keep a statewide child’s health insurance program from cuts during the Great Recession. As a result of advocates’ efforts, the program was not cut, but the state increased the monthly premiums paid by families. While an undesirable result, it was nonetheless better than a complete loss of the program. In this work, softening negative effects of a policy that can’t be stopped is the result. The impact of this work can be considered palliative (Fig. 3), one that may appear to show a negative relationship between the work and the outcomes—that the program is actually doing harm—unless one considers the counterfactual or historical trendline.

Advocates talked about the importance of having “bright red lines” when using a lessening-the-blow approach to know up to what point you are willing to budge or compromise. What losses can advocates take now that could be undone later? There are some advocates who take a principled position to only oppose a bad bill. These advocates will not engage in any compromise to lessen the blow of a bad policy. For others, though, if success can be measured by fewer people negatively impacted by a policy decision or dollars saved, these advocates are willing to engage in the challenging and sophisticated work of minimizing losses.

Kill the bill

Similar to “preserve status quo,” this work focuses on preventing adoption of new policies that would be disadvantageous (Fig. 4). For example, one funder shared a story about a grantee being alerted to a huge cut to a federal agency that was buried in another piece of legislation. The organization was able to rapidly “rally the troops” to remove the provision. The impact of this work may be considered “preventative impact,” where the impact is no change. This differs somewhat from the “stabilizing” impact where no results come from an action; in this case, the catalyzing event that would spur the decline may never actually happen. “Proving” impact in the preventative model is particularly challenging, because the impact in this case is, essentially, that a worse-case scenario did not occur.
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Advocates varied most in how they approached “kill the bill” work

For some, it was a critical part of their work. They spoke about the importance of having good relationships with policy insiders — staffers and others who will alert them to proposed changes or hidden “riders” that could be acted on quickly. They also noted the many points where advocates can intervene and more easily avert a negative result; it’s possible to stop a policy proposal from ever being introduced, before it leaves committee, or before it is signed by an executive or administrator. In addition, the number of votes needed to stop a policy proposal from advancing is often lower than what’s required for adoption. At the same time, other advocates described their focus on these types of scenarios as quite limited. It would be too much to track and act on all possible bills they might oppose, especially given the great likelihood that many policy ideas don’t make it through the many steps in the process to become a real threat.

Some of these differences in approach toward “kill the bill” could be related to the advocates’ focus. Those working in reproductive health and tax policy, for example, often spoke to critical examples of “kill the bill” defensive advocacy. Setting negative precedent could have huge ramifications for their overall efforts beyond any particular policy arena, and defeating a deleterious policy once it has been put into law is a hard slog against the status quo. Alternatively, community advocates in a more progressive state spoke to their focus on their proactive agenda and a defensive focus on maintaining past wins. They expended little energy on stopping bills they saw as unlikely to get legs. We surmised that the political environment and lower likelihood of establishing harmful precedent likely factored into how they decided to focus their defensive work.

Proactive Defense (PD)

“Preventative defense,” “proactive defense,” and “anticipatory defense.” These were all terms advocates used to describe defensive strategies that were not about reacting in a moment to a policy moving through a policy window. While we expected advocates to talk about preserving past wins, minimizing losses, or stopping policies that run counter to their values or mission, we were surprised to hear as many advocates talk about long-game defense strategies compared to reactive defense. While the idea of proactive defense can seem a contradiction in terms, it seems to be a major way advocates think about this kind of work. As we teased advocates’ stories apart, a few different types within this broader category surfaced.
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Pre-emptive defense

Some advocates and funders spoke to their work to build or maintain capacity to be able to react quickly to foreseen defensive needs in the future or when the political climate means forward progress is extremely unlikely, making a proactive approach unfeasible. For example, even though federal bills may not be up for reauthorization for many years, advocates may focus on proactively preparing for that future policy decision. Alternately, advocates in states with majority parties not interested in their issues need to be ready for threats that may emerge during legislative seasons. This kind of work can include trying to build awareness and salience of an issue so that constituents can be rapidly engaged if a reactive moment does emerge, spending time educating lawmakers about an issue ahead of a “crisis” moment, or implementing a longer-term communications campaign. Like in the “kill the bill” scenario, the impact is likely to be preventative, where a theorized decline does not occur.

Another example of pre-emptive defense gleaned from our experience working in policy advocacy evaluation is a state/local versus federal policy approach. In these cases, racial-equity advocates and state/local governments responded to anti-immigrant federal policy by passing state and local policies designed to prevent imminent implementation of a federal policy in their locale. This approach is particularly effective when there is a strong base of support and political will at the state and local level.

Long-term restoration

In cases where advocates were not successful in a reactive defensive effort, many created a long-term strategy to win back losses over time. For example, referring back to the example we shared about lessening the blow, state-level advocates working on behalf of children and families tried for years to slowly cut back the premiums families were paying for a statewide children’s health insurance policy, a loss they had minimized during the Great Recession. Two years later, they were able to pass a policy to end the cost sharing. Advocates shared that long-term restoration efforts often involve a consistent commitment to community engagement, communications aimed at building greater public will, and policymaker education. In some cases, advocates focused their attention on building the base of support for policy solutions while waiting out political cycles or changes in the policy or economic environment. Like when advocates maintain a win, the ultimate impact is to stabilize impact for those who were expected to lose supports.

Long-term defense is “squishy”

In both the types we just described, the degree to which the work is distinctly defense versus more typical offense advocacy is squishier than in the case of reactive defense discussed earlier. Yet as many funders and advocates described examples of long-term defensive advocacy as did those who talked about protecting prior wins. While it could feel like splitting hairs to differentiate activities that lead to long-term defense or clawing back past losses compared to more traditional offense to get a new policy passed, it’s useful to know that advocates think of it all under a defense umbrella.
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During our conversations with funders and advocates, we asked for stories of defensive advocacy successes and failures. We found this helped breathe life into what could otherwise be a conceptual or theoretical discussion. We share these illustrative examples to show what these kinds of defensive advocacy approaches have looked like on the ground. Deeper discussion of outcomes and measurement follows later in the brief.
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Scenario 1
Preserve Status Quo

The policy that advocates fought long and hard for years ago was voted into law. Now, after a tough election, the new president’s policy agenda includes repealing the policy.

Advocacy Strategy: Focused and pragmatic inside champion approach

Advocates knew they needed at least six senators to successfully block the repeal of the Affordable Care Act (ACA) in 2017, so they implemented a seven-month campaign strategy targeting senators from seven states. Strategically identifying a combination of moderate Democrats in red states and moderate Republicans in swing states that were up for re-election, advocates established working relationships with senators and their staff, became trusted, go-to sources of information, and proactively asked what senators needed related to this issue. To craft their in-state approach, the advocates conducted analyses to better understand what messages and information were most salient to each senator. Their aim was not to attack or create enemies but to be allies to support their decision-making. In addition to their focused efforts with key members of Congress, they worked locally and nationally to strengthen established coalitions, amplify the voices of supportive legislators, and maintain frequent media attention.

To their surprise, most of the senators were responsive and provided honest and straightforward input to the advocates’ efforts. For example, one senator routinely urged advocates to include voices from a rural area of the state, suggesting that focusing too heavily on voices from only urban centers could be an impediment to securing the desired outcome. In response, the advocate organized a town-hall meeting in the rural district and the senator participated. On July 27, 2017, as the vote on the repeal came to the senate floor, advocates had solidified five of the six necessary votes. The last vote needed was Sen. John McCain. The voting ultimately culminated in what is now an iconic moment. Sen. McCain walked on the Senator floor and famously delivered his thumbs down vote to defeat the Republican efforts to repeal the ACA.
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Scenario 2
Lessen the Blow

A bill is going to pass. Advocates did not conjure enough support among legislators, and there are not sufficient votes to stop it.

Advocacy Strategy: Inside negotiations

A state ballot initiative to lower the income tax rate to 5% for the state’s top earners was introduced. Local advocates had been working hard to push against the initiative from the start, as this decision would diminish state revenue and result in fewer resources to respond to the needs of children, youth, and families. As the decision neared, advocates eventually concluded there was no reasonable path forward. They shifted their strategy from “kill the bill” to an effort to influence the ballot initiative content. Through their inside-negotiation strategy, they were able to move the income tax rate from 5% to 7%. The advocate admitted it was not the victory they wanted. However, by negotiating and achieving an incremental bump in the income tax rate for the state’s top earners, they were able to protect billions of dollars of state revenue.

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Increased collaboration among advocates and legislators |
|  | Strengthened Base of Support  
Changed voting behavior |
|  | Improved Policies  
Higher tax rate for top earners than originally proposed |

Necessary preconditions: Advocates’ reputation, access to decision-makers, subject matter expertise
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Advocacy activities mapped to outcomes

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Necessary preconditions

Advocates’ reputation, access to decision-makers, subject matter expertise
Scenario 3
Kill the Bill

A bill has just been introduced that advocates believe would have horrible effects on the population whose interests they represent.

Advocacy Strategy: Inside game and scare tactics

A state policy advocate working on food security and nutrition issues faced the threat of a bill that would have enacted a statewide work requirement for individuals to access food stamps, even in districts with high unemployment. Essentially, the bill would have decreased food security among unemployed individuals and their families, including those living in places where finding work was difficult or near impossible. Soon after the advocate learned the bill was scheduled for public hearing, they planned a meeting with the committee chair and worked to educate him about what the bill would do and how it would affect his constituency. Advocates helped the chair understand that if the bill was introduced as planned, there would be a high level of opposition from the other party and from individuals from the community who were poised to testify against the bill. The advocate was prepared to create a very big, ugly public hearing that would potentially look bad for the committee chair. The next day the bill was removed from the hearing schedule, and the advocate has not seen the bill since.

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<td>Bill not introduced</td>
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</tbody>
</table>

Advocates’ reputation, relationships to have intel on bill introduction, access to the chair, constituents ready to be activated
Scenario 3
Kill the Bill

A bill has just been introduced that advocates believe would have horrible effects on the population whose interests they represent.

**Advocacy Strategy:** Inside game and scare tactics

A state policy advocate working on food security and nutrition issues faced the threat of a bill that would have enacted a statewide work requirement for individuals to access food stamps, even in districts with high unemployment. Essentially, the bill would have decreased food security among unemployed individuals and their families, including those living in places where finding work was difficult or near impossible. Soon after the advocate learned the bill was scheduled for public hearing, they planned a meeting with the committee chair and worked to educate him about what the bill would do and how it would affect his constituency. Advocates helped the chair understand that if the bill was introduced as planned, there would be a high level of opposition from the other party and from individuals from the community who were poised to testify against the bill. The advocate was prepared to create a very big, ugly public hearing that would potentially look bad for the committee chair. The next day the bill was removed from the hearing schedule, and the advocate has not seen the bill since.

### Advocacy activities mapped to outcomes

<table>
<thead>
<tr>
<th>ACTIVITIES</th>
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</tr>
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<tbody>
<tr>
<td>Meet with the committee chair</td>
<td>Strengthened Base of Support Increased knowledge of legislator Increased support of legislator</td>
</tr>
<tr>
<td>Organize individuals in communities to testify</td>
<td>Strengthened Base of Support Increased public involvement Increased public will against policy change Decreased political &quot;cover&quot; to advance bill</td>
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**Necessary preconditions**

Advocates’ reputation, relationships to have intel on bill introduction, access to the chair, constituents ready to be activated

**Outcomes**

Strengthened Base of Support
Increased knowledge of legislator
Increased support of legislator
Strengthened Base of Support
Increased public involvement
Increased public will against policy change
Decreased political "cover" to advance bill

Improved Policies
Bill not introduced
Scenario 4  
Long-Term Restoration

The current political climate has advocates in a defensive position, but advocates are playing the long game. Advocacy actions today are planting the seeds for a positive future.

Advocacy Strategy: Engage the public and educate potential candidates

Following a sweeping change in the state legislative landscape, an extremist arm of one party gained control of the government and passed extensive tax cuts that would ultimately cripple the state’s budget and economy. During the battle over the cuts, the advocates’ messages to improve tax policy in their state were not landing with legislators. Once the tax cuts were all but certain, advocates shifted their strategy from near-term offense to near-term and long-term defense. The advocate worked to hold the line in the state House of Representatives on other incoming policies while at the same time working to educate and shift the mindset of the community, legislators, and potential candidates.

The advocates and their partners fanned across the state and held community meetings, engaged local Chambers of Commerce and school boards, and launched media campaigns. With all their efforts the advocates shifted the narrative over time. There were more headlines and editorials and even examples of legislators echoing their messages. After four years implementing the strategy, the state saw unprecedented turnover in the State House. Nearly one-third of the legislators in the House were newly elected, mostly moderate and more open to the advocates’ tax-policy position. Some of the newly elected officials even voiced their longstanding knowledge and appreciation of the advocates’ work. What followed were tax-policy wins, restoring what had been lost as a result of the tax cuts.

Sample of activities mapped to advocacy and policy outcomes

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OUTCOMES

- Shifts in Social Norms
- Increased awareness among the public
- Increased knowledge among the public
- Changed attitudes toward the issue
- Aligned values among the public

- Strengthened Base of Support
- Increased knowledge among legislators
- Increased support among legislators
- Changes in legislators/legislative majorities

- Strengthened Alliances
- Increased collaboration among advocates and legislators

- Improved Policies
- Changes in tax policies

Advocacy capacity to develop and implement long-term strategy; media relationships, reputation, relationships in community, patient funders
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**Advocacy capacity to develop and implement long-term strategy; media relationships, reputation, relationships in community, patient funders**
In interviews, we probed to understand the ways in which reactive defense differs from other kinds of advocacy. We heard that the standard range of advocacy strategies and tactics — power analyses, champion development, coalition building, grassroots engagement, communications, data analysis and research, etc. — all continued to play roles in defensive work. Advocates acknowledged it was just the desired ends and specific ways in which strategies or tactics were leveraged that varied. We explored whether defensive advocacy focused more on an inside game or generating external pressure and heard that neither approach was more typical than the other. The best advocacy approaches are dictated by the specific situation, not whether the advocacy is offensive or defensive.

One difference noted, especially at the federal level, is work to slow down policy adoption by using the legislative processes that exist (such as comment periods) or considering other tactics that will slow things down (such as the timing of when policies are put forward relative to election cycles). Adding more time to the process can help advocates try to wait out a particular political situation or to buy time to build more support and will against a particular situation.

Across our conversations, we heard a few interesting themes about work on the defense. Strategies and tactics come from the same toolbox, whether advocates are on offense or defense. Standing capacity is crucial. Much of what we think of as traditional defense involves advocates rapidly responding to a new policy situation or threat. When those moments arise, advocates don’t have time to build new relationships with champions, policymakers, partners, or constituents. As one funder said, “When doors open, you run through them, you elevate your message and elevate your voice.” Advocates need to be able to leverage their relationships and reputation, whether the defense strategy involves an inside, quiet political game or an outside, big megaphone kind of approach. Advocates also benefit from having relationships in place so that they get intel when new threats are emerging or are getting baked into legislation in unexpected ways. This standing capacity is true, also, for proactive defense, where they need to have the time and resources to be playing the long game to win back losses or prepare for those crisis moments.
What Are the Key Takeaways about Defensive Advocacy?

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We were surprised to hear many advocates literally use the word “easier.” When we dug deeper, they described several factors in those terms:

Clear problem and policy window
Political scientist John Kingdon has theorized that policy change happens based on the intersection of (1) problems being defined as a policy issue, (2) policies being identified to address the issue, and (3) political opportunities opening up. Because defensive work is responding to a political opportunity, it means the issue has already been defined as a policy problem with a particular solution. Advocates can then focus on generating or harnessing energies to debate the policy solution. In comparison, much proactive advocacy work must seek to define an issue as a policy problem and wait for a political opportunity to take action as well as advocate for a particular policy solution.

Easier to sign on partners
Advocates doing proactive work often try to develop broad coalitions or cultivate unlikely allies; however, those we interviewed thought it was often easier to form a broad coalition in a defensive advocacy scenario. Even if people or groups disagree about certain elements of an issue (which would make it difficult to cultivate aligned support for a proactive decision), they can frequently align around a shared interest in defeating or preventing a specific policy. For example, defensive advocacy around the Farm Bill reauthorization led to opportunities to engage advocates with agendas related to food and hunger, children and families, and environmental concerns, when advocates felt it would be harder to get this same diverse group on board for a new policy proposal.

Strong communications opportunity
Additionally, some of our interviewees noted that, within a communications strategy, it can be easier to get media attention, sow uncertainty or doubt, or play up the worst-case scenario of a potential policy change. We surmise that it may also be easier to get media attention for something already at play versus trying to create a new narrative or area of interest. This was an area of divergence in our interviews. Others spoke to the importance of messaging and framing continuing to focus on what’s possible and a positive view of the future.

(Often) bought in constituents
In defensive advocacy, the individuals who are most likely to be impacted by a policy decision are not hypothetical—affected individuals or groups stand to lose something with a change, and they may have even been involved in the original bill passage, particularly at a state or local level. Advocates spoke of working with affected populations to advocate for themselves, such as parents using a child health program, mothers using WIC vouchers, students who face long bus commutes, or those facing disproportionately negative effects of changes in taxes and budget allocations. Some advocates spoke to the fact, too, that being able to point legislators to constituents in their state or district was much more powerful as a strategy in defense than when advocates try to proactively push a new policy or innovation that has worked somewhere else but doesn’t have current application “at home.”

A proactive strategy to get something through Congress must consider each of the key members to either recruit as a champion or at least be willing to nod their assent; key committee chairs, leadership of the House and Senate, or people who have important stakeholders at home on that issue. You have to assemble a broad strategy, and then you have to do full court press and understand where the votes are. On defense, it is less likely you have to build a broad coalition. If you want to stop it from getting to committee, you can just focus on that, perhaps by targeting the chair who sets the agenda. Or you can enter into a negotiation and even if you are really unhappy with the proposal, maybe you negotiate to a middle ground.

Some advocates struggled with the concept of differentiating between defensive and offensive advocacy, particularly those who thought less about reactive defensive work. Those who had a broader campaign mentality with goals over a multiyear period, or had state, national, and federal efforts happening in concert, were much more likely to describe efforts that were about winning the long game than differentiating between the parts along the way. And, in some cases, advocates described times when they might be pushing a new policy and fending off a bad one at the same time. Advocacy is complex, adaptive work that may not always fit inside one box. We hope that having a more nuanced framework about advocacy and defense can help advocates, evaluators, and funders have more productive and sophisticated conversations about this work.

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It’s “yes/and”, not “either/or.”

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I've said this from the beginning: Philanthropy undervalues playing defense. From a funding perspective, it's a much bigger percentage of nonprofits' time than philanthropy understands. And philanthropy undervalues it because foundations want to move the ball forward. But foundations need to understand that standing still is a huge win sometimes.

Advocacy organizations need the kind of general operating support that can sustain strategy to play the long game, not just achieve immediate policy wins or to react to immediate opportunities. While this might seem like a no brainer, or something you might see regardless of the topic of the brief, funders and advocates alike talked about the specific challenges of getting the kind of funding they need to do this work well.

Many funders and advocates alike spoke to the fact that it can be difficult to describe and sell to boards the need and value for defensive work. While most nonprofit organizations would like more unrestricted funding, we understood the fundraising to be more challenging for defense than for a proactive campaign where funders might want or expect a clearer win. Some interviewees spoke to the value of funders providing rapid response funding to support those crisis moments, but rapid response funds don’t replace the value of ongoing investments in organizational capacity for the continuous work in their focus areas.

Through our interviews we heard of ways that defensive work lines up with some other less-well-understood advocacy approaches, including policy implementation advocacy and legal advocacy.4

Policy implementation advocacy includes efforts by advocates to influence the “carrying out of a basic policy decision” through administrative regulation and rulemaking and the actual implementation of policies carried out by agencies or intermediaries. While our informants still largely spoke to the focus on legislative work, they acknowledged that even with a policy loss, the work is not over. They also noted the need to consider ramifications for relationships with agency staff based on the position advocates take during the heat of the policy battle.

Legal advocacy uses the law as a means to effect change. Advocates can use strategic litigation to advance significant changes in or adherence to law, as well as develop legislation, provide legal support, write amicus briefs, and more.5 For some, keeping an eye on how defensive work can later fit into a legal strategy was a key part of their strategy. A reproductive rights advocate, for example, talked about the importance of making sure the legislative battle either creates—or, at a minimum, doesn’t hinder—a future litigation strategy.

Once advocates get a policy win, there are all kinds of ways to be undermined. It’s called “policy drift.” In California, the legislature passed policy to reduce greenhouse gases and created a program called Cap and Trade. The oil companies hated it and filed a ballot initiative to kill the program. Environmental advocates successfully defended the program. But, as the program was implemented, oil companies influenced the program in subtle ways to their benefit. Advocates have had to be on the defense and push agencies to keep enforcement strong. Fighting the ballot initiative was a six-month effort; the implementation effort has been ongoing for 10 years. That’s a lot of defense!

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Advocacy Funders

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How Should We Evaluate Defensive Advocacy?

In addition to defining defensive advocacy as a distinct approach, we were especially interested to understand how defensive advocacy could be measured and evaluated. In this section, we share findings related to interim outcomes and suggestions for measurement and evaluation.

Defensive Advocacy Outcomes

In 2007, ORS Impact published “A Guide to Measuring Advocacy and Policy,” where we laid out a set of outcome areas relevant to advocacy and policy change. This piece has helped evaluators, funders, and advocates better communicate expectations, measure progress, learn from their work, and understand progress, even when policy opportunities may shift. When reviewing advocacy work on the defense, we wanted to understand where outcomes were similar to and—more importantly—different from outcomes expected to result from proactive advocacy work.

We are tracking a number of things, for example: the number of voters engaged, the number of contacts deployed, the composition and number of coalition partners, the number of new resources gained through defense, the number legislative contacts reached, the number of legislative champions organized in each state and whether they are growing, and the extent to which we armed champions with facts to play defense and fight back.
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In addition to defining defensive advocacy as a distinct approach, we were especially interested to understand how defensive advocacy could be measured and evaluated. In this section, we share findings related to interim outcomes and suggestions for measurement and evaluation.
Across interviews, key informants provided many stories of what this kind of work looks like and talked explicitly about what kinds of things they track and measure. When describing what success or progress looked like to them, more than half of the examples given were in line with the kinds of outcomes that could be relevant to any type of advocacy work. Advocates involved in defensive work described efforts to increase awareness and salience of an issue (Shifts in Social Norms); improved capacity of organizations to engage in advocacy work (Strengthened Organizational Capacity); the number, quality, and diversity of alliances and partnerships (Strengthened Alliances); and increased support and activity of policymakers, policymakers staff, key constituents, and the broader public (Strengthened Base of Support). Overall, almost half of the examples given spoke to Strengthening the Base of Support.

Many advocates described the value of these kinds of interim outcomes, even when they were ultimately unsuccessful in their defense. This attitude isn’t surprising in an advocacy context, where the work is adaptive and dynamic. As in all types of advocacy, advocates are playing an “infinite game.” As described by James P. Carse, finite games, such as soccer, are bounded and predictable. There are defined players, a defined playing field, rules, known timelines, and clear winners. Infinite games, on the other hand, are open to clear winners. Infinite games, on the other hand, are open to

Some outcomes are defense-specific.

While just over half of the examples of progress our key informants described were consistent with the kinds of outcomes we might typically think of for advocacy work, some distinct and different outcomes emerged that we think add to this overall framework, in three outcome buckets:

**IMPROVED POLICIES**

While ORS’ original framework category focused on the development, adoption, implementation, and enforcement of policy as key example outcomes, defensive advocacy, unsurprisingly, has a variety of ways of understanding the success of “bills killed” or damage being minimized. This includes:

- Bills not being introduced
- Bills not moving out of committee
- Bills voted down on the floor
- Lawsuits won
- No unfavorable changes to administrative codes or regulations
- Favorable precedent established for future legislation or litigation
- Ultimate policy adopted had elements that minimized original downsides (e.g., ultimate tax rate, ultimate number of children or families affected, dollars protected from proposed cuts)

**CHANGES IN IMPACT**

Advocates and funders also talked about changes in impact differently from how impact is frequently understood in the context of proactive advocacy where wins might be the number of lives improved or the amount of acreage protected. Examples of changes in impact relevant to defensive advocacy included things such as the difference between original legislation to final legislation in relation to:

- Fewer individuals or communities negatively affected
- Reduced barriers or effort necessary to access supportive benefits or services, e.g., the number of miles required to travel to access health care
- Lessened negative effects on a community or environment, e.g., reduced pollution

**STRENGTHENED BASE OF SUPPORT**

While many of the examples provided were very similar to typical outcomes associated with public and policymaker engagement, more than once, advocates described policymakers, who were not aligned with their issue being voted out of office as a sign of success, particularly within the context of long-game defense:

- More supportive candidates in office/fewer opposition candidates retain office
- Changes in majority party in legislative bodies

Many previously identified interim advocacy and policy outcomes are the same and highly valued.

Have we gained new allies, gotten great press, and come out of it looking like victors? Maybe [our opponents] feel the pain of the fight and won’t come up again.

Advocate
Many previously identified interim advocacy and policy outcomes are the same and highly valued.

Across interviews, key informants provided many stories of what this kind of work looks like and talked explicitly about what kinds of things they track and measure. When describing what success or progress looked like to them, more than half of the examples given were in line with the kinds of outcomes that could be relevant to any type of advocacy work. Advocates involved in defensive work described efforts to increase awareness and salience of an issue (Shifts in Social Norms); improved capacity of organizations to engage in advocacy work (Strengthened Organizational Capacity); the number, quality, and diversity of alliances and partnerships (Strengthened Alliances); and increased support and activity of policymakers, policymaker staff, key constituents, and the broader public (Strengthened Base of Support). Overall, almost half of the examples given spoke to Strengthening the Base of Support.

Many advocates described the value of these kinds of interim outcomes, even when they were ultimately unsuccessful in their defense. This attitude isn’t surprising in an advocacy context, where the work is adaptive and dynamic. As in all types of advocacy, advocates are playing an “infinite game.” As described by James P. Carse, finite games, such as soccer, are bounded and predictable. There are defined players, a defined playing field, rules, known timeframes, and clear winners. Infinite games, on the other hand, are open to any player, have no set playing field, rules are changeable, and there is no clear winner. Ultimately, the goal is to keep playing the game. With an infinite game orientation, seeing signs of progress or ways to keep the game going through achievement of interim outcomes is natural.

While just over half of the examples of progress our key informants described were consistent with the kinds of outcomes we might typically think of for advocacy work, some distinct and different outcomes emerged that we think add to this overall framework, in three outcome buckets:

**Defensive-Specific Outcomes**

**CHANGES IN IMPACT**

Advocates and funders also talked about changes in impact differently from how impact is frequently understood in the context of proactive advocacy. While ORS’ original framework category focused on the development, adoption, implementation, and enforcement of policy as key example outcomes, defensive advocacy, unsurprisingly, has a variety of ways of understanding the success of “bills killed” or damage being minimized. This includes:

- Bills not being introduced
- Bills not moving out of committee
- Bills voted down on the floor
- Lawsuits won
- No unfavorable changes to administrative codes or regulations
- Favorable precedent established for future legislation or litigation
- Ultimate policy adopted had elements that minimized original downsides (e.g., ultimate tax rate, ultimate number of children or families affected, dollars protected from proposed cuts)

**STRENGTHENED BASE OF SUPPORT**

While many of the examples provided were very similar to typical outcomes associated with public and policymaker engagement, more than once advocates described policymakers, who were not aligned with their issue being voted out of office as a sign of success, particularly within the context of long-game defense:

- More supportive candidates in office/fewer opposition candidates retain office
- Changes in majority party in legislative bodies

**IMPROVED POLICIES**

While ORS’ original framework included things such as the difference between original legislation to final legislation in relation to:

- Lessened negative effects on a community or environment, e.g., reduced pollution
- Reduced barriers or effort necessary to access supportive benefits or services, e.g., the number of miles required to travel to access health care
- Lessened negative effects on a community or environment, e.g., reduced pollution

**HAVE WE GAINED NEW ALLIES, GOTTEN GREAT PRESS, AND COME OUT OF IT LOOKING LIKE VICTORS? MAYBE [OUR OPPONENTS] FEEL THE PAIN OF THE FIGHT AND WON’T COME UP AGAIN.**

Advocate
### Updated Menu of Interim Outcomes for Advocacy and Policy Work

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>SAMPLE OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift in Social Norms</td>
<td>Changes in awareness</td>
</tr>
<tr>
<td></td>
<td>Increased agreement on the definition of a problem</td>
</tr>
<tr>
<td></td>
<td>Changes in beliefs</td>
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<tr>
<td></td>
<td>Changes in attitudes</td>
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<td></td>
<td>Changes in values</td>
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<tr>
<td></td>
<td>Changes in the salience of an issue</td>
</tr>
<tr>
<td></td>
<td>Increased alignment of campaign goal with core societal values</td>
</tr>
<tr>
<td></td>
<td>Changes in public behavior</td>
</tr>
<tr>
<td>Strengthened Organizational Capacity</td>
<td>Improved management of organizational capacity of organizations involved in advocacy and policy work</td>
</tr>
<tr>
<td></td>
<td>Improved strategic abilities of organizations involved in advocacy and policy work</td>
</tr>
<tr>
<td></td>
<td>Improved capacity to communicate and promote advocacy messages of organizations involved in advocacy and policy work</td>
</tr>
<tr>
<td></td>
<td>Improved stability of organizations involved in advocacy and policy work</td>
</tr>
<tr>
<td>Strengthened Alliances</td>
<td>Increased number of partners supporting an issue</td>
</tr>
<tr>
<td></td>
<td>Increased level of collaboration (e.g., coordination)</td>
</tr>
<tr>
<td></td>
<td>Improved alignment of partnership efforts (e.g., shared priorities, shared goals, common accountability system)</td>
</tr>
<tr>
<td></td>
<td>Strategic alliances with important partners (e.g., stronger or more powerful relationships and alliances)</td>
</tr>
<tr>
<td></td>
<td>Increased ability of coalitions working toward policy change to identify policy change process (e.g., venue of policy change, steps of policy change based on strong understanding of the issues and barriers, jurisdiction of policy change)</td>
</tr>
<tr>
<td>Strengthened Base of Support</td>
<td>Increased public involvement in an issue</td>
</tr>
<tr>
<td></td>
<td>Increased level of actions taken by champions of an issue</td>
</tr>
<tr>
<td></td>
<td>Increased voter registration</td>
</tr>
<tr>
<td></td>
<td>Changes in voting behavior</td>
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<tr>
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<td>Increased breadth of partners (e.g., number of unlikely allies supporting an issue)</td>
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<tr>
<th>CATEGORY</th>
<th>SAMPLE OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengthened Base of Support (continued)</td>
<td>Increased media coverage (quantity, prioritization, extent of coverage, variety of media “beats,” message echoing)</td>
</tr>
<tr>
<td></td>
<td>Increased awareness of campaign principles and messages among selected groups (e.g., policymakers, general public, opinion leaders)</td>
</tr>
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<tr>
<td></td>
<td>Changes in public will</td>
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<tr>
<td></td>
<td>Changes in political will</td>
</tr>
<tr>
<td></td>
<td>Changes in majority party in legislative bodies</td>
</tr>
<tr>
<td></td>
<td>More supportive candidates elected/fewer opposition candidates retain office</td>
</tr>
<tr>
<td>Improved Policies</td>
<td>Policy developed</td>
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<tr>
<td></td>
<td>Policy adopted</td>
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<td></td>
<td>Policy implemented</td>
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<td></td>
<td>Bills not being introduced</td>
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<td>Improved social and physical conditions (e.g., poverty, habitat diversity, health, equality, democracy)</td>
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<tr>
<td></td>
<td>Fewer individuals or communities negatively impacted</td>
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<td>Reduced barriers or effort necessary to access supportive benefits or services (e.g., number of miles required to travel to access health care)</td>
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Updated Menu of Interim Outcomes for Advocacy and Policy Work

**CATEGORY**

**SAMPLE OUTCOMES**

**Shift in Social Norms**

- Changes in awareness
- Increased agreement on the definition of a problem
- Changes in beliefs
- Changes in attitudes
- Changes in values
- Changes in the salience of an issue
- Increased alignment of campaign goal with core societal values
- Changes in public behavior

**Strengthened Organizational Capacity**

- Improved management of organizational capacity of organizations involved in advocacy and policy work
- Improved strategic abilities of organizations involved in advocacy and policy work
- Improved capacity to communicate and promote advocacy messages of organizations involved in advocacy and policy work
- Improved stability of organizations involved in advocacy and policy work

**Strengthened Alliances**

- Increased number of partners supporting an issue
- Increased level of collaboration (e.g., coordination)
- Improved alignment of partnership efforts (e.g., shared priorities, shared goals, common accountability system)
- Strategic alliances with important partners (e.g., stronger or more powerful relationships and alliances)
- Increased ability of coalitions working toward policy change to identify policy change process (e.g., venue of policy change, steps of policy change based on strong understanding of the issues and barriers, jurisdiction of policy change)

**Strengthened Base of Support**

- Increased public involvement in an issue
- Increased level of actions taken by champions of an issue
- Increased voter registration
- Changes in voting behavior
- Increased breadth of partners (e.g., number of unlikely allies supporting an issue)

**Strengthened Base of Support** (continued)

- Increased media coverage (quantity, prioritization, extent of coverage, variety of media “beats,” message echoing)
- Increased awareness of campaign principles and messages among selected groups (e.g., policymakers, general public, opinion leaders)
- Increased visibility of campaign message (e.g., engagement in debate, presence of campaign message in the media)
- Changes in public will
- Changes in political will
- Changes in majority party in legislative bodies
- More supportive candidates elected/fewer opposition candidates retain office

**Improved Policies**

- Policy developed
- Policy adopted
- Policy implemented
- Policy enforced
- Bills not being introduced
- Bills not moving out of committee
- Bills voted down on the floor
- Lawsuits won
- No unfavorable changes to administrative codes or regulations
- Favorable precedent established for future legislation or litigation
- Policy adopted had elements that minimized original downsides (e.g., ultimate tax rates, number of children/families affected, dollars protected)

**Improved Impact**

- Improved social and physical conditions (e.g., poverty, habitat diversity, health, equality, democracy)
- Fewer individuals or communities negatively impacted
- Reduced barriers or effort necessary to access supportive benefits or services (e.g., number of miles required to travel to access health care)
- Lessened negative impact on community or environment (e.g., reduced pollution)
Recommendations for Measuring and Evaluating Defensive Advocacy

While many advocates and funders continue to struggle with meaningful measurement of advocacy and policy change efforts, defensive advocacy, in particular, has some unique challenges. As noted in the impact models previously, some key indicators of success include things such as bills not even making it to the point of introduction. While it’s easier to describe and document a bill passing through committee or on the floor, being able to apply pressure and avoid a fight in the first place can be difficult to verify or prove. We heard from many program officers that it can be hard to get what feels like useful information in grantee reports; efficacy, context, and quality can be difficult to convey. At the same time, grantees feel like it’s hard to report anything meaningful in grant timelines and reporting templates.

The advocacy and policy change evaluation field has long had some standards for quality, including the use of strong theories of change and the acknowledgment of the value of interim outcomes. There’s no reason for defensive advocacy evaluation to do differently. Being more explicit about assumptions behind the work, hypotheses for why certain outcomes are expected, and being more crisp in thinking about the right outcomes for defensive work can only strengthen advocacy strategy and measurement. For ongoing learning and “real time” measurement and refinement, tools and methods exist to measure things such as political will, public will, and message framing, for example, that would work equally well in defensive contexts. Other methods, such as Intense Period Debriefs or Before and After-Action Reviews, 8 could be useful in learning from more reactive efforts to capture lessons learned and outcomes observed after the heat of the moment. As in the best practices for proactive advocacy, use theories of change to identify the most crucial places to invest measurement and evaluation efforts that will support greatest learning and/or provide most evidence about likely progress going forward.

When wins might mean more status quo or mitigated losses, funders and evaluators should question what groups are going to benefit and what groups are going to lose through different defensive win results and consider differential effects in light of historical and structural inequities. Embedding a structural racism lens in any evaluation can be supported by collecting sufficient data to disaggregate by each racial/ethnic group of interest (e.g., urban Native Americans and Native Americans on a reservation); collecting sufficient data to disaggregate by areas of intersectionality; ensuring limitations of summarized or administrative data are clearly described; and framing findings in terms of systemic issues (e.g., if reporting differential rates of high school graduation by race/ethnicity or language spoken at home, also share differential availability of Advanced Placement classes or other academic supports). 9 Consider equity, considerations of power, and disproportionate benefits and risks across the evaluation, from questions to data collection, interpretation, and sharing of findings. 10

1
Continue to use advocacy and policy change evaluation field-accepted approaches rigorously.

2
Build race equity into your evaluation and analysis.

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We know of a number of efforts that have sought to understand the contribution of a particular advocacy organization or funder toward a big policy win. Evaluators keep using more and better techniques to look, after the fact, at how policy change actually happened. We don’t know, however, of cases where funders have applied the same rigor and analytics toward defensive results. We believe some more rigorous evaluative work around the maintenance of a prior win or lessening the blow could yield some useful lessons to add to the sector’s understanding of this work. While advocacy and policy change will never result in a recipe-like best practice, continued exploration into what works under complex, political conditions can only help funders and advocates become more strategic and rigorous in their thinking.

One of the frustrations we heard, largely on the funder side, was around grantee reporting. Reports do little to answer questions about how well the work is going for an individual organization or provide insight to a longer-view vantage point of the issue. Reports mostly share tactical, short-term updates. These critiques in some ways point to other sector conversations underway about grantee reporting versus multi-year general operating support. While we won’t try to resolve the larger issue here, we would argue that it may be unreasonable for individual grantees to provide useful issue-level reports organization by organization. One possible solution to this is to use or support a cluster- or issue-level report. In Appendix A, we provide a sample tool we created for a cluster of policy grantees working on federal education policy. Seeking to build upon their ongoing conversations about strategies, policy opportunities, and ways to align or coordinate across grants, this reporting template sought to have advocates take periodic stock of short-term policy goals and to document progress, including when progress meant unanticipated time was spent to maintain a past win or defend against an unanticipated threat. While this should be modified to fit different contexts, and it requires sufficient resources to support the communication and coordination it would entail, it may provide a starting point for beginning a new conversation about how to get useful reports back about advocacy work through a process that can also serve advocates’ work.

Invest in learning from defensive successes.

Consider an “ecosystem” approach to reporting.

Final Words

We started this work thinking that defense was currently a hot topic, but most advocates we talked to have been on the defense for a long time. These advocates are savvy and thoughtful about how to think about success and failures in this arena, and open to finding ways to better measure and share what they’ve learned from defensive work.

As long acknowledged, advocacy is a complex, adaptive effort. We’ve worked with advocates for more than 10 years and continue honing our understanding of how to ask meaningful questions, collect useful data, and help advocates and funders use it to make good decisions.

As evaluators and funders continue to work in this space, additional areas of nuance and difference have emerged, helping to create a more well-rounded understanding of what advocates do under different circumstances to continue working toward their goals.

We hope this work helps advocates, funders, and evaluators continue to work together in meaningful ways. We also hope this provides fodder for the field to develop more tools and methods that are responsive to this work, more examples of theories of change and evaluations, and ever-deeper learning so that more of our missions and goals can be achieved and maintained for the long run.
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Appendix A
Annual Policy Goal Setting and Reflection Worksheet

This tool is intended to be used at two points in time. First, to help groups of advocates identify policy-related goals in specific areas for an upcoming legislative session. Second, to facilitate later reflection and documentation about progress on these policy goals, as well as additional, unplanned positive changes and disadvantageous policies that were avoided. Following assessment of policy goals and activities, groups should also come to consensus on overall progress for that policy area.

Reporting on Policy-Related Metrics

**FOR EACH AREA**

- Identified goals achieved fully
- Identified goals achieved partially
- Disadvantageous policies advocated against
- Positive unplanned changes achieved (emergent policy opportunities that weren’t part of original goal setting)
- Degree to which equity, as defined previously, was met in achieved policies
- Overall assessment for annual progress within goal area

**ACROSS POLICY AREAS**

- Policy areas maintained (i.e., no changes, disadvantageous policies successfully avoided)
- Policy areas with some increase toward goals (e.g., partial achievements of goals, less than half the stated goals achieved, less significant unplanned changes achieved)
- Policy areas with major improvements toward goals (e.g., more than half of stated goals achieved (maybe), significant unplanned change achieved)
- Policy areas with setbacks (e.g., disadvantageous policies not avoided)
- Qualitative assessment of equity status across policies
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<thead>
<tr>
<th>FOR EACH AREA</th>
<th>ACROSS POLICY AREAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each policy area, groups will be able to assess the following against their annual policy goals:</td>
<td>Across policy areas, groups can report the following:</td>
</tr>
<tr>
<td>» Identified goals achieved fully</td>
<td>» Policy areas maintained (i.e. no changes, disadvantageous policies successfully avoided)</td>
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<tr>
<td>» Overall assessment for annual progress within goal area</td>
<td></td>
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</tbody>
</table>
Reflection Worksheet

<table>
<thead>
<tr>
<th>TIME POINT 1</th>
<th>TIME POINT 2</th>
<th>TIME POINT 2 (continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Policy Targets</strong></td>
<td><strong>Policy Results</strong></td>
<td><strong>Status (Select one)</strong></td>
</tr>
<tr>
<td>List policy target prior to upcoming legislative session:</td>
<td>Describe any policy changes that occurred:</td>
<td>Rationale</td>
</tr>
<tr>
<td>Target 1.</td>
<td>Policy Changes.</td>
<td>Major Improvement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Describe your rationale for this rating:</td>
</tr>
<tr>
<td>List policy target prior to upcoming legislative session:</td>
<td></td>
<td>Rationale.</td>
</tr>
<tr>
<td>Target 2.</td>
<td>Policy Changes.</td>
<td>Some Improvement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Describe your rationale for this rating:</td>
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<tr>
<td></td>
<td></td>
<td>Maintained</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Disadvantageous policies advocated against</strong></td>
<td><strong>Positive unplanned changes</strong></td>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>Describe potentially harmful policies you advocated against:</td>
<td>Describe what occurred that you did not plan for, but was beneficial (e.g., unexpected champions):</td>
<td>Fully avoided</td>
</tr>
<tr>
<td>Policies.</td>
<td>Not planned for,</td>
<td>Partially avoided</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unfavorable change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Highly favorable</td>
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<td></td>
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<th><strong>Equity Implications</strong></th>
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<td>Describe any equity implications:</td>
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**Overall status assessment**

<table>
<thead>
<tr>
<th>Rationale</th>
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<td>Major Improvement</td>
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**Equity Implications**

Describe any equity implications:
Reflection Worksheet

TIME POINT 1

Policy Targets
List policy target prior to upcoming legislative session:
Target 1. ...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

TIME POINT 1 (continued)

Policy Results
Describe any policy changes that occurred:
Policy Changes. ...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

Disadvantageous policies advocated against
Describe potentially harmful policies you advocated against:
Policies. ...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

Positive unplanned changes
Describe what occurred that you did not plan for, but was beneficial (e.g., unexpected champions):
Not planned for. ...........................................................................................................................................................................
...........................................................................................................................................................................
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TIME POINT 2

Policy Targets
List policy target prior to upcoming legislative session:
Target 2. ...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

TIME POINT 2 (continued)

Policy Results
Describe any policy changes that occurred:
Policy Changes. ...........................................................................................................................................................................
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Disadvantageous policies advocated against
Describe potentially harmful policies you advocated against:
Policies. ...........................................................................................................................................................................
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Positive unplanned changes
Describe what occurred that you did not plan for, but was beneficial (e.g., unexpected champions):
Not planned for. ...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

Status (Select one)
Major Improvement
Some Improvement
Maintained
Declined

TIME POINT 2 (continued)

Rationale
Describe your rationale for this rating:
Rationale. ...........................................................................................................................................................................
...........................................................................................................................................................................
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Equity Implications
Describe any equity implications:
Implications. ...........................................................................................................................................................................
...........................................................................................................................................................................
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TIME POINT 2 (continued)

Status
Fully avoided
Partially avoided
Unfavorable change

Rationale
Describe your rationale for this rating:
Rationale. ...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

Equity Implications
Describe any equity implications:
Implications. ...........................................................................................................................................................................
...........................................................................................................................................................................
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TIME POINT 2 (continued)

Status
Highly favorable
Partially favorable

Rationale
Describe your rationale for this rating:
Rationale. ...........................................................................................................................................................................
...........................................................................................................................................................................
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Equity Implications
Describe any equity implications:
Implications. ...........................................................................................................................................................................
...........................................................................................................................................................................
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Overall status assessment
Major Improvement
Some Improvement
Maintained
Declined

Rationale
Describe your rationale for this rating:
Rationale. ...........................................................................................................................................................................
...........................................................................................................................................................................
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Equity Implications
Describe any equity implications:
Implications. ...........................................................................................................................................................................
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We would like to extend a special thanks to those who participated in interviews and those who reviewed and commented on the brief:

Anne Gienapp (ORS Impact, Director), Annie McKay (Kansas Action for Children & Voices for Children Foundation, President & CEO), Charmaine Mercer (William + Flora Hewlett Foundation, Program Officer, Education), Chris Nehls (Democracy Fund Voice, Senior Associate, Congressional Systems, Research and Learning), Christina Wong (Northwest Harvest, Direct of Public Policy & Advocacy), Christine Clark (William + Flora Hewlett Foundation, Program Officer, Global Development and Population), Claire Lane (Anti-Hunger & Nutrition Coalition, Director), Erin Rodgers (William + Flora Hewlett Foundation, Program Officer, Environment), Heather Ludemann (The David & Lucile Packard Foundation, Program Officer, Conservation and Science, Ocean), Jenny Lawson (Planned Parenthood Federation of America, National Campaign Director), Jewlya Lynn (PolicySolve, Founder), Jon Gould (Children’s Alliance, Deputy Director), Kristen Crowell (the Health Initiative, National Campaign Manager (formerly at Center on Budget and Policy Priorities)), Lara Flint (Democracy Fund Voice, Governance Program Director), Laura Maristany (Democracy Fund Voice, Constructive Politics Associate Director), Liz Ruedy (Democracy Fund Voice, Director of Evaluation and Learning), Louisa Warren (Center on Budget and Policy Priorities), Lisa Klein (Alliance for Early Success, Executive Director)."
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Endnotes

3 This was an area of divergence in our interviews. Others spoke to the importance of messaging and framing continuing to focus on what’s possible and a positive view of the future.
4 With the support from the Atlantic Philanthropies and the Center for Evaluation Innovation through the Atlas Learning Project, ORS Impact and TCC Group created thought pieces related to advocacy and policy implementation and legal advocacy. Resources can be viewed at http://atlaslearning.org/products
10 Resources for equity evaluation are viewed at https://www.equitableeval.org/