



**First Annual Report
August 2012 – July 2012**

**Presented to Steering Committee
11 September 2012**

The Advocacy Initiative

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The Advocacy Initiative is a three-year community and voluntary sector project that promotes understanding, awareness and effectiveness of social justice advocacy in Ireland. By creating the conditions for stronger social justice advocacy, the Initiative will strengthen policy responses to existing and emerging challenges in addressing poverty and social exclusion, contributing to a more inclusive and equitable society.

Background

The Advocacy Initiative has its origins in discussions at the Centre for Non-profit Management (TCD) summer school in 2008. There followed a broader debate amongst actors within the Community and Voluntary Sector that led to the formation of Steering Group. The Steering Group developed a proposal for collaborative action to examine the status of community and voluntary sector advocacy in Ireland, and in August 2010 published a report that drew on discussions and analysis by and with a broad range of stakeholders. This project report identified a need for deeper engagement to promote understanding, awareness and effectiveness of social justice advocacy in Ireland. In 2010 with support from The Atlantic Philanthropies the Steering Group defined and articulated a three-year programme of work aimed at promoting the concept, practice and efficacy of social justice advocacy as a central feature of civil society. The implementation of this programme began in August 2011. This report represents a synopsis of the activities in the first 12 months and an analysis of the key learning points.

Implementation Plan

In September 2011 The Steering Committee of the Initiative adopted a 36 month implementation plan. The implementation plan defined the governance structures of the Network and set out a timeframe for implementation. The implementation schedule is summarised in Figure 1, and is supported by governance structures, a communications strategy, and an on-going formative evaluation process.

Figure 1: Summary of Implementation Plan activities



Theory of Change

The Initiative is committed to deep reflection and learning, and to maximising its opportunity to transform the social justice advocacy landscape over the 36 months of its current phase. Consequently an early priority was to develop an evaluation framework. The Initiative undertook to develop a Theory of Change model. The Initiative's Theory of Change is described below and summarised in Figure 2.

Figure 2: Summary of top-level Theory of Change objectives and preconditions



The **ultimate objective** of the Initiative is to influence policy, law and practice in a manner that brings about improved social justice outcomes. This is above the 'accountability line', meaning The Advocacy Initiative can at best contribute only modestly: achieving this objective is subject to several additional factors.

However, the AI feels that a *necessary precondition* to this long-term objective is the **reframing of the relationship between the social justice advocacy sector and state actors** requiring both sides to think differently. It is envisaged that this will:

- be grounded in social solidarity;
- enhance the prospects for influencing law and policy in positive directions;
- enable more effective advocacy strategies.

Furthermore, the AI believes that it can *discernibly influence* this outcome i.e. that it can contribute to a reframing of the relationship between the social justice advocacy sector and state actors.

There are, in turn, three main preconditions to this. First, that there exists **an engaged group of relevant policy makers and influencers**, broadly defined, with sufficient knowledge, understanding and motivation to support the legitimacy and

potential benefit of SJ advocacy, to keep abreast with issues arising and to consult with other stakeholders as required. This group must also be capable of exerting a distinct influence.

Second, that **expectations regarding their mutual relationship are significantly reframed** on the part of both the SJA sector and state actors. In the absence of this, it is unlikely that the relationship can be improved in a constructive direction.

Third, that the **SJA sector produces more effective and constructive advocacy strategies, ideas and options** while engaging with policy makers and stakeholders, that can lead to better results. The sector must implement these in a manner that sympathetic policy makers can use within their political and policy environments.

In realising these three preconditions for reaching the objective of a reframed relationship between social justice advocacy and the State, the Initiative's activities will focus on achieving five key outcomes:

1. Fresh evidence and knowledge on the social justice advocacy environment is available.
2. There is on going self-reflection and knowledge exchange.
3. There is a capacity building framework in place and strategic initiatives underway to develop capacity amongst social justice advocates.
4. There is an active supportive cohort for social justice advocacy.
5. There is renewal of the social justice advocacy sector.

Activity Report

The following summary of activities refers to the first four outcomes or preconditions described above. These are outcomes which are directly associated with the activities described in the implementation plan. Each section also seeks to capture implementation learning from the first year.

1. Fresh evidence and knowledge on the social justice advocacy

Building on the 2010 Project Report a key focus of the first year of activity has been the development of a body of knowledge and evidence about social justice advocacy. The ambition of the Initiative is to deepen our understanding of social justice advocacy and the context in which it operates.

The Initiative adopted a **working statement** on social justice advocacy. The purpose of this statement is to set out The Advocacy Initiative's understanding of social justice advocacy. This understanding will inform the development of the Initiative over its three-year programme. This statement aims to inform the conversations, debates and reflections organised by the Initiative, and to be influenced by them. This statement will be a living document, interrogated and tested by all of those involved in the activities of the Initiative.

CMAAdvice (an independent research consultancy) was commissioned to undertake the **Mapping Study** on Social Justice Advocacy aimed at documenting and describing the practice of social justice advocacy in Ireland to inform the future direction of The Initiative. The study aimed to obtain comprehensive information on both the breadth and intensity of social justice advocacy activity within the non-profit sector, building on earlier studies and on available knowledge of advocacy in Ireland. In order to address the research aims of mapping both the “breadth” and the “depth” of social justice advocacy, the study team adopted a two-phased approach to the research. The first phase, aimed at measuring the breadth of social justice advocacy, used a postal survey of a representative sample of organisations in the non-profit sector. The second phase involved measuring the depth by utilising an online survey of organisations identified in phase 1 as currently engaged in social justice advocacy and was informed by a focus group of key social justice advocates in Ireland. This was complimented with five case studies of examples of effective social justice advocacy.

The Initiative has recruited a group of participant researchers to undertake a study that will explore the **perceptions of social justice advocacy** amongst policy-makers and policy-implementers. Project participants will be provided with dedicated

research training and support throughout this process. Experienced independent social researcher Dr Kathy Walsh has been appointed to oversee the research process and to provide the training. Kathy will also facilitate the overall research process and analysis, and be responsible for the preparation of the final project report. Due to the large interest in this process, the research group has been extended to seven participants:

- Catherine Joyce, Barnardos
- Catherine Lynch, ENAR Ireland
- Cliona McCormack, Irish Heart Foundation
- Diarmaid O'Sullivan, Older and Bolder
- Rory Hearne, Dolphin House Community Development Association
- Rachel Mullen, Equality and Rights Alliance
- Sue Conlan, Irish Refugee Council

Initial training will commence in September 2012, with the report due for completion by the end of 2012.

A third research project on the **funding threats** to social justice advocacy is currently under development. This project will examine the realities of threats or limitations to governmental funding as a consequence of advocacy activity. The research will map the range of experiences, and provide concrete analysis of the relationships between state funding and NGO advocacy. The research will attempt to unravel this complex reality, and will commence in October with anticipated completion early in 2013.

Working with nfpSynergy¹ the Initiative will undertake a **public opinion poll** in November 2012. The polling will take place in November 2012, with the possibility of follow up polling activity in April 2013. The objectives of the poll are to: (1) gauge the level of understanding/awareness of social justice advocacy; (2) identify the level of support (or not) for work which aims to change policy/politics (3) identify how this function of NGOs understood in the context of other elements of the political process (e.g. lobbying, political parties etc.); and (4) Identify how the public rate the effectiveness of this activity.

Implementation learning to date

Over the last 12 months a key focus of the Initiative has been to develop knowledge and understanding of social justice advocacy. During the first year of implementation a number of learning points have emerged:

¹ NFPSynergy is a service which offers collaborative surveys and polling to the non-profit sector in Ireland, see: <http://nfpsynergy.net>

- The research projects are largely sequential, in that one informs the next, hence it was not effective to run multiple research projects in parallel, thus delaying overall implementation, but ensuring the progressive development of the learning generated by the Initiative.
- As anticipated the 2010 report has proved foundational to the overall research programme, allowing the Initiative to explore new methodologies and approaches to the identified research questions (e.g. a participant research approach to the perceptions study).
- There is a high degree of interest in participating in the Initiative's research programme, and opportunities for learning as evidenced by engagement with the mapping study focus group, and the number of applications for the participant research programme.
- There is strong interest amongst research consultants to undertake the research projects, potentially as a result of the current economic climate. As a consequence there has been good value for money available.
- A emerging challenge for the Initiative in years 2 and 3 will be to devise creative solutions to disseminating the outcomes of the research programme.

2. On-going self-reflection and knowledge exchange

A key objective of the Initiative is to promote self-reflection and knowledge exchange amongst social justice advocates, and between social justice advocates and other policy stakeholders.

A key work area of the Initiative in years 1 and 2 is the facilitation of a **national self-reflection process**, over the first 12 months this has continued a number of distinct activities:

1. Organisation of two **Knowledge Exchange Forums**. The inaugural event in February 2012 was launched by President Michael D. Higgins, and included a presentation by Dr Helene Clarke on the outlook for social justice advocacy in the US. The second event in July 2012 focused on the theme of e-advocacy and explored key social media tools and how social justice advocates in Ireland have used them in their advocacy work. A third forum is planned for November 2012.
2. The Steering Committee undertook to participate in a series of **dialogues** exploring the future of social justice advocacy. The ambition is to explore contentious and difficult questions, while experimenting with new methodologies for reflection. In preparing this process the Director undertook a series of one-to-one conversations with all the members of the Steering Committee. The process is facilitated by John Mulligan, the first dialogue took

place in May and focused on the issue of respect. The second is scheduled for early October, and will be extended to include a broader range of social justice advocate.

3. In the autumn/winter the Initiative will undertake a series of **regional and local events**. The process is currently under development, and will contribute to the organisation of a large reflection event in the spring of 2013.

Implementation learning to date

Providing opportunities for self-reflection and learning is foundational and increasingly central in informing the development of the Initiative's activities. Energy for this type of activity is influencing the evolution of the Initiative's work plan.

- The development of the Theory of Change has facilitated a more integrated approach to the implementation of the Initiative's work programme. For example self-reflection is a foundation for much of the work, including the adoption of a participant research approach in the development of the perceptions study.
- There appears to be a significant appetite for self-reflection opportunities across a broad spectrum of stakeholders, both within the community and voluntary sector and across the other sectors explored to date.
- At times there remains a difficulty with regard to shared understanding of what 'type' of advocacy is being discussed, and indeed a complexity with regard to the boundaries between various advocacy activities (e.g. individual, legal, policy etc). The working statement has assisted discussion in this regard, but to date has not itself been interrogated by a broad range of stakeholders.
- There are differences of assumptions and understandings, and imbalances amongst social justice advocates. To date however this has not appeared to undermine the quality of discussion.
- Advocacy is a process and not a concrete specific issue; hence at times discussion and reflection can feel a bit 'intangible' for participants and difficult to 'connect' with. It remains a challenge to facilitate deep reflection while demonstrating connection to day to day realities.
- A significant theme has been an interest in discussing how social justice advocates might engage more holistically in a common framework. There are many nuances in this discussion but a recurring question relates to the implications of the 'fragmentation' of social justice imperatives.

3. Capacity building framework in place and strategic initiatives underway

The 2010 report identified the need for capacity changes on both sides of the policy making process, a key ambition for the Initiative is to support capacity development particularly amongst social justice advocates. While many of the specific initiatives are anticipated in years 2 and 3 of the work plan a number of activities have contributed to this objectives in year 1.

The Initiative has developed a training guide, which **maps existing training** available, based on research conducted by Irish Charities Tax Research (ICTR) for the Atlantic Philanthropies. This guide is available on line and will be updated periodically.

A **resource section** has been developed on the website. To date this includes general resources to support capacity development, but also specific sub section on funding advocacy and e-advocacy.

The second Knowledge Exchange Forum on e-advocacy proved an important opportunity for peer support and learning with regard to the use of social media tools. Concrete learning and tips were exchange, and captured in a report. A dedicated website section includes the videos and reports from the event.

Implementation learning to date

While capacity building was not envisaged as a strong feature of the first year of the work programme, nonetheless it has proved a specific area of activity, both as envisaged though the organisation of the Knowledge Exchange Forums, but also more generally in the development of information tools.

- There is a strong appetite for dedicated learning opportunities. Feedback from the second knowledge exchange forum indicates that similar events would be welcome in the future. However the identification of clear topics remains an on-going challenge.
- Capacity initiatives have proved important in drawing a broader range of actors and organisations into the work of the Initiative.
- There are reasonable external basic training options available, however it is not clear to the extent individuals are availing of more formal training.
- Peer support and learning approaches seem to be a valued model, with much experience and learning available within the sector.
- Capacity building amongst other stakeholder groups could arise from the reflection process described above.

4. There is an active supportive cohort for social justice advocacy.

There are two specific activities in the implementation plan which are associated with developing an active and supportive cohort for social justice advocacy amongst a range of stakeholder groups. The first is to create greater awareness and support for social justice advocacy through a grass roots campaign, planned for year three. The second, which got underway in year one, is to engage in on-going high level dialogue with key stakeholders

The work plan anticipated the establishment of an **expert group of different stakeholders** in the social justice advocacy process (civil servants, elected representative, academics, media, trade unions etc). The work of the group was intended to explore relevant issues and engage with the work programme of the Initiative. Given the development of the Initiative's Theory of Change and work programme, the Initiative took the decision to deepen this process of engagement, in the first instance undertaking engagement processes with the various stakeholder groups individually, with a view to generating an opportunity for a large multi stakeholder event early in 2013.²

To date the Initiative has engaged with:

1. Former senior public servants (one to one interviews, 2 focus groups, and report).
2. Politicians (series of one to one interviews).
3. NGO representatives (through reflection process above).

Anticipated engagement includes the following:

4. Current civil servants (through the perceptions research study).
5. Media actors.
6. Academics.
7. Trade Unions.

An additional element which supports the development of self-reflection across the stakeholder spectrum is the inclusion of a **blog** on The Initiative's website. To date four guest blogs have been published:

1. May Murphy, Game Changers? What next for social justice advocacy (June 2012) (Academic).

² It remains to be determined if the large scale reflection event in Spring 2013, should be combined with the multi-stakeholder event. However it is intended to conclude this phase of the engagement in the Spring of 2013.

2. Johnny Chatterton, E-campaigning is no silver bullet but it IS helping (July 2012) (professional campaigner).
3. Gerry Mangan, Speak Truth to Power (August 2012) (former civil servant).
4. Niall Crowley and Siobhan O'Dowd, The Community Sector – Lost in Austerity? (September 2012) (Community Sector).

Implementation learning to date

Originally the work plan envisaged the core component of this stakeholder dialogue to be an expert group comprised of representatives of the various stakeholder groups that would meet over the three-year period. This approach has been deepened and broadened, to first engaging individual with stakeholder groups, thus expanding the 'cohort'. To date the approach appears to carry some energy. In particular:

- The various stakeholder groups appear to welcome the opportunity for deeper reflection, and value the opportunity to reflect on the relationship with social justice advocates.
- Conversations directly with the Initiative, appear to result in more substantive dialogues, there is an emerging sense of a new conversation which moves beyond 'stock responses', however it is too early to tell if this dynamic can be multiplied.
- It is likely that different individuals elicit different responses, hence it may prove useful to introduce greater diversity within the group conducting these 'conversations'.
- Drawing on the process to date with former civil servants and politicians there appears to be greater clarity of the concept of social justice advocacy, than is sometimes the case within the Community and Voluntary Sector. These stakeholders are very clear about the policy role of social justice advocacy (as opposed to other types of advocacy), and its relationship to decision-making (even if they are not always entirely supportive of the practice!).

5. Supporting Developments

Beyond the specific activities of the work plan, the Initiative has built a core of supporting infrastructure during its first year. Informing these developments has been a deep commitment to the project/temporary nature of the Initiative, and an ambition to build the longer-term sustainability of the envisaged outcomes beyond the specific life of the Initiative.

Support Structures

The Steering Committee is responsible for the overall management of the Advocacy Initiative. In the first 12 months the Committee met four times. The Committee currently comprised of:

1. Brid O'Brien, Irish National Organisation of the Unemployed
2. Caroline Egan, Carmichael Centre
3. David Lynch, Community Workers' Cooperative
4. Frances Byrne, OPEN
5. Ivan Cooper, The Wheel
6. Joyce Loughnan/Mike Allen, Focus Ireland
7. June Tinsley/Catherine Joyce, Barnardos
8. Kathleen O'Meara, Irish Cancer Society
9. Kieran Murphy/Caroline Fahey, Society of St Vincent de Paul
10. Martin Naughton, Disability Federation of Ireland
11. Niamh Garvey, Trocaire
12. Niamh Randall, Simon Community National Office
13. Noeleen Hartigan, Amnesty International Ireland
14. Noeline Blackwell, Free Legal Advice Centre
15. Orla O'Connor, National Women's Council of Ireland
16. Sheila Nordon, Irish Charities Tax Reform Group
17. Siobhan O'Donoghue, Community Platform
18. Tanya Ward, Children's Rights Alliance

The Project Management Group was extended in May and is now comprised of:

1. Brid O'Brien, Irish National Organisation of the Unemployed
2. Caroline Egan, Carmichael Centre
3. Eugene Flynn, 54 Degrees
4. Gerry Mangan, Individual Organisation
5. Ivan Cooper, The Wheel
6. Kieran Murphy, Society of St Vincent de Paul
7. Mike Allen, Focus Ireland

The Project Management Group met 9 times over the 12 month period.

The Initiative has established a series of ad hoc **reference groups** which offer on-going support and guidance to the various projects. Reference groups have been active in the areas of evaluation, communications, Knowledge Exchange Forum, working statement, and the mapping study.

The Initiative adopted a '**membership**' statement which described the levels of possibility participation in the Initiative. Anyone committed to social Justice Advocacy is welcome to get involved. At the beginning of this phase of the Initiative over 250 people had expressed an interested or participated in events. As of August

2012, this database stands at over 600, predominantly representing individuals within the community and voluntary sector, but also those from other stakeholder groups.

The **staff team** consists of the Director (Anna Visser), CE Administrator (Celine Walsh), and recruitment is underway for a part time communications officer. The Initiative is grateful to Laura Gerulyte who joined as an intern and then on a temporary contract from May-August 2012.

Communications

Following the adoption of a **communications strategy**, developed by the communications reference group, the Initiative has put in place a communications structure, and much work has been completed over the first 12 months, to build a **communications infrastructure** to support the implementation of the work plan.

Key outcomes to date have included:

1. Launch of new website
2. Development of online advocacy resources
3. Development of the blog
4. Development of an integrated membership database
5. Development of periodic newsletter 'Advocacy Posts' (first edition, August 2012).
6. Development of social media activity (Twitter, Facebook, Flickr, You Tube).

While not a key priority in the first twelve months some initial **media work** has been undertaken by the Initiative. Coverage has been secured in outlets such as: RTE Radio One, Newstalk, Examiner, Fingal Independent, Herald, Irish Times, irishtimes.com, The Independence, and The Journal.

There is a high level of interest in the Initiative as evidenced by engagement with the activities described above, this has also led to a number of invitations to speak about the work of the Initiative and participate in external events. For example the Initiative prepared a submission to the consultation process on the regulation of lobbying and was invited to participate in the government seminar on this subject. The Initiative has participated in over 60 external events and meetings.

Funder relations

In November 2011 The Initiative presented its work report to the funder The Atlantic Philanthropies and followed up with a meeting in December 2011. The Director is in regular contact with the funder. A revised budget was agreed in December 2011, which realigns the three-year implementation with current timeframes (to August 2014). Dialogue with the funder has given rise to two implementation questions

during this period. First was a request by the Funder that the Initiative consider integrating the implementation costs of the *Oireachtas Brief* service into its work plan. After careful consideration the Steering Committee decided to decline this invitation, however it is feasible that such a relationship could be relevant at a future stage. Second, the Initiative has been asked to coordinate its activities with Atlantic Philanthropies *Lasting Legacy for Human Rights Programme*. The Director has been in touch with the coordinator on a number of occasions, and has attended a number of meetings to brief that programme on the work of the Initiative. Cooperation and information sharing is on-going.

Implementation learning to date

- While there is a high level of engagement by those involved in the Steering Committee, on occasion meeting attendance has been mixed. Nonetheless even those who do not attend all meetings demonstrate strong interest and direct engagement with the Director. On-going communication and direct engagement is important in maximising individual's involvement. There is strong participation and ownership by the Project Management Group.
- Managing external contractors is time intensive, and to date external contractors have looked to the Initiative (Staff and reference groups), for significance input. This is important to the success of the Initiative. Reference groups are proving an important mechanism for supporting the development of the work, but also in creating strong ownership of the Initiative amongst those involved.
- Accessing mainstream media (while not a priority in the first year) is challenging for the Initiative, while the publication of specific outputs may assist, often the ambitions of the Initiative are not specifically 'newsworthy' this is a dynamic which will influence the development of the 'grass roots' campaign.
- Developing the communications infrastructure will be increasing import in Years 2 and 3, as the Initiative moves to engage wider audiences and disseminate its findings, however the basic infrastructure is now in place.

Annex 1: Theory U – A map for our journey: Where are we?

Over the course of the first year, the Initiative developed its Theory U. A tool which complements the Theory of Change, and which seeks to locate the activities and describe the change journey which the Initiative seeks to stimulate.

Figure 3: Theory U, A Map for our Journey

