

**Second Annual Report
August 2012 – July 2013**

**Presented to Steering Committee
September 2013**

The Advocacy Initiative

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The Advocacy Initiative

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.

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 the 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 second year of this programme and an analysis of the key learning points.

The Advocacy Initiative has set out an ambitious objective and work programme. The project of reframing the relationship between the community and voluntary sector will continue long after the Initiative concludes. The Initiative aims to be a catalyst for future innovation, evaluation and strengthening of social justice advocacy in Ireland.

Theory of Change

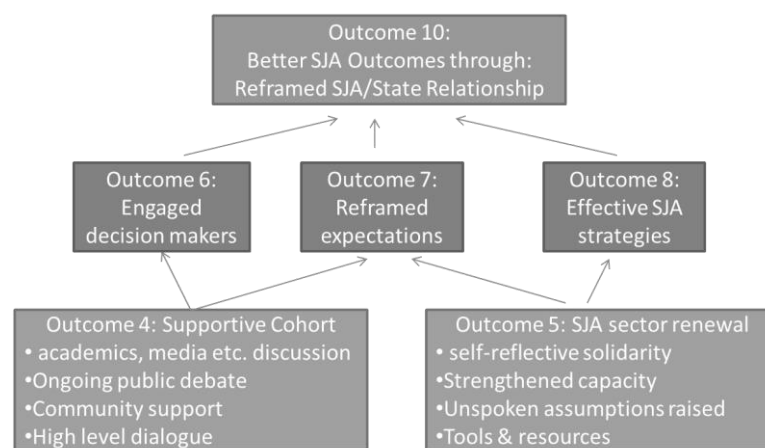
During its first year The Advocacy Initiative undertook to develop a Theory of Change model. The Initiative's Theory of Change is described below and summarised in Figure 1.

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. Reframing the relationship is an ongoing and ambitious project that will continue long after The Initiative has concluded.

Figure 1: Summary of top-level Theory of Change objectives and preconditions



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. This activity description is intended to capture some of the key learning from each activity, rather than to describe the activity in detail.

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.

In the first year the Initiative: adopted a working statement on social justice advocacy; commissioned a Mapping Study on Social Justice Advocacy; recruited a team of researchers to undertake a study that would explore the perceptions of social justice advocacy amongst policy-makers and policy-implementers; began the planning process for a project on the public funding and social justice advocacy; and commissioned a public opinion poll. During its second year The Initiative focused on drawing to a close much of its research programme.

| Project | Some highlights |
|--------------------------------------|---|
| Mapping study | <p>39% of nonprofit organisations do social justice advocacy (51% do advocacy).</p> <p>Majority focus locally (with 32% national, 10% regional and 7% international). Advocacy is different at local level.</p> <p>Half of advocacy is planned, half is unplanned. Half is primarily 'insider', with half primarily outsider.</p> <p>69% rate advocacy as effective but 84% believe policy makers are fragmented.</p> <p>Collaboration is considered the key response to the challenges facing advocacy.</p> <p>Case studies illustrate the importance of clear narrow focus and sophisticated advocacy strategy.</p> |
| Opinion polls (Nov and June) | <p>Negative view of 'lobbying' but advocacy generally seen as a good thing.</p> <p>72% believe it is important for charities to campaign and lobby government.</p> <p>Roughly 25-30% have a reasonable understanding of the specifics of social justice advocacy – recognised when 'they see it'.</p> <p>15% think SJA is influential, 46% think it should be influential (only 'interest group' for which more influence is desired).</p> <p>Public happy to spend €11 of €100 on advocacy.</p> <p>There are significant differences in sympathy levels for various groups on who behalf the sector advocates.</p> |
| Perceptions Study | <p>Generally respondents 'got it' - support for role of advocacy in a democracy.</p> <p>4 key critical observations:</p> <ol style="list-style-type: none"> 1. legitimacy and need to be linked 'to the ground' 2. Perceptions of self-interest and lack of self-reflection, 3. Diversity and disparate nature of the sector; 4. Challenge of being both an insider and an outsider. <p>Dare to do – sector should be more 'out there'/ambitious.</p> <p>Significance of the innovative research process and impact on the researchers.</p> |
| Funding Study (Part 1) | <p>Absence of 'rationale case' for advocacy in Irish context – 2002 as a turning point.</p> <p>Funding link can be positive, negative, neutral across various stages of the funding cycle.</p> <p>Significance of administrative inconsistency.</p> |
| Funding Study (Part 2 – preliminary) | <p>The state does and has supported social justice advocacy.</p> <p>Organisations devote considerable time to managing funding relationships with government.</p> <p>There are informal 'redlines' which organisations avoid crossing.</p> <p>Significance of the 'services paradigm' and more explicit</p> |

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| | <p>restrictions on advocacy. Manifests as 'micro management' of organisations and activities. Advocacy has been driven 'underground' in terms of reporting. It is not possible to engage in a dialogue about funding limits on advocacy. Significance of inconsistencies across civil and public servants.</p> |
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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 included a number of distinct activities: organisation of two Knowledge Exchange Forums; and dialogues with the Steering Committee. During the second year this programme of work continued with two more Knowledge Exchange Forums, further sessions with the Steering Committee and the role out of a series of local reflections opportunities. An additional event was organised on philanthropy and social justice advocacy, as well as smaller scale briefings on the funding study and the public opinion polls (2).

| Project | Some highlights |
|------------------------------|--|
| KEF 3 (Christmas Market) | <p>Launch of the mapping study and a market of good practice case studies. Key learning points which emerged included: Create strong political alliances. Have a strong evidence base. Monitor and evaluate. Keep your messages 'ruthlessly simple'. Build a campaign with local groups. Be innovative and responsive to opportunity – take risks and be flexible. Vision, planning and persistence are hugely important. Empowerment is important for all those involved in the campaign.</p> |
| KEF 4 (Participation) | <p>Participation is a legitimacy requirement of social justice advocacy. Forms of participation vary and are contested. Participation needs to be substantially resourced and cannot be tokenistic. Lack of participation of those experiencing the issues seriously undermines advocacy.</p> |
| Steering committee dialogues | <p>Second dialogue 'process work' day on 2 October. Planning group then invited each steering committee to have 'two cups of coffee' to discuss challenges and difficult issues (there was not a strong response to this invitation). There are a number of issues that are difficult, or believed to be difficult, for social justice advocates to talk about amongst themselves, including:</p> <ul style="list-style-type: none"> • Competition for resources, access and profile. • Compatibility of frameworks, value bases and approaches. • Perceived independence including political independence • Living the values and meeting the expectations • Lack of effectiveness, innovation, creativity and staff turnover • Salary and status inflation. <p>There is a continuing appetite for this type of reflection, however also named a 'spontaneity paradox' – conversations happen 'accidentally' but it is difficult to plan or structure this process.</p> |
| Local events | <p>Three events complete and a range of others in development. While preliminary a number of themes appear to be emerging:</p> <ul style="list-style-type: none"> • Absence of spaces for reflection and networking locally. • Hesitant to be explicitly identified with 'advocacy' (need cover). • Challenge of local government reforms and the marginalisation of the voices of local C&V organisations. • Importance of collaboration and bring together 'silos'. • Difficulty of identifying/describing 'local advocacy' often articulated with reference to national processes. |

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. In the first year The Initiative developed a training guide, which maps existing training available; a resource section on the website; and specific material on e-advocacy. During the second year focus shifted more towards the development of this programme of work and in particular on developing the capacity framework and evaluation framework projects, along with continuing to build a body of online resources.

| Project | Some highlights |
|-----------------------------|--|
| Website and resource guide | These elements of the website have proved consistently popular in terms of web hits. Guides cover issues such as: training, evaluation, funding, participation and regulation. |
| Capacity Framework | Developed and piloted an Advocacy Capacity Framework based on a model developed by Bolder Advocacy in the United States. The pilot has raised a number of questions: <ul style="list-style-type: none"> • Those organisation that are advocacy led did not see how the tool would add to their knowledge or practice. • For less advocacy orientated organisations the tool was not seen as directly relevant to their work. • Advocacy planning section identified as most useful Overall conclusion is that there is a need to clarify the purpose of the tool and how it would be used – needs more support work for non-specialised organisations. |
| Evaluation Framework | Two facilitated workshops to identify most useful approach and methodology. <ol style="list-style-type: none"> 1. Desire to generate reflective learning opportunities that are developmental for individuals and organisations. 2. Reluctance to agree uniform evaluation indicators. 3. Desire to build capacity for cross-sectoral analysis and macro evaluation. 4. Need to generate activities that support broader organisational processes including strategic planning and evaluation. 5. Need to generate sustainable actions beyond the life of The Advocacy Initiative. A proposal emerged to develop a 'reflective learning process' which would be a tailored process for individuals organisations to engage in. Supported initially by The Initiative but self-sustaining. |
| Political Independence Tool | Steering committee decision to develop a 'short sharp' guide to political independence. Following tender process PMG decision to postpone. <ul style="list-style-type: none"> • Raises questions of how to identify and progress projects under the 'bridging the gaps' element of the work plan. • KEFs appear to be useful contributions to developing knowledge, but more structured responses raises challenges. |
| Knowledge Exchange Forums | The KEFs are proving a valued source of peer support and learning. Participants appreciate hearing about practice and critically reflecting on shared challenges. Practical focus of discussions tend to be appreciated. |

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 (grassroots campaign). 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 Initiative took the decision to deepen this process of engagement, in the first instance undertaking engagement processes with the various stakeholder groups individually.

| Project | Some highlights |
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| Trade unionists | There is more that unites us than divides us. There are shared challenges. Sector can be viewed at times negatively or simply dismissed. Sector did not managed the balance of being both inside and outside social partnership. Challenge is to identify allies and build strong collaborations |
| Media | Lack of understanding of the C&V sector and sense that the sector does not build relationships or adequately manage engagement with the media. There are negative perceptions of the sector, but also failure to challenge sector. Focused on specific actions – how C&V could do better. There are shared roles and shared challenges and the potential to build better relationships. |
| Politicians | Challenge of clientalist democratic culture. Sometimes C&V seen as negative, question legitimacy and representativeness. Media do not adequately challenge the C&V sector. Importance of relationships. Sector needs to deal with: perceptions of political affiliation, lack independence, legitimacy, capacity to work with the system, unrealistic expectations, needs for greater coordination/collaboration, institutionalisation, using international/EU tools. |
| Former civil servants | Identified clear contribution to policy making. Difficulties of working within a chaotic system as well as need to strengthen capacity. Key challenges: managing/representing constituents, greater collaboration, understanding the system, making choices, being self-critical. Challenging but possible to leverage change within the public/civil service. |
| Activists with experience of the issues. | Identified the potential and importance of social justice advocacy. Challenges for the sector include: Getting more people to involved, giving real power to people in running campaigns, working better with other organisations, make better use of social media, using plain language, organising protests and be more political, having high expectations, being funded. |

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. In the first year four guest were published, the second year saw an additional nine blog entries.

1. Candy Muprhy, Why are we being criticised for doing advocacy? (November 2012)
2. Senan Turnbull, What Now for Local Advocacy? (December 2012)
3. Brian Harvey, To be seen but not heard - Does the state use funding to control voluntary organisations? (January 2013)
4. Anna Visser, Does social justice advocacy have an image problem? (March 2013)
5. Eugene Flynn and Anna Visser, Fundraising & Advocacy: Turning campaigners into cash and cash into campaigners, (April 2013)
6. David Crosbie, Ending the gag clause in Australia – what does it mean? (May 2013)
7. Kieran Murphy, Trust & Advocacy - Where there is trust, truth can be spoken to power (June 2013)
8. Robin Hanan, The Seanad and Social Justice Advocacy: friend or foe? (June 2013)
9. Six letters to the Irish Times, Response to Irish Times article 'Poverty industry targeted in report' (June 2013)
10. Clodagh O'Brien, Advocacy cannot exist without participation (August 2013)

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 second 12 months the Committee met four times. The Committee currently comprised of:

1. Brid O'Brien, Irish National Organisation of the Unemployed
2. Diarmaid O'Currui, 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. Joan O'Donnell/Martin Naughton, Disability Federation of Ireland
11. Niamh Garvey/Lorna Gold/Selina Donnelly, 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/Edel Quinn, Children's Rights Alliance

The Project Management Group is now comprised of:

1. Brid O'Brien, Irish National Organisation of the Unemployed
2. Eugene Flynn, 54 Degrees
3. Gerry Mangan, Individual Organisation
4. Ivan Cooper, The Wheel
5. Kieran Murphy, Society of St Vincent de Paul
6. Mike Allen, Focus Ireland
7. Joan O'Donnell, Disability Federation of 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 Forums, working statement, funding study 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 interest or participated in events. As of July 2013, this database stands at over 960 (up from 600 in previous 12 months), predominantly representing individuals within the community and voluntary sector, but also those from other stakeholder groups.

The part-time **staff team** consists of the Director (Anna Visser), CE Administrator (Celine Walsh), and communications officer Clodagh O'Brien was recruited in September 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. Over the second 12 months The Initiative continued to develop its website and social media presence and distribute regular editions of its newsletter, Advocacy Posts.

During our second year the website developed into a resource site for social justice advocates. The site was viewed over 30,000 times with over 20,000 unique views. 10,000 people visited the site. The most popular pages were those that offered resources about advocacy, and those that described The Initiative. There are nearly 700 followers on twitter which is a significant driver of website traffic.

While not a key priority in the first twelve months some initial **media work** has been undertaken by the Initiative. In particular the coverage in the Irish Times of the perceptions studies raised a number of questions for how The Initiative engages with the media.

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. Presentations have been delivered about The Initiative's work to 10 conferences or networks, with numerous other less formal engagements during the second year.

Interim evaluation and legacy planning

In July 2012 the external evaluator completed the extended interim evaluation process. A number of significant learnings emerged from this process.

- The review has pointed to key strengths in the work to date of The Advocacy Initiative.
- The overall impact of the Initiative itself (specific activities and structures) on the broader objectives of a 'reframed relationship' with the state will be limited, the challenge is to generate a legacy which continues to engage with this objective.
- Challenges have been identified by stakeholders, many of them a reflection of the nature of the social justice advocacy sector and the wide range of practices and views it contains.
- Challenges/questions for The Initiative include: redefining and agreeing a communications objectives, progressing the elements of critical self-reflection and transformative dialogue, securing deeper cross stakeholder engagement, defining the extent to which learning from the Initiative should be specified by sub-sector (e.g. homelessness), which capacity gaps to purpose in terms of structured tools and resources.
- The evaluation identified a number of specific legacy objectives for the Initiative to consider in refining its work programme for the final year.

Emerging Findings Years 1 and 2

The story so far....

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| <p>About social justice advocacy...</p> | <p>There are many organizations engaged in some form of social justice advocacy. Some things are easier to advocate for than others (but not necessarily those that you would assume!)</p> <p>There is a high level in interest in getting better at social justice advocacy, but also resistance to structured developmental opportunities.</p> <p>Advocacy is valued by a range of stakeholders but there are significant negative perceptions about its practice. It can be regarded as self-interested, unconnected to the experience and stale.</p> <p>There is some 'learned helplessness' or at least significant caution in the practice of advocacy, and at times defensiveness.</p> <p>There is a strong sense that it is increasingly difficult to do advocacy, in particular the dynamics between local and national advocacy</p> <p>There is a clear vision (across stakeholder groups) of what is effective advocacy, including making clear cases and argument</p> <p>There are strong views on how to respond to the current challenges but apparently relatively little innovation (e.g. collaboration)</p> <p>Advocacy is more strongly supported by the general public than we assumed.</p> <p>Social justice advocates are leaders who are deeply responsible to those on whose behalf they work</p> |
| <p>About The Initiative...</p> | <p>The Initiative has stimulated conversations across very diverse actors and organizations.</p> <p>There is significant buy in from those actively involved, though at times this manifests as participation or 'advise' rather than ownership</p> <p>There has been significant support for the Initiative and advocacy more generally from a broad range of stakeholders</p> <p>The Initiative has been a space to try new things.</p> <p>Engaging with the Initiative does not form a core part of people's 9-5 activities, and more urgent activities are sometimes prioritized.</p> <p>There are mixed objectives and visions for the Initiative, these differences can manifest as different interpretations of specific activities.</p> <p>Engaging in media and communications beyond key stakeholders is an ongoing challenge.</p> <p>The Initiative cannot avoid broader dynamics in the C&V sector, though at times it can be a mechanism for temporarily circumnavigating some negative dynamics. It has not managed to create planned opportunities for 'transformative dialogue' though these have happened accidentally (spontaneity paradox).</p> <p>Informal peer based learning opportunities appear to be more valued than structured 'tools' (e.g. Knowledge Exchange Forums)</p> <p>The temporary nature of the Initiative is an important dynamic.</p> <p>There seems to be a growing momentum for more diverse and broader engagement with the findings/activities of The Initiative.</p> <p>Not clear to what extent the research findings are influencing thinking or behavior – are they believe/internalised?</p> <p>Reluctance to develop universal tools/supports e.g. evaluation framework, capacity framework.</p> |
| <p>About our legacy...</p> | <p>The Initiative is limited, it will not fundamentally reshape the relationship with the state but it can support others to do so.</p> <p>The Initiative should not continue in its current form, but should generate ownership of particular outputs and foster 'spin off' activities.</p> <p>There is a deepening sense that collective response the future of advocacy is necessary and may be possible.</p> |

Annex 1: Theory U – A map for our journey

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.

