THE ADVOCACY INITIATIVE

INTERIM EVALUATION REPORT

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Executive Summary

The interim stage of this evaluation examines progress in the work of The Advocacy Initiative through a review of the outputs and a consultation exercise with key stakeholders. The Advocacy Initiative is clearly at a critical phase. This report is introduced in the context of taking decisions about how best to utilise the resources (including relationships) already developed; what new activities to undertake (if any) and agreeing a clearly focused exit strategy and legacy.

The review has pointed to key strengths in the work to date of The Advocacy Initiative. These relate to the manner in which the project has created and maintained open space for discussion and critical self-reflection. Important resources and learning have been produced and shared across a range of existing and new platforms and networks. The Advocacy Initiative has also worked to identify and respond to capacity gaps in the area of social justice advocacy.

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. The Advocacy Initiative's communication role and the nature of the message to be presented have not always been clear. A challenge has also been whether the focus of the work should be wide enough to cater for all social justice advocates across the community and voluntary sector or to focus on specific issue-based or geographical sub-sectors. The nature of and extent to which critical and transformative self-reflection has taken place represents a challenge that The Advocacy Initiative has sought to address through its wide range of activities. The workplan for the final year is taking on these critical factors as the final set of tasks and actions is planned.

The review process elicited opinions on potential legacy options for The Advocacy Initiative. There was a clear consensus that a sustainable outcome should build on the core strengths (space for reflection, access to resources, sharing of learning, addressing capacity gaps) in order to widen and deepen the collaboration and buy-in from social justice advocates and other stakeholders. A number of options are identified in the report, each focusing on these strengths to differing degrees:

1. A multi-stakeholder learning network for those involved in social justice advocacy

2. An outreach programme aimed at bringing the results and discussions to geographic and sectoral centres

3. A community and voluntary sector campaign on the social justice advocacy environment

4. An organic multi-dimensional legacy

An agreed approach to a legacy option requires an effective strategic plan for the final phase of The Advocacy Initiative that must also ensure clarity in communication, focus, collaborative stance and sustainability.

INTRODUCTION

The interim stage of the evaluation process sought to examine progress in the work of The Advocacy Initiative in relation to the validity of the set of assumptions and hypotheses arrived at through completion of a Theory of Change. The evaluation work involved a review of the outputs and a consultation exercise with key stakeholders in Advocacy Initiative[1]. The evaluation also encompassed a series of presentations and working meetings with project management and steering groups. Feedback from these sessions has also been integrated into the report.

Section 1 of the report focuses on a reconsideration of stated outcomes and the transition from theory of change to practice of change. Lessons and learning from stakeholder involvement in Advocacy Initiative actions are also presented.

Section 2 highlights some important thematic implications that arise from the consultation process.

Section 3 examines the workplan as it faces into its final phase.

Section 4 considers legacy options.

1   REVISITING THE THEORY OF CHANGE

Over a year after The Advocacy Initiative Theory of Change exercise was completed, and after participating in and reviewing a range of Advocacy Initiative outputs, Steering Committee members and others closely involved were asked whether they thought the hypotheses and assumptions contained there were still valid.

A Theory of Change is designed to explore how we believe that change happens, and later to allow us to look back and see what we have learned from the experience of attempting to bring about change. It begins with the final objective (at the top of the map in the Annex and in figure below), and looks at the key preconditions to this. This then becomes an outcome sought. We then consider the preconditions that this outcome requires, and so on. The question becomes how The Advocacy Initiative can influence these outcomes through its activity, as one among many other factors. And as we engage in these actions (from the bottom upwards on the map), we engage in learning and self-reflection about how things change. Even in the space of 18 months, and without influencing the higher level outcomes sought, a significant amount can be learned.

The map is summarised in the figure overleaf. This section will explore each of the named outcome areas.

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[1]   Some 18 interviews were undertaken with representatives from Management and Steering Committee members, perception study research participants and other key stakeholders. Given the wide ranging process of stakeholder consultation that The Initiative has undertaken, it was decided to focus the interim evaluation process on those who have been centrally involved in the work to date.

FIGURE 1: SUMMARY OF THE ADVOCACY INITIATIVE THEORY OF CHANGE
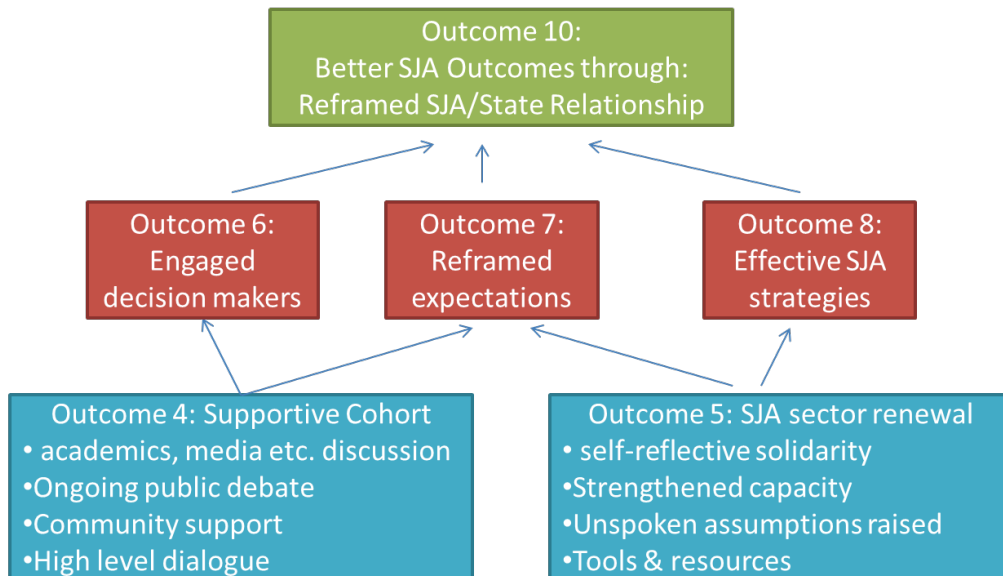
The following section recounts the highlights of the evaluation exercise, and works downwards from the top of The Advocacy Initiative Theory of Change Map (see Annex 1 for the full map). The questions put to each are:

- Should this outcome still be considered as critical to the Initiative achieving its goals?
- Is it realistically more or less likely to happen?
- Are the preconditions identified still appropriate?

This is followed by a consideration of some of the learning that has taken place as a result of Advocacy Initiative activities.

1.1 OUTCOMES RECONSIDERED

OUTCOME 10: A REFRAMED RELATIONSHIP BETWEEN SOCIAL JUSTICE ADVOCACY SECTOR AND THE STATE

The highest level question put to those interviewed was whether it is realistic to assume that the relationship between the state and social justice advocacy sector can be reframed, in a manner that can lead to better outcomes for social justice.

None believe that the state is entirely disinterested in this or that any reframing will *necessarily* be in a negative direction, though there are concerns that the goal of some political actors is the "snuffing out of potential critique of state activity". While a few simply won't allow themselves to believe the outcome will be negative - a triumph of optimism - there is also a feeling that the relationship is changing anyhow and the question we should be asking is how to influence that process of change: "the pieces have been thrown into the air, and the issue is how to nudge them, at the right moment, to fall in the right place".

Against a backdrop of over a decade in which "there has been a dramatic repudiation of the legitimacy of advocacy" on the part of the state, a number of factors are having a destabilising effect:

- The end of social partnership rippling through the system;
- the explicit and unusual opposition of certain Ministers;
- the realignment at local level around local authorities impacting from the bottom up; and

- challenges faced by and disappointments with the traditional ally, the Labour party.

Yet the two sides still must relate to each other in some way, as Brian Harvey points out in his report, this relationship tends to go in cycles. The question is how.

The relationship has many facets and evolves in multiple fora. No one expects or seeks a formal agreement to be reached. Rather the process involves numerous different strands and interactions that together will gradually make up a larger whole, sometimes as unexpected outcomes of other processes.

Most of those interviewed believe that influencing this process is best driven almost entirely on the 'inside' i.e. through a deepening of mutual understanding between the sides, and multiple negotiations at different levels (see outcomes 6, 7 and 8). Others believe that only by acting on the 'outside' can positive change come about in the relationship i.e. through mobilising at community and sectoral level around issues, influencing the wider public, and forcing a change of approach. This latter view is not as fully catered for in the Theory of Change or in The Advocacy Initiative more widely, and indeed this points to a self-selection of organisations that have chosen to be involved with, and to continue to engage with, The Advocacy Initiative.

The potential influence of The Advocacy Initiative on this relationship is recognised as limited: given the scale of the issue and resources available, and the timescale, a modest contribution at most can be expected in terms of potentially influencing this relationship even in the long-term. But the general feeling is that the sector must urgently explore how this destabilization of the relationship can be turned to the sector's advantage, by understanding what is happening and developing coherent responses. There is also a belief that the overall process of reframing a relationship may take considerably longer than expected, and that the points and times at which the sector might be able to influence the process have not yet revealed themselves.

OUTCOME 6: AN ENGAGED GROUP OF POLICY MAKERS

A precondition of such a reframed relationship is that there exists an engaged group of policy makers predisposed towards social justice. A complex picture emerges from the evidence and interviews around this.

First, as revealed by the Perceptions Study, some of those involved in policy development already see themselves as advocates for social justice, while at the same time disagreeing with significant components of social justice agendas. Indeed some may consider it an affront to suggest that they are not, if the alternative is implicitly presented as technocratic indifference to the implications of the policies they devise and support. Although their definition of social justice is often very general or highly personalised, it is accepted that some are passionate about making a contribution. Their willingness to engage with the Perceptions Study, beyond what most of those involved expected, also points to this. On the other hand, at least one person believes that the current rising group of government officials are less pre-disposed towards social justice than are those currently at the top.

Several interviewees commented that it is not very useful to talk about a single engaged group of policy makers, in a general sense, as a precondition to a reframed relationship. The relationship between state and the Social Justice sector will evolve piecemeal, along different parallel dimensions, on different issues, with different institutions and Ministries, in different arenas; each demanding a tailored stance. There are also important motivational distinctions to be drawn between civil servants on the one hand and politicians on the other.

Furthermore, state actors do not generally respond to the concept of social justice in the abstract. A policy is seldom accepted or rejected on the yardstick of its contribution to social justice. Rather, it is assessed based on a set of criteria (which is not to suggest that the process is always rational and systematic) and if it contributes to social justice, that tag can be added to it.

Decisions makers already pre-disposed towards social justice outcomes can reinforce their positions among colleagues if certain preconditions are in place. Key among them is that they can refer to the existence of an ongoing debate in the media, among academics, and at community and public level, a significant proportion of which is supportive of social justice advocacy. This is Outcome 4 (an active supportive cohort for social justice advocacy), and a number of points emerged about this:

- Debate (just as in the policy sphere) is not likely to be about *social justice advocacy* as a concept or practice per se; but rather about *specific issues* that arise: the media, the public and academics for the most part debate around specific, often topical, issues.

  The exception, and it is potentially an important one, is where the issue of government funding for, and the legitimacy and role of, social justice advocacy is explicitly raised, such as whether it contributes to better outcomes overall, and the experience elsewhere. (Brian Harvey's work is most relevant here.)

- The public perception is that the sector would promote social justice advocacy, since it is in their self-interest to do so: "They would say that, wouldn't they"; and that this weakens the impact of the argument. The challenge, several feel, is how the sector can raise these issues with key journalists, community based organisations and academics, and provide them with material to use. Some felt that most effective material is individual, personalised, cases of where social justice is clearly falling down.

- Several raised the issue of representation: the most effective form is to *amplify the voices* of those who are those experience injustice, rather than to *represent* their views. Let them speak for themselves.

Overall, most feel that the activities of Advocacy Initiative would not in themselves succeed in stirring up significant debate, even it they deliberately attempted this. However, they might begin a process that could continue after The Advocacy Initiative, or contribute certain evidence to current debates: the research so far is unique, often innovative and throws up quite a number of interesting propositions and conclusions. A synthesis of these results will be of clear interest to the policy making community. Stimulating their engagement presents some legitimate questions regarding the mandate of The Advocacy Initiative and to its potential legacy.

OUTCOME 7: REFRAMED EXPECTATIONS OF SOCIAL JUSTICE ADVOCACY- STATE RELATIONS

Aside from the existence of lively and generally supportive debate, the baseline Theory of Change also proposed that expanding support among policy makers demands that the latter's expectations and those of social justice advocates concerning their relationship would need to change. The underlying assumptions of each side, about themselves and their expectations of the other, need to be critically reviewed before any 'reframing' of the relationship can take place.

Several people commented on the manner in which the social justice advocacy sector's view of itself is a key factor in expectations. The sector, some believe, engages in a 'blame-game', constantly pointing the finger at politicians and others for the current ills in society, while simultaneously claiming for itself the moral high ground and exclusive access to the 'true' vision of social justice. The sector is poor at admitting to its own responsibilities and shortcomings. This may in turn provoke or reinforce the response, noted earlier, among policy makers that they too are motivated by social justice, tending to undermine a constructive engagement.

Thus if the goal is to leverage a predisposition of some policy makers towards social justice, how this is handled is very important. It is at least necessary to acknowledge the genuine intentions of policy makers, before attempting to influence the operationalisation of their understanding of social justice. Several felt that the basis for mutual empathy should be encouraged, taking the time to build a relationship, to seek advice on what is possible and to give honest options.

The mandate of social justice advocacy organisations, the legitimacy of their claim to represent a group, was also a factor raised by several in the interviews. The sector, and individual organisations, must be able to

clearly establish who they represent and why they are entitled to make such a claim; whether they draw directly from the group in question (such as Traveller or immigrant representative groups) or whether their relationship is more indirect (such as, usually, homeless people). The Perceptions Study demonstrated that some policy makers also believe that party affiliations may compromise the independence and loyalty of some social justice activists.

On the other side, there must also be willingness on the part of officials to engage as an equal, and respect the fact that social justice advocacy organisations are often closer to the ground. They must be willing to listen, assess the validity and merit of the case, and take back to the policy arena. A number of those interviewed feel that senior civil servants often take the easy way out, and are reluctant to support ideas, irrespective of their merit, that may involve risk and an additional burden of work.

For the sector, these issues point in two directions: the need for organisations to enhance certain capacities for self-criticism and the need to substantiate claims to legitimately represent.

OUTCOME 8: MORE EFFECTIVE STRATEGIES, IDEAS AND OPTIONS FOR ADVOCACY

Several argue that re-framing of expectations concerning interactions with state officials and politicians is in fact a precondition to more effective strategies, or that they are mutually reinforcing. In other words, unless the sector can understand better what the state responds to, it will fail to generate more effective strategies.

Almost everyone believes that a shortcoming of the sector, individually and collectively, is an inability to present a clear set of issues and feasible set of solutions to policy makers. Politicians, in particular, tend to look for solutions that fit within their wider agendas and have little time for exploration, problems, options and possibilities. The 'pre-budget submission' syndrome was widely criticised, and several argued for focusing tightly and strategically on specific areas, rather than taking a broad-brush approach. Support does not automatically flow to good ideas; value for money as compared to other approaches has to be considered.

Other aspects of capacity building that many felt were needed included the implementation of good governance within organisations, the ability to assess progress towards goals, and the ongoing ability to learn from mistakes as well as successes.

Almost all feel that The Advocacy Initiative potentially has a role to play in these areas.

OUTCOME 5: SELF REFLECTION AND A RENEWAL

The need and value for the sector to reflect on what it is doing, to engage in dialogue internally within and between organisations, and to ask itself difficult questions is very widely supported among those interviewed. It is recognised as a precondition both for individual organisations to become more effective strategically and in relating to the state, and for the sector collectively to address the current impasse and gain a position of influence in terms of the future and its interactions and relationship with the state. It is also felt that there is a willingness among most to engage in such a process.

Different ideas were put forward regarding the fault lines with the sector, the main issues of difference and contention that a process of self-reflection could attempt to bridge. Among these were the following (there is no consensus over these):

– A gap emerging between organisations active at local level, and those at national. At local level concerns range from being swallowed up within local authorities in the alignment strategy (for instance the Leader programme) and losing any advocacy capacity or opportunities; to slowly but surely being deprived of state supports and funding when the demands on them are growing, to a point where they become unable to engage in effectively advocacy or provide meaningful services. The national sector (whether

those at the hub of networks or those who have solely a national role) are finding that their advocacy activities can achieve less, while resources to support the local level are getting scarcer. The gap arises where each side finds it can gain less from, and offer less to, the other.

- The presence of a 'learned helplessness' that constrains the capacity of some organisations in the sector to engage in dialogue with the state, and discourages the search for innovative solutions;

- Whether the focus in the current climate should be on negotiating with the state to achieve greater social justice or at least on minimising its erosion; or whether it should be on mobilisation locally, nationally and internationally to force a change in direction and more focus on social justice issues.

Several used the term 'transformative dialogue' to refer to what is needed within the sector itself: a form of dialogue that is capable of initiating a learning process that has the potential to transform beliefs and practices, and renew relationships.

Although few ideas were expressed on how best these can be addressed, there was widespread agreement that The Advocacy Initiative has already contributed to opening pockets of debate and reflection and that it has significant potential to do more.

OUTCOME 9: SUSTAINING THE MOMENTUM

The Theory of Change noted only that a precondition for achieving the medium and long term outcomes is that the process be sustained in some manner. While it is still too early to make decisions about this, as one person noted: "it will soon be too late".

This final Advocacy Initiative 'legacy' can take several forms, some of them coexisting and reinforcing each other; others as alternatives.

An argument voiced by several was that The Advocacy Initiative process, if it proves to be valuable, will in some (though not all) respects sustain itself. The argument here is that The Advocacy Initiative will have gathered a certain momentum within relationships formed between those participating, that will drive it forward and even strengthen it depending on the evolving environment it meets. A 'transformative dialogue' will already have begun, between at least some of the partners and participants involved, and a space to develop that will open of its own accord or with minimal intrusive effort.

Within this perspective, there is no reason for a formal space to be created to continue the work of The Advocacy Initiative. Rather, the space is let 'lie fallow' for a period after which new ideas and forms may emerge to re-energise the debate and bring it forward again.

What is important is that participants feel positive about the outcomes of The Advocacy Initiative at its conclusion, that a positive energy is present that may carry the potential to deepen the process of interaction and understanding. A negative outcome could even set the sector back.

At the same time the more concrete products can, by completion, be further processed into a form that can be picked up by Advocacy Initiative participants, and find a home that will sustain the more successful elements and enable their full value to be realised and further value added. This includes the research undertaken (that might establish links with academia), the concrete exchanges such as Knowledge Exchange Forums and any successor, the capacity building tools, and even a few other new suggestions.

There is little appetite to continue in the same form – a few argue trenchantly that at the formal level Advocacy Initiative has always been regarded as a fixed-term initiative and should remain so – and some concern that a continuing role of philanthropy in this space of dialogue could be damaging.

Nevertheless several would like, in principle, to see a somewhat more formal place for ongoing dialogue within the social justice advocacy sector, perhaps moderated lists and occasional meetings and coordinated actions. This might in time lead to something more substantial, with a mandate growing at a pace those involved feel comfortable with. A couple also look north of the Border and recognise the extent to which NICVA (Northern Ireland Council for Voluntary Action) there can claim, with some degree of legitimacy, to speak and negotiate for the entire sector, though it is acknowledged that the situation is very different here. While no such formal solution was suggested for this side of the border, the question was raised as to whether certain of these representative functions might be develop more effectively here.

There was also a warning against the possibility that a small number of organisations, selected by a process of attrition ("the last ones left standing"), might opt to continue and form an social justice advocacy community of interest, with little overall legitimacy, creating further divisions within the sector rather than building bridges.

1.2   SOME LEARNING SO FAR

Some learning points emerging from this reconsideration of The Advocacy Initiative Theory of Change are extracted and the implications explored a little below. In this sense the original *theory* of how change was expected to happen is contrasted with the *practice* of that change over the last 18 months.

This 'big-picture' approach is followed by a look at what has been learned from the bottom-up i.e. what those interviewed feel are the most relevant lessons from The Advocacy Initiative actions taken so far. Of course, the two overlap.

FROM 'THEORY OF CHANGE' TO 'PRACTICE OF CHANGE'

The following are the key points at this stage.

1. Given the timescale, complexity and nature of the goal of reframing the relationship between social justice advocacy and the state, it is not to be expected that significant change can be brought about during the lifetime of The Advocacy Initiative, barring major unanticipated events. Future elections may make a difference, of course, for better or for worse. Direct interventions by Advocacy Initiative (not to say they are being contemplated) designed to impact on this are therefore not possible or useful.

    Nevertheless, the current instability of the relationship should be seen as an opportunity. What might be useful is an exploration of the scenarios around the evolution of the relationship in the medium to long-term, and how the sector might respond to these. This would involve identifying certain indicators of the relationship, the factors that could influence it, and the kinds of responses – perhaps combinations of 'inside' and 'outside' approaches - that might have an affect (public campaigns, platform development, local level mobilisation, further research etc.).

2. The Advocacy Initiative never set out to intervene in issue-based advocacy, but it can legitimately attempt to influence the public and other actors in terms of their understanding of social justice advocacy, directly or through supportive media and other constituencies. Most feel that communication and even advocacy actions (including refining the research results to this end) that are focused on achieving this – and specifically a wider appreciation of the legitimacy and value of social justice advocacy – are within the remit of Advocacy Initiative; and or that this could be an area where a legacy, or at least some impetus, could be achieved.

3. Several areas of social justice advocacy sector capacity building were identified as potentially relevant to the Initiative:

- Social justice advocacy organisations should put in place processes and practices that will allow them to review, renew and convincingly substantiate the legitimacy of their claim to directly represent, work with and/or on behalf of, specified disadvantaged groups; and to demonstrate that this representation is coming from an unbiased and non-partisan position.

- Social justice advocacy organisations should develop a self-critical capacity to review their position and role within the wider sphere of achieving social justice, in the context also of the social justice contributions of others and the constraints they work under, including politicians and policy makers. How are they perceived by others? How do they perceive others, and is it an accurate picture?

- Recognised by the Initiative from the start and reaffirmed here is the need for more effective strategy development, more likely to have an impact on the policy context; and a greater ability to monitor progress towards achieving goals and to understand the process of change.

- Advocacy strategies, particularly for those who have been involved in The Initiative, are dominated by insider type activities, indeed the case studies conducted identified capacity for insider relationship building as critical for success. However a number have also pointed to the need for strategic use of outsider actions including campaigns, media and mass mobilisation. A possible theme for further exploration is how to use these effectively and as a complement to internal approaches.

4. That there exist fault lines within the sectors, some of them ideological, others relating to strategy or to historical differences, is universally believed. Almost as widely felt is that these constrain the sector overall and that reconciling them would be step forward. In theory, one way to approach this is through an explicit process of collective self-reflection (small group, large group) that, as the Theory of Change puts it, would allow unspoken assumptions to surface, be explored and ultimately to some degree of reconciliation through deeper mutual understanding, compromise and some shifts or openings in deeply held beliefs.

    Probably in the light of attempts to achieve this by The Advocacy Initiative itself (see below), most now feel that the Theory of Change put too much emphasis on the possibility of a direct and explicit approach to this, that might in the end not prove constructive. This is returned to below.

5. Finally, a separate section below considers possibilities for a legacy for The Advocacy Initiative, or various ways in which the impetus developed can, as appropriate, be carried forward. Suffice it to say at this point that there is clearly no consensus around this – indeed it was left as an 'empty' outcome/precondition in the Theory of Change. Nevertheless there is agreement that the issue must be decided soon.

LEARNING FROM ADVOCACY INITIATIVE ACTIONS

The following were some of the lessons emerging from the actions pursued by The Advocacy Initiative.

RESEARCH AND EVIDENCE GATHERING ACTIVITIES

Many feel they have gained valuable insights, from direct involvement in the research or through reviewing the results. The results of each research activity were identified by one or more partners as offering insights into how they perceive the sector and how they perceive others, especially policy makers. Some have already changed their practices in significant ways, in more than one case feeding directly into the strategic direction of the organisation.

This suggests strongly that the evidence and ideas emerging are potentially useful to the sector more widely, and that some are of possible interest to media debate and academic discourse. However, most felt that there is also a considerable task of repackaging the results, and carefully targeting it where it is needed. This might

include producing different summaries, extracting and synthesizing from several sources, short video presentation, redesign into educational modules, and more, depending on the decision concerning the remaining Advocacy Initiative actions and the for of legacy chosen.

PERCEPTIONS STUDY

The Perceptions Study was particularly interesting.

The methodology employed by the Perceptions Study was highly participatory, and those involved gained a lot from engagement with the activity itself. It was, in a sense, a microcosm of The Advocacy Initiative process, with social justice advocacy interacting directly with policy makers and politicians in a context in which the former were obliged, due to the goals and structure of the encounters, to listen to the latter and attempt to understand their concerns. The interactions among the research team, and the need to agree on the approach and method, were also enlightening for some. The final section of the report points to significant learning that might facilitate precisely the kind of reframing of the expectations described in Outcome 7.

A question arising from this is whether such encounters could be replicated in a wider way. This would require an understanding of why they did work, and whether such micro-dynamics could be recreated and the support for stakeholders found in other formats.

SELF-REFLECTION

The Steering Committee itself decided to engage in a process of self-reflection, almost as a 'guinea pig' for the sector itself. Several relatively intensive sessions were organised.

Most agree they did not achieve what was intended i.e. enabling the kind of 'transformative dialogue' that might give insights into the key issues that can be addressed, and into how such a process might be instigated more widely. Different reasons were given for the failure: The wrong questions were asked, and hence could never have produced the right answers; the process became too personalised; people were unwilling to fully engage and preferred to seek refuge in more familiar discussion; the process must be undertaken in a supportive manner etc.

A recurring theme was that critical self-reflection and transformative dialogue cannot really be 'manufactured' in this manner: it needs to happen spontaneously. The paradox however is that the conditions must be created for such spontaneity to emerge – these conditions themselves do not emerge spontaneously. Hence a major challenge is facing The Advocacy Initiative in attempting to instigate such dialogue in the sector.

One conclusion shared among most of those interviewed is that a direct approach to exposing the fault-lines and attempting to reconcile is unlikely to work – and indeed might be resisted by many. It could do more harm than good. An alternative approach might be to build such possibilities into all other actions.

KNOWLEDGE EXCHANGE FORUMS

The forums provided an important space where social justice advocacy actors could come together. The KEF linked to case studies proved a particularly effective means of sparking interest in success stories and in allowing participants to draw on the learning. A recurring lesson related to the importance of demonstrating to social justice advocacy actors how and where policy influencing or shaping was successfully and innovatively achieved. It allowed for a move beyond the notion of social justice advocacy as operating as simply a reactive sector, with "a shrill and emotional voice".

A useful exercise may be to review the spread of participating organisations (with a focus on the recurring attendees) from across the sector in order to gain an insight into the degree to which the focus of the forums attracted organisations from the different sub-sectors.

2.   IMPLICATIONS FROM THE REVIEW

As stakeholders examined the Advocacy Initiative theory of change, the learning from actions, and progress on its goals (to contribute to the knowledge and understanding of social justice advocacy; stimulate informed debate on social justice advocacy within the sector and with the state; and facilitate strengthened capacity of social justice advocates), a number of challenges were raised. The review process allowed for a focus on and a discussion of these central thematic concerns.

This section presents these implications and considers how these may be addressed as thoughts move to the next steps for The Advocacy Initiative and to how its final stage is framed.

1.   Communication

A lack of clarity was expressed with regard to the manner in which The Advocacy Initiative would act as a communicator of social justice advocacy messages. Where tailored stances are required, recognising the range of arenas and audiences, there was no consensus as to whether Advocacy Initiative should act as a defender of social justice advocacy in the public sphere.

Addressing this Challenge

Clarification of the message to be communicated will by necessity involve taking a position on the "ask" for the next phase of The Advocacy Initiative. How success is to be measured in terms of communication also requires further exploration in this regard. Does it relate to press releases, informed blog entries and published media articles on core Advocacy Initiative activities, or is it to take a lead campaigning voice on certain specific social justice advocacy issues of concern?

A clear strategy regarding the nature of communication may also be linked to the completion of specific workplan elements. The release of a report with challenging conclusions may require a targeted approach and more visible presence in national media, compared to the release of capacity building resources.

2.   Self-Reflection

Advocacy Initiative stakeholders expressed a level of frustration with regard to the manner in which a self-reflection process was not leading to planned tangible outcomes or "transformative dialogue". A reticence to openly engage with each other on challenging issues in formal settings was noted and interviewees considered that this was restricting the possibilities for being able to draw out "deep learning" and thus lead to changes in practice of doing social justice advocacy.

The Advocacy Initiative sponsored opportunities for coming together had each time successfully created the space and brought together willing participants and actors in social justice advocacy. However, the intended outcomes of engagement, discussion and self-reflection on shared challenges in practice had not always happened as desired.

However, many instances of successful reflective outcomes with regard to "difficult issues" had been noted and these had tended to emerge from informal contact.

Addressing this Challenge

The Advocacy Initiative needs to continue to bring an understanding of this stated paradox (of needing spontaneous and organic development to happen in a structured environment) to the planning of the final phase of the workplan. By possibly allowing more time for informal activities within the structures of the shared spaces, it may allow for increased levels of cross-stakeholder dialogue to emerge.

The successful creation of these shared spaces and exchange forums has been a critical outcome of this phase of the work of The Advocacy Initiative. Participants have welcomed the opportunities to be able to engage and contribute. Sustaining the appeal and increasing levels of participation in these spaces and forums will be an important element of the final phase and beyond of The Advocacy Initiative. It will also be key to unlocking the "transformative" potential of the dialogue process.

3.   Sub-Sectoral Approach

A further thematic issue that emerges from the review and consultation work relates to how Advocacy Initiative is the breadth and depth of its focus. Whether the emphasis continues on working with a wider social justice advocacy set of stakeholders or whether a narrower focus to work within sub-sectors should be taken, has a critical bearing on the approach to completing elements of the workplan, the possible re-orientation of tasks (e.g. production of a synthesis pack) as well as on the steps to be taken to prepare for a sustainable legacy outcome.

Addressing this Challenge

The sectoral focus will be determined on a task by task basis as each remaining element is programmed within the workplan, planned and then carried out. The roll out of a particular capacity building tool may have a narrower target than the launch of a report.

4.   Cross-Stakeholder Dialogue

The importance to The Advocacy Initiative in promoting talk, spaces for reflection and critique has been clearly evidenced through the review process to date. In examining the nature and the extent to which such ongoing listening and learning is to be facilitated in the next phase of Advocacy Initiative's work, one question is how collaborative approaches on issues of common concern are to be promoted. These stakeholder groups, from across the community and voluntary sector with a focus on social justice advocacy, include the trades unions, community based projects, NGOs working on local, national and international issues, faith based projects and academic interests.

Addressing this Challenge

The completion of the workplan and any specific choice of direction for the final phase of The Advocacy Initiative's work will again need to be linked to a clearer understanding of the possibilities and strategies for promoting a readiness to engage amongst the widest range of social justice advocacy stakeholders.

5.   Capacity gaps

The work of The Advocacy Initiative has allowed for an ongoing examination of perceived capacity gaps in the area of social justice advocacy. The workplan has identified a series of areas within which work has been undertaken to develop a range of innovative solutions in such areas as evaluation and training. These tools and solutions will continue to be rolled out during the final phase of work.

The research undertaken for the interim evaluation identified other areas in which perceived gaps may exist. Interviewees highlighted that the management of lobbying and advocacy work involves different challenges depending on the particular focus of the organisation. A national organisation with resources and capacity to deliver specific advocacy projects has concerns that are quite different to those of a locally based project with limited resources to channel into advocacy, policy or campaign work, which may result in different capacity gaps. For instance, the national organisation must ensure that their mandate is clear and that their representation of specific target groups or issues is connected closely with their base. The local project, on the other hand, may be under resource pressure to be able to commit time and effort of staff or volunteers to specific advocacy work.

Addressing this Challenge

The Advocacy Initiative has gathered many resources, insights and materials from a range of research, reflection and capacity building exercises. A synthesis of such resources, packaged and presented, would have the benefit of being able to connect to possible capacity gaps as they are identified by various stakeholders.

Organisations involved in social advocacy work would be able to access general and specific lessons and draw on this learning in their own environment. Such a synthesis pack would also be able to be availed of once the final phase has been completed.

Organisations will also continue to be involved in the roll out of specific online tools and supports, thus increasing capacity and buy-in during the final phase.

3.   MOVING INTO THE FINAL PHASE

Emerging in 2008 The Advocacy Initiative has gone through a number of distinct phases. In the first phase the informal steering committee met to consider the issues and from there undertook to produce a broad scoping report that was published in August 2010. Following this report the Initiative entered a new phase when it agreed a three-year work programme with the funder and hired staff and contractors to implement that programme. The Initiative is now entering the final phase of that three-year work programme, concluding July 2014.

Work has progressed in the three broad activities areas in a developmental way, first focusing on building research and knowledge (outcome 1), while also providing opportunities for reflection and exchange (outcome 2). It is currently focused on deepening and broadening of those reflection opportunities while building a toolbox of capacity initiatives (outcome 3). As this report shows key challenges for this next 12 months will be: (1) completing this work programme; (2) synthesising the learning and outcomes; and (3) putting in place the conditions for a lasting legacy for The Initiative. Table 1 summarises the activities and outputs to date.

TABLE 2: SUMMARY OF OUTPUTS AND ACTIVITIES TO DATE

	Status
Fresh evidence and knowledge on social justice advocacy environment	
Definition of social justice advocacy	Complete
Mapping Study	Complete
Policy maker perceptions	Complete
Funding vulnerability	Eminent
Public opinion polling	Complete
Self-reflection and knowledge exchange	
Expert group consultations	5 of 6 complete
Self-reflection (3 KEFs, SC Dialogue, Local events)	Underway
Grassroots campaign	
Capacity building	
Capacity framework	Eminent
Evaluation framework	Underway
Mapping training	Complete
Filling gaps	First one underway
All of the above supported by a communications strategy and governance arrangements.	

THE WORKPLAN

The key activity choices for the coming period are (1) defining the direction and character of a number of outstanding activities including the proposed grassroots campaign and activities to fill capacity gaps; and (2) defining new activities in the context of the existing resources.

Consequently the work plan for the coming period can be described in three ways: (1) the known knowns (those activities which are identified, defined and already underway); (2) the known unknowns (those activities planned but as yet undefined and open to evolution of concept); (3) the unknown knowns (those activities

which remain to be defined and articulated in the context of the emerging legacy planning). Hopefully there are no unknown unknowns, but you never know!

TABLE 3: SUMMARY OF WORK PLAN TO JULY 2014

	(1) known knowns	**(2) known unknowns**	**(3) unknown knowns**	
Fresh evidence and knowledge on social justice advocacy environment	Finalise funding report Communications and dissemination	Synthesis document Media engagement?		
Self-reflection and knowledge exchange	Complete expert group process (academics). Complete series of local events.	Grass roots campaign Self reflection - Future KEFs Steering committee dialogues		→ LEGACY
Capacity building	Advocacy Capacity Tool Evaluation tool Political independence	Other capacity gaps		
	Overall governance Reporting to funder Final evaluation Exit process			

The discussion on the legacy ambitions of the Initiative will directly influence actions and planning for (2) and (3) above. Choices will have to made with regard to activities in these areas.

4. CONSIDERING LEGACY OPTIONS

In the initial preparation for The Advocacy Initiative's work, members highlighted that they wanted to leave behind a distinct footprint; to know that the work undertaken has led to more effective social justice advocacy. The Advocacy Initiative's long term impact would be that:

"The Advocacy Initiative has been the catalyst that has led to a new way of working between the community/ voluntary sector and the state. This new relationship:

- is grounded in a culture of social solidarity built on recognizing, respecting and valuing the role of social justice advocacy in policy development and wider civil society;

- has led to the development and implementation of more appropriate and targeted policies; and

- has embraced more effective and constructive advocacy strategies which are working towards having a positive impact on the lives of the more vulnerable people in our communities."

As The Advocacy Initiative continues into its final phase to influence a new way of working between the community and voluntary sector and the state, it has to consider how its legacy will be viewed and experienced by its widest set of stakeholders. The planning of any legacy option should take into account the thematic implications arising from the work to date, namely managing a communications strategy, self reflection challenges, sub-sector approaches, capacity gaps and dialogue across stakeholder groups.

MAXIMISING CORE STRENGTHS

A number of key strengths have been documented above in the work to date of The Advocacy Initiative and integrating these within an approach to preparing for life beyond the project will reinforce a sustainable outcome. These relate to the importance of:

- Maintaining open space for discussion and critical self-reflection;

- Creating access to the resources and learning produced through the lifetime of Advocacy Initiative;

- Connecting to platforms (existing or new) whereby this learning can be shared;

- Ensuring that capacity gaps are being addressed.

EXAMINING LEGACY OPTIONS

The following four legacy options draw on these strengths to differing degrees.

1. A multi-stakeholder learning network for those involved in social justice advocacy.

A core element of the workplan relates to the provision of space for ongoing reflection and sharing of insights and learning. The development of a learning network has the potential to involve a wide range of stakeholders engaged in social justice advocacy beyond the lifetime of the final phase of The Advocacy Initiative. Through developing a platform for peer support within and across sectors in the area of social justice advocacy, a more coherent sense of solidarity can be developed amongst actors, whereby all tools and evidence (including synthesised pack) can be accessed and added to beyond the life of The Advocacy Initiative.

Within the learning network, individuals would share experiences in a reciprocal mentoring environment. An option of bringing participants together for an annual conference would be explored. Central to this option is the ability to put meaningful shape on the notion of "transformative dialogue"- the central focus of the mentoring relationship would be to work, through mutually reinforcing discussion and reflection, to change

the practice of social justice advocacy for both partners; thus creating new opportunities for learning to take place.

2.   An outreach programme aimed at bringing the results and discussions to geographic and sectoral centres.

A second option involves the development of a tailored social justice advocacy work programme targeted at geographic or sectoral centres, focusing on sharing evidence and learning, and presenting challenging questions about how social justice advocacy operates in the sector. This programme will be facilitated through working sessions, with capacity tools presented and used. Follow-up post-session is to be a key element of the programme. A loop would be created whereby lessons are feeding into a shared national conversation regarding the state of the social justice advocacy sector, whether renewal is happening, the extent to which the learning of policy mechanics is contributing to more effective forms of engagement and relationship building. The actors in the national social justice advocacy arena would also be centrally involved in this self-reflection and learning process and loop.

As well as feeling secure enough to be able to explore their common concerns, a series of challenging questions can be posed with regard to understanding of the mechanics of policy shaping and making within their frame of reference and their approach to engaging with decision makers. These questions have emerged from the evidence gathering phase of The Advocacy Initiative work and may relate to such key areas as public sector reform, lobbying regulation or local Government reform and the re-alignment process. They include:

- How are critical policy developments and shifts about to affect the social justice advocacy sector?
- What will they mean for new or emerging relationships at local or national level?
- What is the best way to engage and be effective?

3.   A community and voluntary sector campaign on the social justice advocacy environment.

A third option looks to the idea that emerging from The Advocacy Initiative would be a cross-sectoral campaign, seeking a specific change to the relationship between the sector and the state. The form and the specific "ask" of this campaign would be elaborated in the last year of The Advocacy Initiative.

This final phase of The Advocacy Initiative would therefore see the building of a campaign infrastructure, with a consultation phase with key actors in social justice advocacy sector to examine the most important focus for the campaign. The campaign would be set on a sustainable footing and resources would be dedicated to bringing as many organisations within an active and targeted campaign. An example of such a campaign may involve work to bring stakeholders together to develop and roll out a "charter for the social justice advocacy sector".

4.   The Organic Legacy

Option 4 takes an organic approach that the legacy of ongoing critical reflection and dialogue will flow as a consequence of the successful conclusion of the work of The Advocacy Initiative. While specific actions would be undertaken to support the sustainability of individual products (e.g. synthesis documents, handing over ownership of particular tools), this approach assumes that at a minimum level, the conversations will continue, and will lead to new dynamic relationships evolving.

In order to explore the mainstreaming potential of the collective learning and resources produced, certain partners will become responsible for certain strands. With this aim in mind, working partners will be approached such as academics, journalists and community organisations to encourage use of the evidence created. Likewise, the capacity tools or any new synthesis pack will be rolled out through an active forum of committed organisations.

ANNEX 1: BASELINE ADVOCACY INITIATIVE THEORY OF CHANGE MAP