



Effective social justice advocacy: a theory-of-change framework for assessing progress

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Abstract: *This article offers a theory-of-change framework for social justice advocacy. It describes broad outcome categories against which activists, donors and evaluators can assess progress (or lack thereof) in an ongoing manner: changes in organisational capacity, base of support, alliances, data and analysis from a social justice perspective, problem definition and potential policy options, visibility, public norms, and population level impacts. Using these for evaluation enables activists and donors to learn from and rethink their strategies as the political context and/or actors change over time. The paper presents a case study comparing factors that facilitated reproductive rights policy wins during the transition from apartheid to democracy in South Africa and factors that undermined their implementation in the post-apartheid period. It argues that after legal and policy victories had been won, failure to maintain strong organizations and continually rethink strategies contributed to the loss of government focus on and resources for implementation of new policies. By implication, evaluating effectiveness only by an actual policy change does not allow for ongoing learning to ensure appropriate strategies. It also fails to recognise that a policy win can be overturned and needs vigilant monitoring and advocacy for implementation. This means that funding and organising advocacy should seldom be undertaken as a short-term proposition. It also suggests that the building and maintenance of organisational and leadership capacity is as important as any other of the outcome categories in enabling success.*
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AT one of my interviews with the Ford Foundation for a job as a program officer in reproductive health and rights, I was asked whether I had any experience in successfully influencing policy change.

“Yes,” I said. “On abortion in South Africa.”

I proceeded to tell the story of the campaign to increase access to abortion and other reproductive health services in South Africa. The campaign culminated in the Choice on Termination of Pregnancy Act 1996 and in significant, related policy changes that gave the public free access to primary health care, an increased range of contraceptives for free, the right to

screening and treatment to prevent cervical cancer, and more.

The interviewers then asked whether I’d had experience of such advocacy going wrong.

“Yes,” I said. “On abortion in South Africa!”

And I described how, despite winning passage of a law that should have led (and did, to a limited extent) to a significant decrease in the number of maternal deaths and ill-health in the country, the campaign had not managed to address the major barriers to countrywide implementation.

This story highlights a number of the challenges to advocates, donors, and evaluators in understanding and advocating for social change.

This article, therefore, aims to unravel some of the key components of policy advocacy as a way of reflecting on what kinds of outcomes can be used as markers of progress towards achieving the goals of social justice. Before considering the nature of policy advocacy, it is worth making explicit the values underlying my use of the term “social justice”, which draws on the analysis of Nancy Fraser^{1,2} and on principles of human rights.³ Social justice advocacy describes efforts to: a) increase fairness in the distribution of resources;* b) end discrimination against all groups, fostering values that recognize all people as equal; and c) promote the participation of people in policy and implementation processes that affect their lives, and transparency and accountability for how decisions are made and how they impact on society.[†]

Theory of change for policy advocacy

There is a general consensus that advocacy and advocacy evaluation cannot be done without a theory of change (whether explicit or implicit) and that this needs to be grounded in social science research⁴ and in experience, in order to draw on field learning, without which it can be weak or problematic.⁵ One has to understand what the organization, coalition or network thought it was doing and what it hoped to achieve by its actions in the short and medium term in order to be able to evaluate it. A number of evaluators use Kingdon’s⁶ approach to policy analysis as the basis of a theory of change to explain the nature and complexity of policy processes.^{7–10}

Kingdon points out that there are a world of problems which never get onto the political agenda, and similarly a world of potential solutions. In tandem, “political events flow along on their own schedule and according to their own rules, whether or not they are related to problems or proposals”(p.20).⁸ Hence, the process of problem identification, the process of developing solutions, and the political process are not sequential but should be understood as

“multiple streams” that flow independently and simultaneously – and in each, different actors may take part.

For this reason, it is necessary to analyse how a problem gains recognition as a problem to be addressed in the political terrain, how specific solutions get onto the political agenda, and why politicians are concerned with certain issues rather than others at a particular moment in time. I have added a fourth stream, that of bureaucracies and administration, since implementation is as much a site of policy making as is law; and bureaucrats and administrators, as with policy makers, act on the basis of personal and institutional concerns that may bear no relationship to the problems and desired solutions of those who are most in need or marginalized.¹¹ Hence, the focus of advocacy is on the processes required to influence problem definition and identify matching solutions and then to get these onto the agendas of the politicians, bureaucrats and other decision-makers who determine policies and their implementation, and keep them there in the face of opposition or bureaucratic apathy (see Figure 1).

Kingdon suggests that “policy entrepreneurs” have the role of creating connections between these streams, working with the media and lobbyists as critical components of this process. In relation to social justice advocacy, I frame these as “policy activists”¹² to denote the link to social movements, and the recognition that mobilization of those most affected can in itself change the policy environment, in particular the public discourse, to get specific problems and preferred solutions onto public and policy agendas.

It is here that the question of values comes into play. Pastor and Ortiz specifically critique the process of “policy entrepreneurs” writing papers and engaging policy makers without engaging and generating grassroots leadership so that the social movement can “make sure to directly involve those with ‘skin in the game’ and make sure that the frames and values are derived from them and not from focus groups conducted by distant intermediaries”(p.2).¹³ The choice of the term “policy activist” aims to signal the desirability, from a social justice point of view, of building the capacity of individuals and groups who are part of or closely tied to grassroots movements, to play this role – to get solutions onto the political agenda that match problems identified by those who are most

*For example, in relation to services such as health or education, ensure equity in their availability, accessibility, acceptability and quality.

†Hence the term “social justice” is used broadly to incorporate social, economic, cultural, civil and political rights.

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