

Pulling together:

A synthesis of the work of

The Advocacy Initiative 2010-2014

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What is social justice advocacy and who is involved?

The two key questions we had to address at the outset of the Advocacy Initiative were:

1. What is social justice advocacy?

&

1. Who is involved in social justice advocacy?

## 1.1 What is social justice advocacy?

### What is advocacy?

The word advocacy comes from the Greek word ‘ad vocare’ which literally means ‘towards a voice’. Advocacy is therefore all about giving voice to/on behalf of an individual or a group/s, in order to promote and achieve positive change/s in relation to:

* Public policy and practice
* Corporate policy and practice
* Public attitudes and behaviour
* Resource allocations
* Power and relationships
* Decision making processes so that affected communities are involved
* Empowering affected communities to influence the decisions that affect them

We found many different forms of advocacy including:

- ‘insider’/‘internal’ activities, in which organisations participate within official policy-making spaces (engaging with politicians, civil servants and policy influencers), such as through writing submissions to government, face to face meetings with politicians and other policy makers, sitting on government committees, etc.). We identified lobbying as a part of insider advocacy work which relates to influencing a specific piece of legislation or policy process, such as the annual budgetary process.

-more ‘outsider’/’external’ activities, include public and media campaigns (targeting the media and the general public) as well as more radical activities like street protests or occupying spaces.

In hindsight we probably focused more on insider than outsider strategies because that was what our members were interested in.

### Why do organisations undertake advocacy?

We found that organisations engaged in advocacy on behalf of the interests they represent based on the belief that by engaging in the public sphere, they could influence public policy and/or key decisions makers or institutional elites. We found that these organisations direct their efforts at a range of audiences and seek to use ideas and speech to shape the environment in which they operate. If one’s aim is to shape public priorities, some believe advocacy is a way of achieving substantial leverage. While direct service programmes change the world one client at a time, advocacy efforts generally focus on broad changes in systems and policy.

We believe that organisations engage in social justice advocacy work in order to represent and articulate positions on behalf of excluded and/or vulnerable group/s believing that advocacy is a way of achieving substantial leverage. According to our report Funding Dissent: Research into the Impact on Advocacy of State Funding of Voluntary and Community Organisations it can:

* Mobilise citizens: Channelling participation and promote cohesion, giving voiceto those who are under or unrepresented in policy making. This is especially important when membership of political parties is so unattractive and when other opportunities to participate in democratic decision-making are so limited.
* Improve policies: Organisations involved in this work can bring a broad range of information, options and solutions to government, improving the quality of the decisions subsequently taken and enabling government to avoid unintended and negative consequences.
* Provide expertise: Government cannot be expected to have the range of staff and skills to define and administer policy on its own, but social justice advocacy organisations often have these resources, which can be quite technical and important for improving the quality of decisions.
* Promote a longer-term perspective: Analysis and solutions to problems that extend beyond the five-year electoral cycle of government.
* Act as watchdogs of accountability: Improving both the surveillance and accountability of government.
* Enable minority views to be heard: Including perspectives that might otherwise be overlooked;
* Provide ‘ground truth’ to government about situations of which it would not otherwise be aware: related to this, as they seek to get fresh issues on the political agenda, they can serve as an early warning to government of upcoming issues that must, sooner or later, be addressed.
* Communication and buy-in: Organisations involved in social justice advocacy can provide an important channel of communication from government to people and vice versa, including the achievement of buy-in or acquiescence in complex and difficult decisions.
* Role in in the monitoring, implementation and enforcement of government decisions (laws, policies, procedures, protocols, strategies).

Harvey (2014)

Desmond Tutu very aptly describes the shift from individual level advocacy to social justice advocacy in the following terms: *“There comes a point where we need to stop just pulling people out of the river. We need to go upstream and find out why they’re falling in.”?* This is appealing particularly because many issues are so broad that their resolution requires sustained government action at a national level.

### What is social justice advocacy?

We understand social justice advocacy to be planned, organised and sustained actions, the purpose of which is to influence public policy outcomes, with and/ on behalf of a vulnerable group or community or indeed the wider public good. Social justice advocacy can be done by a range of organisations and groups.

Social justice advocacy is informed by experiences of poverty and exclusion, including through:

1. Providing individual/personal advocacy supports aimed at realising right and entitlements.
2. Delivering direct services and meeting social and economic needs.
3. Empowering and involving those experiencing the issues in the decisions that impact their lives.
4. Producing research and analysis that illustrates the realities of poverty and social exclusion.

It is targeted at a broad range of stakeholders including: policy-makers, civil and public servants, social partners, relevant international organisations, broader public opinion, and other relevant actors. Social justice advocacy can focus on individual communities or on the broader public interest.

While independent of formal institutions, social justice advocacy is a product and tool of democratic legitimacy. It is grounded in the premise that social change occurs through political systems and the state, supported democratically by the public, can be motivated to act in ways that realise greater equality and inclusion.

## 1.2 Who is involved in social justice advocacy?

### Civil society social justice advocacy

Civil society is the space between the household and the state. Civil society fulfils many roles including providing alternatives, vision and acting as a counterweight to the influence of commercial interests and unfettered state power. It represents two of the fundamental freedoms in a democracy – namely the right to free speech and the right to freedom of association.

Civil society organisations that are involved in social justice advocacy can include: non-governmental and non-profit organisations the community and voluntary sector, trade unions, professional associations, community-based organisations, faith-based organisations, social movements and networks, the media and academia.

### Community and voluntary sector social justice advocacy

While the community and voluntary sector does not have a monopoly on social justice advocacy, we made a decision to focus on this sector because the organisations who set up The Advocacy Initiative believed they play a critical role in addressing the structural causes of inequality and exclusion in our society and in ensuring the voices of those who are excluded and marginalised are heard.

We believe that community and voluntary sector social justice advocacy includes any action, compatible with the values and principles, aimed at promoting or resisting legislative or policy change.

We believe that the right to freedom of association and the right to freedom of speech together with the connection to real experiences is what gives the community and voluntary sector its legitimacy in terms of undertaking this work.

# 2 What we did - The Story of the Advocacy Initiative

## 2.1 Initiative development

Our origins can be traced back a discussion in 2008 at the Centre for Non-Profit Management Summer School in Trinity College. Participants at that event agreed that the role and value of community and voluntary sector advocacy needed further exploration. There was also a concern among some of those attending that event that levels of hostility to community and voluntary advocacy work sector were growing and this issue merited further exploration.

A workshop to explore the current state of advocacy by the community and voluntary sector was held in October 2008. At its conclusion a small number of individuals agreed to progress this work further and a Steering Committee involving individuals from 17 organisations were formed.

It should be noted that these discussions took place against a back drop of a serious, ongoing and deepening economic crisis which was to have profound social and political ramifications. A crisis which seemed all the more severe coming as it did so quickly on the heels of the ‘Celtic Tiger’ years.

The Steering Committee worked together for about nine months to develop and agree the purpose and goals for a collaborative action to examine the current state of advocacy by community and voluntary organisations and its impact on relations with the state.

This work was developed and underpinned based on a number of shared beliefs:

* A functioning civil society is critical to participative democracy, but within the Irish context there is often a lack of clarity and understanding about the importance of this role and the processes vital to its conduct.
* There exists little opportunity for a shared reflection among community and voluntary organisations doing advocacy.
* Advocacy meant different things to different people/organisations and that there is a need for a better understanding and ideally shared agreement of the role of advocacy in a democracy.
* A need to explore the experience of advocacy from both the perspective of those who were on the receiving end of advocacy – the politicians and senior civil servants – as well as from the perspective of those doing the advocacy.
* A need to look at the effectiveness of current advocacy work in order to learn how it might be enhanced.

This Steering Committee sourced funding to undertake the initial research phase of this work from Atlantic Philanthropies. Following a competitive tendering process this phase of the work got underway in December 2009. It involved an online survey of community and voluntary organisations as well as interviews and consultations with community and voluntary representatives and others with an interest in community and voluntary sector advocacy and it concluded with the identification of a series of recommendations for further action. The Steering Committee subsequently used these recommendations as the basis for the development of a detailed three year work programme and a further proposal for funding which the Atlantic Philanthropies ultimately also funded. Our formal three year Advocacy Initiative programme commenced in August 2011 and ends in August 2014.

## 2.3 Overall objective & goals

Our overall objective was to contribute to better social justice outcomes, by reframing the relationship between the state and social justice advocates. We were also interested in exploring the idea that in the then economic and political climate of cutbacks there was a threat to advocacy.

The specific goals of The Advocacy Initiative were:

* To contribute to the knowledge and understanding of social justice advocacy.
* To stimulate informed debate and reflection on social justice advocacy within the community and voluntary sector and with the state.
* To facilitate the strengthening of the capacity of social justice advocates.

## 2.4 Values and principles

We were committed to addressing the causes and consequences of inequality, poverty, social exclusion and discrimination. Our aim was to work constantly to build a society that is founded on the principles of justice, equality, human rights, human dignity and social inclusion. We believed that these values and principles are at the core of social justice advocacy.

## 2.5 Funding & resources

We received two tranches of funding from Atlantic Philanthropies as follows:

* €50,000 to undertake the scoping research.
* €500,000 (plus €50,000 in-kind co-financing provided by Focus Ireland and the Saint Vincent de Paul) for the implementation of the detailed three year work programme. See Table 2.1 for a more detailed breakdown of this spend.

|  |  |  |
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| Table 2.1 Analysis of three year project spend | | |
| *Description of Spend* | *Total spend* | *% of the Total Project Budget* |
| Consultancy and activity costs (research, events, tools etc). Employment of specialists to undertaken specific pieces of work | €242,186 | 44% |
| Staff and expenses   * + - Director (appointed August 2011) (50% role)     - Communications Officer (appointed October 2012) (50% role)     - Admin Support (CE) (2012-2013) (10-20% role) | €229,246 | 42% |
| Communications and websites | €29,418 | 5% |
| Administration (including operational costs, rent, light, heat, equipment) | €30,275 | 6% |
| Project evaluation | €18,875 | 3% |
| Total | €550,000 | 100% |

What was unusual about our programme was that the majority of the resources were spent on the employment of specialists to undertake specific pieces of work. Staff resources were limited to one full time equivalent.

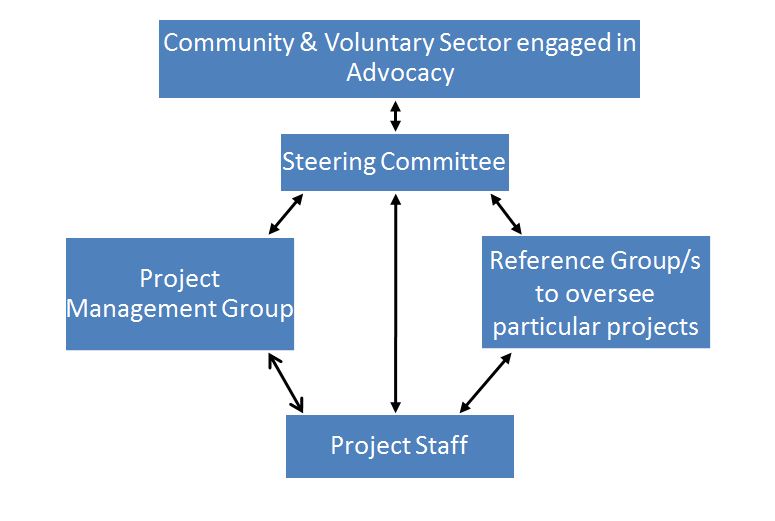
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## 2.6 Project governance and management

Our Steering Committee (21 members) was responsible for overseeing the implementation of the Advocacy Initiative. Membership of this group was open to any community and voluntary organisation engaged in social justice advocacy. This group met quarterly and elected the Chairperson.

As the Initiative developed and staff were employed we made a decision to form a smaller 5-7 member Project Management Group. This group met monthly to co-ordinate the day to day management. The Steering Committee nominated the members of this group. See Figure 2.1 for details.

#### Figure 2.1 - The Governance Structures



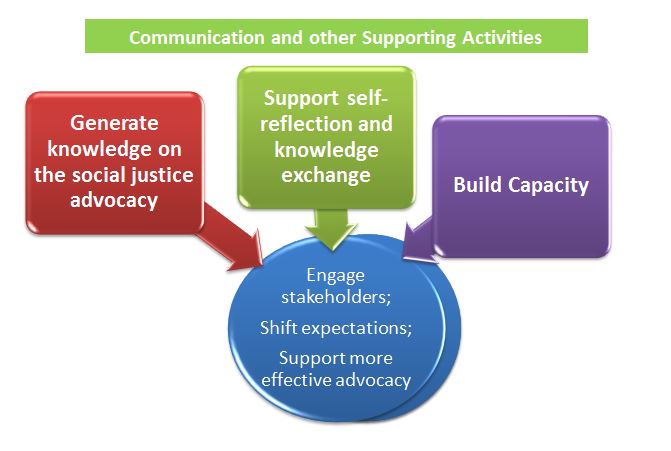
## 2.7 Project activities

We facilitated the organisation of a range of activities, which can be examined under a number of different headings/goals:

* Activities that generate knowledge in relation to social justice advocacy
* Activities that stimulate debate and reflection on social justice advocacy within the community and voluntary sector and with the state.
* Activities that build capacity
* Communications and other supporting activities

These headings relate to the project goals with some activities contributing to more than one heading/goal see Figure 2.2 for details.

#### Figure 2.2 An Overview of Activities



## 2.8 Project timeline

See Figure 2.3 for details of the overall timeline. We can break this down into two phases:

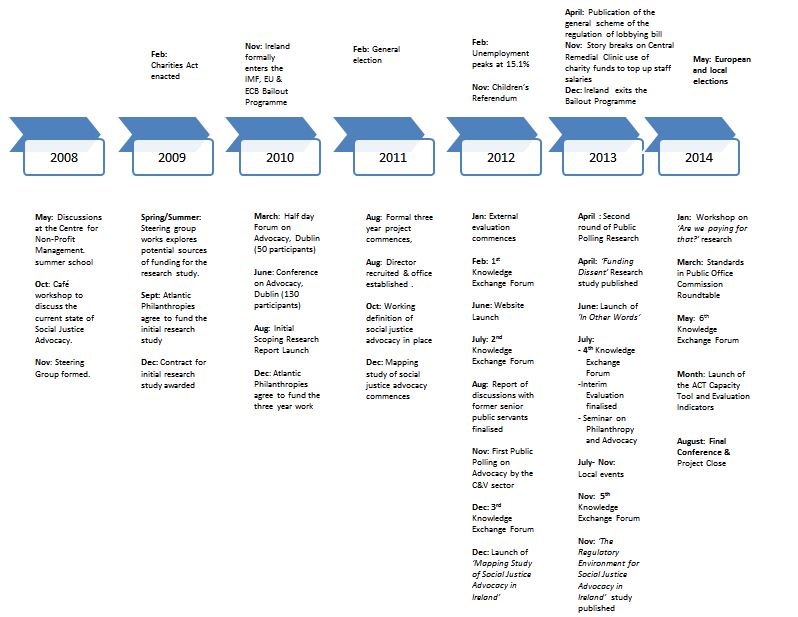
*Phase 1 The Research and Scoping Activities (2008-2011) which included:*

* Establishment of the Steering Committee
* Work by the Steering Committee to agree shared objectives and goals
* Development of the terms of reference for the scoping study on advocacy
* Sourcing of funding for the study
* Implementation, completion and launch of the study
* Application and use of the study findings to develop a three year work programme
* Location of a funder (Atlantic Philanthropies) to fund the three year Advocacy Initiative Programme.

*Phase 2 Programme Activities (2011-2014) which included:*

* Formal project launch and recruitment of project staff
* Development of a working definition of social justice advocacy
* Participation in external events
* Preparation of submissions (e.g. a submission to the consultation process on the regulation of lobbying)
* Consultations with retired politicians, senior civil servants, media, trade unions and those experiencing poverty/exclusion
* Mapping study of social justice advocacy in Ireland
* Development of the Advocacy Initiative website
* Social media activity (Twitter, Facebook, Flicker, You Tube)
* Study of policy makers perceptions of social justice advocates
* Studies of the links between funding and advocacy
* Public opinion polling
* A series of six Knowledge Exchange Fora
* A series of local events
* Preparation of a guide to the regulatory environment for social justice advocacy in Ireland
* Development of the *Assess Your Advocacy* tool
* Communication activities
* Developing indicators for the measurement of social justice advocacy

#### Figure 2.3 The Timeline

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## 2.9 Outputs and events

We generated a number of distinct outputs which clearly contribute to the levels of knowledge and capacity and well as promoting increased levels of self-reflection in relation to social justice advocacy. See Table 2.2 for details

|  |  |
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| Table 2.2 - Outputs | |
| Project Scoping Report | This research examined the literature on advocacy. It involved a survey of 170 community and voluntary organisations to assess the extent and nature of advocacy work being undertaken by these organisations. Interviews were conducted with a small number of policy makers, few of whom had a clear view on the advocacy role of the community and voluntary sector. A series of recommendations for action were identified as a result of these consultations and analysis and these were used as the basis for the development and funding of the three year Advocacy Initiative work programme. |
| Statement on Social Justice Advocacy | The working statement on social justice advocacy was developed in order to inform the development of the Initiative. The statement was also designed to inform and stimulate conversations, debates and reflections organised by the Initiative. |
| Guide to Social Justice Advocacy Training Opportunities | This online guide was compiled based on research conducted by Irish Charities Tax Research (ICTR) for Atlantic Philanthropies. It was updated in 2012, 2013 and 2014. |
| Mapping of Social Justice Advocacy in Ireland Study (2012) (including five case studies of effective social justice advocacy) | This research examined and documented the breadth, depth and practice of social justice advocacy with the non-profit sector in Ireland. It involved a postal survey of 288 community and voluntary organisations. It also involved a more in-depth online survey of the organisations who indicated that they were actively involved in social justice advocacy and well as benefiting from a discussion with key social justice advocates. The study was complemented by five case study examples of effective social justice advocacy. |
| Public Opinion Polling (Nov 2012 & June 2013) | The purpose of these polls (two online surveys of over 1,400 respondents over the age of 16) was to understand what the general public thought of the lobbying, campaigning and social justice advocacy work of the community and voluntary sector. A summary of the findings emerging from these two polls was produced entitled: *Who Cares About Social Justice Advocacy? What the public thinks.* |
| Funding Dissent Study:  Research into the Impact of Advocacy on State Funding of Voluntary and Community Organisations  (2013) | This study explored the link between advocacy and funding in both an international and Irish contexts. It found in the Irish context inconsistent practice by government, with both provision for and prohibition of advocacy work. It found limited evidence of explicit hostility toward the advocacy work of voluntary organisations in the Oireachtas, indifference being identified as the greater problem. It did indicate that further examination of the impact of the application of service level agreements that prohibit advocacy work would be merited. This report also sets out the ‘rational case’ for advocacy and its role in a democracy. |
| “In Other Words”  Policy Makers’ Perceptions  of Social Justice Advocacy (2013) | This study (conducted using a participatory research approach which involved seven social justice advocates in the research process) explored 33 policy makers and influencer’s views on social justice advocacy. Among the critical observations arising from the study were concerns about the legitimacy and representativeness of some community and voluntary sector organisations. Policy-makers also recognised a clear tension for community and voluntary sector organisations in relation to being part of the system and also providing a critique of the system. The diversity of the sector was also found to be an issue in terms of being definitive about the role and purpose of the sector. Other critical observations relation to perceptions of self-interest and an absence of self-reflection within the community and voluntary sector. |
| “Are we paying for that?” - Government Funding and Social Justice Advocacy (2014) | This study explored the funding relationship between the state and voluntary and community organizations engaged in public policy advocacy in Ireland from the perspective of the voluntary and community sector. It found relationships on a continuum from the inhibition and suppression of advocacy to active and positive support for advocacy work. |
| The Regulatory Environment for Social Justice Advocacy in Ireland | This study offers an overview of the regulations, both formal and informal, which affect the social justice advocacy environment in Ireland. It also anticipates the challenges that will be posed for the sector with the introduction of legislation in relation to the regulation of lobbyists and the Charities Act 2009. |
| Assess Your Advocacy Tool | This online tool (developed with the assistance of Bolder Advocacy, an initiative of the Alliance for Justice (AFJ) in the United States) was designed to help support community and voluntary sector organisations and coalitions a) measure their advocacy capacity, and b) identify activity areas that need to be strengthened. |
| Identification of Indicators for Social Justice Advocacy | This tool sets out a framework to allow advocates and their organisation to identify their own indicators for effectiveness. The purpose of these indicators is to support those doing social justice advocacy answer the question: How do we know our advocacy is working? The indicators were developed though focus group discussion with experienced social justice advocates working across a broad range of areas and involved in reflecting on advocacy through their participation in the Initiative. |
| Outputs from the various Knowledge Exchange For a | Various reports, presentations and videos. Following the inaugural meeting each Exchange Fora focused on a different topic. The topics covered included: e-advocacy and social media tools; good practices; participation; collaboration; and creative approaches and tactics for social justice advocates. |
| Guest Blogs | 20 guest blogs from a variety of individuals from across a range of sectors addressing themes relevant to the community and voluntary sector and their social justice advocacy work in particular. |
| The Advocacy Initiative Website | Since its launch (June 2012 to Jan 2014) the site had 9781 unique visitors. The majority (86%) were from the Republic of Ireland. |
| Advocacy Posts (Newsletter of the Advocacy Initiative) | Post are sent on a monthly basis to approx. 800 people. These posts drove traffic to the website and encouraged engagement with Advocacy Initiative research, news and events. |

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| Table 2.3 Events | | |
| *Event Type & Numbers* | *Event Description* | *Number Registered* |
| Report Launches (3) | Funding Dissent Study (Part 1)  (Feb 2013) | 50 |
| In Other Words Study  (June 2013) | 65 |
| Are we paying for that? (Funding Study Part II)  (Jan 2014) | 115 |
| Briefings (3) | Public Opinion Poll 1  (Feb 2013) | 40 |
| Public Opinion Poll 2  (June 2013) | 9 |
| The Regulatory Environment  (Dec 2013) | 22 |
| Knowledge Exchange Fora (6 & a Final Conference) | Inaugural Knowledge Exchange Forum (Feb 2012) | 113 |
| 2nd Knowledge Exchange Forum  (July 2012)- Focus on E-Advocacy and Key Social Media Tools | 101 |
| 3rd Knowledge Exchange Forum  (Dec 2012) – Good practice case studies | 104 |
| 4th Knowledge Exchange Forum  (July 2013) - Participation | 86 |
| 5th Knowledge Exchange Forum  (Nov 2013) - Collaboration | 95 |
| 6th Knowledge Exchange Forum  (May 2014)- Creative Approaches and tactics for Social justice advocates | 143 |
| Final Conference  (July 2014) | 177 |
| Local events (11) | Making Sure All Voices are heard in Dublin 12 organised and hosted by Rathmines Pembroke Community Partnership. | 11 |
| Launch and discussion of the book ‘Paid For – My Journey through prostitution’ by Rachel Moran organised and hosted by Doras Luimní (Limerick). | 60 |
| Advocacy - whose role is it anyway? Organised and hosted by Meath Equality, Rights and Anti-Poverty Network. | 50 |
| Disconnect between policymakers and C&V sector. Organised and hosted by Limerick Active Citizen Network. | 8 |
| Thriving & Surviving in Changing Times Limerick and Clare Education and Training Board. | 30 |
| Are our hands tied?. Organised and hosted by Clare Active Citizenship Network (Clare) | 20 |
| Artists for Civic Action- using theatre to advocate for social justice and influence public policy. Organised and hosted by the Smashing Times Theatre Company (Dublin). | 25 |
| Creating Safe Communities where Children Can Flourish. Organised and hosted by the Irish Society for the Prevention of Cruelty to Children (ISPCC). | 65 |
| Campaigning and Advocacy: The experience of home care campaigning. Organised and hosted by the Carers Association (Dublin). | 50 |
| Knowledge Exchange Workshop. Organised and hosted by the National University Galway. | 40 |
| 'Our Community - Our Voices' Launch of a Human Rights Based Approach toolkit to inform advocates Organised and hosted by Dundalk Simon Community (Louth). | 100 |
| Other Events (2) | Advocacy and Philanthropy (July 2013) | 50 |
| Implications of the electoral acts and the regulation of political financing for social justice advocacy (March 2014) | 16 |

## 2.10 Communications

Internal and external communications were identified as important early in the development of the Initiative. We developed a two phase communications plan to guide our work in this area. The first phase of the plan focused on building awareness and credibility of the Initiative among key social justice stakeholders and on building our capacity to engage with the wider media. The second phase of the plan focused on strengthening the reach of the Initiative and on strengthening support for social justice advocacy more generally. This plan (which benefited from the recruitment of a part-time Communications Officer in October 2012) was both ambitious and challenging.

Our key communication tools included:

* The development and operation of the Advocacy Initiative website (which went live on 22nd June 2012) has had 12,335 unique visitors, 42% of which were return visitors, the average number of pages visited per visit was 3.35.
* The development and operation of our customer relationship management (CRM) database which monitored and tracked all our interactions by the various different stakeholders involved with the Initiative.
* The monthly Advocacy Post e-mail newsletter as well as monthly updates for The Wheel’s Focal Point newsletter.
* The use of Social Media (Facebook and Twitter). We made more use of Twitter than we did Facebook as it was a channel that suited our needs to disseminate information and was used at events for people to comment via hashtags.
* The commissioning of blogs (see Table 2.2) with an average of three minutes spent reading each blog.
* The development of various print materials which provided information on the Initiative.
* Engagement with the wider media (to raise awareness of the work, events and findings emerging from the work of the Initiative) through press releases and articles). Media coverage achieved included articles in the Irish Times (5 articles and a series of letters), The Irish Examiner (2), the Irish Independent (1), the Evening Herald (1), Thejournal.ie (2), Be the Change (2) and the Irish Social Worker Journal (1).

## 2.11 Engagements with stakeholder groups

An important part of our work was our proactive and targeted engagement with various groups involved in social justice advocacy work. We proactively engaged with a wide range of groups across a wide range of sectors; see Table 2.4 for an overview of these engagements.

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| Table 2.4 Pro-active engagement with groups involved in social justice advocacy work | |
| *Group type* | *Description of engagement* |
| Elected representatives (current & former) | 16 one to one interviews with politicians and former politicians, (including eight undertaken as part of the Perceptions Study) |
| Civil/public servants - (former & current) | One to one interviews and a focus group undertaken with six retired civil servants |
| 11 one to one interviews undertaken with current civil servants as part of the Perceptions Study |
| Meetings with civil servant in various government departments   * + - 12 Dept. of Social Protection officials     - 12 Dept. of Environment, Community, & Local Government officials,     - Three Dept. of Justice Equality and Law Reform officials |
| State/semi-state agencies, organisations | Nine one to one interviews undertaken as part of the Perceptions Study |
| The media | Roundtable attended by six people from the media to discuss media perceptions of the non-profit sector and explore how to improve relations between the two sectors for the benefit of both. |
| Trade Unions | Four one to one interviews with trade union officials. |
| Experts/Advisors/Academics/Researchers for political parties | Five one-to-one interviews undertaken as part of the Perceptions Study |
| The community and voluntary sector | 500 registered to attend the various five knowledge fora held to date (March 2014) (TBC) |
| There have been 15 meetings of the Steering Committee with an average attendance of 12 individuals at each meeting |
| There have been 27 meetings of the Project Management Group with an average attendance of 5 individuals at each meeting |
| 170 community and voluntary organisations participated in the initial project research survey |
| 288 community and voluntary organisations participated in the mapping study |
| 123 community and voluntary organisations participated in the funding studies |
| Workshop with 11 community activists who have experience of poverty and exclusion (June 2013) |
| Seven social justice advocates involved in the perceptions study as participant researchers |
| General public | Online survey of 1,436 respondents in Nov 2012 and a further 1,408 in June 2013. All were over the age of 16 and the survey was balanced to reflect the diversity in the general population including age, gender and socioeconomic status. |

The Initiative also sought out and availed of other opportunities to engage with diverse audiences, (including the wider community and voluntary sector, policy-makers, academic, funders, and more general audiences) and gave over 20 external presentations, primarily to Irish audiences, but also to international and European audiences.

## 2.12 Evaluation

Following a competitive tendering process conducted in Autumn/Winter 2011 we appointed Nexus Research Cooperative to design the evaluation framework and to deliver the interim and final evaluation report. A decision was subsequently made to use the Theory of Change Model as the evaluative framework. This framework began with our long term objectives, working down through the various preconditions and ultimately the interventions required to lead the outcomes (for further information on the Theory of Change go to <http://www.theoryofchange.org/what-is-theory-of-change>).

The interim evaluation (finalised in July 2013) explored how the practice of change happened relative to the how the original theory of change was expected to happen. It concluded that while it was unlikely that significant changes could be brought about during the lifetime of The Advocacy Initiative (barring a major unanticipated event/s) the instability of the relationship between the community and voluntary sector and the state should be seen as an opportunity in terms of the application and use ‘insider’ and ‘outsider’ approaches.

The interim evaluation also identified a number of learning points arising from the work of the Initiative to date as follows:

* + - The various research studies undertaken for The Advocacy Initiative had generated useful insights in relation to how the community and voluntary sector and its social justice advocacy work were perceived by the sector and by others.
    - The Knowledge Exchange Fora provided an important space where social justice advocacy actors could come together.
    - Social justice advocacy organisations should develop their 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.

Areas where the interim evaluation concluded that The Advocacy Initiative had traction were seen to be related to achieving ‘a wider appreciation of the legitimacy and value of social justice advocacy’. The evaluators suggested that this could be done by ensuring that by the Initiative generated a legacy that:

* + - Maintained open space for discussion and critical self-reflection
    - Ensured access to the resources and learning produced through the lifetime of the Initiative
    - Connected to platforms (existing or new) where by this learning can be shared
    - Ensured that capacity gaps could be addressed

Complementing our Theory of Change, The Advocacy Initiative has also used a Theory U process to describe our journey as one of focusing, broadening and deepening our reflections on social justice advocacy in Ireland. This tool enabled us to further reflect on the nature and consequences of the relationships between the state and social justice advocates (for more information on the Theory U see: <https://www.presencing.com/theoryu>).

## 2.13 Self reflection

Self-reflection was a key element of the work with many of the activities implemented in such a way as to promote self-refection (e.g. the space for reflection created by the Knowledge Exchange Fora, the adoption of a participatory approach within the perceptions study, the compilation of best practice case studies and the detailed interviews conducted as part of the funding studies). The steering committee also engaged in a deliberate process of self-reflection while the social justice advocates involved in the Perceptions Study also included a self-reflection section within their report.

The purpose of the specific self-reflection work done with/by the Steering Committee was to facilitate and enable 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. This work began with an internal conversation in relation to what members of the steering committee would *least* like to talk about; whether there were any issues with the dynamics of the group; peoples openness to contribute to meetings as well as consideration of the challenging issues for social justice advocates more generally.

This was followed by a formal dialogue session (May 2012) facilitated by an independent facilitator. This session focused on the topic of respect. Following that session two further internal preparation meetings before the second formal dialogue (October 2012) facilitated by the same independent facilitator. With the first session better attended than the second, the feedback from those who attended these sessions was that these types of conversations were hard. In an effort to move away from reflection in larger groups (which was found to be challenging) in Spring 2013 it was agreed that individual members of the Steering Committee would undertake two conversations ‘2 cups of coffee’ with two other individuals from the community and voluntary sector in relation to the challenges facing social justice advocacy). In the event only three individuals undertook these conversations as requested and a decision was ultimately made to move away from the use of formal self-reflection sessions and instead to allow space in existing meetings for self-reflection.

This decision was supported by the interim evaluation finding that these more intensive self-reflection exercises did not achieve that was intended. Different reasons were given from this lack of success the most compelling of which was that critical self-reflection and transformative dialogue cannot be 'manufactured', it needs instead to be supported to happen spontaneously, with conditions created for this spontaneity to emerge, the challenge being that these conditions do not necessarily emerge spontaneously- the so called ‘spontaneity paradox’.

## 2.14 In Summary

We believe that the Initiative has provided an opportunity to investigate attitudes to and experiences of social justice advocacy from a range of perspectives. It has also provided a space to try new things and to bring people together in new ways and new combinations. It has generated a range of very useful outputs and learning and has stimulated a broad range of conversations and learning about community and voluntary sector social justice advocacy and how it is perceived across a range of sectors and organisations.

The Initiative has benefited from a significant contribution of approximately 630 hours of staff time from the community and voluntary sector who freed up staff to participate in the 15 Steering Committee and 27 Project Management Group meetings. With each meeting lasting on average two hours (this does not include preparation time or broader attendance at the various Initiative events and activities). More than that the initiative benefited from the active and open engagement and indeed commitment of many individuals, who gave generously of their own time and expertise to attend meetings and events that were additional to their work. The Initiative has also received support from a broad range of other stakeholders who generally all responded positively to requests to be interviewed or to attend engagement type events.

# 3 Who does social justice advocacy and what was going on in social justice advocacy (2010-2014)?

## 3.1 Introduction

We generated information and knowledge from a combination of different pieces of work (documented in Table 2.2 and 2.3) in relation to:

1. The nature and extent of social justice advocacy work undertaken by the community and voluntary sector
2. Relationships between the community and voluntary sector and the state
3. Relations between the community and voluntary sector and others (including the media, the trade unions and the general public)

The following section draws together the various findings from these pieces of work in order to answer these key questions.

## 3.2 The nature and extent of social justice advocacy work undertaken

The absence of a clear shared understanding of advocacy within the community and voluntary sector made it difficult for us to definitively quantify the number of community and voluntary organisations involved in advocacy work and in social justice advocacy work in particular.

The Centre for Non-Profit Management, Trinity College Dublin 2006 ‘Mapping of the Third Sector’ found that 768 (18.2%) of the organisations they surveyed were involved in ‘civil rights and advocacy activities’ (p.35) while ‘advocacy, law and politics’ organisations made up just 4.7% of non-profit organisations at that time (p.38).

Six years later our 2012 Mapping Study provided more detailed information on the range of organisations involved in this social justice advocacy work. It found that more than half of the community and voluntary organisations surveyed (51%) did advocacy work, while 39% (almost two-fifths) undertook social justice advocacy work. Areas these organisations worked in included: social services (25%); community development & housing (22%); and education and research (13%). Interestingly the majority of the organisations who undertook social justice advocacy were also service provider organisations and were more likely to be based and to serve urban rather than rural locations.

We also found that much of the social justice advocacy work undertaken by community and voluntary sector organisations identified took place at local level (50%), with a smaller percentage occurring at national (32%), regional (10%) and international levels (7%). A wide diversity of advocacy strategies and techniques were used, split roughly evenly between activities that involved engaging with the decision making system and activities that involved working outside the decision making system to influence that system. Among the most popular types of advocacy work undertaken by the sector included:

* Public information and awareness-raising
* Networking
* Participation in local and regional committees
* Lobbying
* Membership of national networks

Community and voluntary organisations generally reported they were doing more social justice advocacy work generally and specifically more ‘insider’ focused activities than they had been in the past. About 50% of the work being undertaken was planned while the remainder were unplanned responses to particular situations or opportunities. Almost 50% of the planned work related to information and awareness raising, while the remainder of the work focused on influencing the implementation process, influencing the legislative process, new policy development and the protection of existing policy.

An increasing number of community and voluntary sector organisations had become involved in national and indeed EU coalitions, alliances and/or networks in order to progress their advocacy work. There was a view that it was safer to be part of a group that to go it alone when undertaking advocacy work in the current climate, with collaboration considered the key response to the challenges facing advocacy.

We found that some groups prioritised issues through a strategic planning process, while others prioritised issues based on feedback from staff and members/clients. Public support for advocacy was generally mobilised by either holding an information meeting or running a media campaign while membership organisations tended to mobilise their members by actively involving them in campaigns or in policy briefings with policy makers. Social media was regarded as an increasingly important tool for advocacy work.

## 3.3 Relationships between the sector and the state

The White Paper Supporting Voluntary Activity (2000) provided the first formal policy level definition of the relationship between the state and the community and voluntary sector. It also affirmed the right of community and voluntary organisations to:

* Speak
* Be independent
* Have freedom of action
* Promote social inclusion

The paper also specified the need for ‘the state and the sector to each recognise their mutual right to constructively critique one another’s actions and policies’ and acknowledged ‘the role of the (community and voluntary) sector in inputting to policy making’. This paper was however never fully implemented indeed the lack of implementation of some of the key strands of this White Paper (e.g. voluntary sector units within government department) was a huge disappointment and was thought by some to have damaged the relationship between the community and voluntary sector and the state.

Various pieces of research we commissioned over the lifetime of the Initiative found an uneasy relationship between the community and voluntary sector and the state. In some cases this uneasy relationship could be linked back to historical events. The disparate and diverse nature of the community and voluntary organisations involved in the sector was also a source of some confusion, as was the limited nature of collaboration between organisations purporting to represent similar interests/groups. In the case of the community and voluntary sector it was also clearly linked to the challenge of retaining independence in the context of the sectors dependency on reducing levels of state funding.

The uneasy nature of the relationship was also clearly linked to the existence of different expectations of the role of the community and voluntary sector. Some policy-makers for example considered ‘flexible on the ground’ local service provision to be the most important purpose of the sector, while others were of the view that advocacy work was core to what the sector did and that the sector was an important part of democracy. For some the advocacy role of the sector was intimately linked to their role as a source of information and evidence with questions raised about groups who did not engage in this type of activity. Questions were also about the representativeness of the sector in comparison with the democratic mandate of the politicians, who in many cases saw themselves as the ‘true advocates’.

Policy-makers and influencers while they generally understood and in most cases accepted and acknowledged the role of advocacy by the sector in a democracy there was a range of views on this role. Some policy-makers were very positive about this role (promoting and encouraging advocacy), while others had negative perceptions about its practice (regarded by some as self-interested and unconnected to the experience), with no-advocacy clauses (e.g. Service Level Agreements) introduced by some government agencies and organisations. There was also a view that some community and voluntary organisations engaged in social justice advocacy were not sufficiently familiar with policy making processes nor indeed with the constraints facing policy-makers.

The presence of such contradictory views at government and policy making level towards community and voluntary sector social justice advocacy in turn had consequences for the community and voluntary sector organisations working in this area, who were not always clear what was possible and what was not. Indeed some community and voluntary organisations reported having been supported, funded, welcomed and respected for their social justice advocacy work, while others reported treading a fine line in what they say, aware that some government and public agencies were sensitive about particular topics or issues. A smaller number reported experiencing being threatened with funding cuts as a result of their advocacy activities.

Both community and voluntary organisations and policy makers reported a positive bias among government and its agencies for organisations who undertook both advocacy work and service provision.

There was also a view that the lack of regard and in some cases negative perceptions of social justice advocacy had driven it underground in terms of reporting, and had resulted in some community and voluntary group organisations being very closely scrutinised to ensure that advocacy work was not being supported.

## 3.4 Relations with others (including the media & trade unions)

### Relations with the media

The word most used and perhaps most apt in terms of describing the relationship between the community and voluntary sector and the media was ‘underdeveloped’. Although there are of course examples of where community and voluntary organisations have successfully used the media to influence public opinion and ultimately lever social change. It is also the case that some community and voluntary organisations have had negative experiences in relation to their engagement with the media and this has made them wary in relation to further engagement.

Discussions with media personnel led to the identification of a series of practical suggestions to enhance the sectors engagement with the media. See Table 3.3 for a summary of these suggestions.

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| Table 3.3 - Suggestions to enhance the sectors engagement with the media | |
| *Suggestion* | *Description* |
| Identify spokespeople | It is useful to have a clear, easily identifiable spokesperson. It is important to remember that there is also fatigue with ‘paid’ spokespeople, and if possible it is useful to have people who have/are experienced the issues speak. |
| React to the issues in emerging news items | If a breaking story is relevant, react with your messages, providing commentary that can then be incorporated into existing coverage, rather than trying to generate new news items. |
| Build relationships | Cultivate particular media contacts, keep in touch where possible provide off the record briefings and information to keep them up to date on the issues. |
| Target news | Exclusives are still important, as is targeting a story. It may well turn out that other news outlets will pick up a story that has already been published. |
| Use the power of the individual voice/story | Use the media’s need for individual stories to leverage social change. |
| Supply pictures | Photos are important, particularly images that tell the story, sending multiple images can be helpful in securing news coverage, particularly for online outlets. |
| Be passionate | Passion is important for ‘newsworthiness’ and credibility. |

There is clearly scope for the sector to enhance relations with media personnel and use the media more strategically.

### Relations with trade unions

Consultations with the trade unions found a shared social purpose between the unions and the community and voluntary sector, ‘with more to unite than to divide’ particularly in terms of giving voice to/on behalf of an individual or a group/s, in order to represent their views and promote equality and positive change. The consultations also found tensions in the relationships leading to limited levels of cooperation between the sectors.

The tensions identified related to the complexity and diversity of the community and voluntary sector which can make it hard for unions (and others) to relate to and work with the sector and in some cases the dismissal of the sector by some unions. There was also a view that some in the community and voluntary sector were trying to take the space of the trade unions, although often with different agendas and while the sector was not necessarily a competitor this caused difficulties.

Some union representatives we consulted also believed that the sector could be insular with individual organisations focusing on their particular issue rather than the broader picture and this was also a concern for the unions. While it was possible to identify examples of positive collaboration between the community and voluntary sector and the unions, these examples were limited and there was a sense that even these initiatives had not realised their full potential. There is a need for the community and voluntary sector and unions to develop a better understanding of the other and to identify and develop allies and organisations that they can work together with to enhance collaboration between the sectors.

### Relations with the general public

Among the general public there was a generally negative view of ‘lobbying’, but interestingly advocacy by the community and voluntary sector was generally seen as a good thing. Indeed 72% of those we polled believed it was important for charities to campaign and lobby government, while 51% recognised campaigning as part of the ‘cause’ of charities and non-profits.

Interestingly 25-30% demonstrated they had a reasonable understanding of social justice advocacy. Members of the public’s most common involvement in community and voluntary sector campaigning activities was adding their name to a petition. They were significantly less likely to attend a public meeting or demonstration. Interestingly in terms of effectiveness only 15% of the public believed that the social justice advocacy work being undertaken was influential, while 46% though it should be.

## 3.5 In Summary

The lack of a common definition of what constitutes advocacy made it difficult to quantify the number of community and voluntary organisations involved in social justice advocacy work. What we did find was that 39% of the community and voluntary organisations surveyed as part of the 2012 Mapping Study do social justice advocacy work, mostly at a local level and to a lesser extent at a national level. These organisations employed a wide diversity of advocacy strategies and techniques, split roughly evenly activities that engage with the decision making system and activities that sought to influence the decision making system from outside the system.

Community and voluntary organisations generally reported doing more social justice advocacy work generally and specifically more ‘insider’ focused activities than they had been in the past. Another key finding was that an increasing number of community and voluntary sector organisations had become involved in alliances and/or networks in order to progress their advocacy work. Interestingly too it was found that organisations who undertook both advocacy and service provision work were generally better regarded by the state than organisations that did only advocacy work.

We found a complex and at times uneasy relationship between the community and voluntary sector and the state, linked both to historical events as well as to the diversity and disparate nature of the sector. The existence of a variety of different expectations, understandings and perceptions of the role of the sector was also found to contribute to the complexity and challenging nature of the relationships. On a more positive note policy-makers and influencers generally understood the potential role of advocacy by the sector in a democracy, with varying degrees of positivity about the actual role and less positive feedback about the role in practice. Relationships between the community and voluntary sector and other sectors (including the media, trade unions and the general public) would probably best be summarised as ‘underdeveloped’.

# 4 What was the learning?

## 4.1 Introduction

This section draws on the findings emerging from the various studies we commissioned and activities we undertook to answer a number of key questions in relation to:

* What value is placed on social justice advocacy work?
* How effective and impactful is social justice advocacy work?
* What are the key contextual challenges for the community and voluntary sector?
* What are the key practice challenges for community and voluntary social justice advocacy?
* What is the role of policy makers in maximizing the impact of social justice advocacy work?

## 4.2 What value is placed on social justice advocacy work?

The majority of groups (including civil servants, politicians, the general public trade unions, the media, the community and voluntary sector and social justice advocates) consulted as part of The Advocacy Initiative recognised that community and voluntary sector advocacy work had a role to play in a democratic society.

Some believed that role was specifically related to service provision alone, others believed that advocacy should be linked to service provision, while others strongly believed that the sector and its social justice advocacy work had a distinct role to play in policy development (that could be linked to service provision). All of the groups consulted had questions in relation to how the social justice advocacy work was conducted in practice. Our 2013 funding study identified nine social justice advocacy objectives. We decided to retrospectively analyse the reports and notes of interviews with different groups to explore the extent to which these groups attributed these objectives to community and voluntary sector social justice advocacy. We found that some objectives were well understood while others were less well understood while others simply did not arise in the conversations with these different groups. See Table 4.1 for details of this retrospective analysis which indicates that:

* The role of community and voluntary social justice advocacy in enabling minority views to be heard and in providing ‘ground truth’ to government are clearly and widely valued.
* The role of the sector in mobilising citizens, improving policies and providing expertise in contrast were valued by some policy makers, the unions, the sector and people experiencing the issues, but less clear and less valued and understood by the general public and the media in particular.
* The roles of the sector in providing a longer term perspective, in monitoring implementation and enforcement and in providing a channel of communication from government to the people and vice versa did not feature in discussions outside of the sector and those experiencing the issues.

This analysis poses clear challenges for the social justice advocacy and social justice advocates in relation to how they can enhance awareness of their roles and potential to contribute to enhanced decision making. There are different conceptions of, and priorities associated with, the role of social justice advocacy.

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| --- | --- | --- | --- | --- | --- | --- |
| Table 4.1 - The value placed on community and voluntary sector social justice advocacy by different groups | | | | | | |
| *Social justice advocacy objectives*  *(Harvey 2013)* | *Policy makers and influencers(including civil servants and politicians)* | *The general public* | *Trade Unions* | *The media* | *People experiencing the issues* | *The community and voluntary sector* |
| 1. Mobilise citizens and channel participation | **Yes**, assuming the group is representative | This was not explored with/by this group | **Yes**, it was noted that this is also a role of the Trade Unions | There was a lack of clarity about the overall purpose of the sector | **Yes** but needs to be resourced to do this effectively) | **Yes,** it requires a clear connection to the excluded group/issue. |
| 1. Improve policies | **Yes,** assuming they have a sufficient understanding of the policy making processes | **Yes,** but need to ensure to maintain independence | **Yes,** this is a key part of the work for many groups. |
| 1. Provide expertise | **Yes**, focused research can be very useful | **Yes** | **Yes** |
| 1. Promote a longer-term perspective | This was not highlighted by this group | This was not explored with/by this group | **Yes,** but this is very difficult give the precariousness of funding and staff contracts. |
| 1. Act as watchdogs of accountability improving the accountability of government | This was highlighted by some members of this group and not others | **Yes** | This was not explored with/by this group | **Yes** they could do this…. but have a lot of issues to address before they could be taken seriously in this role (e.g. salary levels; ‘insider/elite’ status; lack of independence, etc.) | **Yes,** but need enhanced levels of resources to be able to do this effectively |
| 1. Enable minority views to be heard that might otherwise be overlooked | **Yes**, assuming the group is representative) | **Yes** for groups that were publically palatable | **Yes** in a similar way to unions | **Yes** | **Yes** but it is hard to get people motivated to speak out and get engaged | **Yes** but it is hard to get people motivated to speak out and get engaged |
| 1. Provide ‘ground truth’ to government about situations which it would not otherwise be aware | **Yes** | **Yes** some do this well others are more interested in their own survival | **Yes** this is essential | **Yes** this is essential |
| 1. Provide a channel of communication from government to people and vice versa, including the achievement of buy-in or acquiescence in complex and difficult decisions | This was seen more as the role of elected representatives | This was not explored with/by this group | No the sector should not become a voice for government- they need to maintain their independence | **Not clear** that this is their role | This was not explored with/by this group | This is not necessarily the role of the sector. The sector needs to maintain its independence |
| 1. Play a role in in the monitoring, implementation and enforcement of government decisions (laws, policies, procedures, protocols, strategies) | This was not explored with/by this group | This was not explored with/by this group | This was not explored with/by this group? | Could do this…. but have a lot of issues to address before they could be taken seriously in this role | **Yes** but needs to be resourced to do this. | **Yes** but needs to be resourced to do this. |

## 4.3 How effective and impactful is this work?

Views on the effectiveness and impact of the community and voluntary sector social justice advocacy work varied.

* The majority of *community and voluntary sector organisations* (69%) rated their social justice advocacy as either effective or very effective (Mapping Study, 2012), while the majority of organisations surveyed in the initial project report awarded themselves a score of three out of five, for their effectiveness (where five was very effective and one was ineffective).
* The case studies (developed as part of the mapping study) highlighted the importance of clear narrow focus and sophisticated advocacy strategy as well as a number of other issues as predictors of effectiveness see Table 4.2 for details.

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| Table 4.2 - Factors that contribute to effective social justice advocacy work |
| 1. Have a well thought out advocacy campaign and strategy with clear intermediate goals within a longer term vision with agreed outcomes, underpinned by values of equality, human rights and community development. |
| 1. Keep the message simple but be ambitious and appeal to human interest and concern. |
| 1. Empower those affected to be their own advocates through training and professional support. |
| 1. Remember that how you win a campaign is as important as what you win. A positive win lays the foundation for future wins – and a certain level of pragmatism is often required |
| 1. Be reasonable, constructive and professional when dealing with decision makers. Build relationships of trust, appealing to the best in politicians and public servants can be helpful to their sense of fairness. |
| 1. Recognise the value of proven international models and frameworks and harness these whenever possible. |
| 1. Where relevant adopt a collaborative approach (access regions/organisations) in order to provide evidence that the identified problems are systemic. |
| 1. Take advantage of opportunities and adapt to changes in the external environment when they arise, e.g. a new government, new Minister, changing economic conditions. |
| 1. Find ways to measure the impact of an advocacy campaign (this will help in terms of harnessing resources and goodwill for future campaigns). |
| *Source: Mapping Study (2012) Case Studies* |

* *Policy-makers and influencers* commenting on the differences in effectiveness between social justice advocacy organisations all clearly linked effectiveness to a number of key characteristics. See Table 4.3 for details.

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| --- | --- |
| Table 4.3 Policy makers perceptions of the characteristics of effective social justice advocacy | |
| *Characteristics of Effective Social Justice Advocacy by Community and Voluntary Sector Organisations* | *Characteristics of Ineffective Social Justice Advocacy by Community and Voluntary Sector Organisations* |
| Being genuinely representative with a clear mandate from the individuals/groups represented | The absences of a clear mandate |
| Combining being representative and professional in terms of having clear strategies for engagement with policy makers | Outrage – without solutions (often  linked to a lack of realism) |
| Building relationships with people in the system and working to feed into the system | A general absence of energy and enthusiasm, linked to negative attitudes and approaches |
| Being solution focused | Outrage – with no solutions (often linked to a lack of realism) |
| Being responsive and innovative | Being unresponsive, with a lack of innovative thinking and action |
| Working collectively | A lack of awareness and understanding of how policy/decision making processes work |
| *Source: ‘In Other Words’: Policy makers’ perceptions of social justice advocacy (2013)* | |

Areas where there were less consensus and more divergent views about what is effective advocacy included:

* + - The use of outsider strategies (including engagement with general public (e.g. petitions/mass emails) and the use of the media) was seen by some to be very effective and by others to be destructive (of relationships with policy-makers).
    - Combining an advocacy function with the service provision function was seen by some to be essential to effective advocacy, while others where happy for these functions to be exercised independently.
    - The ability to be able to produce focused and timely research that could be fed into policy formulation was seen by some to be critical to effective advocacy, while for others this was less important than the effective delivery of services.

The development by The Advocacy Initiative (with the help of Bolder Advocacy, an initiative of the Alliance for Justice (AFJ) in the United States) of the Assess Your Advocacy tool and the evaluation indicators which are designed to help community and voluntary organisations measure their advocacy capacity, if applied by the sector have an important contribution to make in relation to measuring the effectiveness of particular organisations social justice advocacy work.

## 4.4 Key contextual challenges for the community and voluntary sector?

### The broader economic, social and political context

There was a strong sense at the outset and indeed throughout the lifetime of the Initiative that the wider economic, social and political context made advocacy work and social justice advocacy work in particular more challenging. This was specifically linked to:

* + - The effects of the ongoing economic recession – including a more challenging funding environment, and diminished prospects for positive change.

- The increasingly complex nature of poverty and social exclusion caused by the cumulative impact of unemployment or poorly paid employment, lack of opportunities and cuts to services and supports over a number of years for people on low incomes, unemployed, marginalised or dependent on welfare as well as those in debt.

- A level of hostility at government level to the equality agenda – and to dissent, more generally (a number of community and voluntary organisations reported actual/threatened funding cuts as a direct result of their advocacy work).

- With the demise of social partnership, increasingly limited ‘space’ for civil society to engage in policy making fora.

- Recession linked to compassion fatigue in media and amongst the general public leading to a fall in the number of people donating to charities in general (with some exceptions), while there was an increase in the individual amounts being donated.

- Increased competition for resources – within the community and voluntary sector and between the community and voluntary sector and other sectors.

- Questions at government level and among the media and general public as to whether there are too many community and voluntary organisations.

- The current economic focus of policy-making structures.

* + - Challenges in relation to the legitimacy of the community and voluntary sector and a concern about where organisations within the sector get and how they sustain their mandate.

Taken together it is clear that the community voluntary sector needs to be both efficient and innovative in terms of maximising both its resources and opportunities to engage with policy-makers combining both insider and outsider strategies.

### A lack of understanding of the sector’s social justice advocacy work

Neither the community and voluntary sector nor its advocacy role and work were particularly well understood in general but particularly outside of decision making circles. This was not helped by the diversity and disparate nature of the sector.

Interestingly the public opinion polls found a level of positivity and openness towards the sector engaging in social justice advocacy work with 57% believing that greater involvement of charities and community groups in national policy making would assist in ensuring that vulnerable people are better provided for in the current crisis, and 46% in favour of the sector being more influential in relation to the law and policy. It should also be noted in this context that there were significant differences in sympathy levels for various groups on who behalf the sector advocates. There was for example a lot of support for work in relation to people with mental health issues and those experiencing homelessness and less support for asylum seekers, refugees and migrants.

The challenge for the sector is to find ways to promote a better and wider understanding of its role and work among both the general public and indeed the media in order to capitalise on the positivity that exists towards it. It also needs to find and use new and enhanced ways (e.g. better use of social media/use of plain jargon free language) to engage with members of the public in order to get more people involved in campaigning for social justice.

## 4.5 Key practice challenges for community and voluntary social justice advocacy?

The Advocacy Initiative’s work documented and identified the following challenges for the community & voluntary sector undertaking the social justice advocacy work:

### A lack of dedicated resources/constraints related to funding dependencies

The absence or limited nature of dedicated resources available to the sector to undertake social justice advocacy work is a challenge particularly as policy influencers and makers with limited resources at their disposal look to social justice advocacy organisations to provide/collect hard evidence and relevant contemporary data in order to support the cases they make (Walsh *et al*, 2013, p 20).

The fact that many community and voluntary organisations are in receipt of state support for at least part of their work can make it more challenging and in some instances can impose a range of constraints (perceived and actual) and prohibitions on community and voluntary sector engagement in public policy critique. The 2014 Harvey Funding Study identified the two key instruments that facilitate the state inhibition of advocacy as the informal ‘services-only’ paradigm, whereby organisations may only use state funding for providing ‘services’; and clause §2.8 of the Service Level Agreement (SLA) of the Health Service Executive which prohibits the use of funding for any attempt at persuasion in matters of policy or practice. This challenge of being both an insider and an outsider capable of robust critique is a significant one for many community and voluntary organisations which was also recognised within our Perceptions Study (Walsh *et al*, 2013, p 52).

### Dedicate resources to relationship building with policy-makers

Making time to get to know and build trust and relationships with policy-makers and influencers was recognised as critical (by the community and voluntary sector, the media and trade unions) in terms of raising credibility of the individual, the organisation and their agenda for change. This should be done in an energetic and constructive way with follow up as necessary. This relationship building is particularly challenging in the current climate where:

* Organisations act as independent voices critiquing the system.
* There are increasing constraints on the public sector.
* Reduced opportunities to meet with and build relations.

### Address issues related to legitimacy, representativeness and credibility – Ensure authenticity

In order to be taken seriously particularly by policy-makers (including politicians and civil servants) community and voluntary sector organisations involved in social justice advocacy need a clear mandate/connection to the group/s they represent. This mandate is linked to the strength of the connectedness of the organisation to the groups they represent.

Ideally this needs to be an ongoing and two-way process where the organisation’s agenda is set by the group(s) it represents, and the organisation in turn relays information back to its support base in order to support participation, empowerment and mobilisation of those most affected by the issues. Participation is indeed a key requirement of social justice advocacy to be fully effective it needs to be substantially resourced and not tokenistic.

Organisations need to recognise that a lack of participation of those experiencing the issues they represent can seriously undermine their work. Getting individuals and groups who are excluded to become involved can also be a very significant challenge. Encouraging the emergence of new spokespeople to represent the views of an organisation can be one way of doing this. There is also a challenge in relation to maintaining the connection between those representing or leading an organisation and those who the organisation represents.

The recent media coverage of the controversy over the remuneration packages provided to senior staff in REHAB and CRC also raises challenges for the sector in terms of the credibility the sector and calls for greater transparency in relation to levels of pay and funding sources. This need for greater levels of transparency and openness is something the sector needs to address as a collective and at the level of individual organisations.

### Enhance capacity to work with the system

Policy and decision making processes at all levels are complex. Those seeking to engage and work with that system clearly need to understand it. There was a view that community and voluntary sector organisations engaging in social justice advocacy are not always clear about how the system works. The challenge is therefore for the sector to build its capacity and the capacity of individual organisation and coalitions to better understand and ultimately engage with the system and build relationships with those working in the system, with considerable scope for the application and use of international and EU tools.

Building a strong evidence base (that recognises the complexity of the issues) to support the direction of the changes sought is also very useful in this context. This can be done by undertaking focused research (which gets to the heart of the issues) providing the evidence necessary to make the case for key policy changes.

### Challenge perceptions of self-interest through self-reflection

Community and voluntary organisations engaged in social justice advocacy work need to find ways to challenge the view that they are motivated more by an interest in sustaining the organisation/their jobs, rather than the interests of the groups they represent. One way for the sector to do this is by engaging in more honest reflection, which openly acknowledges the tension between being funded by the state and engaging in social justice advocacy. Other difficult issues that were identified through a process of self-reflection by the Steering Committee that the wider sector could also clearly benefit from greater level of reflection on include: competition for resources, access and profile; the compatibility of frameworks, value bases and approaches used by different organisations; the challenge of living the values and meeting expectations; lack of effectiveness, innovation, creativity and staff turnover as well as salary and status inflation.

### Be positive, be persistent and monitor change

The community and voluntary sectors social justice advocacy work and indeed some social justice advocates have been described by some commentators as being overly negative and not ambitious enough, having become caught up in a narrative of the challenges it faces. Where this is the case the sector needs to find ways to regain its confidence and ambition and transform the challenges into opportunities.

The sector has also been charged with having unrealistic expectations. The sector needs to find ways to a) reflect on the extent to which these commentaries are valid, b) where they are valid address them and c) where they are not valid find ways to challenge these perceptions in order to be taken seriously.

Vision, focus (on a small number of key priority areas), planning and persistence are all key attributes for organisations and individuals engaged in social justice advocacy work where change can be slow. Monitoring and evaluation are also important in relation to demonstrating and learning in relation to where change has been/has not been levered. It is also the case that where positive changes have been won these should be recognised and welcomed, even where there is more to be done.

### Engage in collaboration and build strategic alliances

Where relevant (i.e. there is a shared agenda around a particular topic) there can be a value in organisations (community and voluntary and others) coming together to build formal and informal collaborations and alliances to lend weight to arguments, to develop shared compromise solutions and to seek positive change in relation key policy objectives. These kinds of alliances are also useful for policy makers as they make it easier in terms of the number of groups they have to meet to get a view from the ground.

### Be innovative in terms of the advocacy techniques used

Community and voluntary sector organisations need to be flexible and adopt more innovative approaches to influencing policy both within and outside the system. Organisations also need to be able to respond quickly to unforeseen opportunities.

## 4.6 The role of policy makers in maximising the impact of social justice advocacy work

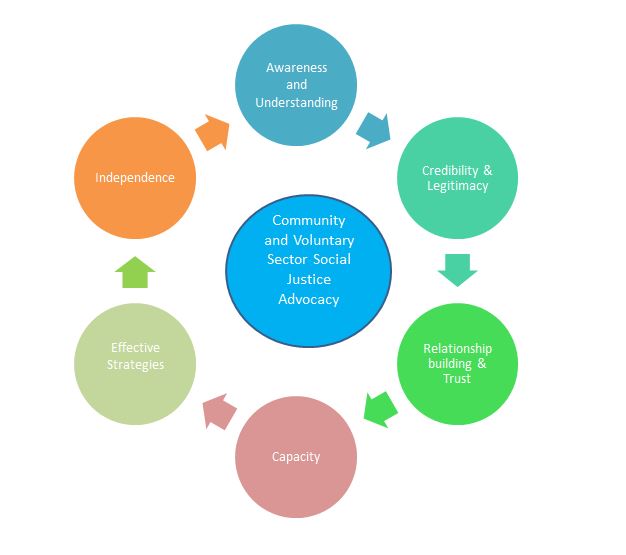
Getting more from community and voluntary sector social justice advocacy work not only requires changes within the sector it also requires changes at the levels of policy- makers and influencers. Among the changes identified as required at this level by The Advocacy Initiative include:

* A recognition that there are significant differences in sympathy levels for the different groups on whose behalf the sector advocates, making some groups easier to advocate for than others and ensuring that community and voluntary organisations that advocate for particular groups will receive more popular support and find it easier to fundraise than others might.
* Valuing and recognising the potential of community and voluntary sector advocacy work to bring specialized knowledge and expertise to the policy making and policy implementing processes because they are close to the ground and generally enjoy a level of trust by groups marginalised from decision making.
* Working to build trust and relationships with representatives from the community and voluntary sector in order to broaden their understanding of the advocacy role of the community and voluntary sector as not only a provider of information and research but also as:
* A challenger of current orthodoxies
* A source of solutions
* A mechanism for mobilizing support for change within and outside the political system, including the media
* A mechanism for empowering and developing the capacity of marginalised individuals and groups so that they can do their own advocacy
* Recognising and taking action to tackle the financial vulnerability (caused by structural and resourcing issues) of the sector through the application of multiannual funding initiatives and the removing the ‘services only’ and no advocacy clauses in contracts and agreements. Funding should be prioritised for groups that can demonstrate good governance principles.
* Creating new spaces where policy makers and representatives from the community and voluntary sector can meet and engage in policy making processes in a post-partnership era.
* Both policy makers and community and voluntary sector leaders encouraging and actively support development of community and voluntary sector coalitions and once formed actively engaging and prioritizing engagement with these coalitions.
* Being open to doing things differently, adopting more innovative approaches to policy implementation and development.
* Taking time to identify the community and voluntary organisation best qualified/most knowledgeable/most grounded in relation to the issue being addressed and engage with that group.

## 4.7 Overview of the Key Learning

It is important that the key learning generated by the Initiative has a life after the Initiative. See Figure 4.1 for an overview of the key areas of learningand Table 4.4 for a summary of the key learning and challenges both for the community and voluntary sector and for policy-makers and influencers.

#### Figure 4.1 The Key Areas of Learning



|  |  |  |
| --- | --- | --- |
| Table 4.4 Key Learning and Challenges | | |
| *Area of Learning* | *Key Learning Points* | *The Challenges* |
| **Awareness & understanding** | Community and voluntary sector advocacy work is not well understood, particularly outside of policy and decision making circles.  The state of social justice advocacy is ad hoc and underdeveloped.  The Advocacy Initiative’s definition of social justice advocacy, has (if widely adopted by the sector) the capacity to increase levels of understanding of social justice advocacy is and its role in wider civil society. | **Community and voluntary sector challenges are to:**   * **Raise awareness** of the contribution their social justice advocacy work can and has made to Irish society   a) at political & administrative levels  b) with the media  c) among the general public   * **Use new/enhanced ways** (e.g. better use of social media) to engage more widely with members of the public in order to get more people involved in campaigning for social justice. * **Demonstrate the legitimacy of social justice advocacy work** by the sector needs more clearly * **Find better ways to measure the effectiveness** of social justice advocacy work. The ‘Assess your Advocacy’ tool developed by the Initiative should support this process   **Policy-makers and influencers challenges are to:**   * **Recognise the value and potential of the community and voluntary sector’s engagement/input** into policy making processes. |
| **Credibility & legitimacy** | Policy-makers and influencers have concerns in relation to where community and voluntary sector organisations engaged in social justice advocacy work get their mandate and who exactly they represent.  Questions have been raised in relation to whether in relation to whether the professionalisation of the community and voluntary sector has led some organisations to become more focused on sustaining the organisation than representing its membership. | **Community and voluntary organisations challenges are to:**   * **Prove where they get their mandate**, who exactly they represent and how they engage on an ongoing basis with the group/s they purport to represent. * **Engage in regular questioning** of their purpose and activities.   **Policy makers and influencers challenges are to:**   * **Recognise the differences in sympathy levels** for the different groups on whose behalf the sector advocates, making some groups easier to advocate than others |
| **Respect, relationship building and trust** | The issue of a lack of respect arose frequently within work undertaken by the Advocacy Initiative.  Research found a lack of acceptance among some policy-makers that the sector had a role and contribution to make to the policy making process.  Policy-makers reported being frustrated by the community and voluntary sector as a result of their constant criticism, the lack of acknowledgement when progress is made and a lack of understanding about how the policy making system works and of its unwritten rules and etiquette.  In a post-partnership era opportunities for policy-makers and representatives from the community and voluntary sector to meet have become more limited. | **Community and voluntary organisations and policy makers challenges are to:**   * **Dedicate resources to forging more respectful relationships** between the two groups   **Community and voluntary organisations challenges are to:**   * **Invest time in building relations with the media and others**   **Policy makers and influencers challenges are to:**   * **Create some new spaces** to facilitate engagement with the community and voluntary sector * **Be open to doing things differently**, and adopting more innovative approaches to policy implementation and development. |
| **Capacity** | Skills and knowledge deficits were identified within the community and voluntary sector in relation to their understanding of:   1. the policy making system 2. strategic planning 3. advocacy techniques (including how the voice of their members and service users can be used more in advocacy work)   Resources are required to address these deficits and to ensure that the sector can advocate effectively. | **Community and voluntary organisations challenges are to:**   * Address resource and skills deficits and to ensure that the sector can advocate effectively. * Work to establish a continuing professional development programme * Be more proactive and strategic in the way that it approaches social justice advocacy   **Policy-makers challenges are to:**   * Investigate whether if might be possible to do things differently and adopt more innovative approaches to both policy development and policy implementation |
| **Effective Strategies** | There is a lack of clarity in relation to what constitutes effective and impactful social justice advocacy work.  The sector is not proactive nor strategic enough in the way that it approaches its social justice advocacy work  The focus of The Advocacy Initiative has been on the application and use of insider approaches, but there is also scope for the selective use of more outsider approaches. The challenge is to find the balance between insider and outsider strategies | **Community and voluntary organisations challenges include consideration of:**   * Theneed for greater coherence, linked to more coordination, alliance working and the consolidation of organisations * The need for innovation and innovative approaches to influencing policy * In the context of increasingly limited civil society ‘space’ the sector needs to continue to find ways to meet, network and work together * The Advocacy Initiative’s ‘Assess your Advocacy’ tool and the tool for developing evaluation indicators should provide the sector with useful resources in this context   **Policy-makers** **and influencers challenges are to:**   * Encourage and support the development of coalitions. * Be open to doing things differently and to having things done differently |
| **Independence & resources** | The case as to why the state should fund the community and voluntary sector social justice advocacy work is centered around the belief that this work has the capacity to:   * Mobilise citizens, channel participation and promote cohesion * Improve policies: by bringing additional information, expertise and solutions to government * Promote a longer-term perspective beyond the five-year electoral cycle of government * Act as watchdogs of accountability improving both the surveillance and accountability of government. * Enable minority views to be heard * Provide ‘ground truth’ to government. * Provide a two way channel of communication from government to people and vice versa * Play a role in monitoring, implementation and enforcement. (Harvey (2014)   There is a concern that state funding for this type of work can undermine independence (The Advocacy Initiative found examples of where state funding did and did not impose some degree of constraint on social justice advocacy work ranging from mild inhibition to complete suppression). | **Community and voluntary organisations challenges are to:**   * **Be honest** about the increased levels of competition for resources – within the community and voluntary sector and between the community and voluntary sector and other sectors.   **Policy makers** **and influencers challenges are to:**   * **Recognise the value and potential of the community and voluntary sector** to input positively into policy making processes (and where relevant be prepared to a) resource it and/or b) not restrict or preclude it. * **Be cognisant of the financial vulnerability** of the sector and the work, taking action through the application of multiannual funding initiatives and the removal of no advocacy clauses in contracts and agreements. |

# 5 What next?

The formal conclusion of The Advocacy Initiative takes place in August 2014. In order to sustain and embed the learning process that we have begun some of our member organisations have taken on to manage number of products/activities for a further three year period from September 2014- August 2017. See Table 5.1 for details of the products and activities to be sustained and the organisations that will sustain them.

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| Table 5.1 Advocacy Initiative products and activities to be sustained (August 2014- July 2017) | |
| *Product/Activity* | *Organisation that will manage the product/process* |
| * + 1. The Advocacy Initiative legacy website | The Wheel  [www.wheel.ie](http://www.wheel.ie) |
| * + 1. The Evaluation Indicators | Disability Federation of Ireland  [www.disability-federation.ie](http://www.disability-federation.ie) |
| * + 1. The Capacity Tool | Barnardos  [www.barnardos.ie](http://www.barnardos.ie) |
| * + 1. The Opinion Polling | Focus Ireland  [www.focusireland.ie](http://www.focusireland.ie) |
| * + 1. The Knowledge Exchange Fora (two per year) | Carmichael Centre  [www.carmichaelcentre.ie](http://www.carmichaelcentre.ie)  Community Platform  [www.communityplatform.ie](http://www.communityplatform.ie)  The Wheel  [www.wheel.ie](http://www.wheel.ie)  54 Degrees (e-campaigning forum)  [www.54degrees.com](http://www.54degrees.com) |

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# 6 Resources

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| **Name** | **Description** | **Web-link** |
| Project Scoping Report  (2010) | This research examined the literature on advocacy. It involved a survey of 170 community and voluntary organisations to assess the extent and nature of advocacy work being undertaken by these organisations. Interviews were conducted with a small number of policy makers few of whom had a clear view on the advocacy role of the community and voluntary sector. A series of recommendations for action were identified as a result of these consultations and analysis and these were used as the basis for the development and funding of the three year Advocacy Initiative work programme |  |
| Statement on Social Justice Advocacy  (2011) | The working statement on social justice advocacy was developed in order to inform the development of The Advocacy Initiative. The statement was also designed to inform and stimulate conversations, debates and reflections organised by the Initiative. |  |
| Guide to Social Justice Advocacy Training Opportunities  (updated annually) | This online guide was compiled based on research conducted by Irish Charities Tax Research (ICTR) for Atlantic Philanthropies. It was updated in 2012, 2013 and 2014. |  |
| Mapping of Social Justice Advocacy In Ireland Study (2012) (including five case studies of effective social justice advocacy) | This research examined and documented the breadth, depth and practice of social justice advocacy with the non-profit sector in Ireland. It involved a postal survey with 288 community and voluntary organisations responding to the postal questionnaire. It also involved a more in-depth online survey of the organisations who indicated that they were actively involved in social justice advocacy and well as benefiting from a discussion with key social justice advocates. The study was complemented by five case study examples of effective social justice advocacy. |  |
| Public Opinion Poll (Nov 2012) | The purpose of these polls (two online surveys of over 1,400 respondents over the age of 16) was to understand what the general public thought of the lobbying, campaigning and social justice advocacy work of the community and voluntary sector. |  |
| Public Opinion Poll (June 2013) |  |
| Who Cares About Social Justice Advocacy? What the public thinks  (2013) | This is a summary of the findings emerging from the two public opinion polls |  |
| Funding Dissent Study  Research into the Impact of Advocacy on State Funding of Voluntary and Community Organisations  (2013) | This study explored the link between advocacy and funding in both an international and an Irish context. It found in the Irish context inconsistent practice by government, with both provision for and prohibition of advocacy work. It found no evidence of hostility toward the advocacy work of voluntary organisations in the Oireachtas, indifference being identified as the greater problem. It did indicate that further examination of the impact of the application of service level agreements that prohibit advocacy work would be merited. |  |
| “In Other Words”  Policy Makers’ Perceptions  of Social Justice Advocacy (2013) | This research explored 33 policy makers and influencers (including elected representatives, experts, advisors, researchers for political parties, key public/civil servants, state/semi-state agency representatives) views on social justice advocacy. The study was conducted using a participatory research approach with seven social justice advocates involved in the research process. |  |
| The Regulatory Environment for Social Justice Advocacy in Ireland (2013) | This study offers an overview of the regulations, both formal and informal, which affect the social justice advocacy environment in Ireland. It also anticipates the challenges that will be posed for the sector with the introduction of legislation in relation to the Regulation of Lobbyists and the Charities Act |  |
| “Are we paying for that?” - Government Funding and Social Justice Advocacy (2014) | This study explored the funding relationship between the state and voluntary and community organisations engaged in public policy advocacy in Ireland from the perspective of the voluntary and community sector. It found relationships on a continuum from the inhibition and suppression of advocacy to active and positive support for advocacy work. |  |
| www.assessyouradvocacy.ie | This online tool is designed to help support community and voluntary sector organisations and coalitions a) measure their advocacy capacity, b) identify activity areas that need to be strengthened and c) identify indicators to measure progress. |  |
| Evaluation Indicators | This tool provides a framework to enable advocates and their organisation to identify their own indicators for effectiveness. The purpose of these indicators is to support those doing social justice advocacy answer the question: How do we know our advocacy is working? The indicators were developed though focus group discussion with experienced social justice advocates working across a broad range of areas and involved in reflecting on advocacy through their participation in the Initiative. |  |
| Knowledge Exchange Fora Outputs | Various reports, presentations and videos (all available on The Advocacy Initiative website) |  |
| Guest Blogs | 20 guest blogs |  |
| The Advocacy Initiative Website | [www.advocacyinitiative.ie](http://www.advocacyinitiative.ie) |  |
| Advocacy Posts (Newsletter of the Advocacy Initiative) | Post were sent on a monthly basis to approximately 800 people. These posts drove traffic to the website and encouraged engagement with Advocacy Initiative research, news and events. |  |