WaterAid's common approach to PMER of advocacy

WaterAid believes its programmatic approach[1] is the best way to achieve sustainable change at scale. With advocacy and influencing at the heart of this approach, planning, monitoring, evaluation and reporting (PMER) is more important than it has ever been. Below we outline the key behaviours and the core commitments for all of WaterAid. Across the Federation we will plan, monitor, evaluate and report on our advocacy and influencing activity at national, regional and global levels. This is most relevant for advocates, but requires collaboration across the whole organisation.

Key behaviours: good PMER of advocacy work…

1. Is informed by **political economy analysis** and driven by **context**
2. Is **good enough** to effectively inform next steps – it doesn't need to be perfect
3. Involves **planning** processes that are **flexible and responsive** to change
4. Means routinely **documenting** key activities and progress to inform **monitoring for accountability**
5. Includes periodic **critical reflection** on achievements and success as part of **monitoring for learning**
6. Integrates **insights and evidence** from monitoring into planning processes
7. Means developing teams across WaterAid with the necessary **analytical, political and technical skills**

Common commitments

Our plans will…

1. Understand context, where power is, decision-makers, allies, and how change happens
2. Understand WaterAid's added value – what our role is, and what are the roles of others
3. Establish high-level, strategic change objectives and clear and incremental short and medium-term priorities
4. Be iterative and adaptable to changes in context and lessons learned
5. Be pragmatic and appropriate to programme design and available resources

Monitoring: we will regularly…

1. Document (more regularly than quarterly) what we are doing and the key activities we have been part of
2. Reflect on our progress to understand what is working, what is not, and how we could operate more effectively

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[1] The way we work is to influence systemic change through joined-up programmatic work, linking practical interventions on the ground with capacity building, learning, influencing and advocacy.

3. Analyse our successes and achievements to understand their significance and implications for future work
4. Document progress, reflections and achievements to report insights and lessons
5. Revisit our plans and use monitoring data to inform course-corrections
6. Monitor the sector and government's progress towards the changes we want

Evaluation: we will…

1. Explore what has changed, and how and why change transpired
2. Draw credible, plausible conclusions regarding the contributions our initiative made in order to understand unique added value, but recognise that **attribution** is likely to be beyond our means to measure
3. Include feedback from stakeholders on the effectiveness and impact of our advocacy
4. Analyse how our initiative adapted and responded to context, achievements, progress and lessons learned
5. Use evaluation to influence planning for the next programme or project

Reporting: our reports will…

1. Be timely and succinct
2. Avoid duplication of effort – use the same report for multiple audiences
3. Be shared with communities/stakeholders to demonstrate transparency and build trust

Key tools for PMER of advocacy

The above approach builds on existing and developing approaches in WaterAid, including the accountability framework, the core PMER procedures for UK country programmes, and adaptive management – it is not intended to supplant them.

To support the common approach to PMER of advocacy, we have prioritised a small number of tools. These are neither binding nor always appropriate for all projects, but are likely to be helpful in fulfilling the common approach. These tools have been selected because they recognise and reflect that advocacy and influencing often takes place in a context of uncertainty and frequent or unexpected change. Within this context, progress or success can happen suddenly or incrementally through a series of small, sometimes overlooked, interactions with decision-makers. These tools can help to ensure that our PMER is effective and appropriate to this context.

1. Political economy analysis (PEA)

When should I use this? Strategic **planning** of programmes and projects.

What does it do? Helps to design well-informed initiatives, with clear priorities.

Why is this useful? It helps you think through the analytical steps to assess the political landscape within which you are advocating, identify the key decision-makers to influence for a given objective, and identify what WaterAid itself could do.

2. Advocacy log

When should I use this? Regularly, to keep an ongoing record of activities.

What does it do? It **monitors** for accountability; it captures what has been done.

Why is this useful? To ensure we remain transparent and accountable. To document whether we did what was planned. Logs also aid reflection and experiential learning that can inform future work.

3. Reflect and review

When should I use this? Periodic workshops at key moments throughout the year.

What does it do? It creates space for **monitoring** and **evaluation** through reflection, analysis and learning about progress, achievements and change.

Why is this useful? It provides a structure for learning and assessment of progress in a dynamic and changing context, to help adapt your approach.

4. Most significant change

When should I use this? For periodic assessment of changes arising from our work.

What does it do? Participatory process that can be used in **monitoring** and **evaluation** that helps identify key changes resulting from our work and describe how the change happens.

Why is this useful? Documenting achievements will drive learning and allow teams to apply lessons to future action. Over time, an evidence base will be generated that can be assessed to understand contributions to change.

Further information and support

Email: pmerofadvocacy@wateraid.org