

# Recommended tools for PMER of advocacy

## 1. Political economy analysis (PEA)

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

**What does it do?** It helps you 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.

### What is political economy analysis?

Political economy analysis (PEA) is about understanding how change happens, helping to identify how best to influence change and make more politically informed decisions.

WaterAid has developed a full PEA toolkit, which provides a structured approach for analysing how change happens, from the national to the local level. It can help shape our country strategies, programmes and even 'everyday' decisions. The toolkit consists of four different tools. These are complementary, but can be used separately as stand-alone exercises, too. Each tool includes facilitation guidance, a set of core questions and discussion points, and participatory exercises to help visualise the political economy features being analysed. They are intended to help produce rapid, good-quality analysis, to increase our understanding of which strategies, tactics or decisions may be appropriate in different contexts. See the full toolkit at [www.wateraid.org/pea](http://www.wateraid.org/pea)



For the PMER of programmes and projects that involve advocacy interventions, the **'tactical' tool** is likely to be the most appropriate. [You can download the Tactical tool, with complete facilitation guidance, here.](#)

### Features of the 'tactical PEA tool

**What is it?** This tool draws on the World Bank's [problem-driven political economy analysis](#), with additional insights from tools already being used by WaterAid and others to analyse micro-level issues. Its aim is to increase our understanding of the politics and relationships that govern how change happens within specific issues, and to help to sharpen the tactics we use to bring about change.

**When would you use it?** The tool can be used as part of planning when developing the design of a programme or project, or to support refining the design as part of 'reflect and review' monitoring. PEA provides a framework to guide an analysis of context, in particular the emergence of specific challenges or opportunities (for example, the introduction of a new piece of legislation). It complements the strategic PEA tools, and could draw from previous analysis at these higher levels. It could also be used after use of the 'everyday PEA' has highlighted the need for more detailed analysis of a specific issue.

### Step by step: what to do

#### Preparation work:

1. **Schedule between two hours to half a day** for the PEA exercise.
2. **Ensure you have a range of knowledge** to reduce areas that the group may struggle with (include external guests, if appropriate).
3. **Invite participants** – team members, partners.
4. **Encourage all participants to review any previous PEA** that has been done, including Country Strategy PEA or Sector Strategy PEA.
5. **Gather materials:** handouts (see [tactical tool guidance](#) for details); flip chart; pens (three colours); post-it notes or card (three colours).
6. **Decide how the analysis will be documented, and who will do this.**

#### At the PEA workshop:

7. **Encourage people to think analytically** about how change happens. Participants will need to be **reflective**, and **honest** about what they do not know. Respect views, but also constructively challenge.
8. Use the [tactical tool guidance](#) to **guide participants through discussion of the 'core questions', and write up the learnings:**
  - What is the issue we want to change?
  - What is the situation now?
  - Why are things this way?
  - What does this mean for our desired change?
  - Where can we go now?
  - What next?
9. **Use the 'discussion points' for each question to prompt people to reflect and analyse.** The discussion points are not intended to be definitive, rather suggestions to guide your analysis.

**10. Finish by reflecting on the PEA exercise itself.** Have participants found it useful? Has it helped learning of any lessons?

**At the end of or after the PEA workshop:**

**11. Write up a short summary** of the lessons from the workshop. Share this with participants to ensure it reflects everyone's understanding (but don't try to 'perfect' the document – **it's how you use it that matters**).

**12. Agree the next steps, document these** and allocate responsibility for who will do what – for example, designing project, revising project.

**13. Take short-term** small steps to improve your tactical approach.

**14. Decide how to take forward long-term implications** for your tactical approach, or for your broader programme.

**IMPORTANT!** PEA should not be used as a stand-alone exercise. Aim to integrate learnings and actions into project design and project monitoring.

### Some useful references

- The full tactical PEA guidance:  
[www.wateraid.org/~media/Publications/PEA-toolkit/PEA-toolkit\\_Tactical-Tool.pdf](http://www.wateraid.org/~media/Publications/PEA-toolkit/PEA-toolkit_Tactical-Tool.pdf)
- PEA toolkit, with tools for Country Strategy, Sector Strategy, tactical and everyday PEA: [www.wateraid.org/pea](http://www.wateraid.org/pea)
- The World Bank's problem-driven political economy analysis:  
[http://siteresources.worldbank.org/EXTPUBLICSECTORANDGOVERNANCE/Resources/PGPE\\_book\\_8-25-09.pdf](http://siteresources.worldbank.org/EXTPUBLICSECTORANDGOVERNANCE/Resources/PGPE_book_8-25-09.pdf)