

MONITORING, EVALUATION AND LEARNING FOR ADVOCACY INTERVENTIONS

LEARNING FROM THE EXPERIENCES OF UNITED FOR PREVENTION

This learning brief draws insights from **United for Prevention (U4P)**, a Frontline AIDS project, funded by the Bill & Melinda Gates Foundation. The 18-month project, which ran from April 2023 to September 2024, supported civil society and community coalitions to work with their governments on HIV prevention. It aimed to ensure that these governments followed through on the commitments made in the Global HIV Prevention 2025 Roadmap. The participating coalitions were located in Kenya, Malawi, Mozambique, Nigeria, Tanzania, Uganda and Zimbabwe.¹

THE PURPOSE OF THIS BRIEF



The design and implementation of the U4P project was a learning process. This brief aims to share lessons on effective approaches to monitoring, evaluation and learning (MEL) for advocacy. It reviews the main MEL tools and processes used, and discusses areas for improvement. The observations in this brief are not limited to the HIV or health sector. They are intended for project practitioners and funders who are involved in the design of civil society advocacy projects, and particularly MEL for advocacy.

¹ The U4P Coalition in each country had a lead organisation. These were LVCT Health in Kenya, Alive Medical Services (AMS) in Uganda, Pakachere in Malawi, SAFAIDS in Zimbabwe, Regional Psychosocial Support Initiatives (REPSSI) in Mozambique, Education as a Vaccine (EVA) in Nigeria and DARE in Tanzania.



THE U4P PROJECT

The broad aim of the U4P project was to accelerate progress towards targets set in the Global HIV Prevention 2025 Roadmap. The seven participating countries, as members of the Global Prevention Coalition, were expected to translate the Roadmap's actions to their domestic contexts and ensure that policies and programmes are put in place to achieve the 2025 HIV prevention targets. U4P focused on strengthening the role of civil society and communities in holding their governments accountable to these commitments. To this end, the project supported diverse coalitions in the countries to engage in strategic, evidence-based advocacy around HIV prevention. The coalitions carried out activities such as PESTLE² analyses, stakeholder mapping, produced accountability "shadow" reports and formulated accountability strategies and work plans, amongst other activities. The coalitions implemented their advocacy strategies over approximately 12 months, adjusting them as needed to fit their specific contexts. The intention is for these advocacy efforts to continue beyond the lifespan of the project, while recognising that the absence of external funding may pose a challenge to sustaining them.

As the focus of this brief is on MEL, it is beyond the scope of this publication to provide a detailed account of the overall project design and lessons learnt. To find out more about the U4P project itself and how the Global HIV Prevention 2025 Roadmap was used as a springboard for country-specific civil society advocacy, follow this [link](#).

MEL DESIGN FOR U4P



MEL was an integral part of the U4P project from the beginning, rather than something added periodically or at the end. In some respects, the MEL approach could be described as a way of working or a way of thinking that permeated the whole project, and one not limited to a set of technical tools. However, several key components were important for implementing the MEL aspect of the initiative:

- **Learning questions:** A clear, shared set of learning questions helped to clarify that learning was a core part of the project. These initial questions were developed collaboratively and later refined as the project's learning agenda evolved. Partners in all seven countries understood that reflecting on their experiences wasn't just a theoretical exercise—it had a strategic purpose. It provided real-time guidance on how to adapt and fine-tune their advocacy activities and asks (see Box 1). An abbreviated version of the learning questions is presented in Box 2 on [page 3](#).

Box 1: What is an 'advocacy ask'?

The U4P coalitions all formulated advocacy asks as part of their HIV prevention advocacy strategies. Each ask clearly defined one specific change they wanted to achieve as a result of their advocacy. For example, the coalition in Tanzania called on their country's Commission for AIDS (TACAIDS) to launch a National HIV Prevention Roadmap by September 2024.

² A PESTLE analysis investigates the political, economic, social, technological, legal and environmental context.

Box 2: Learning and evaluation questions of the U4P project



The U4P evaluation and learning framework featured two types of questions. The questions in pink, used exclusively by the MEL team for evaluation purposes, were not shared directly during learning activities. The questions in black were broader, collective learning questions intended for all project participants.

QUESTIONS ABOUT METHODS: *What we want to learn about the main activities we are using to strengthen advocacy for HIV prevention, including knowledge sharing, political analysis, coalition building, shadow reports etc*

- 1 What can be learned from our experiences of working to foster collaboration with wider civil society and community networks in our coalitions, National AIDS Councils, and relevant government departments/ministries?
- 2 What has gone well, and less well, in terms of the functioning and progress of our coalitions in achieving our advocacy asks?
- 3 To what extent have opportunities been identified and capitalised on to strengthen the influencing capacity of community networks by means of peer learning between and among the country coalitions?
- 4 What strategies appear to be effective in terms of our influence over national HIV prevention priorities, and why?
- 5 What measures have been put in place that are considered effective in supporting the sustainability of this project's achievements and influence over the coalitions' advocacy targets?

QUESTIONS ABOUT OUTCOMES: *What we want to learn about how change happens, to what extent U4P has contributed to outcomes, and what works in different contexts.*

- 6 In what ways are we as country partners better able to voice our concerns in relevant HIV Prevention Coalition spaces?
- 7 In what ways are we better able to engage in advocacy and/or political analysis as a result of our experience of delivering our U4P Accountability Strategy?
- 8 What evidence is emerging of the contributions we are making as U4P coalitions to the content and implementation of our countries' National HIV Prevention Roadmaps and other national strategies for HIV prevention?

QUESTIONS ABOUT CONTEXT: *What we want to learn about which contexts and environmental factors influence our work, how we are responding and adapting to these factors.*

- 9 Reflecting on the social, cultural, political, and economic environment in which we work, what strategies have we developed to harness the enablers, and respond to and navigate barriers to our advocacy and influencing efforts?
- 10 What have we learned from our experience in U4P concerning how change happens, how decisions are made, how policies are approved, and so forth, in our national context?
- 11 How might our lessons about contextual factors influence our future HIV prevention advocacy work?
- 12 What has been the value of working in coalitions for advocacy under the U4P in our context, and has this experience yielded any sustainable strategies?

→ **Advocacy log:** Coalition partners in the participating countries were encouraged to log all **significant moments of change** related to their advocacy on a shared database called Wanda (hosted on DHIS2, an open source data platform used in the public health sector). This allowed participants to track both their progress and setbacks, which provided essential insight into the effectiveness of different advocacy strategies and the responses of diverse stakeholders. It should be noted that developing the practice of logging amongst project partners took time and deliberate attention; it wasn't sufficient to simply provide training and access to a database. Throughout the project, participants gained a deeper understanding of what constituted a 'significant moment of change' (see Box 3), leading to more regular entries in Wanda in some countries. (See [the final section](#) of this brief for more observations on the uptake of Wanda).

Box 3: What is a 'significant moment of change'?

For the purposes of the U4P project, a significant moment of change could be seen as anything that impacted on a coalition's advocacy strategy. It could represent an outcome or a step towards an outcome. It didn't have to be a 'big' event like the launch of a publication or a policy being formally adopted. It might also be something relatively small or informal, like realising that a given government decision-maker is not receptive to civil society input, or being invited into a previously closed policy space for the first time.

- **Working with a learning partner:** In 2023, Frontline AIDS recruited Southern Hemisphere to help develop and facilitate a learning and evaluation accompaniment process. This accompaniment meant that the U4P partners were constantly supported, helping them to learn and to enhance their advocacy practice.
- **Regular meetings dedicated to learning:** The project provided structured opportunities for partners to reflect on what they were learning from their own on-the-ground project experiences. Monthly online learning meetings were held between Southern Hemisphere and coalition members to support active reflection. In each meeting, coalitions reviewed their achievements since the last meeting, identified enablers and obstacles, discussed significant moments of change and clarified their next steps. They also met with the Frontline AIDS team to discuss any changes to their advocacy plans and the budget implications arising. These guided processes enabled partners to practice adaptive management of their advocacy strategies. The Frontline AIDS team also facilitated regular meetings where country partners could share their experiences and exchange information, such as insights from their PESTLE analyses, the shadow report processes, launch and impact, and adaptations to their advocacy plans.
- **'Light touch' mid-term review:** A year into the project, coalition partners from all seven countries, and the Frontline AIDS team, gathered for a three-day in-person learning workshop, facilitated by Southern Hemisphere. This workshop provided an opportunity to engage more deeply with the learning questions and ensure that emerging insights were strategically applied to adjust the coalitions' advocacy activities and asks. Southern Hemisphere also reviewed project documentation, conducted stakeholder interviews, collated and further analysed the information from the advocacy log and learning meetings, compiling these into a report. It reflected back to the project leaders and country coalitions what insights had been gained so far, relative to the learning questions. This report reflected on the insights gained so far, relative to the learning questions. The findings and recommendations highlighted themes across the coalitions' advocacy strategies (what was working well and less well), considered important contextual factors affecting the coalitions' work and identified opportunities for adaptation.
- **End-term evaluation:** The end-term evaluation focussed on harvesting outcomes related to the advocacy strategies of the U4P coalitions. Three outcomes were harvested per partner, drawing on monitoring data and further engagement with the coalition partners. These harvested outcomes were analysed to identify insights for future interventions for HIV prevention advocacy. One outcome per country was substantiated to develop outcome case studies.

WHY DO ADVOCACY PROJECTS NEED A TAILORED APPROACH TO MEL?



The U4P experience illustrated some of the unique challenges facing advocacy projects. Civil society organisations (CSOs) working to influence powerful decision-makers and hold them to account on HIV prevention often pursue outcomes that are beyond their control. They undertake activities to try and sway other stakeholders, while navigating a constantly-changing political and socio-economic context which can shift dramatically. Successful advocacy usually depends more on adaptability than sticking to the blueprint of initial plans. This requires an MEL framework that is well-attuned to, and appreciative of, adaptive learning and continuous re-strategising, rather than a strict assessment of deliverables against predetermined targets.

WHAT WORKED WELL TO SUPPORT LEARNING IN U4P



For others designing MEL for civil society advocacy projects, the following characteristics of the U4P approach stand out as positive contributors to learning:

- **Clear, but adaptable, advocacy strategies and work plans.** As a foundation for the coalitions' work but also for reflection, it was useful to have relatively detailed advocacy strategies formulated in each country, using a common template. Although these strategies could be adjusted (and indeed coalitions were encouraged to do so as required), the plans provided a shared reference point for tracking changes and holding conversations about how change works in complex environments.
- **Making learning explicit.** Starting with a focus on learning, structured around a set of learning questions, the U4P project created an opportunity to understand progress in the project and fostered a spirit of collective inquiry. Coalitions experienced the benefits of learning and reflection as tools for enhancing their effectiveness, even though various factors³ made it difficult to sustainably embed the effectiveness of their advocacy.
- **A culture of recognising the value of setbacks.** The U4P project made a deliberate effort to encourage reflection and learning not only about successes, but also about what went 'wrong' in the coalitions' advocacy. Often, these setbacks sparked important discussions on contextual obstacles, such as unexpected changes in government positions, shifts in political leadership due to elections, or the introduction of oppressive legislation. The partners also had space to talk openly about what they hadn't achieved, without fear of being seen to have 'failed'. The learning orientation of U4P focused on improvement rather than just proving success, while also being realistic about what was achievable given the changing contexts in each country.
- **Strong feedback loop from learning insights back to project activities.** The monthly learning meetings facilitated by Southern Hemisphere with coalition leads and partners in each country, as well as their regular meetings with the Frontline AIDS team, proved invaluable to ensure that the insights emerging from the ground were being used to review assumptions and adapt advocacy asks and activities. This commitment to adaptation was supported by ongoing and detailed dialogue about the specifics of each advocacy strategy and backed up with flexible budgeting.

³ Factors included participants' workloads and too few staff, as well as competitiveness around funding in the HIV sector. These factors are not limited to the U4P experience and continue to place considerable constraints on time available for learning for CSOs and community networks.

- **Skilled learning support.** Having an external partner with extensive experience in facilitating learning and evaluation was a critical success factor in the U4P project. It provided the U4P project leaders with an 'outside ear' and knowledgeable accompaniment in managing the MEL dimension of the project. Participants could also engage in regular reflection sessions with an independent, yet informed, third party, who had the best interests of the project at heart without being invested in it.
- **Long-term, strategic commitment to learning.** The MEL approach and tools used in this project had the benefit of many years of development and refinement in other projects. They reflect the priority that Frontline AIDS attaches to learning and adaptive management. While not all advocacy projects will have this advantage, it is important to see MEL design as part of a longer process of deepening understanding of how change works, and what tools best support this.
- **Balancing guidance and autonomy.** The U4P project provided country partners with MEL tools and frameworks to facilitate strategic conversations. Implementing the tools also required considerable support, regular encouragement and joint sense-making. Through the learning workshop and monthly meetings, the U4P project invested in broadening participants' critical thinking and strategic adaptation skills. At the same time, the country coalitions had high levels of autonomy in implementing their advocacy strategies and applying the insights emerging from MEL to their advocacy work.

WHAT COULD FURTHER STRENGTHEN MEL FOR ADVOCACY



The U4P project offered an opportunity to learn not only about what enabled MEL, but also what limited or constrained it. The following aspects could gain from further reflection, re-thinking and refinement:

- **Clarifying benefits:** A recurring theme in MEL discussions amongst CSOs is the perception that data generated for monitoring and evaluation mainly serves the needs of funders and powerful international development organisations. Many civil society practitioners feel that MEL should primarily benefit project implementers and beneficiaries, which does not align with their on-the-ground experiences. Although the U4P project tried to demonstrate the benefits of MEL to coalition partners through the process described in this publication, the results were mixed, regarding participants' consistent use of the advocacy log (see also the point below). More needs to be done to explore and address these important questions around MEL, such as when it becomes routine or extractive, and who benefits from it. These questions are not unique to the U4P project.
- **Being alert to duplication:** In U4P, an unintended overlap emerged between the advocacy log and the monthly learning meetings. The latter provided coalition leads and partners with opportunities to discuss the 'significant moments of change' that they were experiencing and to talk through the implications of these for their advocacy strategies. As a result, there may have been less motivation for coalition leaders to log into Wanda and record the same information if it had already been covered in the meetings. Given partners' limited time to engage meaningfully with data and outcomes, each MEL tool they are expected to use should add value from their point of view.



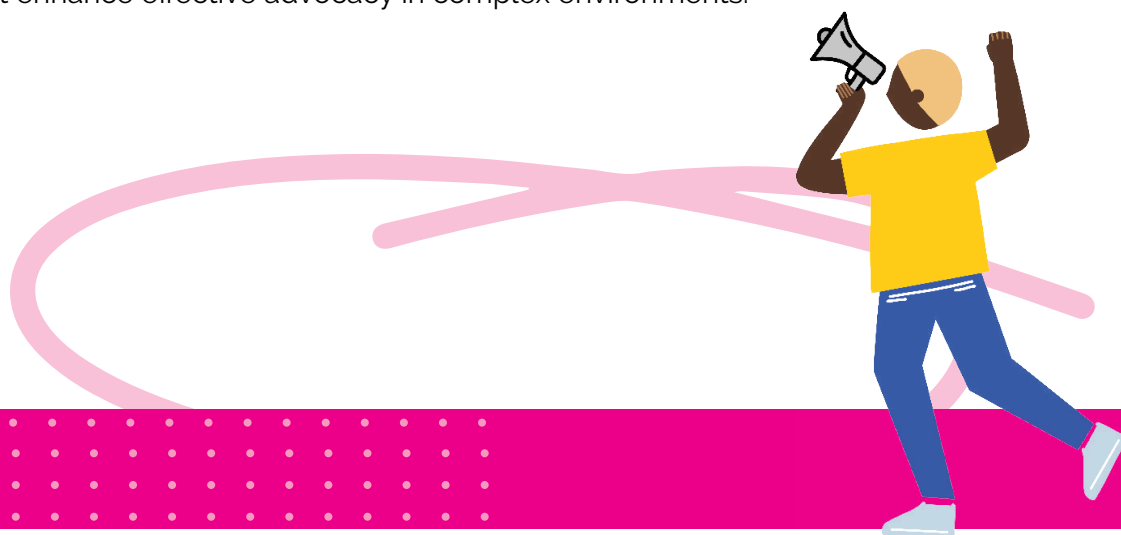
→ **Distillation and appropriate use of learning questions:** In the U4P project, the list of learning questions was useful as a reference point for conversations and also provided an organising structure for the learning workshop and mid-term review. Although the questions were beneficial for the overall project, it is less clear to what extent they supported the learning of individuals and coalition members. Some found the questions to be cumbersome or unclear. While participants were invited to adapt the questions to their own country contexts, few chose to do so.

This suggests that there is more to learn about the role and relevance of learning questions and how to ask more productive and enabling ones. Additionally, it may be worth considering whether learning questions should remain in the background, to help MEL practitioners when designing evaluations and learning exercises, especially in the early stages of an advocacy project. This approach could relieve already overburdened project implementers from having to track another set of factors over and above their advocacy strategies - and allow more time to instil learning practices as the project unfolds.

→ **Matching expectations to timeframes:** The U4P coalitions were able to learn from their advocacy in ways that allowed them to adjust their advocacy strategies and advocacy asks. However, some advocacy asks were not fully achieved, with some advocacy activities continuing beyond the end of the project timeframe. This was largely due to the slow pace of policy cycles and the continuously changing contexts within the target countries. The 18-month duration of the U4P project was ultimately too short to document comprehensive lessons concerning which of the U4P coalitions' methods and strategies were most and least effective. Some MEL practices and habits, like using the advocacy log more consistently, could also have been embedded more effectively had there been a less pressurised project schedule.

To read more about the U4P experience and having realistic ambitions for advocacy projects, [click here](#)

In conclusion, this learning brief has suggested that civil society advocacy projects require approaches to MEL that employ and support adaptive learning. For others designing such interventions, we hope that the learning insights from the U4P project offers useful tools and pointers for further experimentation and reflection about how change happens, and how MEL can best enhance effective advocacy in complex environments.



This brief was written by Erica Coetzee and Dena Lomofsky on behalf of Southern Hemisphere Consultants, with editorial input from Casey Davison O'Brien and Leora Pillay of Frontline AIDS. Design by Jaywalk Design for Change.