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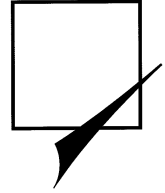
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Learning about Advocacy

A Case-Study of Challenges, Everyday Practices and Tensions

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Advocacy has become an important area of development support. Simultaneously, the interest in learning-oriented monitoring of advocacy programmes has increased. Starting from the premise that learning has sociopolitical dimensions, this article explores how the challenges and contradictions of such monitoring present themselves in Latin American advocacy activities supported by a Danish NGO. Our case-study demonstrates that two largely separate monitoring systems coexist. Side by side with a conventional formal and indicator-based monitoring system, project staff and stakeholders have developed a more informal and dialogical mode of monitoring advocacy. Although the latter has potential advantages from a learning perspective, the article demonstrates that its actual contribution to organizational learning is suboptimal and points to several sociopolitical obstacles and influences that lead to limited learning. The article concludes that the improvement of learning-oriented monitoring first and foremost requires affirmative 'political' action and leadership towards widening the space for learning and reflexivity.

KEYWORDS: advocacy; learning; monitoring; NGOs; politics

Introduction

This article links two popular fields in development aid: learning and advocacy. To learn as an organization is a growing objective amongst non-governmental organizations (NGOs) in development. Why is this so? First, development itself is increasingly regarded as the outcome of learning processes among societal stakeholders. NGOs' staff are part and parcel of such processes and consequently need to anticipate ever-changing dynamics and conditions in their working environment, and translate these into organizational policy. Second, Northern governments

channel a considerable amount of development funding to Southern NGOs via Northern NGOs. In doing so, these governmental donors increasingly emphasize the need for accountability, transparency and value for money, which, according to Edwards (1997), requires that NGOs learn much more, and learn much more effectively. Thus, many NGOs have expressed the desire to become 'learning organizations', in line with Senge's adage that '[t]he organisations that will truly excel in the future will be the organisations that discover how to tap people's commitment and capacity to learn at *all* levels in an organisation' (1990: 4).

Advocacy too is a popular focal area among NGOs. One reason is that NGOs have come to realize that service delivery projects alone do not change the fundamental problems and structural inequalities that generate poverty (Edwards, 1993). As a consequence, macro-level advocacy by NGOs, in order to influence unequal global trade relations, debt and macro-economic policy, has come to the fore. More recently, this has been combined with efforts to strengthen marginalized groups in civil society in the South in their attempts to challenge power structures in their own countries and to take on regional and international alliances.¹ Another reason for the popularity of this kind of advocacy is that Southern NGOs and social movements have increased in terms of both size and capacity to implement their own projects. With a diminishing role as aid implementers, many Northern NGOs have sought out this new role in advocacy (Coates and David, 2002).

However, most NGOs are struggling with how to demonstrate and illustrate the changes triggered by advocacy (Chapman and Wameyo, 2001; Roche, 1999). The political processes and the variety of societal stakeholders involved make advocacy a highly complex and particular type of intervention. Confronted with the need to demonstrate that advocacy is not only effective but also cost-effective in making a positive difference to people's lives, and with the strong desire to learn, NGOs have to meet several challenges. First, an approach to monitoring needs to be developed that does justice to the complex nature of advocacy and is able to overcome the limitations of conventional planning and monitoring systems (Mosse, 1998). Second, despite the relevance and beauty of the idea of organizational learning, it cannot be taken for granted that such learning occurs automatically. As several authors on organizational learning have shown, phenomena like knowledge, information and learning are closely intertwined with the operation of power and control, and this interconnection may well lead to constraints in learning (Argyris, 1994; Dörner, 1996; Weick and Westley, 1999).

This article explores how these challenges present themselves – and are dealt with – in the everyday practice of learning about advocacy. We analyse how monitoring of advocacy takes place in a Danish NGO, Ibis, and the extent to which this contributes to learning. The purpose of doing so is not only to improve our conceptual understanding of learning about advocacy, but also to contribute to developing future monitoring systems. For this purpose, it is worthwhile to examine the actual practices related to monitoring, an effort seldom given priority in development policy. As monitoring is an essential part of daily activities in the organization, a greater understanding of what is already in place, what is functioning and what is not, can guide the search for alternative monitoring methods.

The article first explains the conceptual orientation that has guided our analysis of monitoring and learning in the case-study presented. Inspired by sociological theory, it is suggested that learning needs to be understood as a sociopolitical process influenced by social relations and conditions. After the formulation of the questions that guided our research, we briefly introduce Ibis and present the methodology applied in the research. Subsequently, some of Ibis's experiences with advocacy work are described and the challenges this poses for monitoring are explored. The article then turns to the actual practices of monitoring advocacy in Ibis and shows that there are large differences between formal and informal monitoring efforts. Furthermore, the extent to which these diverging practices foster organizational learning are analysed and several sociopolitical obstacles to this effect are identified. Finally, the wider implications of the findings are discussed.

Learning as a Social Process

In the context of development discourse, the current interest in learning is in many ways a response to the instrumental approach to development that dominated from the 1960s to the end of the 1980s. The instrumental approach assumes that it is best to plan intervention in advance with predefined goals and outcomes for the future. It presumes that it is possible to rationally plan and implement development interventions (usually in the form of projects), based on predictive knowledge and understanding about causes and effects in human behaviour and societal dynamics. This approach to development intervention has been criticized strongly. It was observed that – in everyday practice – planned projects turned out to be ‘arenas of struggle’ in which change is negotiated and occurs in a much less straightforward fashion influenced by, for example, social conflict and unpredictable dynamics (Crehan and Von Oppen, 1988; Long and Van der Ploeg, 1989). Moreover, the idea that one could generate unequivocal and uncontested knowledge and understanding of a situation as a basis for rational planning has eroded rapidly since the 1980s, and has been replaced by the idea that it is essential in development efforts to deal with multiple realities (Leeuwis, 2004). On the wave of such criticism, increasing attention is being paid to learning processes by scholars and practitioners in development. Røling (2002), for example, suggests that change basically entails new forms of coordinated action in a social network, and that arriving at coherent practices requires that various stakeholders somehow develop a greater understanding of the multiple perspectives on complex situations, and – at least to some extent – a shared reality and ambitions as a basis for coordinating their actions. The process through which this occurs is labelled ‘social learning’ (Guijt and Proost, 2002; Leeuwis, 2004; Røling, 2002). In a similar vein, it has been proposed that the conventional planned development project should be replaced by a process approach in which learning among stakeholders is deliberately organized and facilitated (see e.g. Cracknell, 2000; Estrella, 2000; Mosse, 1998). This ‘learning process’ approach implies treating development projects as flexible systems with changeable procedures and approaches (Mosse, 1998). According to Mosse, such flexible systems require process-oriented monitoring that is characterized by continuous information gathering, a focus on present dynamics, an action-oriented purpose and an open and inductive atmosphere (Mosse,

1998). Against this background, many development NGOs express the wish to become 'learning organizations', a concept used initially in companies and businesses (Garvin, 1993; Senge, 1990). While the term 'social learning' is used mainly in connection with multi-stakeholder situations, there are many parallels between 'social' and 'organizational' learning since organizations often are not homogeneous entities, and consist of units and levels with diverging interests and experiences.

Although the attention being given to learning in development projects and organizations is certainly important and meaningful, it has been argued that the underlying theories of social and/or organizational learning tend to be unreflective of power relations, conflicts and tensions that occur in change processes and/or during the learning processes that are supposed to be part of these (Berthoin Antal and Dierkes, 2001; Leeuwis, 2000; Long and Long, 1992). Although the existence of politics and conflict is not denied altogether, it tends to be suggested that frictions between stakeholders can be resolved through the development of a shared understanding of a situation, as a result of joint learning and improved communication. In philosophical terms, these ideas can be traced back to Habermas's (1981) notion of communicative action (see e.g. Bawden, 1994; Röling, 1996). Habermas speaks of communicative action (and communicative rationality) when actors aim at reaching agreement or consensus on a shared definition of the situation as a basis for coordinating their activities. This type of action differs from instrumental and strategic action in that the coordination of action does not arise from egocentric, goal-oriented calculation by self-interested actors, but from an open process of argumentation in which any claim (including normative ones) is subject to critical debate. According to Habermas, communicative action requires an 'ideal speech situation' in which undistorted communication can take place (Habermas, 1970a, 1970b, 1981). In such a situation, conflicting situation-definitions (based amongst other things on diverging interests) can be solved by the 'peculiarly unforced force of the better argument' (Habermas, 1973: 240) rather than by the bringing in of power resources. Such rather normative and prescriptive undertones are also present in the literature on learning organizations, which tends to present a rather rosy picture of how learning in organizations can be improved, and/or of what organizational practice should be (see e.g. Argyris and Schön, 1996; Senge, 1990).

In line with authors such as Giddens (1976), Long (2001) and Davies (1994), we argue that, in everyday practice, knowledge, perception and power are intertwined to such an extent that it is unproductive and naïve to ignore these aspects when talking about learning. We anticipate that there are various ways in which learning and issues of power may be interrelated. To begin with, it has been documented in general that perceptions to which actors adhere in a specific context are not neutral, but tend to be shaped by perceived political, cultural, economic, relational or normative interests, and may also be influenced by pressures imposed by various others who can mobilize resources to support adherence to their views (see Leeuwis, 2002, 2004). If perceptions are tainted by historically situated social interest and influences, then perceptual change (i.e. learning) is likely to be shaped by such phenomena as well. In line with this, it is clear that learning processes may well include the exertion of control. Participants in projects or members of organizations, for example, might withhold information from others or use information in

a strategic way in order to maintain or enhance their control of the situation and to attempt to build up agency, alone and in collaboration with others (Coopey, 1996). Power plays and control happen at all levels in organizations or projects, because 'all actors exercise some kind of "power", leverage or room for manoeuvre, even those in highly subordinate positions' (Long, 2001: 17). Deliberate efforts to monitor and evaluate projects are a conducive context for the intermingling of – and tension between – control and learning, since it is in such arenas that past activities are interpreted and assessed and where future courses of action can be legitimately proposed. Finally, it is clear that learning requires energy, effort and time, and hence can be a considered a scarce resource. In connection to this, literature suggests that actors' motivation to learn can be stimulated or hampered by various conditions (Leeuwis, 2002), many of which have sociopolitical connotations (e.g. relating to social interests and associated problem perceptions, availability of social space and resources, experienced urgencies and pressures, etc.). On the basis of this, we conclude that any effort to understand current practices and challenges in relation to monitoring and learning about advocacy must be sensitive to the sociopolitical conditions and obstacles that may affect the process.

In sum, our research was inspired theoretically by the idea that learning is an important process at the interface between NGO-supported development projects and the organizational dynamics within NGOs. Monitoring has been mentioned as an important mechanism to support such learning, and hence the article focuses on that aspect of organizational and project practice. In this case, we study the monitoring of advocacy, which is a relatively new field in development intervention, and which we suspect creates specific demands on learning-oriented monitoring. At the same time, we add to the conventional perspective on learning in organizations and/or projects the proposition that learning needs to be understood as a sociopolitical process influenced by social relations and conditions. This perspective led us to pose three main research questions:

- (1) What are the characteristics of advocacy, and what challenges does this pose to learning-oriented monitoring?
- (2) How does monitoring of advocacy take place in actual practice, and to what extent does it meet the requirements for learning-oriented monitoring?
- (3) To what extent does monitoring actually lead to learning and how is learning affected by sociopolitical obstacles or stimuli?

As can be noted from these questions, the results from the first question will lead to the formulation of requirements that serve as a framework for analysing material collected for the second question. The interrelations between learning and power discussed will serve as sensitizing concepts for analysing sociopolitical dimensions of learning, as connected with the third question.

Methodology

Our methodological approach is inspired by actor-oriented perspectives in development sociology (Long, 1990, 2001), which suggest that development is shaped

in the everyday interaction between societal agents, and that the understanding of development intervention may benefit from the use of in-depth case-studies of everyday development practice, and the use of anthropological case-study methods (see also Strauss and Corbin, 1990; Van Velsen, 1967). We felt that adopting such a case-study approach (rather than e.g. a quantitative survey across a number of advocacy projects) was congruent with our ambition to explore a relatively new domain and analyse less tangible phenomena such as learning and sociopolitical dynamics.

The Danish NGO Ibis was selected as a suitable case-study for the research, in which the focus was on its advocacy operations in South America. Ibis is among the largest development NGOs in Denmark. The organization has a decentralized structure, with a head office located in Denmark and field offices in countries and regions in the South. Ibis's advocacy plays a leading role in their work, which supports the struggle for the indigenous peoples to reach recognition and to exercise their rights as citizens within the nation state. The present advocacy programme covers Bolivia, Ecuador and Peru, and partners are mainly indigenous organizations in the Andean highlands as well as in the Amazon rainforest. As a result of the reduction in funding from Danida – the Danish government body for development activities and Ibis's main donor – learning has been receiving more attention within Ibis over the last few years.

Fieldwork was carried out by the first author from July to November 2002, mainly in Bolivia and Ecuador. Qualitative case-study methods were chosen since these serve best to explore everyday practices, uncover people's meaning, values and views (Peacock, 1986; Yin, 1994) and allow for the possibility to study the organization as a whole, including relations appearing in the process that might be necessary to understand the organization from within. The methods used included participant observation and in-depth and semi-structured interviews. Participant observations were conducted in approximately 15 formal meetings in Ibis and in 20 informal gatherings (e.g. during travel, lunches, etc.) with Ibis staff. Similarly, participant observations were made in regional meetings and seminars. In addition, 20 in-depth and semi-structured interviews were conducted with Ibis partners (12), Ibis staff in South America (6) and Ibis staff at the head office in Denmark (2). Among the staff of Ibis's partner organizations, respondents were selected who had significant experience with advocacy work. Of Ibis personnel, all of the programme officers responsible for the monitoring of projects were interviewed. Moreover, interviews were conducted with the Danish advisers who worked directly with advocacy and two officers at the head office responsible for monitoring and methodology.

In order to test the validity of our findings, we deliberately searched for information that would allow us to reject the initial interpretations that we developed during the process of studying advocacy, monitoring and learning in Ibis. In addition, we used respondent validation in the form of the regular cross-checking of emerging interpretations with the actors observed and interviewed (e.g. staff members, coordinator, partners). The next sections present and discuss the main findings from the research in relation to three interrelated themes. More detailed empirical accounts and underpinnings can be found in Ringsing (2003).

Challenges of Monitoring Advocacy

In this section, we further explain the idea of advocacy and point to a vacuum in the literature about monitoring advocacy. We then present some empirical observations regarding the actual practice of advocacy and, on the basis of this, identify challenges that will have to be met in any approach to monitoring it. We conclude with some overall implications for learning-oriented monitoring.

Advocacy and Monitoring

Advocacy can be understood as a new form of NGO intervention (Coates and David, 2002). However, it differs from traditional development projects in that advocacy has the goal of combating the structural causes of poverty and of supporting marginalized people's own efforts to advocate for their rights and interests (Edwards, 1993). Advocacy includes campaigns, lobbying and capacity building and can be understood as pleading a cause, or helping others to plead a cause. Advocacy is a way to influence decision-making about problems that concern people, especially those who have been marginalized and left out of the policy process. Advocacy should not be understood as isolated events but as processes of change interwoven into societal contexts.

Monitoring of advocacy has gained interest amongst NGOs as well as governmental aid organizations. However, the existing literature contributes little to the issue. Since advocacy became significant in development work about ten years ago, several NGO handbooks have been written to guide practitioners (Cohen et al., 2001; Miller and Covey, 1997; Rasmussen and Ringsing, 2002). However, the guidelines focus first and foremost on how to effectively implement advocacy and deal with power and politics. None focuses on monitoring. Reviews on how (mainly English) NGOs monitor and evaluate advocacy (Chapman and Wameyo, 2001; Davies, 2001) do not provide concrete proposals about how advocacy should be monitored either. Hence, even though advocacy is presented as meaningfully different from the classical development project, it is unclear what this implies in terms of monitoring. In the absence of clear guidance, it may be expected that classical forms of project monitoring play a role (as illustrated in fact by the Ibis case). In the development sector, such monitoring is usually based on a specific approach to planning and managing projects that Northern donors tend to prescribe to those who receive and/or distribute funds: the 'logical framework approach' (LFA). The 'logical framework' is an objective-oriented planning tool (see BOND, 2003; NORAD, 1999; Örtengren, 2004; Shields, 1993) which requires that projects are described in terms of (inter alia):

- the ultimate development objectives to which a project is expected to contribute;
- the specific purposes that are to be realized by the project;
- the specific outputs and results that are expected in a certain time frame;
- the activities through which outputs are achieved;
- the measurable or objectively verifiable indicators that will be used to assess progress;
- the data and information that will be collected to verify progress;

- the inputs needed; and
- the core assumptions about the wider environment which underlie the project.

Despite the criticism that this approach is based on (and fosters) instrumental thinking (see also Hersoug, 1996; Leeuwis, 2004; Long and Van der Ploeg, 1989), it has become and remains the dominant format for project formulation, monitoring and evaluation (Cracknell, 2000).

Actual Advocacy Practices and Challenges to Monitoring

Based on case-study observations and interviews, this section presents three examples of advocacy processes and reflects on the kinds of challenges they present for monitoring. This is done by mirroring salient characteristics of advocacy processes with key features of LFA inspired monitoring, such as a limited project time span, fixed objectives, preplanned activities and predefined (quantitative or qualitative) indicators.

Example 1: Advocacy is a long-term process with changing objectives Some years ago, COICA, the coordinating body of indigenous peoples' organizations in the Amazon Basin, worked for the establishment of a permanent forum for indigenous peoples in the Economic and Social Council in the United Nations. Advocacy took place in the UN Commission on Human Rights and continued over several years. Every year, a workshop that included the participation of indigenous representatives and country members of the Commission was held to undertake negotiations about a possible future forum. Ibis supported a project with COICA, where one objective was to establish this body for indigenous peoples.

The advocacy process lasted six years (a project period is normally two years). In the negotiation process it was necessary to make compromises with governments about the mandate of the body, numbers of members, amongst other things. Therefore objectives changed and the focus of lobby activities shifted during the process. COICA made alliances with other indigenous representatives to form a negotiation platform. This meant that COICA had to negotiate its demand with the indigenous network as well. It became a common case, and the outcome of the efforts depended both on the strength of the international indigenous networks to lobby and have influence and on the willingness of the representatives of the member countries. In the end, a forum for indigenous peoples' issues was approved and established in the Economic and Social Council, but it will still take time before the impact is felt.

From this example, we can derive some important characteristics of advocacy work. First, it suggests that advocacy is a long-term process in which strategies and objectives may need to shift in view of emergent dynamics. Another salient feature is that many actors, alliances and networks may be involved, and that change depends not only on one organization (or project) but on multiple actors in networks, including those who are the target of advocacy. Conventional project-focused monitoring does not seem to be very feasible in this kind of trajectory since it is difficult to isolate the impact of a particular organization, activity or

project. Moreover, the use of predefined time-bound indicators seems impractical in view of shifting objectives and long time horizons, and long-term impacts that emerge after a project ends are normally not assessed in project-focused monitoring.

Example 2: Advocacy can lead to unexpected changes Ibis has a project with an organization that represents the indigenous peoples in one of the provinces of Bolivia. A local NGO that gives legal assistance is also a partner in the project. The overall objective is to strengthen the indigenous movement so that 'it will be able to influence state politics by presenting political and ideological proposals with the aim of constructing a pluri-cultural and multiethnic society'.² Activities in the project include: training in law and other legal issues (collective and individual rights in relation to land, environment, bilingual education, etc.), meetings to analyse and prepare proposals with other organizations and public information, amongst others.

In May and June 2002, the indigenous organization participated in an extensive 30-day march to the administrative capital, La Paz, together with its member organizations and with organizations of the indigenous movement from the lowlands of Bolivia. Marches are a known form of protest, but it was the first time the indigenous peoples in the highlands had organized one. The goal was to press the government to sign an agreement about the development of a constituent assembly. The intention of the indigenous movement was that an assembly, with the participation of the civil society, would establish a new constitution in order to strengthen the pluri-cultural and multiethnic dimension of Bolivian society and to include indigenous peoples' collective rights, amongst other issues. The outcome of the march was an agreement with the government to hold an extraordinary session of parliament after the upcoming elections to examine the measures necessary for such a constituent assembly. The march was not part of the planned activities. However, it drove towards the same overall objective as the project, namely, to construct a pluri-cultural and multiethnic society. In fact, the march provided the organization with more recognition, experience and capacity than the activities originally planned for the same period would probably have given them.³

In terms of characteristics of advocacy work, this example suggests once more that planned activities in advocacy processes must be allowed to change in response to unforeseen and/or unexpected dynamics and opportunities. Project-focused monitoring again seems problematic since predefined indicators may only account for expected changes, and be unable to capture unforeseen activities, processes and contributions.

Example 3: Disagreements about the advocacy process and results can arise easily In the context of a global advocacy project with the aim of enabling civil society from different countries to have their say at the Earth Summit on Sustainable Development in 2002, Ibis in Bolivia started a project with a local NGO. This NGO was appointed by Ibis to be the focal point in an NGO network with the task of elaborating a proposal about sustainable development in Bolivia.

The objectives were to get the proposal approved by a network of social organizations in Bolivia and to have the government incorporate the proposal devised by civil society into one elaborated by the government to be presented at the Earth Summit.

The proposal that was elaborated by the NGO network created disagreement within the same network, which ended up being divided into two groups. One group, represented by the focal point NGO, was supporting the proposal, whereas another group was very critical of the document. A representative from the focal point NGO argued that what they had carried out was a systematic evaluation of which laws had been complied with and which had not. The representative said that they wanted to evaluate the process and not take a position against the structural adjustment policy or the neo-liberal model. An actor from the network representing the group disagreeing with the proposal declared that the proposal had received hard critiques from the social organization present in the network, because the proposal had been elaborated in collaboration with the government and therefore had become too soft in their opinion. According to the group, the position of the government and that of civil society were totally different in respect of issues relating to land, water, etc. The first group was satisfied with the document because it had the possibility of being taken up by the government. The second group considered the document uncritical of governmental politics and therefore almost useless.

This example illustrates that, in the politically laden sphere of advocacy, participants can easily disagree about the meaning or value of change processes and that strategies applied may well be a source of conflict within or between groups. In conventional project-focused monitoring, it is difficult to capture results on which disagreement exists since predefined indicators tend to capture results which are generally agreed upon at the outset of the project.

Implications for Learning-Oriented Monitoring

A monitoring approach that supports learning about advocacy must somehow be sensible to the characteristics described and anticipate the challenges outlined. Here, we outline some basic features of the monitoring approach required.

Process sensitive monitoring It seems more meaningful to monitor the process rather than predefined results. Monitoring that can cope with uncertainty and conflict, which is open to changes in the project, and which does not measure progress against a fixed set of indicators only is in a better position to support learning from the dynamics in advocacy.

Monitoring beyond project boundaries If learning is one of the organization's goals, it is useful to have a monitoring system that questions the social and political context rather than a method that is bound by the framework of the project. Changes that result from advocacy often happen outside the scope of the project, and it is an illusion to think that one project or actor alone can bring about the change. If monitoring focuses on what is actually happening (beyond the parameters of the project), it can draw attention to changing contexts – and through this have an important influence on a project's success (Mosse, 1998).

Looking for tension in interpretation Social learning may be enhanced if monitoring focuses on actors' different interpretations of change rather than on insisting on 'objective' assessment. Advocacy – like social development processes – will always be subject to multiple, conflictive interpretations and understanding (Long, 2001). Disagreements about the meaning and value of change express the different interpretations of actors involved in the advocacy process, and can be an important input for learning processes. Moreover, these different interpretations may be equally significant to designing meaningful advocacy strategies for the future as are points of agreement (Davies, 2001).

Formal and Informal Monitoring Practices

Our empirical research on the actual practice of monitoring revealed that two (largely separate) sets of monitoring practices exist. The first set is connected to the logical framework approach (LFA) that constitutes the formal project management tool in Ibis and takes indicators as the starting point for monitoring. In addition to this formal procedure however, Ibis staff appear to implement an alternative and more flexible monitoring practice. In this section we describe the two approaches.

Formal Procedures in Project Monitoring

Within Ibis, definitions of quality control, monitoring and evaluation are closely related to the system of project cycle management and LFA. According to respondents, it is an important tool in Ibis because it serves to legitimize funding and ensure upward accountability to the Danish government. As part of project preparation, indicators for monitoring are negotiated and defined in a process in which Ibis staff, indigenous representatives, advisers for the organizations and supporting local NGOs participate. However, Ibis staff reportedly have a significant input into the specific formulation of indicators, especially since they know the kind of indicators that must be included in the document if a project is to be approved by the Ibis board. All participants are of course interested in the approval of the project, but it is the Ibis staff who manage the project logic and thereby seem to control the formulation process. As one programme officer puts it:

You formulate [the indicators] together with [the partner organization], yet Ibis is the owner of the document as such. The proposal and what they want to do is totally the property of [the partner], but the methodological structure, the coherence or logic in which it is articulated depends a lot on Ibis. Because the document is Ibis's, it is for Danida.

In addition, our observations suggest that it is often a challenge for the partner to define indicators because the application of the cause–effect thinking underlying the LFA tool that this requires seems to be far removed from the lifeworld of indigenous people. Typically, the indicators arrived at eventually include a mix of qualitative process-oriented descriptors and more quantitatively formulated items (see Box 1 for a few examples).

The indicators play a role in the various elements of Ibis's monitoring system (Ibis, 1996) that includes, amongst other things, three-monthly partner progress

Box 1. Examples of Indicators in Three Ibis Advocacy Projects

Project title: CIDOB Strategic Plan 1999–2001

Partner: CIDOB (Confederation of Indigenous Peoples of Bolivia), Bolivia

Period: 1999–2001

Three of the twelve indicators of the project:

- The national leaders represent the policies and strategies defined by the regional organizations on a monthly basis with governmental bodies, other social organizations and the private sector
- The indigenous movement's priorities are recognized in at least two processes of revision of laws and regulations yearly
- The CIDOB has an active and well-prepared representation in COICA (regional body), and participates fully and representatively in at least three specific themes of priority per year at international level

Project title: Capacity building in municipal, territorial, juridical and environmental management, for the Ayllus^a of Caiza 'D' Chaqui, Tomave and Puna, strengthening their original organizational structures

Partner: ISALP (Social Research and Legal Advice Potosí) (NGO), Bolivia

Period: 1999–2000

- Four ayllus of the target population take the first steps before public authorities for the recognition of their territorial rights
- Four ayllus of the target population make the first steps before their municipalities in order to be considered with their requirements in the Annual Plans of Operations (POAs)
- Thirty percent of the target population of the project participate actively with their legitimately recognized authorities in the preparation of municipal strategies, politics and management together with the Council of Original Ayllus of Potosí (CAOP)
- Ten original authorities of the target population participate actively in Vigilance Committees and insist on the fulfilment of their POAs

Project Title: Increase the participation of the NGOs from the South in the Earth Summit RIO+10

Partner: Fundación Tierra (NGO), Bolivia

Period: 2001–2002 (10 months)

- Within four months an elaboration of a national report on the fulfilment of the conventions signed by the government in the RIO Summit in 1992 has been realized
- The institutional working platform is a reference to preparatory discussion of the Summit RIO+10
- At the end of the project, political proposals for sustainable development are to be found as an outcome of agreement among several social actors
- From the third month onwards, messages to create awareness about the problems regarding the Summit RIO + 10 are to be found in the press and radio

^a An ayllu is an ancestral social organization situated in a particular territory and administrated by its original authorities.

reports, Ibis field office annual status reports for each project and project reviews (approximately every two years, or mid-term in a project cycle).

Most Ibis staff, however, experience serious difficulties when using the agreed-upon indicators in their interaction with partner organizations, and especially the indigenous leaders in these. As a programme officer recounts:

Several times, I have intended to make an analysis with [the partner] and I have taken the point of departure in the project in a very technical way. This ended in a discussion between the technical staff of [the partner] and me. And this was not important, I was not interested in discussing with the technical staff, it does not make sense. The technical staff had their arguments, but it was a discussion between technicians and me, and the leaders became the audience.

Another officer narrates:

Our partners experience serious difficulties in drawing up the monitoring reports to be submitted to Ibis. Unless there is a *técnico* to take care of it, their level of compliance with Ibis's methodological requirements is deplorable.

The technical staff (*los técnicos*) of the indigenous organizations are usually non-indigenous persons with some educational background, whereas the indigenous leaders (*los dirigentes*) often have only a few years of primary school education. The LFA logic and indicators do not seem to resonate well with the latter. In general, when indigenous leaders were asked during fieldwork and interviews about *their* tools for monitoring, they emphasized the importance of daily feedback from the community bases and the judgement of member organizations at larger assemblies. For them, the success of a project is clearly linked to internal and collective assessments and less to predefined indicators for the achievement of project objectives. Programme officers too realize that progress in the partner organizations cannot always be captured by the LFA framework laid out at the start. A programme officer tells about a situation where an external consultant came to do a review:

It was impossible to evaluate outputs and things like that, if we took the project document as a starting point to see what had happened. Well, then we felt very bad, but we knew that the partner organization was managing very well. Instead it became an evaluation about how the partner had elaborated its institutional capacity, about the extent to which the Ibis support was appropriate in the relation with the partner, and how lines of action for the next project could be drawn. It was not an evaluation in a strict sense, but we formulated a new work plan on the basis of the detected progress. It was not carried out in relation to the project document but in relation to the process. We are interested in the processes, not in projects.

Comments by local Ibis staff suggest that many are aware of these tensions in the monitoring system, as they talk about indicators as an obstacle rather than as a facilitator of effective communication. At higher levels too, awareness of such limitations seems to exist, as is reflected in this quote from an Ibis application for Danida funding:

These two instruments [project cycle and LFA] are essentially neither process-oriented nor useful to facilitate learning among Ibis's staff, partners and expatriate advisers. (Ibis, 2002: 23)

Despite internal criticism, LFA is still adhered to in Ibis in order to comply with the demands of Northern governments. In its advocacy programme, Ibis encourages partners to play an active role in applying LFA with a view to being participatory and strengthening ownership. In practice, however, our interviews and observations suggest that this participatory approach is easily turned into a form of disciplining partners in a certain methodological logic – a logic that may even divert them away from their original role, namely, to bring about changes in a society that is built upon institutional discrimination of indigenous culture and its own ways of societal organization. This is contrary to Ibis's stated objectives which emphasize ownership, empowerment and the fulfilment of the collective rights and autonomy of indigenous peoples. Such disciplining and contradictions have also been signalled by Craig and Porter (1997) who conclude that participation and the conventional models to guarantee effective management are deeply contradictory.

Informal Practice: The Policy Dialogue

The other and very central element of monitoring practice in Ibis's South America Programme is what is called *diálogo político* – policy dialogue.⁴ The dialogue is only carried out in this region and is not included in the general Ibis manual of methodology. Policy dialogue forms part of the monitoring visits that the programme officers make to the organizations every three to five months. During the observed monitoring meetings the formal indicators were never referred to. A programme officer confirms this:

I think that in the end Ibis, in this case me, and [the partner] we are conscious that the document will not play any role in the relation between [the partner] and Ibis. Therefore we do not give it the necessary importance. It is a tacit agreement that it is a formality. We make the project in such a way that it is correct (. . .) the indicators are less relevant. It is to comply with Danida.

Programme officers explain that they do not follow specific guidelines or procedures for the dialogue that takes place. However, common qualities can be found.

Basically, the dialogues are meetings where programme officers visit the partner organization. Sometimes, supporting local NGOs also participate. Ibis staff in South America see these meetings as a necessary part of monitoring. It is a way of creating confidence between Ibis and its partners, a vital attribute in a society that is characterized by racial discrimination towards indigenous peoples and relations of mistrust between different groups. A programme officer discussed the importance of building trust between Ibis and its partners:

The first step is to establish political confidence. If you do not have confidence, it does not function. You have to talk, narrate, listen [to their stories] and be in the process with them.

Besides these dialogues being an opportunity to create confidence between Ibis and its partner, respondents argue that the meetings create a space for joint reflection on, and analysis of, the changes in political surroundings. During the dialogue, events such as negotiations with politicians, popular protests and alliances made with other

civil society groups, as well as the role of the organization in these events, are discussed. Furthermore, information is exchanged on different political and development issues. Because programme officers have contacts with other NGOs and access to national and international sources of information, they are able to provide new and useful material in relation to ongoing processes of policy development and initiatives in other organizations. Frequently, meetings unfold as a relaxed conversation covering a wide range of topics. Nevertheless, the unstructured conversation serves as a way of monitoring aspects such as political formation and capacity building amongst leaders in the organizations. A programme officer explains how he assesses progress in such aspects:

When you start to discuss you also notice if there is any progress or not. If you go there again after six months and the leaders and community members still talk about what happened to the cow or the bull, then you know that something is not functioning. This is also a part of the monitoring, but you also discuss politics, you create sympathy, and you see if there is progress or not.

For programme officers, it takes considerably more time to travel to the partners in order to build the collective analysis and discussion amongst partners and programme staff than to administrate the formal monitoring reports. Additionally, there is no doubt that such policy dialogue requires a programme officer to have an in-depth understanding of the context, local power relations, social tensions and areas of support and opportunities. However, the programme officers prioritize the informal policy dialogue. Whereas formal reports may be written by technical staff in the organizations, the meetings in the field are opportunities for programme staff to meet indigenous leaders and sometimes the target group. It seems to be the widespread perception among Ibis staff that it is through these monitoring visits that 'you get insight into the consolidation process of the organization', as one programme officer expressed it.

The Suitability of the Two Approaches to Monitoring Advocacy

Our observations suggest that although the staff try to maintain the LFA structure for formal accountability – however rigid or irrelevant they think it is – in practice they manage the project monitoring in a more flexible and process-oriented way. As a consequence, the LFA is mainly used to deal with the outside world. It is a necessary instrument to access project and programme funding and to prove accountability to Northern governments who fund Ibis. The evidence suggests that the formal LFA monitoring is neither regarded nor utilized by project staff and stakeholders as a useful learning aid. According to them, its features and underlying logic match neither the nature of advocacy activity nor the indigenous understandings about how to effect change, so that it becomes a rather superficial and dutiful exercise.

On the other hand, policy dialogue monitoring is used mainly internally and seems to have certain qualities when dealing with advocacy. It is a process-oriented monitoring that is not limited by objectives and indicators defined at the outset of a project. It is flexible and has the ability to adapt to new situations and changing contexts, and it has the potential to capture both expected and unexpected changes.

It is open-ended and takes into account what has actually happened in the social and policy environment of the partner organizations. The policy dialogue is, as the name indicates, a dialogue between different persons, views and interpretations of reality, and this has the quality of bringing different meanings of, and possible disagreements about, the advocacy process into the open.

With Giddens's (1984) concept of the 'reflexive monitoring of action', we can understand the monitoring practised through policy dialogue between Ibis and partners as a regular characteristic of everyday action. To Giddens, human action is a continuous flow of conduct ordered into social practices. The continuity of practices presumes reflexivity, which is grounded in a continuous monitoring where purposive agents reflect on their practices. Through the policy dialogue, the indigenous organizations and Ibis are monitoring their activities and the political context as a routine, day-to-day activity rather than engaging in monitoring that is motivated by specific wants linked to objectives in the Ibis project. As purposive agents, the leaders will always have reasons for their activities even though they might not be a part of the project or planned activities. At the same time, these activities may be relevant for the achievement of project objectives. If we understand the Ibis project as only a fragment of the indigenous peoples' struggle for recognition and that this struggle has to be seen – and monitored – in a much broader perspective than the project allows for, then the political dialogue seems to have advantages over a strict monitoring of predefined indicators.

Obstacles to Learning

In this section, we explore the extent to which the monitoring of advocacy in Ibis actually leads to learning and how learning is constrained by its sociopolitical nature. Although there are many sources of learning in Ibis – reviews, studies undertaken by other organizations and literature in general – the following analysis focuses on the learning that takes place through the daily monitoring. As we have seen in the previous section, the policy dialogue between programme officers and partners indeed seems to provide some room for learning. However, learning triggered by such monitoring practices in Ibis also has some limits.

Indications of Suboptimal Learning

Our observations and interviews point to several areas where learning is sub-optimal in that relevant experiences do not become subject to critical discussion and/or lead to adaptation of organizational practices.

One such lack is that there does not seem to be a systematized way of processing the information collected in monitoring meetings, and there is no organized distribution or sharing amongst actors in the form of reports, seminars, etc. For example, we observed great variability in the extent to which programme officers make reports or take notes about the monitoring visits. One programme officer does not take notes at all, whereas another has shelves in his office full of notebooks containing information from the many meetings with counterparts. However, here too, none of the information is exchanged, so that in both extreme cases nobody other than the programme officer is informed about what decisions and changes

have been made, their justification and the process leading to these outcomes. Thus, the learning from the monitoring takes place at the interface between programme officers and partners, and it does not involve other actors in Ibis.

Another indication of limited learning is that project elements (objectives, indicators and activities) are seldom changed in the project documents, even though the project in practical terms changes during its life-cycle. This prevents learning in the organization, given that the project document remains a significant means of communication between, especially, actors at higher organizational levels. Thus, the learning that takes place remains largely implicit and informal, and again does not extend easily into the realms of headquarters and governmental donors.

A third limitation seems to be that LFA and indicators persist as the formal monitoring policy, even though programme officers regard these as being inappropriate for monitoring advocacy with indigenous partner organizations. In the interviews, programme officers indicated that it would be reasonable to change monitoring policy, but little initiative has been taken to that effect.

A fourth observation relates to the lack of use of reports made by expatriate advisers who are contracted for a two-year period to work in the indigenous partner organizations or local NGOs. The advisers make semi-annual reports about their activities and compliance with objectives of the post. However, it is the experience of all eight advisers in the South America region that their reports are rarely read or used by anybody and that their posts are seldom monitored. This again may lead to the loss of key opportunities for learning.

Sociopolitical Obstacles to Learning

The observed limitations in learning about advocacy within the organization are not accidental but appear associated with several sociopolitical conditions and influences.

In general, suboptimal learning appears to be related to lack of time, mechanisms and motivation in the organization. One programme officer answered:

Institutionally there does not exist any mechanism for learning. We say that we are a learning organization, but we do not have any mechanisms.

According to this respondent, the creation of room and incentives for learning is still not a priority at the field level, despite all the rhetoric about learning. Hence, motivation to improve learning and work out appropriate mechanisms remains low.

Interviews suggest that the scarce distribution of information among different actors in the organization may well have to do with competition that exists between the three country programmes in the region (Ecuador, Peru and Bolivia). Respondents indicate that staff try to protect against funding cuts for their own programme, without much consideration for the other programmes. The competition between the programmes in the different regions is also acknowledged at the head office in Denmark. The coordinator in South America describes her experience in her former post as desk officer at head office:

We know too little about what each other is doing and we do not share our experiences. I think it is absurd that we were four desk officers at the head office having the same function in relation to different countries and regions and it was incredibly seldom that we had the time, possibility and structure to talk about concrete experience. And

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sometimes we had a situation where one officer said: 'oh, you want to use this set up, but we already tried that and it went to rack and ruin.' . . . I think there is far too little exchange of experience between the five kingdoms. . . . An internal competition has always existed about who has the highest status and who receives most funds, which has the effect that you do not tell others about the problems and weaknesses in a programme.

As the regional coordinator states, it seems that this type of competition prevents openness towards the sharing of experiences, especially about failures in the different programmes.

Several motives can be identified for the continued existence of LFA and indicators. First, it has been the general perception that there were no real alternatives to the widespread LFA method. In connection with this, programme officers showed little confidence in their own ability and power to change the formal monitoring system. Our impression is that it is only since head office recently developed an interest in learning that the programme officers have felt comfortable expressing some of their criticism of the formal monitoring system. Second, if Ibis did not use the LFA, it would simply not get funding. In this way, upward accountability has directed the work. Third, the coexistence of the formal monitoring system and an informal monitoring practice can be understood as a situation from which programme officers can derive power and create room for manoeuvre. As long as programme officers manage to follow the formal logical framework upwards in the Ibis system, the situation gives them the opportunity to handle the relationships with the partner organizations in their own way, without much external interference. Thus, they create room for themselves and their partners to pursue projects that are not strictly speaking part of the formal policy and simultaneously manage to *ease* the relationship between Ibis's project world and the partner organizations. In this context, the replacement of LFA by an approach that is more conducive to learning might even be threatening to some extent, as it might increase not only transparency but also control over staff.

Our observation that the programme officers seldom make use of advisers' reports also seems to be associated with diverging interests and frictions. The expatriates' reports are often very critical of the progress of projects and the efficiency of the partner organizations. Ibis programme officers regularly present the information (including the criticism) in the advisers' report as an expression of a lack of understanding of the local cultural and political context. The advisers, in turn, complain that it is sometimes hard to get information from programme officers, or that information is concealed rather than shared. The phenomenon of Danish advisers delivering critical judgements after spending short periods in the region is felt by programme officers and partners as not doing justice to their own expertise, effort and judgement, and they use the brief presence of the advisers as an argument to delegitimize their critique, regardless of whether the advisers' judgements are appropriate or not. In all, we see that learning is affected by relational frictions and tensions over who can claim to be 'the expert', and associated interests of staff in maintaining their credibility and social status.

In sum, we have shown that learning in Ibis is influenced, and sometimes impeded, by sociopolitical processes, interests and conditions, such as incentives

structures, internal competition, the wish to create room for manoeuvre, status considerations and the associated strategic use of information. This illustrates that knowledge and learning processes are not neutral. On the contrary, both learning practices and the capacity to learn are shaped by the dynamics of power, agency, conflict and tension.

Discussion and Conclusion

On the basis of our analysis of the everyday practices and dynamics of advocacy, we have identified several characteristics of advocacy and argued that this poses specific challenges for monitoring it. Advocacy is a long-term process that almost by definition operates in a conflictive and ever changing environment, and that requires an adaptive approach and flexibility with respect to the specific objectives and activities that are being pursued. Moreover, potential impacts and relevant dynamics are often difficult to observe and/or hidden behind the scenes, whereas any 'success' is likely to be contested and usually depends on many actors and factors so that specific contributions of a project cannot be isolated. In view of these characteristics, we have argued – inspired also by authors such as Mosse (1998) and Estrella (2000) – that learning-oriented monitoring of advocacy must focus on progress in processes rather than on predefined results, take into account contextual dynamics, and make interpretative differences explicit rather than impose an 'objective' reality.

Interestingly, our observations regarding the actual practices used to monitor advocacy in Ibis show that programme staff have developed an informal, internal monitoring routine, labelled policy dialogue, that indeed is quite flexible, process-oriented, context-sensitive, and able to capture intended and unintended consequences as well as make use of multiple realities. At the same time, Ibis also maintains a formal monitoring system based on predefined indicators, grounded in LFA and project documents. The approach is practised across all levels in Ibis, and serves mainly to create legitimacy and secure funding from the Danish government under the current system of accountability and control.

The two monitoring practices, LFA and policy dialogue, illustrate a clash between two different views on planning and development. The LFA and indicators are influenced by an instrumental approach to development that embraces the idea that it is possible to plan development intervention beforehand in a straightforward manner, emphasizing rationality, cause-effect relations and control. The policy dialogue is associated with another idea of development and change in which ex-ante planning plays a more limited role, and which recognizes that development is a socially constructed, negotiated and emergent process, to which interventions need to be adapted continuously. Interestingly, our evidence suggests that this latter kind of thinking seems to resonate better with the indigenous leaders' understandings of change. As our empirical evidence suggests, advocacy processes, outcomes and impacts cannot be captured easily through the employment of a monitoring approach that assumes that advocacy work can be planned and 'engineered' in advance. It is not surprising, therefore, that respondents in this research did not find LFA and its predefined indicators

useful in terms of providing learning support as it fails to enhance insight into the everyday dynamics of advocacy and the ways in which it can be supported (more) effectively. The argument here is not that indicators in themselves cannot be useful; after all, one does need (quantitative or qualitative) indications of some kind in order to be able to make inferences. In the sphere of advocacy, however, these cannot be usefully defined beforehand, must be allowed to evolve with time and may have to be formulated in a more process-oriented fashion.

Although the informal system of policy dialogue seems to contribute to learning at the interface between individual programme officers and indigenous partners, the results of the policy dialogue often remain implicit and are not formally communicated to other levels in the organization. This reduces learning from field experiences at the higher levels and creates a tension between understandings in different organizational realms. One may wonder whether the described tension is indeed a serious problem that needs to be addressed, or whether it is the normal situation in organizational life and development work, and/or even serves usefully to meet requirements and provide room for manoeuvre in different hierarchical contexts. Although we certainly agree that not everything that is important at one level may necessarily be relevant at another level, we feel that – in the Ibis case of monitoring advocacy – there is reason for concern. The interpretative differences between the formal and informal, the explicit and the implicit, the higher and lower levels, respectively, are too significant to be healthy, not least because they are associated with completely different modes of thinking about the nature of development processes. In addition, maintaining two largely disconnected monitoring systems seems a waste of energy and resources. And, finally, a better explication and communication of insights generated at the level where actual advocacy experiences unfold is crucial for the improvement of horizontal learning among advocacy initiatives in different contexts, regions or countries, as well as for the enhancement of reflexivity within a specific advocacy situation. In the case of Ibis, this problem is indeed recognized and efforts are being undertaken to experiment with new approaches (e.g. Davies and Dart, 2005) and to improve horizontal exchange (see Ringsing, 2003).

It would be a mistake, however, to think that more effective learning can be fostered solely and simply by new methods, tools and/or the creation of platforms for communication and collective reflection. We have shown that both the way and the degree in which learning occurs is influenced by a variety of sociopolitical aspects and conditions. Thus, any attempt to enhance learning is unlikely to be as smooth as theories on social and/or organizational learning often portray, essentially because knowledge and power are intertwined to such an extent that learning is likely to affect social relationships (see Leeuwis, 2004; Long and Long, 1992). As we have indicated, it may well be beneficial for some to withhold information and informal practices, for example in order to enlarge one's room for manoeuvre and/or reproduce expertise statuses and resource distributions. Moreover, making informal understandings and practices explicit may lead to a challenging of ingrained practices, procedures, role divisions and relations, and can easily lead to organizational tensions. The improvement of learning, then, will require a 'safer space' (Habermas, 1981) where actors can bring their knowledge

and views without fear of being ‘punished’. This is said despite our recognition that the idea about a safe space is at the same time an illusion. Due to the complexity, unpredictability and power-laden-ness of social interaction it is fundamentally impossible to create a completely safe space. Nevertheless, the social space (and need) for learning can be enhanced in various ways. In addition to methodological improvements, managers in an organization may, for example, change reward structures, create new urgencies and interdependencies among actors, or introduce mechanisms through which negative experiences can be communicated in a more anonymous way. This shows that the improvement of learning-oriented monitoring itself also requires affirmative political action and leadership.

Notes

1. This work has been called ‘people-centred advocacy’ by some NGOs (Chapman and Wameyo, 2001).
2. Ibis, ‘Proyecto fortalecimiento y consolidación de la estructura organizativa del consejo de Ayllus Originarios del Departamento de Potosí’, 1 May 2001–30 April 2003.
3. Unfortunately, the politicians of the incoming government did not feel bound by the agreement made by the former one, and therefore no extraordinary session was held in the parliament to consider a possible constituent assembly.
4. In this article we use the commonly accepted English-language phrase ‘policy dialogue’. There is often some confusion between policy and political dialogue, and it should be noted that, as used in this article, there continues to be an element of value-based discourse (e.g. political) within a policy context.

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