

Main Report

Champions for 'Life': How to identify, support, and evaluate advocates for social change

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Executive Summary

Background and objectives

‘Champion building’ is a key advocacy tactic that many organizations including the Bill & Melinda Gates Foundation (BMGF) employ in their influencing work. BMGF and its partners have extensive experience engaging with and supporting champions but there is a gap in the literature in bringing wider experience together to understand what this adds up to and what generalizable lessons can be drawn from it.

This report, commissioned by BMGF, seeks to contribute to the wider field of advocacy and leadership development by presenting and collating learning from the literature and practice of champion building, including planning, implementing, and measuring the effectiveness of these efforts. The research focus is on ‘grasstops’ – as opposed to ‘grassroots’ – champions who we define as individuals who are in a position of power or influence to advance an issue or a cause. However, during the research process we found useful information that was relevant to ‘grassroots’ champions. As a result, while the primary focus remains on ‘grasstops’ champions, there are references to champion building applicable to both.

Methodology

The first phase of the research consisted of a document review of publicly available and internal BMGF documents to synthesize learning on champion building from a wide range of literature sources such as academic articles, activity reports, and monitoring and evaluation data. We complemented our document review with semi-structured key informant interviews with BMGF staff and other relevant stakeholders in the advocacy and leadership development space to explore issues and themes emerging from the literature.

In the second phase of the research, we identified eight case studies to explore, in more depth, particular dimensions of champion building. Key findings from the case studies are highlighted in this report to illustrate best practice from current champion building efforts. Please see [Annex 2](#) for the full list of case studies.



Key findings

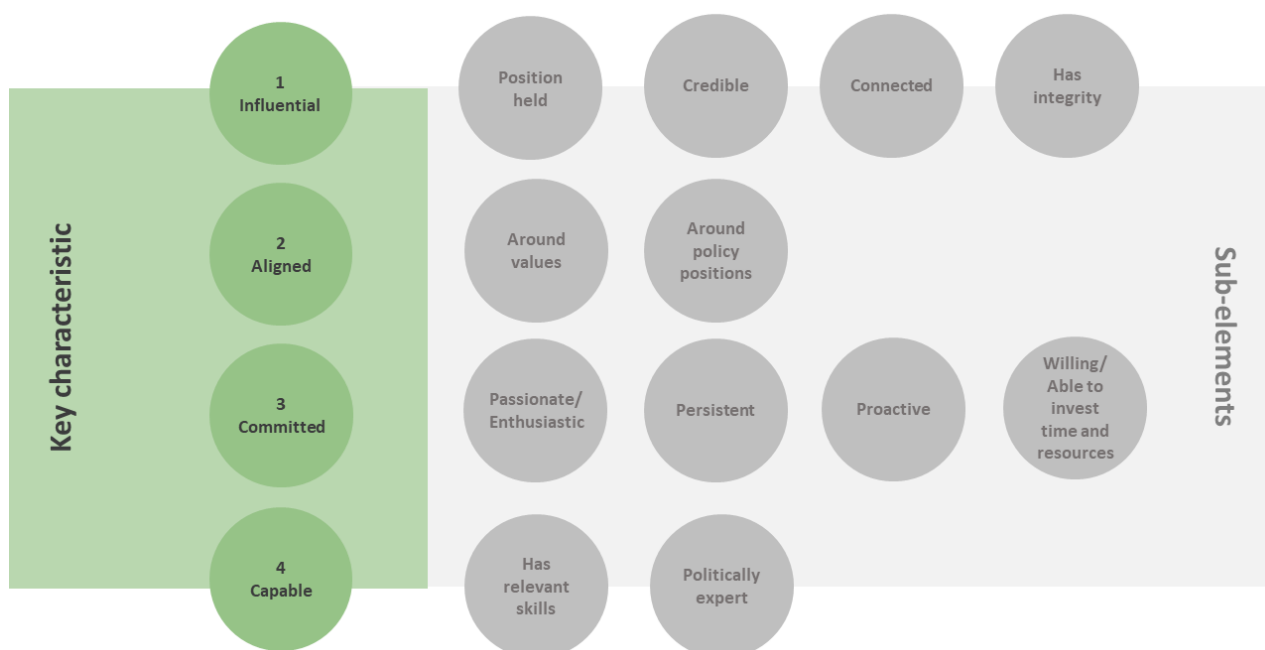
A

Champion building definitions and terminology

Definitions

We found 17 definitions in the literature relating to champions, and/or using terms that are synonymous to a 'grasstops' champion. These reveal ten commonly referenced champion characteristics, summarized as: **1) Influential; 2) Credible; 3) Connected; 4) Has integrity; 5) Committed; 6) Passionate/Enthusiastic; 7) Persistent; 8) Proactive; 9) Has relevant skills; and 10) Politically expert.** We found alignment around values and policy positions to be important, but this seems to be assumed rather than explicitly stated in most of the literature. Similarly, it is clear that influence can come from a position that a person holds, but this is rarely spelled out.

In our analysis, the key champion characteristics can be grouped and categorized as follows:

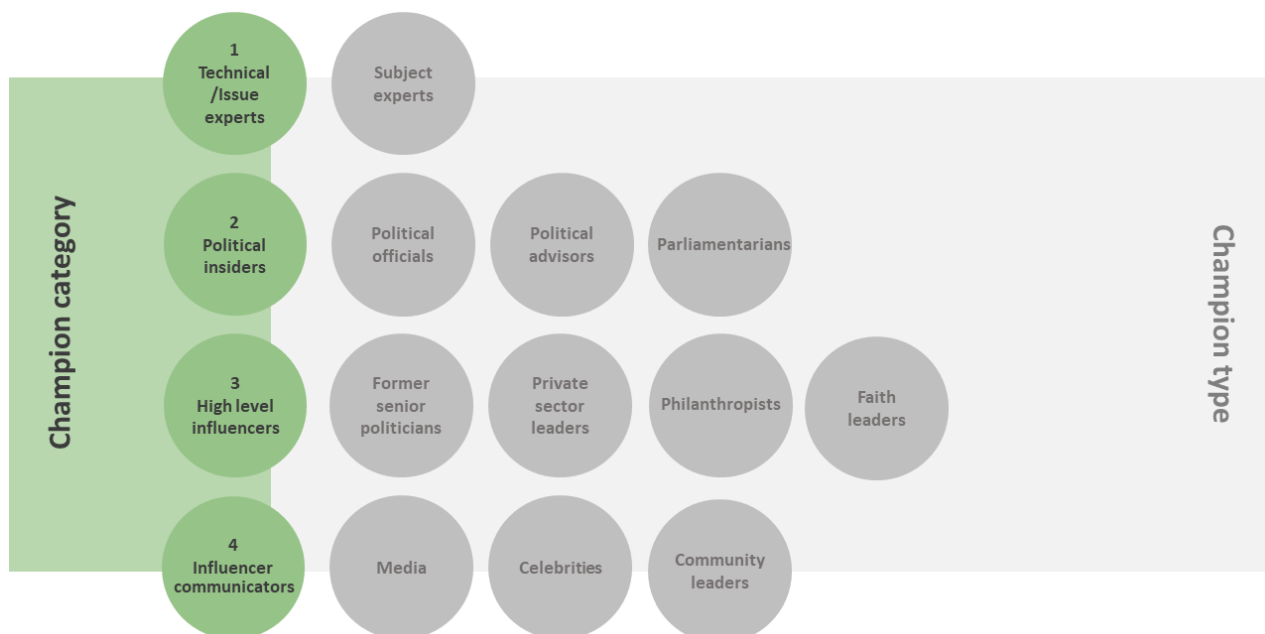


Consistent with this, we suggest defining a (grasstops) champion as “an individual who is **influential, aligned, committed, and capable** [in advancing an issue or set of issues] and who demonstrates their commitment through action.” The four key characteristics can be defined as:

Key characteristic	Definition
Influential	A champion has the ability to affect priorities and decisions - because of the position they hold and/or their capacity to persuade or put pressure on decision makers.
Aligned	A champion shares a common position [with the organizations/groups they are partnering] around the resolution of a specific policy issue and/or more broadly, in advancing common values.
Committed	A champion demonstrates their continued dedication to an issue or set of issues through persistence, passion and being proactive.
Capable	A champion is equipped with the right skills and knowledge to be effective in advancing an issue or set of issues.

Champion types

Champion building approaches will vary by the *type* of champion, according to the nature of the influence they can exert and/or the source of that influence. A few examples of different types of champions are cited in the literature but these are not generally arranged in a typology. However, looking across and combining these different examples, we have identified the following four categories of champions: **1) Technical/Issue experts**; **2) Political insiders**; **3) High level influencers**; and **4) Influencer communicators**. These categories provide a helpful way of grouping different types of champions, allowing for consideration of champion types according to their common characteristics:



B Planning and targeting champions

Champion building as a component of wider advocacy

Whilst the relative importance of champions as part of wider advocacy and communications tactics, as well as the relative importance of different tactics, will vary according to issue and operating context, in most cases, there will be a high reliance on champions to deliver these tactics effectively.

In particular, the need to plan work with multiple champions was stressed in the literature on champion building and in particular, in our key informant interviews. Working with a **diverse mix of champions with different spheres of expertise** allows for a **strategic approach to mobilizing different constellations of support**. The fact that different champions will have **salience with different audiences** also highlights the need to work with champions from diverse backgrounds.

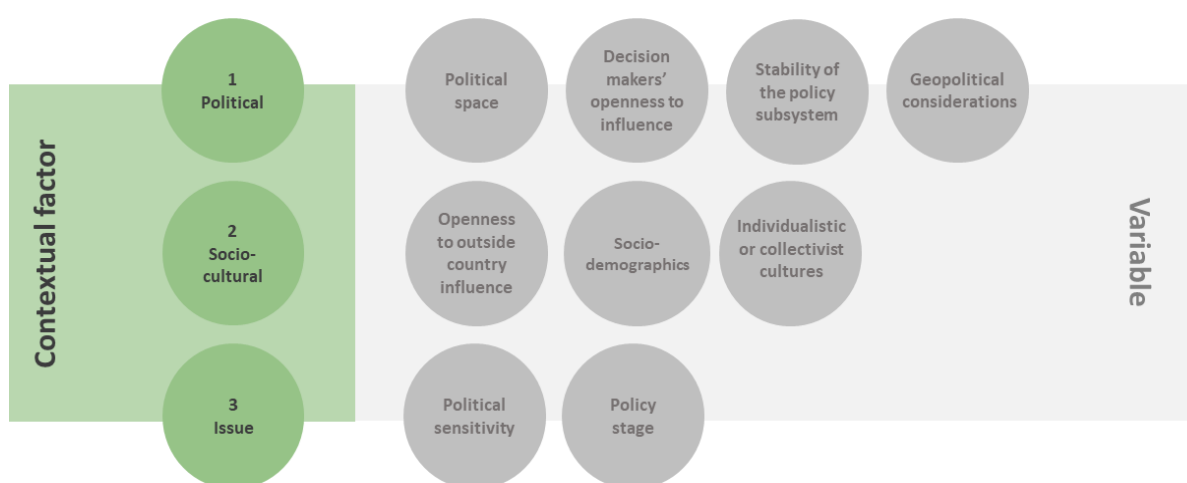
Engaging potential champions can also create an opportunity to support wider and more diverse voices in policymaking. Champion building can be about more than identifying those who are currently influential, and trying to work with them; it can be a vehicle for intentionally expanding leadership. Specifically, when considering investments in champion building, there is an opportunity to explore ways to address and rebalance inequalities around whose voices are heard, and who has power in decision making processes.

Diversity in the pool of champions also increases the chance of taking advantage of unexpected opportunities, making it more likely that there is an opportunity for influence when the situation changes: “It is about having a pool of people you can call upon when you need them.”

For organizations with diverse country portfolios, it makes sense to think of champion building strategies sitting outside of (and complementing) single issue strategies – because (a) the effects of champion building investments will often be seen beyond the timescales within which a specific policy issue plays out, and (b) champions may transcend issues rather than being associated with just one. Given this, a possible starting point for champion building could be a country level assessment, mapping the different champion types according to: (a) their relative importance as a route of influence in the specific geographic context, and (b) the current strength of existing champions of this type. This would then highlight the champion building investments that should be prioritized in country portfolios.

Champion building in different operating contexts

It is important to consider political and sociocultural factors to identify the ‘right’ type of champion. The key contextual factors we identified in the literature are: **1) Political**; **2) Sociocultural**; and **3) Issue-related**.



Headline conclusions include the following:

Context	Specific implications
Political space	Where political space is restricted or closed, identify champions who might provide alternative entry points (e.g., outside central government), and/or traditional authority, and/or from outside the country. Building a plurality of champions can help provide solidarity and security.
Decision makers' openness to influence	When coalitions of decision makers are expansive, be alert to the risk that access to decision making processes and fora does not always equate to meaningful influence. When coalitions of decision makers are restricted, consider champions with indirect influence (who can influence those people who are in the inner circle of influence).
Stability of the policy subsystem	In highly stable contexts, plan to work with champions in the very long term (10+ years). In highly fluid contexts, reach beyond the governing coalition, identify champions who can generate and focus media and public attention and plan to build a diversity of champions, to cover different eventualities.
Geopolitics	Champion building investments should fit within wider strategies and investment approaches that determine which countries and groups of countries should be prioritized – this could mean, for instance, prioritizing longer-term investments in emerging nations rather than in traditional donor countries.
Openness to influence from	When government is open to outside influence, share and develop international intelligence and information exchange, to identify who might best influence whom, when.

outside-country champions	When government is skeptical of outside influence, invest in emerging indigenous leadership and identify potentially influential regional champions.
Socio-demographics	Consider which demographic groups are most important to your goals and identify champions based on their likely appeal to those groups.
Cultures	When an individualist culture is dominant, identify champions with 'hard' characteristics, such as the socioeconomic position they hold and the formal power they exert. When a collective culture is dominant, identify champions with 'soft' characteristics, such as warmth and generosity.
Issue sensitivity	When the issue is highly sensitive, it may be comparatively more important to supplement grassroots champion approaches with constituency level work and to give particular attention to bipartisan coalition builders.
Stage in the policy process	At the agenda setting stage, prioritize champions who are best placed to encourage acceptance of a new policy or program and advocate for innovation, at both public and policy levels. At the policy formulation stage, prioritize champions who can offer technically feasible solutions and who are well placed to undertake insider engagement.

Criteria in identifying and assessing champions

When identifying and assessing potential champions, the literature puts strong emphasis on taking sufficient time to get these early phases of champion building right.

- Some champions can be relatively easily identified because of their current **influence**. However, in many cases, it will be important to identify those with potential, who will or might have likely future influence.
- One way that effective champions differ from others is through their **commitment**. Persistence is the most mentioned characteristic of champions across the literature.
- Issue **alignment** is an important factor to consider, but there is space for some evolution in champions' positions over time, and space to operate where alignment is not full. There are risks in requiring too-close alignment in that impressions of 'orchestration' (a sense that champions are being closely directed or coordinated) can lead to questions about champions' credibility and legitimacy.
- An effective champion must be **capable** of effectively fulfilling the role they are taking on (in terms of having the requisite skills and expertise). In general, though, this is not a necessary condition for selection, in that capabilities can be developed through 'champion building' processes.

Potential champions who do not already exhibit the characteristics discussed above must be judged to some extent on their potential. One interviewee described recognizing potential as both a "science and an art" and that unexpected champions can emerge in unpredictable ways due to unusual circumstances. In the U.S., for example, the Parkland students stepped into a national leadership role on gun control – after a mass shooting at their school – having exhibited limited or no obvious prior public 'champion' characteristics. The same could be said for other high-profile champions like Malala or Greta Thunberg.

In assessing potential champions, it is important to gather, and make sense of, good intelligence, but there will also be an element of judgement involved.

Practical approaches in identifying and assessing champions

Looking across the literature, we found two main tools for identifying and assessing potential champions, explored in turn below: **1) Stakeholder maps** and **2) Champion indices, or spectrums**. Stakeholder

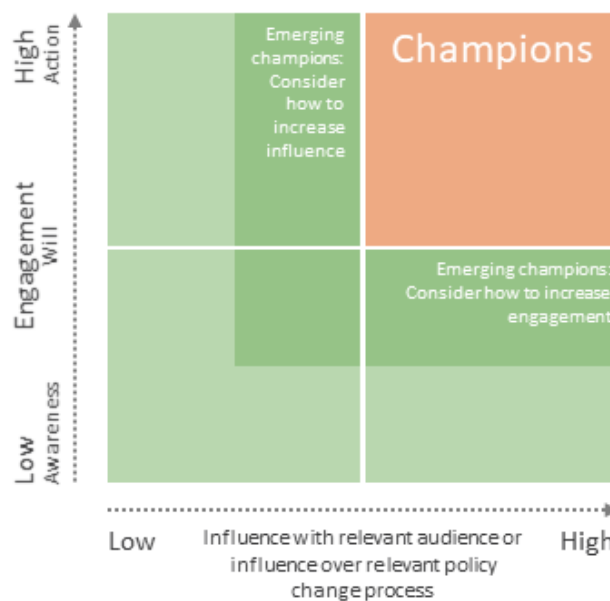
mapping is widely cited as a tool in the literature on champion building, as well as in advocacy planning, more generally. It involves:

1. Identifying and listing all the actors that may affect the policy outcome under review.
2. Mapping these actors according to agreed criteria.
3. Analyzing the results and considering potential champions.
4. Selecting champions to prioritize, based on the picture that emerges.

Stakeholder mapping most commonly relates to a person's (a) influence, (b) level of commitment to the issue (through assessing levels of engagement and/or other markers of commitment for example), and (c) issue alignment. The results of this mapping are represented in a two-dimensional matrix (with size, shape or color used to represent any additional variable). These results can then be used as basis for developing individually-tailored champion development plans.

'Indices' offer an alternative way to stakeholder maps to identify and assess champions. These model stakeholders as part of a spectrum, typically along a set of gradations from champion to opponent. They are a less commonly used tool and guidance on their practical use is less available.

As a tool, stakeholder maps have the edge on champion indices because they are widely used, easy to use and adapt, and supported by clear guidance. Results are also relatively easy to distil and make sense of because they can be presented in a straightforward diagrammatic fashion, as below:



Source: Roma and Levine (2016)

In identifying and assessing potential champions:

- It is important to be able to make well-informed decisions when identifying and assessing potential champions. This typically requires deep knowledge of relevant processes (such as policy processes).
- It can be helpful to supplement internal expertise with the knowledge and perspectives of others, to help ensure access to a wider pool and constructively question any internal assumptions.
- Depending on the champion type and approach, there might be an element of self-selection, with individuals asked to nominate themselves.
- Get the balance right between quality and quantity. Many stress that quality is more important than quantity, that is, a smaller number of effective champions is better than a greater number of less effective champions.

C

Implementing champion building programs

Understanding champions' motivations

Understanding champions' motivations is crucial when considering how best to engage and work with them. This means paying attention to champions' extrinsic, as well as intrinsic motivations by keeping in mind how the relationship can benefit champions themselves. Possible benefits include: (a) Funding and resources, (b) Recognition, (c) Skills building, (d) Access, to key meetings and events for example, and (e) Relationships.

Some literature points to the possibility and advantages of involving champions themselves in considering how best they can be deployed and how the partnership can best evolve.

It is important to recognize that champions' development routes are not always linear and that the approach to champion engagement needs to be fluid and organic. It may be better to offer a spectrum of opportunities for engagement and think in terms of an engagement 'cycle' rather than an incremental 'ladder'.

Developing champion support programs

While it is important to develop individually tailored plans, and the balance of support needed will vary according to champion type, it is possible to categorize the types of support offered to champions in their development pathways. Support offered to champions typically involve a mix of: **1)** Resourcing; **2)** Creating opportunities for recognition; **3)** Networking and relationship building; **4)** Skills building; **5)** Content support; **6)** Learning opportunities; **7)** Well-being support; **8)** Expanding access, to resources and to convening opportunities for example; and **9)** Establishing links to constituency-level priorities (e.g., for Members of Parliament). All these are underpinned by the importance of relationships and of trust, which comes from mutual investment in an ongoing, long-term relationship.

Sometimes a formally structured approach will be appropriate (such as a fellowship scheme or the establishment of a formal network). At other times, support will be more ad-hoc and one-off. There was very little in the literature relating to either costs of different elements within champion building programs or providing commentary on their replicability. However, we generally find that structured programs are more easily replicated than less structured programs.

Potential or emerging champions are likely to benefit from a more structured package of support, through fellowship schemes for example, because organized, systematic programs offer a range of development opportunities. Those who already exhibit champion characteristics, will likely benefit from more one-off, tailored support, because the program could target specific areas of growth.

Sustainability and timescales

There is strong consensus that champion building involves a long-term commitment, and that it is important to be realistic about the timescale of change. This is consistent with what is known about policy change; while the specific timescale of change depends on the issue and context, issues are rarely resolved in the short term. In addition to the uncertainty around timescale, the likelihood of results is not always predictable.

Some early results from champion building might occur in the medium-term (1–3 years) but it is likely to take at least four years before there is robust evidence of an investment paying off. Change may take comparatively longer when working with new constituencies and investing in emerging champions.

Timescales also point to the need to pay attention to champions' possible difficulties in maintaining focus on an issue. Maintaining focus can be difficult and strategies to prevent or address fatigue may be needed.

It is important to consider the balance of investment in existing or potential/emerging champions. Thinking in the long-term is likely to be particularly relevant when seeking to build new leadership rather than simply working with existing leaders.

Programs should consider how best to build genuine relationships and avoid an 'orchestration mindset' that can stand in the way of sustaining champions' commitment. Having ownership and space for self-direction encourages champions to stay engaged and can foster their individual creativity.

Funding should reflect the timescales of change. Funders should consider longer life-cycle investments and that short funding horizons may work against achieving sustainable change. Various sources also highlight the need for, and value of, unrestricted funding as a way to build in flexibility to programs.

Networks of champions

It is often effective to consider grouping cohorts of multiple champions as networks. For the purposes of this report, we define networks as "any combination of actors who have come together through shared interests or values for the main purpose of seeking to influence the policy process". Networks are evolving entities, with continually developing processes aimed at producing results that move towards the network's ultimate purpose.

While networks will not always be appropriate, it is clear from the literature that they come with a set of advantages that individual champions operating alone do not benefit from. Networks can help generate a sense of community as well as create opportunities for peer exchange and learning, provide effective vehicles for identifying, filtering, and sharing information, and promote mutual learning. Networks can also facilitate collective leadership and enable people to better engage with problems that require collective action. Change in individual leadership may be insufficient to create sustainable impact, given wider societal constraints, and so networks of actors may be needed to overcome the barriers to change. Networks can also amplify members' influence, and under the right conditions, groups of actors will make better decisions than individuals.

However, networks can be difficult to maintain, because of tensions between members or from a lack of interest in, or commitment to, operating as part of a network. To support network health, sources stress the value in encouraging member-to-member interactions and the importance of adopting a 'network mindset' based on shared decision-making, collective intelligence, and open learning.

Network members should share a common purpose, but with room for diversity. Decisions about best structure and timescale are defined by context and purpose.

Organizations may be well placed to play different support roles to networks, in different combinations, according to context. Typical roles that funders play in networks include being a: **1) Catalyst** (e.g., by playing a role in establishing a network); **2) Sponsor** (by providing resources); **3) Weaver** (by working to increase connections among participants and growing the network); **4) Coach** (by providing advice, as needed); **5) Participant**; and **6) Assessor** (by diagnosing network achievements and needs).

Engaging skeptics and opponents

As in all engagements, when thinking about skeptics and opponents, it is important to understand and respond to the motivations that they have for the positions they hold and for their behaviors.

Skeptics and opponents should be considered differently. Essentially the aim should be to encourage skeptics, while seeking to 'neutralize' opponents. In all engagement, it is important to be realistic about

expectations: rarely do people adopt different values or accept positions that are not aligned with their values, and efforts to change people's minds face many barriers.

There may be an opportunity to engage skeptics and opponents through others. Given the importance people assign to the behavior of peers, drawing in support from across all parties can create important space for others, who are in parties not traditionally associated with support for a particular issue.

There are potential advantages in seeking to depolarize the issue by downplaying differences and focusing on shared goals and mutual inter-dependencies.

Finding ways to offer something valuable to current skeptics and opponents may create an opportunity for influence in the future, as well as build up credibility and credit.

Finally, it is important to find the right messenger for a particular audience and to ensure that messaging is targeted to key audiences' concerns.

D Measuring champion building

Considerations in developing an MLE approach

The value and importance of ongoing monitoring is strongly and widely stressed in champion building measurement approaches, with the emphasis on monitoring as a tool for learning. Taking a long-term view is important too, given the timescales of change; however, approaches to monitoring and evaluating champions have tended to focus on the shorter term, even while acknowledging that this misses crucial longer-term outcomes. There is a need and opportunity to trial longitudinal reviews that look across the very long term (10+ years).

We identified a range of methods – drawn from wider advocacy evaluation methods such as network analysis – which are used in both monitoring and evaluating champion building programs. These include key informant interviews, surveys, social listening, case studies, social network analysis, 360 feedback surveys, timelines, experimental studies, observation, stakeholder maps, and capturing ongoing feedback.

Existing monitoring frameworks appear often quite challenging to implement in practice given their resource and time implications. Organizational monitoring, learning, and evaluation (MLE) approaches should be designed in a way that best considers different resource and investment implications according to (a) MLE resource capacity and (b) the relative importance of champion building as part of an overall influencing strategy.

Frameworks and approaches

Existing monitoring frameworks consider several different areas, in various combinations. These are: **1)** Actions; **2)** Quality of champions' relationship with the relevant organization; **3)** Influence; **4)** Alignment; **5)** Skills/capacities; **6)** Relationships; and **7)** Signs of increased political will. Actions are by far the most tracked element in these frameworks.

Some monitoring approaches use checklists (of actions for example) to show progress (or reveal the absence of it). Others use scorecards (based on rating scales), which is a more streamlined approach. The simpler scorecard method may well be preferable given how time-consuming tracking can be.

Champion building results are shown through both (a) champions' actual influence on policy and funding and (b) champions' development, so that they are better placed to exert future influence. However, monitoring frameworks in the advocacy field typically stop at the point of measuring and rating

champions' actions, and not what those actions lead to, and so the links between inputs, outputs and outcomes tend to be assumed or claimed, rather than evidenced. This contrasts with the tracking frameworks associated with the leadership field, which embed consideration of outcomes within the overall approach. It points to the need to supplement tracking approaches with more in-depth, qualitative assessments of the dynamics of change and how different actors and factors have contributed to it, or not.

In reviewing champion building programs, it makes sense to consider both (a) champions' contribution to policy and funding changes, and (b) the extent to which champions are better placed to have influence on future policy and funding decisions. The latter can be addressed through tracking champions' progressions; the former should best be assessed by considering champions' contributions and roles, within wider campaign evaluations for example.

Recommendations

Definitions and terminology A	<p>As a common working definition, a champion could be defined as “an individual who is influential, aligned, committed and capable [in advancing an issue or set of issues] and who demonstrates their commitment through action”.</p> <p>Those engaged in champion building initiatives should consider adopting a typology in which there are four categories of champions: 1) technical/issue experts; 2) political insiders; 3) high level influencers; and 4) influencer communicators.</p>
Planning and targeting B	<p>In developing champion building programs, consider conducting country level assessments as a way to identify priority investment areas based on a review of needs, gaps and opportunities. Country level assessments could be aggregated to identify what regionalized or centralized programs of champion building are most needed.</p> <p>When developing champion building programs, consider how implications play out differently according to context, taking into account: 1) extent of political space; 2) decision makers' openness to policy influence; 3) stability of the policy subsystem; 4) decision makers' openness to outside country influence; 5) socio-demographics; 6) political sensitivity of the issue; and 7) policy stage of the issue.</p> <p>In identifying and assessing potential champions, focus in particular on their level of commitment. Also factor in their current and/or likely future influence. There is more scope to develop other characteristics in the process of champion building itself.</p> <p>Make sure the right people are involved in identifying and assessing potential champions by (a) ensuring that people with deep knowledge of relevant (political and policy) contexts are involved, and (b) drawing on the knowledge of others to reach beyond existing networks of contacts. Where appropriate, establish an approach that mixes proactive recruitment and self-selection.</p> <p>In decisions about trade-offs, prioritize quality of champions over quantity: in most cases, a smaller number of effective champions is better than a greater number of less effective champions.</p> <p>Use stakeholder maps to identify and map potential champions; select those to prioritize based on the picture that emerges. Map influence versus alignment on a matrix, and incorporate a summary judgement or score of (a) that person's level of commitment to the issue or theme, and (b) the extent to which they currently have the capabilities to act as a champion on the issue or theme.</p>
Implementation	<p>When working with champions, take time at the 'engagement' stage to understand a champion's motivations and the benefits they might be looking for, including in relation to (a) Funding and resources, (b) Recognition, (c) Skills building, (d) Access, and</p>

<div data-bbox="260 210 379 331">C</div>	<p>(e) Relationships. An engagement that brings benefit to all those involved is likely to be deeper, more sustainable, and effective.</p> <p>Those working with champions should consider the following support elements as a framework for considering - and continually plotting – the support a champion is likely to need: 1) Resourcing; 2) Creating opportunities for recognition; 3) Networking and relationship building; 4) Skills building; 5) Content support; 6) Learning opportunities; 7) Well-being support; 8) Expanding access to networks and resources; and 9) Establishing a link to constituency-level priorities (when appropriate). Ringfencing time to invest in ongoing relationship building as an integral part of champion programs should be encouraged and valued.</p> <p>To be consistent with likely timescales of change, foundations and others supporting champion building should commit long-term funding (4+ years) to champion building investments wherever possible.</p> <p>Where appropriate, champion building should operate to an explicit twin-track, working with existing champions, while also developing new ones. When investing in emerging champions, be intentional about expanding the diversity of voices advocating for an issue or set of issues in order to (a) avoid reinforcing existing power relations and (b) open up new opportunities for influence.</p> <p>Funders supporting champion building work should provide unrestricted funding where possible, to maximize flexibility and encourage and embed trust. This reflects the finding that maximizing champions’ latitude comes with substantial advantages and restricting their independence or seeking to over-manage the relationship can be problematic for the champion’s credibility.</p> <p>Where there is opportunity to bring people together, as peers and/or across champion types, and where there is good reason for thinking that potential benefits can be exploited, organizations should consider ways to encourage networking and networks, through a connecting and convening role, and through providing resources as appropriate. This recommendation reflects that networks come with a set of advantages that individual champions operating alone do not benefit from, such as enhanced peer learning, improved information flows, and greater collective leadership.</p> <p>Principles for working with skeptics and opponents should be consistent with the following (a) treat skeptics and opponents differently, (b) work through others, (c) seek to depolarize the issue, (d) offer something valuable, (e) think about the best messengers, (f) ensure messaging is targeted to audiences’ concerns, and (g) be realistic about expectations.</p>
<p>Measuring champion building</p> <div data-bbox="244 1675 363 1796">D</div>	<p>Budgets allowing, champion programs should include a plan that:</p> <ul style="list-style-type: none"> • Sets out how information is going to be gathered and captured and how and when that information will be drawn on, at key moments, to reflect on progress and consider any need to adapt the approach. • Builds in more substantive reviews over the medium and longer term, allowing for deeper consideration of questions about effectiveness and results. <p>Organizations that have made long term investments in champion building should consider commissioning – and making public – retrospective longitudinal reviews of relevant programs that have been operational over the very long term. This could help establish a sense of what methodologies are appropriate and what, ideally, needs to be in place for such reviews to be effective.</p>

Where resources allow, a champion building monitoring framework should relate to (a) influence, (b) alignment, (c) commitment, as shown by signs of increased activity and/or political will, and (d) how well placed they are, in terms of skills/capacities. These could typically best be tracked using a scorecard method in which standardized rating scales are applied.

Monitoring approaches adopted should be proportionate. Each organization's approach should be tailored according to (a) their MLE resource capacity and (b) the relative importance of champion building as part of their overall influencing strategy.

Foundations that support multiple grantees working in specific geographies and with common audiences (such as parliamentarians) should consider the viability of – and demand for – the creation of a single information point that all relevant grantees and partners can access. This could be done by providing support to an NGO or other partner to operate a real-time champion tracking system that others can draw on (rather than each organization being responsible for setting up their own system).

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List of acronyms

ACET	African Center for Economic Transformation
AFIDEP	African Institute for Development Policy
APPG	All Party Parliamentary Group
AVPN	Asia Venture Philanthropic Network
BOND	British Overseas NGOs for Development
BMGF	Bill & Melinda Gates Foundation
CGP	Coalition for Global Prosperity
DFID	Department for International Development
DPAF	Development Policy and Finance
DSW	Deutsche Stiftung Weltbevölkerung
EPF	European Parliamentary Forum for Sexual and Reproductive Rights
EU	European Union
FGM	Female Genital Mutilation
GALI	Global Accelerator Learning Initiative
GPA	Global Policy and Advocacy
GDPR	General Data Protection Regulation
GFAP	Global Fund Advocacy Portfolio
GHV	Global Health Visions
ICO	India Country Office
INGOs	International Non-Governmental Organizations
MLE	Monitoring, Learning, and Evaluation
MP	Member of Parliament
NVF	New Voices Fellowship Program
OAFSLAD	Organization of African First Ladies for Development
ODA	Overseas Development Assistance
ODI	Overseas Development Institute
OSF	Open Society Foundations
PAC	Program Advocacy & Communications
PCV	Pneumococcal Conjugate Vaccine
SADC	South African Development Community
SNL	Save Newborn Lives
SUN	Scaling Up Nutrition
TED	Technology, Entertainment, and Design
TOI	Theory of Influence
UHNWI	(Ultra) High Net Worth Individuals
UK	United Kingdom
UN	United Nations
UNF	United Nations Foundation
US	United States

Introduction

Background and objectives

This report presents the main findings of Itad's research on 'champion building' as an advocacy tactic. Although BMGF and its partners have undertaken a lot of work in this area, there is a gap in the literature in bringing this experience together to understand what this adds up to, and what generalizable lessons can be drawn from it. Specifically, the research explores how to identify champions and assess their potential as advocates in a particular context, how to engage, build, and sustain champions in long-term relationships, and how best to use monitoring and evaluation approaches to measure champion effectiveness.

The research focus is on 'grasstops' – as opposed to 'grassroots' – champions. For the purposes of this report, we refer to 'grasstops champions' as individuals who are in a position of power or influence to advance an issue or a cause. However, during the research process we found useful information that was relevant to 'grassroots' champions. As a result, while the primary focus remains on 'grasstops' champions, there are references to champion building applicable to both.

The main purpose to this research is to contribute to the global knowledge base on champion building. The primary audience for the findings and recommendations in this report are those who currently engage, or are thinking of engaging, champions as part of their overall influencing approaches.

Design and scope

The key research questions are as follows:

- What are the key characteristics that make an effective grasstops champion?
- In what situations and contexts should you plan to engage champions?
- What are the best practices for designing and implementing champion building programs?
- What are the measurement frameworks used to assess champion effectiveness?

As part of the research, we reviewed and coded over 170 publicly available documents on champion building (design and strategy documents, reporting documents, reviews, activity reports, academic articles, evaluation reports, monitoring data, etc.). Furthermore, the team conducted 40 key informant semi-structured interviews with internal BMGF staff and grantee partners (e.g., advocacy practitioners and monitoring and evaluation leads at advocacy organizations). For more detail see [Annex 1](#).

We engaged our Research Advisory Group in further discussions in order to receive independent advice on the latest thinking in both the theory and practice of champion building and advocacy. The Group has vast collective experience in research, consultancy, and implementation of policy advocacy and grassroots activism. Jedidah Maina, based in Kenya, is a senior development practitioner with expertise in formulating and implementing organizational and programmatic strategies, particularly experienced with building in rights-based approaches and working to incorporate community voices. Renuka Motihar, based in India, is an independent consultant working on social development issues, with a focus on the areas of young people's health and development, reproductive health, and broader social, leadership, and gender related issues. Dr. Duncan Green, based in the UK, is a Senior Strategic Adviser at Oxfam GB, Professor in Practice in International Development at the London School of Economics, and the author of 'From Poverty to Power' and 'How Change Happens'. Rhonda Schlangen is a widely published independent evaluation consultant based in the U.S., specializing in policy, international development, and evaluation.

The report also incorporates key findings from eight case studies, exploring different dimensions of champion building. For a full list of case studies and description, see [Annex 2](#).

Overview of report structure

Chapter A explores how champions are defined and described in the literature, summarizes their most important characteristics, and identifies key champion types and categories.

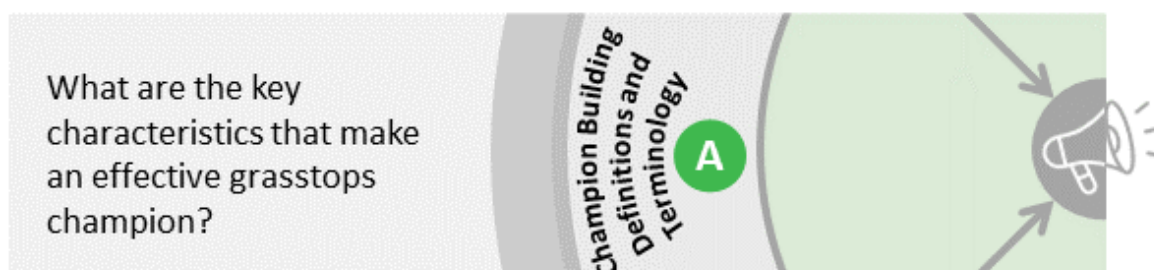
Chapter B explores champion building as an advocacy tactic, key considerations in different operating contexts, and criteria and approaches in identifying and assessing potential champions.

Chapter C explores the importance of understanding champion motivations, the different types of champion building support, and designing the right support package.

Chapter D reviews existing practices in monitoring and evaluating champion building and draws conclusions and lessons from them.

Chapter A: Champion building definitions and terminology

This chapter explores how champions are defined and described in the advocacy and leadership development literature, and summarizes their most important characteristics. It also sets out findings relating to the different types of champions and how they can be categorized.



1. Champion definitions and descriptions

We found 17 definitions in the literature relating to champions, and/or using terms that are synonymous to a 'grasstops' champion. Terms in the literature that convey the same meaning as 'champion' include 'elite leader', 'policy-' or 'development entrepreneur', 'change agent', 'influential messenger', and 'inside influencer'. These definitions are listed in [Annex 3](#). We have identified these various terms as synonyms for (grasstops) champions, because in each case they relate to influential actors in advocacy contexts, who use that influence to advance an issue or a cause. An elite leader, for example, "show[s] leadership ... in pursuit of agreed goals".¹ A policy entrepreneur "has a claim to a hearing ... [and is] persistent,"² while a development entrepreneur is someone who is "committed to improving and transforming their societies".³ Change agents "[get] others excited about the prospects for making a significant difference".⁴ Finally, influential messengers "[have] access to and credibility with [a target] decision-maker,"⁵ while inside influencers have "a status of being recognized as credible expert[s]".⁶

Analyzing these various definitions and the supplementary descriptions offered in the literature reveals 10 commonly referenced champion characteristics, summarized as: 1) Influential; 2) Credible; 3) Connected; 4) Has integrity; 5) Committed; 6) Passionate/Enthusiastic; 7) Persistent; 8) Proactive; 9) Has relevant skills; and 10) Politically expert. The full list of characteristics and sources is set out in [Annex 4](#).

In our analysis, these characteristics, as highlighted in the literature, can be categorized as follows in Table 1:

¹ Leftwich, 2009.

² Kingdon, 2003.

³ Faustino, 2012.

⁴ Management Strategies for Improving Health Services, 2014.

⁵ PATH, 2014.

⁶ Shephard et al, 2018.

Table 1: Champion characteristics and sub-elements

Key characteristic	Sub-Elements	Rationale
Influential	Position held Credible Connected Has integrity	The position a person occupies is one key element in defining their influence because positions of power come with control over assets such as information and access. ⁷ This source of influence perhaps goes without stating, which is why it is only implicit in the champion literature and rarely spelled out. Other factors are more explicitly referenced. Credibility, for example, is best conceived as one sub-component of influence – on the basis that people who are seen as credible are more likely to be listened to. Connectedness also leads to influence. And if someone is seen as having integrity, again they are more likely to be taken seriously.
Aligned	Around values Around policy positions	Alignment is mentioned only once in descriptions of champion characteristics, in a reference to the importance that a champion “supports ... goals aligned with the organization’s strategy”. ⁸ However, we believe that this is because in other cases it is <i>assumed</i> rather than explicitly stated. Clearly, alignment is important, as shown by how commonly alignment is highlighted as an important factor in identifying and assessing potential champions. As we explore in chapter B, section 6 , alignment may relate narrowly to agreement on a specific policy issue or more broadly, as expressed in common values.
Committed	Passionate/Enthusiastic Persistent Proactive Willing/able to invest time and resources	Being committed is widely seen as critical in the literature on champion building. Commitment is demonstrated through a person’s persistence, passion and being proactive as well as their willingness to prioritize time, attention, and political capital to help make change happen.
Capable	Has relevant skills Politically expert	Other champion characteristics found in the literature can be summarized as relating to being equipped with relevant capabilities, which refers to being well placed (i.e., having the right skills and being politically knowledgeable) to be effective as a champion.

As we explore throughout the report, this categorization creates a framework that can be used through the different stages of champion building. In other words, there can be an integrated approach from identifying and assessing potential champions through monitoring and evaluating their ‘champion-ness’ that uses the same key champion characteristics as selection and measurement criteria.

Establishing common vocabulary is a key element of field building⁹ and is the bedrock of developing common standards. If champion building is to be considered a field, then it will be important to set some parameters around what it includes (and what it does not). This means differentiating between champion building and wider advocacy initiatives that involve some kind of engagement with influential people (which is very common to, if not universal in, advocacy).

With this in mind, we detect some ambiguity around what actually qualifies as champion building that it would be helpful to resolve. For consistency we would suggest that:

- An initiative relates to ‘champion building’ only if it has a clear strategy for developing champions and there is a realistic expectation and intention that a person/the people being engaged will

⁷ Handy, 1993.

⁸ Stachowiak et al, 2016.

⁹ Stachowiak, Gienapp & Kalra, 2020.

become champions through that process. Other types of engagement – with skeptics or opponents for example – may be important, but do not necessarily constitute ‘champion building’.

- The term ‘champion’ should be reserved for someone who exhibits the characteristics of a champion. Those who do not currently exhibit champion characteristics (even if they are perceived as having the potential to do so) would be better referred to as ‘potential’ or ‘emerging’ champions.

Recommendation 1

As a common working definition, a champion could be defined as “an individual who is influential, aligned, committed and capable [in advancing an issue or set of issues] and who demonstrates their commitment through action”.

We offer the following working definitions of these champion categories in Table 2:

Table 2: Champion characteristics

Key characteristic	Definition
Influential	A champion has the ability to affect priorities and decisions - because of the position they hold and/or their capacity to persuade or put pressure on decision makers.
Aligned	A champion shares a common position [with the organizations/groups they are partnering] around the resolution of a specific policy issue and/or more broadly, in advancing common values.
Committed	A champion demonstrates their continued dedication to an issue or set of issues through persistence, passion, and being proactive.
Capable	A champion is equipped with the right skills and knowledge to be effective in advancing an issue or set of issues.

2. Champion types

As we discuss throughout the report, champion building approaches will vary by the *type* of champion, according to the nature of the influence they can exert and/or the source of that influence. Thus, before we turn to exploring how to plan champion building, we set out a typology to guide our analysis.

In devising a typology, there is not much to draw on in the literature. Examples of champions are typically listed, with no attempt to construct a comprehensive typology. For example, PATH categorizes ‘key influencers’ in categories such as “profession or business association representatives, civic leaders, academics, journalists, community action groups, celebrities, or research institutions,” but acknowledge this list is not comprehensive.¹⁰ Similarly, Roma and Levine (2016) state “there are many different types of champions ... [such as] health professionals ... politicians, journalists, religious leaders, government officials, local leaders, parents, donors, celebrities, and other influential individuals, such as the spouse of a minister of health” and “each requires a unique approach”.¹¹

We believe it would be helpful to have a comprehensive picture of champion types that can be commonly utilized and referred to (in planning, etc.). There are different ways that different (grassroots) champion types could be defined and demarcated; we propose the following breakdown in Table 3.

¹⁰ PATH, 2014.

¹¹ Roma & Levine, 2016.

Table 3: ‘Grasstops’ champion types

Champion type	Definition	Example
Subject experts	Individuals, often operating in institutions, dedicated to producing information that expands collective understanding of an issue or theme	Overseas Development Institute; Brookings Institution
Political officials	Influential individuals with a formal executive role within the political system	Hill staffers
Political advisors	Individuals who have influence with political decision makers	Chiefs of Staff for Members of Congress
Parliamentarians	Individuals with a formal legislative role within the political system	Members of Congress
Former senior politicians	Former Heads of State or senior level politicians	Graça Machel
Private sector leaders	Leaders in the for-profit sector	Aliko Dangote, Ashish Dhawan
Philanthropists	High net worth individuals who are making investments for the public good fund	Dato’ Sri Prof. Dr. Tahir
Faith leaders	Religious leaders with associated followership	Archbishop of Canterbury; Nigerian Imams
Media	Individuals who develop or produce media	Journalists and social media influencers
Celebrities	Individuals with broad name recognition for a skill/talent	Angelina Jolie, Annie Lennox
Community leaders	Individuals representing their communities who have taken on broader leadership roles	Malala Yousafzai

While the table focuses on types of ‘grasstops’ champion, it is important to note that the demarcation between ‘grasstops’ and ‘grassroots’ champion is not always definite. Community leaders, for example, are commonly perceived as ‘grassroots’ champions because of their role in taking responsibility and action with and on behalf of their community – but some may transcend this community-specific role, by becoming national spokespeople for example, which could be seen more as a ‘grasstops’ role.¹²

3. Champion categories

Based on the wider literature, we have looked at possibilities to organize these champion types by category and propose the following four categories of champions: 1) Technical/Issue experts; 2) Political insiders; 3) High level influencers; and 4) Influencer communicators.

While none of the existing typologies of champions in the literature present a template that can be lifted and adopted, some do contain elements to draw on. One starting point is the Overseas Development Institute’s four ‘character styles’,¹³ which are defined as: (1) Story-tellers; (2) Networkers; (3) Engineers (who “know it is important to be engaged with reality on the ground and understand how the policy details are enacted at field level”), and (4) Fixers (who focus on understanding policy and political processes and knowing when is the right time for their input). These are themselves adapted from

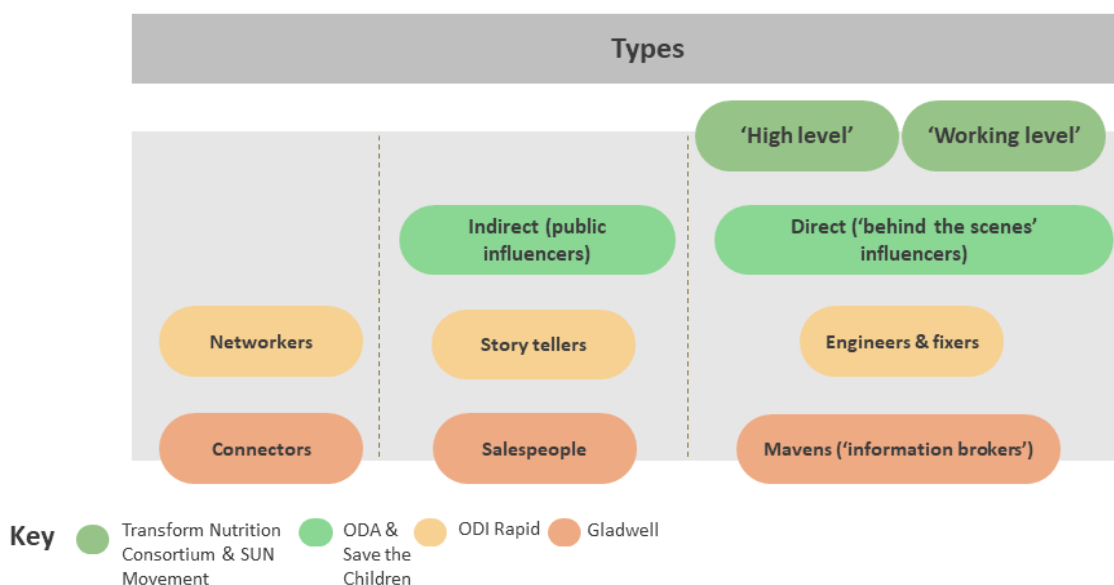
¹² See Williams and Aldred, 2011.

¹³ Tsui et al, 2014.

Malcolm Gladwell's description of the key types of people who drive social change: connectors, salespeople and mavens (or information brokers).¹⁴

This characterization points to the value of drawing a distinction between 'public facing' champions ('story tellers') and 'insider' influencers ('engineers' and 'fixers'). This is elsewhere expressed as a distinction between direct ('behind the scenes') and indirect (public) influencing: "advocacy can aim to change decision makers' beliefs, opinions, behaviors and policies...directly...or via other actors who may have influence on decision makers (e.g., the media, voters)."¹⁵ Considering direct influencers specifically, one source contrasts champions operating at 'high level' - such as First Ladies, Prime Ministers, celebrities, and religious and traditional Leaders – with those operating at a 'working level', such as Ministers, Members of Parliaments, and heads of organizations and institutions.¹⁶ These understandings can be summarized in a series of nested relationships as follows in Figure 1:

Figure 1: Champion typologies in the literature



Source: Itad (2021)

This points to a possible typology that distinguishes between direct and indirect influencers, and further, between types of direct influencers ('high level' vs 'working level' in the terminology used above). From this, we derive the categories of 'political insiders', 'high level influencers', and 'influencer communicators' (Table 4).

Based on the prominence of the characteristic of 'connectedness' in the literature, we believe that all champion types need to be able to be 'networkers' and/or 'connectors'; hence, this role transcends types. We also see a distinct role for 'technical/issue experts', who generate evidence and analysis that others can then draw on.

We, therefore, identify the following champion typology, based on the following categories: 1) Technical/Issue experts; 2) Political insiders; 3) High level influencers; and 4) Influencer communicators. These four categories map against the champion types set out above:

¹⁴ Gladwell, 2000.

¹⁵ Tilley et al, 2018.

¹⁶ Transform Nutrition Consortium & SUN Movement, 2016.

Table 4: Suggested champion typology

Champion category	Champion type
1. Technical/Issue experts	<ul style="list-style-type: none"> • Subject experts
2. Political insiders	<ul style="list-style-type: none"> • Political officials • Political advisors • Parliamentarians
3. High level influencers	<ul style="list-style-type: none"> • Former senior politicians • Private sector leaders • Philanthropists • Faith leaders
4. Influencer communicators	<ul style="list-style-type: none"> • Media • Celebrities • Community leaders

Recommendation 2

Those engaged in champion building initiatives should consider operating to a typology in which there are four categories of champions: 1) Technical/Issue experts; 2) Political insiders; 3) High level influencers; and 4) Influencer communicators.

Chapter B: Planning and targeting champions

This chapter explores champion building as a tactic within wider influencing and the key considerations when planning champion building in different operating contexts. It also discusses criteria in identifying and assessing potential champions, and the practical approaches and tools involved.



4. Champion building as a component of wider advocacy

After discussing champion definitions and types, we turn to exploring champion building as an advocacy tactic and the key considerations when planning, identifying and assessing potential champions for a particular operating context.

The relative importance of champions as part of wider advocacy and communications tactics, as well as the relative importance of different tactics, will vary according to issue and operating context. It is difficult to draw any general conclusions about this, beyond the overall findings that in most cases, there will be a high reliance on champions to deliver these tactics effectively. This headline finding is supported in the literature. For example, one meta-evaluation of multiple advocacy initiatives identified that “the role of influential supporters...came across strongly in our analysis”.¹⁷ In a similar finding in a different country, John Kingdon, in his study of the U.S. policy context, recognized that “in [their] 23 case studies [they] coded entrepreneurs [his term for champions] as very or somewhat important in 15”.¹⁸ Finally, in a meta evaluation, CARE found that champion building featured prominently in advocacy in both donor and recipient countries.¹⁹

The need to plan work with multiple champions was stressed in the literature on champion building²⁰ and particularly in our key informant interviews. One key advantage is the ability to deploy multiple influence routes, as complex problems often require a multi-stakeholder collaboration and collective response.²¹ Reflecting this, one interviewee described champion building as creating “a web that at its best can...build a buffer around your strategies and goals”. To take one example, cited by an interviewee, “to address financing of health, we’ll need champions that are talking to the Ministry of Health, the

¹⁷ Pasanen et al, 2019.

¹⁸ Kingdon, 2003.

¹⁹ Aston, nd.

²⁰ FHI360, 2010; Ashoka et al, nd.

²¹ Ashoka et al, nd.

Ministry of Finance, and the Ministry of Science, Technology and Innovation...you'd need different champions that talk to individual Ministries". Where there are many spheres of influence, such as in the UK, it is important to build access to all of them to maximize your chances of influencing meaningful change.²²


In some (possibly quite rare) cases, resolution of an issue may be relatively straightforward and non-contentious. In such cases, the need for multiple champions might not be as relevant. If there is limited opposition or resistance to change then working with a small group of insider champions (such as political officials and advisors) may be sufficient to help deliver the desired policy outcome.

But where a more multi-faceted approach is needed, working with a diverse mix of champions with different spheres of expertise allows for a strategic approach to mobilizing different constellations of support as needed, and taking advantage of unexpected opportunities.²³ The fact that different champions will have salience with different audiences also highlights the need to work with champions from diverse demographic and behavioral backgrounds.²⁴ As one interviewee identified, the more diverse your pool of champions, the bigger opportunity you'll have to leverage change:

"It's dangerous to have individuals becoming synonyms of a cause and become the brand of cause...To be sustainable you need multiple voices that can speak and provide validation of issues."

Engaging potential champions can also create an opportunity to support wider and more diverse participation in policymaking, by helping to bring groups who have traditionally been under-represented (because of race, gender, etc.) to the table. Champion building can be about more than identifying those who are currently influential and trying to work with them. Some identify champion building as a vehicle for intentionally expanding leadership:²⁵

"The concept of who is a leader has expanded. No longer are investments made only in individuals who hold senior leadership positions. There has been increasing focus on non-traditional leaders including ... youth, other individuals in informal leadership positions, and individuals traditionally excluded from leadership opportunities."

Initiative	Open Society Foundations' Roma Initiatives
Theme	Building inclusive leadership
Champion type	Community leaders
	In its work with champions, Open Society Foundations (OSF) seeks to ensure that its engagement is responsive to diversity, equity and inclusion principles. OSF invests in supporting leadership within marginalized groups, for example by directing resources towards supporting Black-led justice organizations and

²² BMGF Learning Session, 2019.

²³ Cross et al, 2005.

²⁴ Dolan et al, nd.

²⁵ Orians et al, 2018.

Roma leaders. OSF seeks to provide stable funding that can allow these groups and organizations to grow their power and influence. In one of its main programs in Europe, for example, OSF engages with Roma leaders, both at the grassroots and grassroots level, to increase their ability to participate in policy decision making and have a greater political voice.²⁶

Specifically, when considering investments in champion building, there is an opportunity to explore ways to address and rebalance inequalities around whose voices are heard, and who has power in decision making processes.²⁷ This is explicitly the approach Oxfam adopts for example: “a policy-influencing effort that expands civic spaces so that citizens and civil society can actively engage in the decision-making process, thus shifting the balance of power, is a central aim of Oxfam’s policy-influencing efforts”.²⁸ Such an approach would be relevant to any organization that seeks to apply an equity lens to power and how it is built and distributed.

Diversity in the pool of champions also increases the chance of taking advantage of unexpected opportunities, making it more likely that there is an opportunity for influence when the situation changes:

“It’s about having a pool of people you can call upon when you need them.”

For organizations with diverse country portfolios, it makes sense to think of champion building strategies sitting outside of (and complementing) single issue strategies because (a) the timescales of champion building mean that the effects of champion building investments will often be seen beyond the timescales within which a specific policy issue plays out and (b) champions may typically operate across, and so transcend, single issues.

First, our findings – as elaborated here – identify that champions are typically ‘built’ through an ongoing process of engagement, often over many years, with the benefits (in terms of champions’ actions) resulting from the maturity of the relationship. One key purpose of champion building programs is to ‘build’ champions so that they are ‘in place’ and can be activated when the need or opportunity arises. As we identify in [section 10](#), it may take many years for champions to reach this position, especially when the investment is in support of emerging champions and their development. In this case, champion building is about looking ahead to future influencing efforts in which potential champions can play a part.

Second, champions sometimes transcend specific issues, working across issues rather than simply being associated with one. This is true for many of BMGF’s current champion building investments, such as Max Roser, for example. As the founder and editor of Our World In Data, which presents data and information relating to global problems and global changes in highly accessible formats, he is best perceived as a champion for communicating about development issues, whose overall contribution transcends single issues. One source describes this as a distinction between ‘overall champion’ and ‘single issue supporter’.²⁹ A champion, who promotes ‘global health and development’ or Overseas Development Assistance (ODA) as a general good, contributes across multiple issues. Such champions may be well placed to make a particularly valuable contribution. One interviewee said:


²⁶ For more information, please visit <https://www.opensocietyfoundations.org/who-we-are/programs/roma-initiatives-office#:~:text=The%20Roma%20Initiatives%20Office%20works%20to%20achieve%20equal%20opportunities%20for,related%20grant%20making%20and%20advocacy>.

²⁷ Pasenan et al, 2019.

²⁸ Shephard et al, 2018.

²⁹ Stachowiak et al, 2016.

“People usually define champions in very specific terms, oftentimes linked to specific issues, but the people we want to influence may not think about singular issue (e.g., singular illnesses), they think about the system and how illness (as a whole) influences the system.”

Initiative	Hive
Theme	Championing gender equality
Champion type	Private sector leaders, celebrities, media
	<p>The goal of the Hive program supported by BMGF was to nurture a group of influencers across sports, media, and music to become champions for gender equality in Kenya. In the first year of the program, the focus was more broadly on “why gender equality is better for Kenya”. In the second year, it became more targeted with champions requested to engage the Kenyan government in amplifying its stated commitment to end female genital mutilation (FGM). The transition from a broader agenda to more specific action was “organic” and in response to opportunities provided by the current political context.</p> <p>The initiative was based on a recognition that while there are numerous gender advocacy and feminist activist groups in Kenya, they often lack the power and finances to advance issues of gender equality onto the political agenda. Hive staff also acknowledged the country’s government tended to be highly influenced by business and celebrity culture: “We realized that if we got celebrities to speak on these topics and pair them with grassroots organizations, these issues could be elevated.”</p>

Given this, a possible starting point for champion building could be a country level assessment, rather than an issue-specific one. This would involve looking across priority issues and mapping the different champion types according to: (a) **their relative importance** as a route of influence in the specific geographic context, and (b) **the current strength of existing champions of this type**. This would then highlight the champion building investments that should be prioritized in country portfolios. Aggregating these assessments would provide a picture of where global champion building investments could be most usefully made.

The tool below (Figure 2) outlines one practical way of doing this. Using it would involve considering each champion type in turn and:

1. **Exploring the current strength an organization’s relations with champions** who represent that type, and give this a score (high, medium, low).
2. **Assessing how important that type of champion is**, comparatively, as a route to influence in the specific country context being considered, again arriving at a summary score (high, medium, low).
3. **Plotting the scores for each champion type on a matrix**, and then developing differentiated strategies accordingly.

Figure 2: Tool for mapping gaps in country champion portfolios

		Relative importance of this champion type as a route of influence in geographic context		
		L	M	H
Current strength of existing champions of this type	H	Consider disinvesting	Maintain current champions	Maintain current champions
	M	Maintain current champions	Invest in champion building	Invest in champion building
	L	Maintain current champions	Invest in champion building	Priority for investing in champion building

Source: Roma and Levine (2021)

Recommendation 3

In developing champion building programs, consider conducting country level assessments as a way to identify priority investment areas, based on a review of needs, gaps and opportunities. Country level assessments could be aggregated to identify what regionalized or centralized programs of champion building are most needed.

5. Champion building in different operating contexts

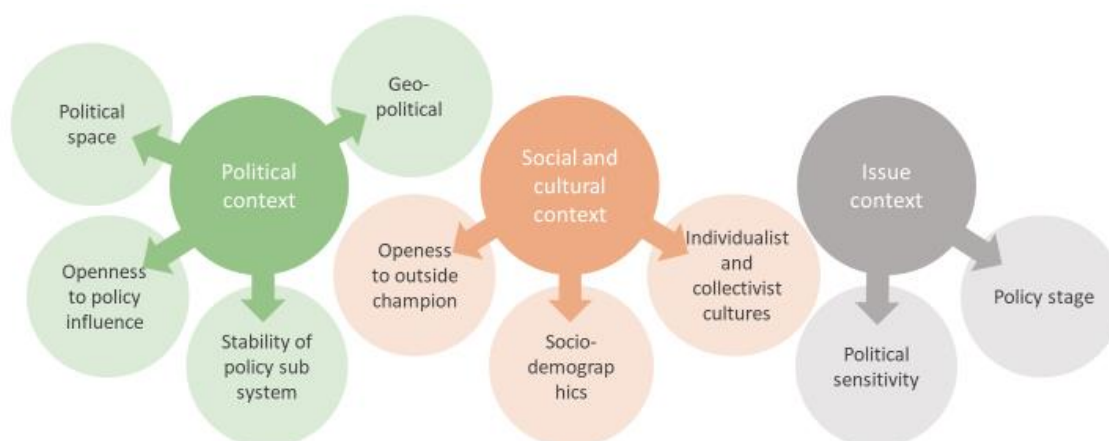
It is vital to consider political and sociocultural factors to identify the 'right' type of champion. As identified through research conducted by the Development Leadership Program (which explores how leadership, power and political processes drive or block successful development),³⁰ political leadership "must always be understood contextually, occurring within a given...configuration of power, authority and legitimacy, shaped by history, institutions, goals and political culture".³¹ However, whilst the importance of context is widely stressed in the literature, there is very little direct guidance provided on how to interpret and navigate different contexts. There is information we can draw on to isolate and identify key variables to consider, when thinking about which types of champions might be effective in a particular context. The key contextual factors we identified in the literature are shown in Figure 3 and described in detail below.

³⁰ University of Birmingham, Development Leadership Program (DLP) (2019-2022).

<https://www.birmingham.ac.uk/schools/government/departments/international-development/research/dlp.aspx>.

³¹ de Ver, 2009.

Figure 3: Key contextual factors



Source: Itad (2021)

5.1. Political context

Political space

Political space refers to the extent to which there are freedoms of association, peaceful assembly and expression. It is an important consideration, when identifying the ‘right’ type of champion for a specific national context because different contexts present various influencing opportunities and constraints. Drawing on multiple data sources, the international civil society organization CIVICUS has categorized countries as fitting on points of a spectrum in relation to these freedoms, or the absence of them: open (e.g., Germany), narrowed (e.g., USA), obstructed (e.g., Indonesia), repressed (e.g., India), or closed (e.g., China).³² This framework is widely used by international non-government organizations (INGOs) to understand political contexts in their work (Figure 4). Both Oxfam³³ and CARE³⁴ have used the model to make sense of outcomes in different country contexts in their meta-evaluations.

Figure 4: Degrees of political space



Source: CIVICUS Monitor (2020)

³² For more information, please see Monitor: Tracking Civic space at <https://monitor.civicus.org>. Ratings are live and subject to change. Based on a review in 2020, the USA was downgraded to ‘obstructed’ (<https://findings2020.monitor.civicus.org/americas.html#country-ratings-changes>).

³³ Shephard et al, 2018.

³⁴ Aston, nd.

While each country context is unique, the following guidance (Table 5) offers generalized guidance to champion building in contexts where political space is relatively limited:

Table 5: Identifying the ‘right’ type of champion in restrictive political contexts

Guidance	Explanation	Champion categories most needed
Consider champions who have influence with people other than senior members of government	Where there is no prospect of making progress with senior members of the government, alternative entry points (for example, at the local level) might be available. ³⁵	Technical/Issue experts Political insiders High level influencers
Work with champions who can help exert influence from outside the country	There may be scope to raise issues, with other national governments and at the international level, for example with diplomats and foreign embassies in other countries. ³⁶	High level influencers
Consider the role that international champions can play in supporting national advocacy	A review of advocacy looking across open versus more restricted country contexts points to the conclusion that in countries with more restrictive civic spaces, a more prominent role for international organizations can be helpful as they can use their profile “to raise the profile, credibility and legitimacy of domestic civil society organizations and networks”. ³⁷	High level influencers
Put emphasis on engaging traditional champions	Traditional authorities such as elders and religious leaders may provide particularly effective routes to influence. ³⁸	Influencer communicators
Build a plurality of champions	This can be a way to ‘share the threat’ by moving attention away from one organization or individual. It is also a potential way of countering a “divide-and-conquer” approach by governments and non-state actors. ³⁹	All types

The guidelines above may well be effective in any country, not just those where space is more restricted; however, it is a question of comparative emphasis. That is, these aspects of a champion building approach could be *relatively more important* in restricted and closed contexts. Obviously, effectiveness of different approaches will depend, too, on other country-specific contexts (as we explore below); for example, in some cases, outside-country influence will not be at all welcomed, and so may not be viable.

Openness to policy influence

Decision makers’ openness to policy influence is another important factor to consider because it determines who leaders may listen to in implementing change. Some leaders may seek to limit space for change, and deter challenges to their position, by recruiting more elites into their coalition, essentially as a strategy of cooption.⁴⁰ In contrast, in the case of Nepal and other countries with a similar political ecology, one analysis is that the abundance of patronage networks mean that “many high-profile decisions are made by an extremely small group of individuals, based on discussions and negotiations behind closed doors”.⁴¹ Where coalitions of decision making are expanded, it might be easier to get

³⁵ Greenfield, 2020.

³⁶ Ibid.

³⁷ Shephard et al, 2018.

³⁸ Greenfield, 2020.

³⁹ Ibid.

⁴⁰ Leftwich et al 2012.

⁴¹ Pasanen et al, 2019.

access, but it will be less likely that access equates to influence. In countries like Nepal, access to decision making is likely to be harder, but where access is secured, it is more likely to result in practical influence.

Stability of the policy subsystem

The stability of the policy subsystem is a third key factor to consider, because it can determine the actors who are likely to have influence over decision makers.

In non-democratic contexts, which are typically highly stable, such as some Middle Eastern kingdoms, the configuration of decision makers is typically slow to change.⁴² In such contexts, the group of actors, who are likely to have influence over them, will also tend to be relatively static.

Other contexts may be stable, but subject to occasional, sometimes radical, shifts. In reviewing policymaking in the U.S., for example, Baumgartner and Jones (1993) argue that while resistance to change is built into the system,⁴³ when resistance breaks down, the possibilities of far-reaching change open up. Obstacles to change can include a lack of attention or support to a particular issue, difficulties in creating a bipartisan coalition, and the existence of gatekeepers, who may have been involved in creating the existing policy and so have a stake in its continuation.⁴⁴ In such contexts, attracting new participants to an issue who seek to create media and public attention can help break the impasse. Unexpected events may also help shift priorities.⁴⁵

Policymaking in many countries is also becoming less stable. The growth in the number of populist politicians either in or near power is both a manifestation and a cause of this. In those contexts, policymaking can be more erratic, not necessarily operating to a coherent or predictable political philosophy. Media and social media trends are also driving the increased speed and unpredictability by which issues fall and rise on the agenda. These trends in combination are causing what one study has called “a shifting and often uncertain political and social environment, particularly in key donor countries”.⁴⁶

Geopolitical considerations

Another way of thinking about national differences is in relation to a country’s geopolitical status. One standard way of categorizing countries in relation to this is by income. For example, one categorization groups countries by: high-income, middle income, low income, highly indebted; another distinguishes between “developed economies, economies in transition and developing economies”.⁴⁷ For the purposes of organizations like BMGF, it would also be important to consider a country’s role in relationship to financial flows to global health and other issues. We have not found a definitive categorization in relation to this, but categories here might include traditional donor governments and recipient countries, new global leaders (such as India and China), other countries that have regional or global significance (the G20 countries), and less economically developed countries (the G77). We have not found specific guidance on differential strategies in the champion building literature.

How to think of these different groupings in relationship to champion building would most likely be shaped by wider strategies and investment approaches that champion building approaches would then fit within. **As resource mobilization to supporting social provision becomes more about national revenue generation and less about aid, for example, it might make sense to focus longer-term champion building strategies more on emerging nations than on traditional donor countries.** This would also be consistent with the increasing salience of localization agendas.⁴⁸

⁴² BMGF Learning Session, 2019.

⁴³ Baumgartner and Jones, 1993.

⁴⁴ Baumgartner et al, 2004.

⁴⁵ Baumgartner & Jones, 1993.

⁴⁶ Cody & Perkins, 2020.

⁴⁷ UN Secretariat, 2020.

⁴⁸ <https://interagencystandingcommittee.org/grand-bargain>.

Implications of this analysis can be summarized as follows in Table 6:

Table 6: Political contexts and their implications

Variable	Characteristic	Specific implications for identifying the right champions
Political space	When political space is open	<p>Work with multiple champions, from diverse demographic and behavioral backgrounds.</p> <p>Consider expanding leadership, to help address and rebalance inequalities around whose voices are currently heard in decision-making processes.</p> <p>Look ahead to future influencing efforts in which potential champions can play a part.</p>
	When political space is restricted	<p>As with more open political spaces but with increased emphasis on:</p> <ul style="list-style-type: none"> Identifying champions who might provide alternative entry points (e.g., outside central government). Identifying champions from outside the country. Identifying champions with traditional authority. Planning to build a plurality of champions.
Openness to policy influence	When coalitions of decision makers are expanded	Be alert to the risk of co-option (in which you might gain access to decision making processes and fora but do not actually have any meaningful influence within them).
	When coalitions of decision makers are restricted	Consider champions who might have indirect influence (and who can influence those people who are in the inner circle of influence).
Stability of policy subsystem	In highly stable contexts	Plan to work with champions in the long term.
	In highly fluid contexts	<p>In identifying champions, reach beyond the governing coalition.</p> <p>Identify champions who can generate and focus media and public attention.</p> <p>Plan to build a diversity of champions, to cover different eventualities.</p>
Geopolitical considerations		Tailor champion building investments to wider investment strategies – for example by prioritizing longer-term investments in emerging nations rather than traditional donor countries.

5.2. Social and cultural context

Openness to influence from outside-country champions

Decision makers' openness to outside-country influence is an important sociocultural factor to consider because champions can potentially have international influence; the opportunity, however, needs to be considered carefully. This approach can, but will not always, be very effective. As one interviewee noted, in countries like India, where there is a growing sense of nationalism, "it's not a good strategy to overtly influence...you need to work with domestically-rooted individuals and institutions". Similarly, a meta-review of Oxfam's effectiveness showed that in countries with strong "sovereignty-based conceptions of legitimacy", including India, the influencing role of a foreign actor may be perceived

as crowding out the voices of local actors.⁴⁹ Over the past decade, for example, private sector leaders and philanthropists have emerged in the South East Asia region and become socially engaged.

One informant said:

“The success of the champions depends on independence...We need to step back and allow people to assume the role of champions. In our work, we are learning that direct engagement is not the best. It is not about us, more about the issue. Need to step back and let it flower...We shouldn’t fall over ourselves to get impact too quickly.”

Initiative	BMGF India’s philanthropic partnerships
Theme	National and regional leadership
Champion type	Private sector leaders, philanthropists
	<p>BMGF’s India Country Office works closely with the Government of India, state governments and a host of private and development sector leaders to support key social development efforts.</p> <p>It brings specialized technical expertise to help find solutions to complex challenges that have remained unaddressed and relies on this approach in all areas in which the Office works: healthcare, sanitation, agricultural development, financial inclusion, and gender equality.</p> <p>Furthermore, ICO believes partnerships are key to driving progress at scale – in fact, partnerships and expertise are the fundamental principles of its operating model.</p> <p>The Philanthropic Partnerships Team (PPT) engages with (Ultra) High Net Worth Individuals (UHNWIs) to partner, support and champion issues that are in alignment with foundation priorities, recognizing that partnering with local partners is critical to garner expertise and local contexts.</p>

In some cases, in-region champions will be more effective than international ones from outside the region. One evaluation of Oxfam’s global advocacy work, for example, found that African governments are typically more likely to be susceptible to outside influences if those outsiders are also from within Africa.⁵⁰ This finding is reflected in how BMGF has been trying to cultivate other champions in the South East Asia region, for example. In late 2018, the foundation organized a small roundtable with Indonesian and Thai women, along with Melinda Gates to discuss how they can rally together on women’s economic empowerment issues. Since then, they have been rallying with champions in Thailand, Malaysia, and Indonesia through the Asia Venture Philanthropic Network (AVPN), but the work is still in early stages.

The country dynamics of being open to outside-country influence may also vary by the type of issue, as explored in more detail in [sub-section 5.3](#). For example, one BMGF staff interviewee explained how:

⁴⁹ Shephard, et al 2018.

⁵⁰ O’Neil et al, 2015.

“In some instances, when countries are aware of their own limitations regarding a specific issue, they are open to getting help from other countries...But...with issues [such as] justice, gender, women's rights, human rights, voices from within the country or community are better than external ones, which may be perceived as an attempt of trying to impose one culture over the other.”

Socio-demographics

A country's socio-demographics is another key factor to consider because demography can affect perceptions of problems, and interest in messengers and messages, pointing to different influencing choices. In the Middle East, for example, young people comprise a large part of the population, so involving them as champions could be critical to sway political or public opinion of an issue.⁵¹ This contrasts with the UK, for example, where young people's voices have, in recent years, not been heard in formal politics.⁵² Furthermore, a key factor in a messenger's influence relates to demographic and behavioral similarities between the messenger and the recipient, so it is also important to understand who is likely to be influential, from a demographic perspective.⁵³ For example, Open Society Foundations (OSF)'s Roma Initiatives aims to achieve equal opportunities for Roma in housing, employment, and education, through building Roma leadership to engage with discriminatory laws that affect the Roma population in Europe at the policy level.⁵⁴

Individualist and collectivist cultures

Finally, a country's culture of individualism or collectivism is an important element to consider when thinking about champion building efforts because it can play a role in determining the most effective messengers in a particular geographic context. Individualistic cultures place more value on messengers with **'hard' traits** such as the socioeconomic position they hold and the formal power they exert. In contrast, **collectivist cultures** – where group cohesiveness is valued more than individual contributions – tend to value messengers with **'soft' traits** such as warmth and generosity. For example, “In the U.S., a politician who is regarded as dominant is also likely to be regarded as competent...In Japan, by contrast, politicians viewed as warm are more likely to be regarded as competent.”⁵⁵

In considering who are effective spokespeople for an issue, Bond (the UK network for organizations working in international development) has drawn on Susan Fiske's 'stereotype content model'⁵⁶ in setting out that **the most engaging spokespeople are perceived as both warm and competent.** For example, the British public perceive frontline workers (especially doctors, teachers, nurses) as the warmest and most competent spokespeople, deployed by global poverty organizations. Furthermore, overseas volunteers and iconic spokespeople (such as Malala) are seen as both warm and competent, celebrities are generally seen as warm, but less competent, and philanthropists as competent, but not warm. Businesspeople score badly on both warmth and competence.⁵⁷ However, our research on messengers' effectiveness suggests that perception of traits, such as competence and warmth, are **culturally specific.** As one interviewee put it, in some Middle Eastern countries:

⁵¹ BMGF Learning Sessions, 2018-2019. Video.

⁵² Adams & Coe, 2019.

⁵³ Dolan et al, nd.

⁵⁴ Roma Initiatives Office, Open Society Foundations. <https://www.opensocietyfoundations.org/who-we-are/programs/roma-initiatives-office#:~:text=The%20Roma%20Initiatives%20Office%20works%20to%20achieve%20equal%20opportunities%20for,related%20grant%20making%20and%20advocacy.>

⁵⁵ Martin & Marks, 2019.

⁵⁶ Fiske et al, 2002.

⁵⁷ Bond, 2016.

“It will not be about having charismatic, loud, extrovert people...it might be more effective to move quietly...What doesn’t work in the Middle Eastern context is to put public pressure to change decision makers’ minds. What works well is to amplify those decisions that you do like.”

This finding highlights the importance of understanding the dominant national culture and the extent to which it is individualistic or collectivist and tailoring champion strategies to that understanding.

Implications of this analysis can be summarized as follows in Table 7:

Table 7: Social and cultural contexts and their implications

Variable	Characteristic	Specific implications for identifying the right champions
Culture	When an individualist culture is dominant	Identify champions with ‘hard’ characteristics, such as the socioeconomic position they hold and the formal power they exert.
	When a collective culture is dominant	Identify champions with ‘soft’ characteristics, such as warmth and generosity.
	In relation to socio-demographics	Consider which demographic groups are most important to your goals and identify champions based on their likely appeal to those groups.
Openness to influence from outside-country champions	When government is open to outside influence	Share and develop international intelligence and information exchange, to identify who might best influence whom, when.
	When government is skeptical of outside influence	Identify potentially influential regional champions. Invest in emerging indigenous leadership.

5.3. Issue context

In addition to the political, social, and cultural context, planning champion building programs must also consider the issue at hand, in particular its political sensitivity and stage in the policy process.

Political sensitivity

If an issue is politically sensitive or unpopular, then a decision maker’s motivations to act will be different to those in relation to an issue that has broad-based support or is publicly salient.⁵⁸ Where political sensitivities are high, a Member of Parliament (MP), for example, might find that to speak out on particular issues might be unpopular with colleagues or with constituents, creating additional barriers to action. In these circumstances, it is important to **generate constituency level support**. If there are signs that constituents care about the issue, this can give cover and validation to a parliamentarian, who might otherwise be reluctant to step up as championing an unpopular issue. Hosting constituency events can be a way to create space to allow an MP to be more vocal in support of an issue.⁵⁹ Another approach is to **seek to depolarize the issue**. If issues are sensitive or highly contested, it is likely to be especially

⁵⁸ Pasanen et al, 2018; Cody & Perkins, 2020.

⁵⁹ BMGF Learning Session, 2019.

important to work with those who are willing and able to work constructively with politicians from other parties.⁶⁰

Policy stage

In addition, models that break the policy process down into different components can provide a helpful guide to identifying types of champions to engage at different policy stages, while recognizing that processes are often not linear. Such models commonly distinguish between three main stages in the policy process, including agenda setting, formulation and enactment of policy, and finally, its implementation and monitoring of application and impact.⁶¹ We look at each of these stages in turn in Table 8:

Table 8: Stages in the policy process

Stage	Description	Role of champions	Champion categories most needed at this stage
Agenda setting	At this stage, when there are competing priorities for policymakers' attention, effective agenda setting strategies include building coalitions of support, and engaging in policy and public debate. ⁶²	Various sources point to the importance of engaging champions at this stage, to encourage acceptance of a new policy or program and advocate for innovation. ⁶³	Technical/Issue experts Influencer communicators High level influencers
Formulation and enactment	At the stage, when policy is being formulated, practical detail becomes more important and the scope for change narrows. This is captured in the idea of the policy funnel, which describes how generalized concern leads to policy debate, then there is focus on particular policy proposals and finally a specific text around which negotiations focus. As this process advances, focus tends increasingly to be on working with allies 'inside the room' , although there is sometimes still need for ongoing engagement of media and public audiences, to push good solutions and prevent backsliding. ⁶⁴	Overall, at formulation stage there is greater importance to technically feasible solutions and insider engagement. ⁶⁵ A key role for champions at this stage is to build and sustain decision makers' will to act. ⁶⁶ Hence the importance of program and technical/issue experts able to present credible evidence in compelling ways. ⁶⁷	Technical/Issue experts Political insiders High level influencers
Implementation and monitoring	The concept of the implementation gap refers to the phenomenon in which changes in policy do not guarantee that the reform will be implemented in practice. ⁶⁸ Capacity to implement policy is key to impact, which explains the	Support to implementation and implementation capacity explains the importance of 'engineers' as a champion category, as discussed in section 3 .	Technical/Issue experts

⁶⁰ Mathies & Aston, nd.

⁶¹ Miller & Covey, 1997; Sutton, 1999; Perkin & Court, 2005.

⁶² Pollard & Court 2005; Kingdon, 2003; Baumgartner & Jones, 1993.

⁶³ Roma & Levine, 2016; Development Leadership Program, 2018; Schiffman, 2007.

⁶⁴ Green, 2011.

⁶⁵ Conciliation Resource, 2011; Redstone Strategy Group, 2013.

⁶⁶ Coffman & Reed, 2009.

⁶⁷ PATH, nd.

⁶⁸ Tsui et al, 2014.

	importance of paying close attention to the body that will implement a policy. ⁶⁹		
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Implications for identifying the ‘right’ champion can be summarized as follows in Table 9:

Table 9: Issue contexts and their implications

Variable	Characteristic	Specific implications for identifying the right champions
Political sensitivity of issue	When the issue has relatively low sensitivity	In theory, the issue should be comparably straightforward to resolve, and multiple influencing strands may not be needed - consider a particular focus on insider champions and on ensuring the evidence base is in place to back the position being advocated for.
	When the issue is highly sensitive	Work with multiple champions, from diverse demographic and behavioral backgrounds. Consider expanding leadership, to help address and rebalance inequalities around whose voices are currently heard in decision making processes. Look ahead to future influencing efforts in which potential champions can play a part. Supplement grasstops champion approaches with constituency level work. Give particular attention to bipartisan coalition builders.
Policy stage of issue	At the agenda setting stage	Prioritize champions who are best placed to encourage acceptance of a new policy or program and advocate for innovation, at both public and policy levels.
	At the formulation of policy stage	Prioritize champions who can offer technically feasible solutions. Prioritize champions who are well placed to undertake insider engagement.

Recommendation 4

When developing champion building programs, consider how implications play out differently according to context, taking into account: 1) Extent of political space; 2) Decision makers’ openness to policy influence; 3) Stability of the policy subsystem; 4) Decision makers’ openness to outside country influence; 5) Socio-demographics; 6) Political sensitivity of the issue; and 7) Policy stage of the issue.

6. Criteria in identifying and assessing champions

After considering key contextual factors in planning, we turn to exploring criteria in identifying and assessing potential champions. Here the literature puts strong emphasis on taking sufficient time to get the early phases of champion building right⁷⁰ and this was also widely stressed in our key informant interviews.

Influence

Some champions can be relatively easily identified because of their current influence. For example, some champion types, such as political officials and advisors, hold positions of influence that mean they

⁶⁹ Barkhorn et al, 2013, Pasanen et al, 2019.

⁷⁰ Clarke, 2019; Roberts et al, 2016; CARE, nd; Cody & Perkins, 2020.

will be gatekeepers for issues that advocacy organizations are interested in advancing. The only choice is to seek to cultivate them as champions (as far as that is possible).

For other champion types, a person's current influence is important to consider, but other factors come into play too. For example, various sources identify a set of criteria when considering which parliamentarians to engage. These take into account current positions of influence – for example committee membership, caucus membership, role in policy formulation, and position in their party.⁷¹

However, they also tend to look beyond this too, to seek to identify those with potential, who might be influential in the future. When engaging with parliamentarians, current influence is likely to be one (important) factor of many of the wide-ranging areas of interest to those identifying and assessing potential parliamentary champions.

Initiative	European Parliamentary Forum
Theme	Assessing potential in parliamentary champions
Champion type	Parliamentarians
	<p>After an election, the European Parliamentary Forum (EPF), a network of Members of Parliament (MPs) throughout Europe committed to protecting sexual and reproductive rights, scans the new parliament, sometimes in partnership with national civil society partners, to identify those to approach. Being able to do this successfully requires excellent knowledge and understanding of the institutions EPF seeks to influence and work with, as well as strong political and policy analysis. EPF takes a holistic approach to reviewing parliamentarians' potential, taking into account party, position, personal interests, and background.</p> <p>The organization does not apply a standardized scoring system in answering these questions; it is more about being able to make an informed qualitative judgement based on the best evidence. However, even with this expert knowledge, when assessing potential, "it's impossible to have precise understanding of [their likely future effectiveness]. We are in constant dialogue with civil society organizations to try and understand this, but you can't be precise." For example, parliamentarians evolve in their political career, which may, at times, create windows of opportunity for individual MPs to advance certain issues for a certain period of time.</p>

Influence can be very fluid. Turnover of parliamentarians in elections, or of ministers in reshuffles, for example, is an occupational hazard and not always predictable. In the UK, for example, one Conservative MP was identified by an NGO in that country as a rising star and future Cabinet member,⁷² but has subsequently been sacked from a junior ministerial position. He may still have some policy influence and may in future regain positions of influence, but this example shows that influence is not always predictable or linear.

The less current influence is used as a criterion for selection, the more that potential becomes the relevant factor. But evidence is mixed on how possible it is to get this right as we explore below.

⁷¹ Coffman & Reed, 2009; Devlin Foltz & Molarino, 2010; Mathies & Aston, nd.

⁷² BMGF Learning Session, 2019.

Commitment

One way that expert performers differ from others is through their commitment to improvement. This in turn comes from ‘deliberate practice’, which Anders Ericsson, an authority in the science of expertise, identified as “a universal approach to improving performance, in any field”. Deliberate practice is purposeful and involves building or modifying previously acquired skills by focusing on particular aspects of those skills and practicing in a highly systematic way, breaking the skill down into component parts that can be delivered, repeatedly, and analyzed to determine weaknesses and work out ways to address them. Ericsson noted that this kind of approach requires a high level of commitment: practicing in this focused way is arduous work and generally not enjoyable.⁷³ This is the kind of commitment to improvement that interviewees meant when they talked about identifying people who have “ambition” and “drive”.

Persistence is the most mentioned champion characteristic across the literature.⁷⁴ Policy theorist John Kingdon, for example, highlights persistence as the most important quality and stresses that it implies “a willingness to invest large and sometimes remarkable quantities of one’s resources”.⁷⁵ This model of ‘deliberate practice’ applies to Hans Rosling’s route to becoming a world-leading expert in data and data visualization, which involved a supported journey, during which areas for improvement were identified and systematically addressed (such as coaching on data manipulation and public speaking): “All these things helped push him. People took him along and made him a star.” It is also reflected in the finding from a BMGF-commissioned evaluation of the Aspen Institute’s New Voices Fellowship (NVF) Program (a year-long program that cultivates media and communications skills among standout development professionals from the developing world) which found that, “Insofar as they share common traits, successful fellows demonstrate deep commitment to their work and have a genuine desire to make a difference using the tools the fellowship provides”.⁷⁶ Persistence, or resilience, is also one of the key selection criteria for Echoing Green’s Fellowship. They look for people who can make a “compelling case for lifelong commitment to social impact”.

Alignment

Lack of issue alignment comes with reputational risks, and it can potentially impact policy progress, if different positions are being advanced by different actors. However, there are risks in requiring too-close alignment too, which came across strongly in interviews, as well as in the literature.

For one internal interviewee, alignment is central and needs to be in place from the start:

“You need to find people that are already committed. With champions we need to agree and believe towards a common goal. This work is not about convincing people to agree, ‘championing’ is about having credible voices that think alike, and we want to give them more ability to influence, to have legitimate conversations.”

However, impressions of ‘orchestration’ can lead to questions about champions’ credibility and legitimacy. Political insiders often cannot be seen as being influenced by an advocacy group: “MPs are proud of their free mandate.”⁷⁷ The success of the champions depends on independence and non-

⁷³ Ericsson & Pool, 2016.


⁷⁴ Please refer to [Annex 4](#).

⁷⁵ Kingdon, 2003.

⁷⁶ Arabella Advisors, 2018.

⁷⁷ DSW, BMGF Learning Session, 2019.

alignment. We need to step back and allow people to assume the role of champions.” The evaluation of the New Voices Fellowship Program points to a similar conclusion.⁷⁸

Initiative	Open Society Fellowship
Theme	The value of independent voices
Champion type	Community leaders
	<p>The Open Society Fellowship, a key OSF initiative designed to support individuals pursuing innovative approaches to fundamental open society challenges, looks for people who are aligned with their values but are willing to challenge the Foundations’ thinking, strategy, and principles: the program seeks to build “a universe of people who generally support OSF values but may come at [issues] from very different perspectives”. While OSF recognizes that engaging with people who may question some of its assumptions is a risk, it allows both the organization and the cohort of champions to broaden their focus and engage in issues from diverse perspectives. Our informant said “it’s worth taking [such] risks” as “there is always a danger in any large organization of working within a bubble and engaging in groupthink.” Fellows play an important role in deepening or challenging the Foundations’ thinking.</p> <p>For example, the Open Society Fellowship has supported the work of James Forman Jr, the son of James Forman Sr, who was a prominent leader in the civil rights movement, in developing and promoting a book on the war on drugs and its impact on communities of color. Our interviewee acknowledged he was a “classic OSF Fellow,” as he was “challenging a set of ideas both to their own work and public sphere”.⁷⁹</p>

As we discuss in [section 10](#) in relation to developing sustainable relationships, too close alignment can be detrimental to effectiveness.

In some cases, there is no realistic choice but to work with people with whom alignment is only partial, because of the value in engaging with decision makers from across the political spectrum and/or difficulty in identifying alignment at the start. In the U.S. for example, given the importance of working across the aisle, any organization working on global health issues will need to find ways to engage constructively with Members of Congress, whose view on sexual and reproductive health will not be aligned with the organization’s goals in those areas. Furthermore, one piece of research identifies that beliefs on an issue can be established even *after taking action* on that issue. Munson (2008)’s study describes a process whereby direct, personal contact through social networks generated initial activism and the development of beliefs about the issue followed later: “Individuals...in fact began the mobilization process with a surprisingly diverse range of ideas about the issue.”⁸⁰ This also points to initial issue alignment not being essential.

All this suggests that issue alignment is an important factor to consider, but the requirement does not need to be applied narrowly, as there is space for some evolution and space to operate when alignment is not complete.

⁷⁸ Arabella Advisors, 2018.

⁷⁹ The book is called *Locking Up Our Own: Crime and Punishment in Black America* and won the 2019 Pulitzer Prize for General Non-Fiction.

⁸⁰ Munson, 2008 pp186-7.

Capability

As described above, there is extensive attention in the literature to the importance of a champion's commitment and much commentary around influence and alignment but there is less said about how well-equipped potential champions need to be. It is clear from descriptions of champion characteristics that an effective champion must have the capabilities to be able to fulfil the role they are taking on effectively. However, it is not a necessary condition for selection; in general, these capabilities can be developed through 'champion building' (assuming a basic level of capacity, for example that researchers have research skills and knowledge, etc.).

The threshold of what level of capability needs to already be in place partly depends on timescales. When operating over shorter time periods, champions would need to have a greater set of capabilities at the start due to the limited time frame to develop skills during engagement. There will also be variation by champion type. For example, in roles that depend on specific specialist skills, such as researchers and journalists, having existing capabilities would be important because of the substantial investment needed to develop professional competencies before one could be considered a potential champion.

Star potential

Prospective champions who do not already exhibit the characteristics discussed above must be judged to some extent on their potential. One interview described recognizing potential as both a "science and an art". In the ideal scenario, it should be possible to identify something about a person that makes them a fruitful prospect – their 'star potential' – and nurture that. However, advocacy staff may not have the skills to do this. Furthermore, the experiences of those who specialize in recruiting people with potential also reveal some doubt about how confident they can be in their choices. For example, the evaluation of the NVF Program found that "beyond unpredictable life circumstances, fellows who are less successful do not share common traits or indicators that could be screened during the application process. This is a challenge for peer programs, as well." The report cites one interviewee describing the selection process: "We had a very protracted system of selection when we had a year-long fellowship. We read everyone's applications, we interviewed subsets in person. And still, you wonder whether you are making the right choices. And some of that is just hard to know."⁸¹

It is also the case that unexpected 'champions' emerge in unpredictable ways due to unusual circumstances. In the U.S., for example, the Parkland students stepped into a national leadership role on gun control – after a former student, armed with a semi-automatic rifle, killed 17 people at their school – having exhibited no obvious prior champion characteristics. As one local leader who encountered them put it, "One minute they are like any [teenager]...then...they turned into some of the most inspirational leaders in the world today."⁸² The same could be said for other high-profile champions like Malala or Greta Thunberg; it would have been difficult to identify their potential in advance of their showing it. This suggests that, while there are ways to be systematic in assessing potential, making decisions based on an algorithm or ranking/scoring system may not be the most sensible approach. It is important to gather, and make sense of good intelligence, but in the end, there will be an element of judgement to decisions reached.

Initiative	United Nations Foundation's Nothing But Nets campaign
Theme	Assessing potential in celebrity champions
Champion type	Celebrities

⁸¹ Arabella Advisors, 2018.

⁸² Cullen, 2019.



The United Nations Foundation (UNF) seeks to deploy and work with celebrities, who can communicate issues in ways that resonate and reach a wider audience. Passionate and informed celebrities can also play a more direct role, in advocating to Members of Congress and other decision makers. **The Nothing But Nets (NBN) campaign**, a global grassroots campaign to raise awareness, funds, and voices to fight malaria, was itself initiated by author and sportswriter Rick Reilly in 2006.

The process of determining a target list of celebrities is different to that of identifying Members of Congress. UNF develops a wish list or “matrix” of criteria to determine what celebrities would be ideal spokespersons and champions for its mission and issue area. Among the criteria that NBN considers are: if they’ve had a direct experience with malaria or have a connection with a malaria endemic country; if they are a mother or father to young children (since malaria disproportionately affects children and pregnant women); and if they have a sports affiliation given Nothing But Nets’ history with NBA (National Basketball Association), MLS (Major League Soccer), Sports Illustrated and with sports stars such as Stephen Curry. UNF also assesses if they have any experience in being an effective spokesperson or advocate for a cause; gauge the size and engagement of their followers (such as on social media, media, etc); and runs a “due diligence” report as to ascertain their reputation and rule out any ethical conflicts.

Other factors UNF takes into account when assessing a celebrity’s potential include:

- Strong alignment on mission;
- A sense of an authentic connection, not a forced partnership;
- Family or other emotional connections, to a particular region for example;
- The make-up of their fan base (and so whether their orbit of influence reaches the ears of those UNF is ultimately seeking to influence);
- The loyalty of their fan base (and so how much interest will likely be generated by their communications and calls to action on the issue);
- Their potential sphere of influence, communications resonance, and likely cut-through.

Table 10 outlines the relative importance of criteria in assessing and identifying potential champions.

Table 10: Relative importance of criteria in assessing and identifying champions

Criteria	General implications	Exceptions
Influence	For most champions, current influence is important, but likely future influence should also be factored in.	Former senior politicians have currency as influencers because of their existing influence, rather than future potential.
Commitment	Insofar as it can be understood and predicted, this is the key criterion that defines a prospective champion’s potential.	Political officials and advisors – by nature of their position – cannot be sidestepped whether or not they have any commitment


Alignment	Alignment is important, but there are opportunities to improve alignment to the degree needed during champion building and so it is not likely to be an essential prerequisite.	to the issue, or their positions on the issue are aligned.
Capability	Champion building also provides an opportunity to equip champions with the necessary skills and knowledge needed, and so having a set of capabilities in place from the start is not generally essential.	Some basic skills will need to be in place, e.g., for professionals such as researchers and journalists.

Applying this analysis to different champion types produces the following summary of which characteristics to consider when assessing potential champions (Table 11).

Table 11: Relative importance of key characteristics by champion type

Champion types	(Currently) Influential	Committed	(Currently) Aligned	(Currently) Capable
Subject experts	Relevant	Essential	Important	Important
Political officials	Important			
Political advisors	Important			
Parliamentarians	Important	Essential	Important	
Former senior politicians	Essential	Essential	Important	
Private sector leaders	Important	Essential	Important	
Philanthropists	Important	Essential	Important	
Faith leaders	Important	Essential	Important	
Media	Important	Essential	Important	Important
Celebrities	Important	Essential	Important	
Community leaders	Relevant	Essential	Important	

Initiative(s)	Organization of African First Ladies for Development; Champions for an AIDS-Free Generation; African Institute for Development Policy; African Center for Economic Transformation
Theme	Approaches to identifying champions

Champion type	Political officials, former senior politicians, community leaders
	<ul style="list-style-type: none"> ▪ Influence <p>The Organization of African First Ladies for Development (OAFLAD) is an advocacy organization, formed by African First Ladies, whose Secretariat is based in Ethiopia. First Ladies champion a number of societal, health, economic and other issues, based on the priorities in their respective countries. They hope to influence policy by leveraging their status as First Ladies. Similarly, The Champions for an AIDS-Free Generation, a network of African leaders with a Secretariat based in South Africa, works with former Heads of State to rally and support regional leaders towards ending the AIDS epidemic as a public health threat. The African Institute for Development Policy (AFIDEP), a research and policy institute based in Kenya, meanwhile, engages with Heads of State whose current position gives them authority to speak and to represent national interests at high-level regional events such as the African Union (AU) Summit.</p> ▪ Commitment <p>Having passion is a key champion characteristic. The former President of Botswana, Festus Mogae, launched The Champions for an AIDS-Free Generation for example on retirement following his visit to the International AIDS Conference in Mexico in 2008. This led him to reach out to several former Heads of State to join him in this initiative.</p> ▪ Alignment <p>Being aligned to organizational values becomes especially important when champions work collectively to advance change. However, a focus on being ‘publicly’ aligned to the organization’s vision may fail to recognize the role of ‘behind-the-scenes’ advocacy especially when dealing with sensitive issues. Senior politicians may be under public pressure to speak out on an issue but ‘behind the scenes’ advocacy may be just as important, and may be more appropriate, depending on the issue’s sensitivity.</p> ▪ Capability <p>Research and policy organizations such as AFIDEP naturally give great importance to previous expertise and technical knowledge when identifying champions. But there is scope to invest in development of skills and knowledge too: in its Transformation Fellows Program,⁸³ The African Center for Economic Transformation (ACET), a Pan African policy organization, based in Ghana, is seeking to build and expand capacities through supporting young African professionals to conduct research and engage in the policy making process with governments and policy institutions.</p>

⁸³ The Fellows are generally PhD students in the field of economics, who are sponsored by ACET through a partnership with organizations such as the World Bank, UK Government, and Princeton University.

Recommendation 5

In identifying and assessing potential champions, focus in particular on their level of commitment. Also, factor in their current and/or likely future influence. There is more scope to develop other characteristics in the process of champion building itself.

7. Practical approaches in identifying and assessing champions

The literature points to good practices to follow during the process of identifying and assessing potential champions as part of champion building programs.



Supplement internal expertise with the knowledge of others. It is important to be able to make well-informed decisions on who to bring into champion building programs, for which “profound knowledge of working processes is critical”.⁸⁴ However, if one seeks to identify the ‘best performers’ in an area that lacks rules-based competition or clear objective measures of performance – such as in advocacy work – those judgements are inherently vulnerable to bias.⁸⁵ Assumptions and the limits of existing network of contacts may constrain ability to consider a wide range of potential leaders:⁸⁶

“Keep in mind that the range of...leaders you are able to connect with might be biased by your existing network, power dynamics, and even your own assumptions of what a...leader looks like. Actively work against these potential biases...by connecting with people that are outside your comfort zone.”

It is thus important to draw on the judgement of peers⁸⁷ to go beyond existing networks, by collaborating with people who can complement, and constructively challenge, your starting points. The need to avoid bias also explains the emphasis on ensuring a diverse group takes part in stakeholder mapping exercises to assess and identify potential champions.⁸⁸



Depending on the champion type and approach, there might be an element of self-selection, with individuals asked to nominate themselves.⁸⁹ A key finding from Ashoka (nd)’s review of fellowship programs was that “50% of the...leaders [they] surveyed indicated that they were approached by their funders, rather than vice versa. ...This is especially important when individuals or organizations do not (yet) consider themselves to be...leaders.”⁹⁰ This raises questions of equity and who is given the opportunity to be a leader.

Recommendation 6

Make sure the right people are involved in identifying and assessing potential champions by (a) ensuring that people with deep knowledge of relevant (political and policy) contexts are involved and (b) drawing on the knowledge of others to reach beyond existing network of contacts.

⁸⁴ BMGF Learning Session, 2019.

⁸⁵ Ericsson & Pool, 2016.

⁸⁶ Ashoka et al, nd.

⁸⁷ Ericsson & Pool, 2016; Petruney et al, 2009; Clarke, 2019.

⁸⁸ Coffman & Reed, 2009.


⁸⁹ Petruney et al, 2009.

⁹⁰ Ashoka et al, nd.



Get the balance right between quality and quantity. Many stress that quality is more important than quantity, that is, a smaller number of effective champions is better than a greater number of less effective champions.⁹¹ One guide to public affairs, for example, recommends that staff aim to “build deep relationships with 10 members each”.⁹² This sense of the importance of depth over numbers is corroborated by findings from an evaluation of the Global Accelerator Learning Initiative (GALI)’s accelerator program, which found that:⁹³

“The high-performing programs actually had smaller applicant pools. On average, the low-performing programs selected from almost 100 applicants, while high-performing programs considered roughly 75 applicants. However, their applicants tended to have more intellectual property and more educational, entrepreneurial and senior management experiences.”

Initiative	Echoing Green Fellowship
Theme	Identifying emerging leaders
Champion type	Community leaders
	<p>For Echoing Green, a global organization based in New York that supports social entrepreneurs, the Evaluator Review is one of the most critical elements of the selection cycle, designed to identify and objectively assess early stage leaders who may not have a proven track record in their chosen field.</p> <p>Following an initial screening by Echoing Green staff and alumni Fellows, applications are reviewed by external evaluators, who are provided with anti-bias and evaluation training, detailed evaluation guidelines, and a scoring rubric to assess applicants. Finalists are then invited for an in-person interview and evaluated by panels of judges, who help select the final cohort. Constructive feedback from the Evaluator Review is shared with all second-round applicants, whether or not they reach the Finalists stage, to ensure they receive value from their time participating in the process.</p> <p>Individual applicants are assessed based on the following selection criteria:</p> <ul style="list-style-type: none"> ▪ Purpose & Passion: Do they care deeply about this issue? Do you understand why? ▪ Resilience: Will this applicant bounce back from obstacles they will face? ▪ Leadership: Could this applicant inspire others to action or help to shape a field? ▪ Resource Magnetism: Can this applicant attract money, people, and other resources to their cause?

⁹¹ BMGF Learning Session, 2019.

⁹² National Journal Membership, 2015.

⁹³ GALI 2016.

Echoing Green has also experimented with the use of a machine learning algorithm in their selection process (as opposed to manual screening) but found that the algorithm was ineffective at reading applications in a non-English language; it also identified ‘total funds raised’ as one of the most predictive features of application success, despite Echoing Green’s intentional focus on attracting Fellows from underrepresented backgrounds. While the automated model could be useful to highlight applications “on the cusp” for more focused reviewing, the selection of emerging leaders, who will thrive in the Fellowship program, remains “75% science and 25% art”.

Recommendation 7

In decisions about trade-offs, prioritize quality of champions over quantity: in most cases, a smaller number of effective champions is better than a greater number of less effective champions.

Looking across the literature, we found two main tools for identifying and assessing champions, explored in turn below: **1)** Stakeholder maps and **2)** Champion indices, or spectrums.

Stakeholder maps

Stakeholder mapping is widely cited as a tool in the literature on champion building,⁹⁴ as well as in advocacy planning, more generally.⁹⁵

In summary, it involves the following steps:

1. Identifying and listing all the actors that may affect the policy outcome under review.
2. Mapping these actors according to agreed criteria.
3. Analyzing the results and considering potential champions.
4. Selecting champions to prioritize, based on the picture that emerges.

For a review of the criteria that all the sources we have identified use to map stakeholders, please refer to [Annex 5](#).

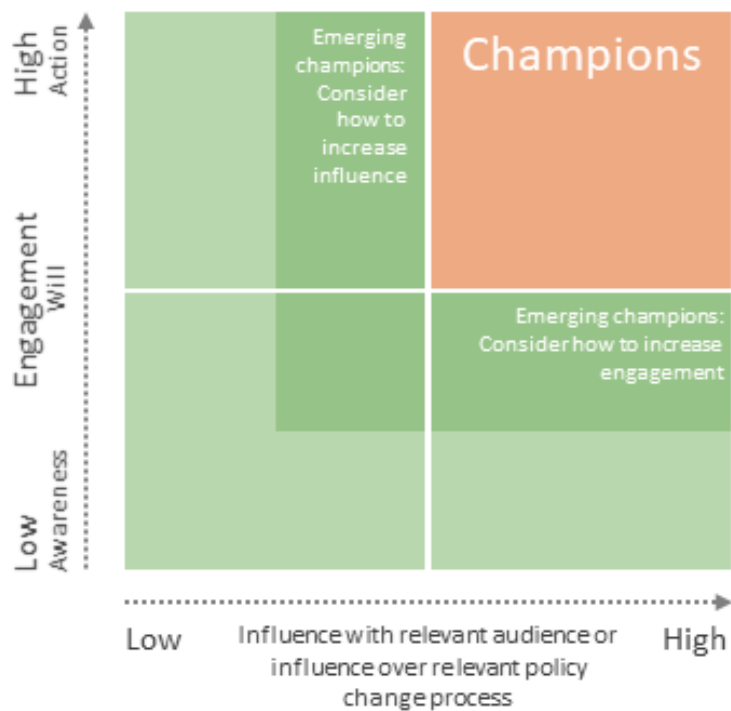
There are differences across the models, but some clear common features emerge, which is that stakeholder mapping most commonly considers two or three criteria. These relate to a person’s (1) influence (2) level of commitment to the issue (through assessing levels of engagement and/or other markers of commitment for example), and (3) issue alignment. Several of these approaches specifically recommend that the results of this mapping exercise should then be plotted on a matrix with the criteria under consideration as axes, as in the following example (Figure 5):⁹⁶

⁹⁴ Roma & Levine, 2016; Conciliation Resources, 2011; CARE, nd; Mendizabal, nd; Tilley et al, 2018.

⁹⁵ Cohen et al, 2001; Tsui et al, 2014.

⁹⁶ Roma & Levine, 2016.

Figure 5: Stakeholder mapping

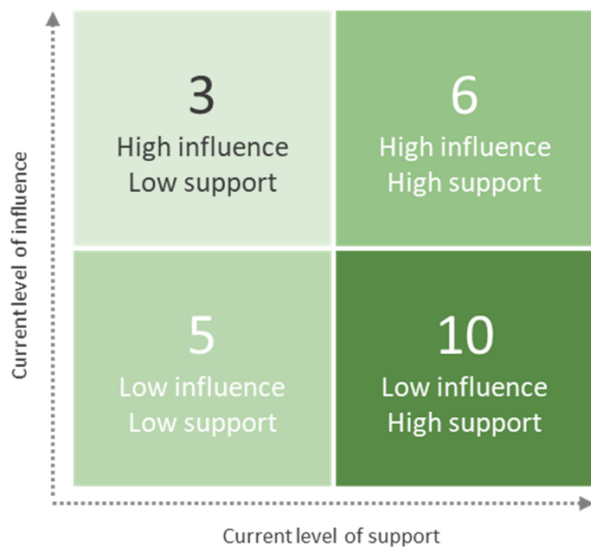


Source: Roma and Levine (2016)

In this model, champions fall into the top right quadrant (because they are both influential and engaged). In this case, the model opens up possibilities of discussion around potential or emerging champions, who do not currently fulfil ‘champion’ criteria but *could*, in the future.

As well as being a way to distil information about individuals, this matrix model can also be used as a way of presenting a summary aggregate picture of the existence of champions in a population of interest, such as amongst key parliamentarians, as in the following example (Figure 6)⁹⁷

Figure 6: Aggregate stakeholder map



Source: Stachowiak, Afflerback, and Howlett (2016)

⁹⁷ Stachowiak et al, 2016.

In most cases, the basis on which these criteria are rated is not specified. One example of where the rating system is made explicit is included as [Annex 6](#).⁹⁸

The results from stakeholder mapping can then be used as basis for developing individually tailored champion development plans.⁹⁹ One champion development program, for example, sets out a template for developing individual plans, taking the baseline mapping as the starting point ([Annex 7](#)).¹⁰⁰ As well as being a planning tool, stakeholder maps can be used to track individual and collective progress over time.

Champion indices

‘Indices’ offer an alternative way for stakeholder maps to identify and assess champions. Indices position champions and potential champions as part of a spectrum. We found two examples of champion indices in the literature – from the Coalition for Global Prosperity (CGP)¹⁰¹ and the United Nations Foundation. These indices can be placed alongside each other as follows (Table 12):

Table 12: Comparison of champion indices

Coalition for Global Prosperity (CGP)		United Nations Foundation	
Champion	Active and vocal supporter, generates own activity in support of [issue], will recruit other colleagues	Super advocate	Introduces supportive legislation or caucus, initiates sign ons, speaks at events, meetings or with media highlighting the campaign message
Advocate	Supporter in general, has been vocal or active publicly, will attend events	Issue promoter	Original co-sponsorship of supportive legislation, caucus leadership, participates in sign ons, positive statements at hearings, sponsors events highlighting campaign message
Ally	Interested and active, mixed voting history, attends events, has been mildly vocal or active publicly	Involved and interested	Co-sponsors or votes in favor of supportive legislation, caucus participation, positive floor statements, staff meetings, attends events or observation trips
Supporter	Interested but inactive, passive supporter. Will take actions when pressed		
Neutral	Inactive and disinterested	Neutral	Unclear position because legislative sponsorship, votes and statements are both positive and negative and/or neutral or nothing
Skeptical	Skeptical	Opposition	Votes against supportive legislation, makes negative statements
Hostile	Actively opposed		

UNF’s champion index has fewer gradations (five instead of seven). Based on our exploration of the importance of the distinction between skeptics and opponents ([section 12](#)), it seems fair to conclude that the seven-gradation model has a better degree of nuance than a more truncated index. Meanwhile, the UNF index provides more specific practical guidelines on the basis of which a particular person’s support could be categorized. For both however, we have not seen accompanying guidance on how such an index could be used to identify and assess potential champions. Presumably, this would involve 1) mapping all relevant stakeholders against the categories in the index; 2) within each category, considering who could

⁹⁸ Coffman & Reed, 2009.

⁹⁹ Transform Nutrition Consortium & SUN Movement, 2016; National Collaborating Center for Methods and Tools, 2017; Mendizabal, nd.

¹⁰⁰ National Journal, 2015.

¹⁰¹ Clarke, 2019.

be a priority to 'develop', with the likely aim of moving them up the spectrum, and then 3) developing personalized development strategies, reflecting the category the person is currently in (e.g., neutral, supporter, ally, advocate, champion). Those organizations that use these kinds of spectrums in planning may then follow through to use them as a basis for monitoring and tracking but this does not seem to be a commonly used tool. We explore approaches to engaging skeptics and hostile actors in [section 12](#).

Stakeholder maps may typically have the edge on champion indices because they are widely used, very easy to use and to adapt, and supported by clear guidance that would be easy to adopt. Results are also easy to distil and make sense of.

Recommendation 8

Use stakeholder maps to identify and map potential champions; select those to prioritize based on the picture that emerges. Apply criteria that relate to the identified champion's characteristics by mapping influence versus alignment on a matrix and incorporating a summary judgement or score of (a) that person's level of commitment to the issue or theme, and (b) the extent to which they currently have the capabilities to act as a champion on the issue or them.

Chapter C: Implementing champion building programs

This chapter explores the importance of understanding motivations, the different types of champion building support, and designing the right support package. It looks at issues of sustainability and timescales of change, networks of champions, and engagement with skeptics and opponents.



After the decisions to invest in champion building in a specific operating context and who the ‘right’ champions are have been made, it is crucial to spend sufficient time understanding their needs and motivations in order to design the most effective support package. **When considering the level of champion building support, it is important to consider issues of sustainability, timescales of change, networks of champions, and engaging with skeptics and the opposition.**

8. Understanding champions’ motivations

Understanding champions’ motivations is crucial when considering how best to engage and work with them. This was widely signaled in the literature¹⁰² and in our key informant interviews.



Pay attention to extrinsic, as well as intrinsic motivations. Intrinsic motivations appeal to someone’s internal belief system, while extrinsic motivation is driven by external reward. The latter is important to consider: this means keeping in mind how the relationship can benefit champions, because it is not likely to be just about their belief in the cause.¹⁰³ This is also highlighted by Kingdon in his description of the return on investment coming to the champion in the form of policies of which they approve, satisfaction from participation, or even personal aggrandizement in the form of job security or career promotion.¹⁰⁴ Consistent with this, Hahrie Han quotes James Q Wilson’s articulation of the three different types of motivations for getting involved in political organizations:¹⁰⁵ 1) purposive (wanting to achieve particular policy goals), 2) solidarity (social and emotional), and 3) material (to do with personal gain). For example, SheDecides, a global political movement to advance the fundamental rights of girls and women to make their own choices around sexual and reproductive health and rights (SRHR), recognizes that champions help the movement achieve its goals, so they should help the champions achieve

¹⁰² FHI360, 2010; Transform Nutrition and SUN Movement, 2016; Cody & Perkins, 2020; Roma & Levine, 2016.

¹⁰³ Transform Nutrition Consortium & SUN Movement, 2016.

¹⁰⁴ Kingdon, 2003.

¹⁰⁵ Han, 2014.

their goals as well, through offering them support, tailored to their need. The African Center for Economic Transformation acknowledges the efforts of champions through formal and informal votes of thanks, inclusion in events (panel discussion, seminars) and highlighting their work on the website and through social media. If the champions' work is thematic, they might also support or write op-eds to amplify the champions' voices and visibility.



Be aware of the multiple possible benefits to champions themselves. From the literature, we have identified five key potential benefits that champions can gain from being active in support of an issue (Table 13):

Table 13: Summary of benefits to champions

Benefit	Comment
Funding and resources	Financial backing supports achievement of tasks but can also help ensure the champion feels supported and recognized. ¹⁰⁶
Recognition	It is important to give formal acknowledgment of champions' role, celebrate their accomplishments and raise their profile and visibility with public and peer audiences. ¹⁰⁷ Champion building programs can similarly offer validation, for example because acceptance in a program may itself be seen as a vote of confidence in a particular person and their potential, and so a means of leveraging future support from others.
Skills building	Provide opportunities to build champions' capacities. ¹⁰⁸ This is a core element of fellowship programs, for example. ¹⁰⁹
Access	Provide opportunities for champions to take part in meetings and events, and to interact with influential actors. ¹¹⁰
Relationships	Nurture and build relationships, which are important in sustaining motivation: ¹¹¹ "It is through relationships and collective action that people's motivations for action are likely to develop." ¹¹²



Consider that in some cases, there may be opportunity to co-create development pathways. It will not always be appropriate, depending on the individual and the nature of the relationship, but **some of the literature points to the possibility and advantages of involving champions themselves in considering how best they can be deployed and how the partnership can best evolve.**¹¹³ This can be a way to help ensure expectations are clear and reasonable.¹¹⁴ Due to the risk of champion fatigue, it is important to be clear about the time and efforts, requested of champions.

Initiative	BMGF India's philanthropic partnerships
Theme	Co-creating champion engagement

¹⁰⁶ FHI360, 2010; KIIs.

¹⁰⁷ Transform Nutrition Consortium & SUN Movement, 2016; Collaborative for Student Success, 2018; FHI360, 2010; Cody & Perkins, 2020.

¹⁰⁸ Transform Nutrition Consortium & SUN Movement, 2016; FHI360, 2010.

¹⁰⁹ Ashoka et al, nd.

¹¹⁰ Transform Nutrition Consortium & SUN Movement, 2016.

¹¹¹ Ericsson & Pool, 2018.

¹¹² Han, 2014.

¹¹³ Transform Nutrition Consortium & SUN Movement, 2016; Ashoka et al, nd.

¹¹⁴ Roma & Levine, 2016; ORS Impact, 2018.

Champion type	Philanthropists
	<p>BMGF Philanthropic Partnerships Team in collaboration with the India Country Office has partnered with a small group of local and regional leaders to advance issues of inequities in Indonesia, where the foundation has investments but not a local office. Dato's Sri Prof Dr. Tahir, an Indonesian philanthropist, who has been a partner of BMGF since 2013, has been able to engage multiple sides of the political landscape, including the President of Indonesia, while the foundation has provided limited funding and technical assistance.</p> <p>In 2018, following a letter request from Bill Gates, Dr. Tahir formally agreed to be an ambassador for Pneumococcal Conjugate Vaccine (PCV) immunization in Indonesia. He played a critical role in engaging with government partners and intervened at critical moments. There were clear decisions on what actions and follow up was required from Dr. Tahir and BMGF co-chairs wrote personal letters to acknowledge his contributions.</p>



Recognize that development routes are not always linear. Models of engagement are often described as ladders or pyramids, where you start with an 'easy' action and gradually move up.¹¹⁵ As the United Nations Foundation has found, even sending a single message can create a dialogue and pave the way to high barrier actions such as a public speech.¹¹⁶ However, **rather than imagining linear, incremental progress in this way, some suggest that it is better to offer a spectrum of opportunities for engagement and think in terms of an 'engagement cycle' rather than a ladder.**¹¹⁷ The idea of 'gradual ascendancy' up a ladder is contrary to the strategic approach in organizing, which emphasizes achieving high engagement by laying a relational base from the beginning and by focusing on the capacity to take on leadership.¹¹⁸ Along similar lines, Jane McAlevey recommends "framing a hard choice" as a way of determining levels of commitment - by encouraging people either to step up or step back.¹¹⁹

This suggests **that the approach needs to be fluid and organic:**

"Too often, projects...follow linear framework and theories of change that tend to attract professionals who can deliver the scope of work and outputs. Projects that encourage experimentation, testing, and probing have a higher likelihood of attracting development entrepreneurs."

For example, one informant explained how, in its support to leaders, OSF found that after "pilot programs and experiments, [OSF] began to shift resources away from [individual] grant making toward convenings" when they saw the value in bringing "critical thinkers" together in diverse cohorts: "initially there was friction...[but] it was one of the most enriching professional experiences they've ever had".

¹¹⁵ Rolfe-Redding, 2019.

¹¹⁶ Nothing But Nets, nd.

¹¹⁷ Price, 2017.

¹¹⁸ Han, 2014.

¹¹⁹ McAlevey, 2016.

Now, in addition to a living stipend and project budget, they also tell Fellows “they will be expected to attend three to four convenings with other Fellows”.

Recommendation 9

When working with champions, take time at the ‘engagement’ stage to understand a champion’s motivations and the benefits they might be looking for, including in relation to (a) Funding and resources, (b) Recognition, (c) Skills building, (d) Access, and (e) Relationships. An engagement that brings benefit to all those involved is likely to be deeper, more sustainable, and effective.

9. Developing champion support programs

While we highlight the importance of individually tailored plans above, it is possible to *categorize* the types of support offered to champions in their development pathways.¹²⁰ Not surprisingly, these areas mirror the analysis around what motivates champions to sustain their support. As one interviewee noted, “when you find a champion or subject matter expert you want to work with, there’s always something that can be improved or strategically be made more effective”.

The different types of support are discussed in turn below. We then consider which support offers are likely to be most effective and relevant for which champion types (see **Error! Reference source not found.**).

Resourcing

Funding is a direct way of supporting champions. Those supplying resource support can also do so indirectly, by driving more resources toward champions and potential champions.¹²¹ But – as discussed in relation to ‘orchestration’ in [section 10](#) – there can be sensitivities that come with funding support. One interviewee said that:

“It is important to dissociate ourselves with the...mindset that champion building has to be expensive and that we need to pay them to work ‘for us’...Our role should be more about sustaining them through platforms that can help bring those voices together and sustaining them as a whole.”

Creating opportunities for recognition

Another way of building and sustaining motivation is by providing opportunities for greater visibility and exposure – in the media for example, or by nominating champions for leadership roles, awards and other types of formal recognition and acknowledgment.¹²²

Networking and relationship building

A third type of support is around boosting access to networks of other leaders and partners, bringing potential leaders into contact with each other, including by connecting across sectors. This creates important opportunities for champions to work with others, as well as bolstering social connection and support.¹²³ Alumni networks, for example, can support long-lasting relationships between the organization and the alumni, as well as facilitating connections and networking between alumni

¹²⁰ Ashoka et al, nd; Transform Nutrition Consortium & SUN Movement, 2016; Roma & Levine, 2016; Han, 2014; Cody & Perkins, 2020; Clarke, 2019; Petruney et al, 2009; Arabella Advisors, 2018; Price, 2017.

¹²¹ Ashoka et al, nd.

¹²² Ashoka et al, nd; Roma & Levine, 2016; FHI360, 2010.

¹²³ Ashoka et al, nd; Price, 2017; Arabella Advisors, 2018; Cody & Perkins, 2020; Petruney et al, 2009.

members. They can be a particularly effective vehicle for this because members often “self-select into...social groups with interests closely aligned to their own, which generates both a higher level of interaction and longer-lived relationships”.¹²⁴ There may be opportunity and need to supplement this networking value through additional support offers:¹²⁵

“Sometimes, just the networking value of an alumni program is enough...But the most effective alumni programs offer additional benefits, such as access to ... intellectual capital, free or subsidized training programs, and invitations to events and social gatherings.”

Skills building

Champion building can also involve providing support to areas where champions may need to develop or improve a specific skill, such as public speaking, the ability to write effectively, and the ability to have a solid digital footprint.¹²⁶ One example is the importance of parliamentarians’ training in aspects such as budget advocacy and coalition building, as well as issue-specific education.¹²⁷ There is also evidence that skills building is an important element of fellowship and accelerator programs. **A review of accelerator programs, for example, found that “the high-performing programs spent more time on presentation and communication skills, networking, and organization structure and design”.**¹²⁸ This is consistent with wider evidence around how people develop expertise. The most effective interventions in professional development have an interactive component – such as through role-play, case solving, or hands-on training, and these are more valuable than didactic inputs (such as listening to a lecture). The emphasis should be on skills, not knowledge.¹²⁹

Content support

Providing technical expertise can also be an important component of support, including by equipping champions with evidence but also, for example, by drafting articles and social media outputs.¹³⁰ Packaged information can be of great value:¹³¹

“Parliamentarians need data, the capacity to interpret that data; translating this data so it can be used effectively—in manageable talking points, digestible reports, and through strategic communications.”

As mentioned by one interviewee, sometimes it is important to allow time and space for champions to create their own “authentic” content, especially when working with local champions who are nationally prominent. This may help ensure messages are considered more credible. However, she stressed the importance of ensuring champions are paid for any additional work.

¹²⁴ Cohen & Malloy, 2010.

¹²⁵ Sertoglu & Berkowitch, 2002.

¹²⁶ Ashoka et al, nd; Petruney et al, 2009.

¹²⁷ Cody & Perkins, 2020.

¹²⁸ GALI, nd.

¹²⁹ Ericsson & Pool, 2016.

¹³⁰ Roma & Levine, 2016; Petruney et al, 2009; Clarke, 2019.

¹³¹ Cody & Perkins, 2020.

Learning opportunities

The importance of providing personal growth opportunities to champions has also been widely cited.¹³² According to one source, to be challenged and to learn is a requirement for a champion to prosper.¹³³ This can include deeply immersive opportunities, such as overseas tours, which provide a classic opportunity for learning from experience. Parliamentarians' commitment also can be bolstered by the group dynamics between parliamentarians on the tour.

This kind of immersive experience can also be important for champions other than MPs. Barr Fellows, for example, spend the first two weeks of their (three-month) sabbaticals traveling together to the 'Global South'. This provides a disruptive learning context, and space for interaction with community leaders, who might stimulate ideas and bolster their ambition to achieve change.¹³⁴

Well-being support

Providing well-being support is becoming increasingly valued across champion building programs in order to sustain continued involvement and engagement.

Initiative	Echoing Green Fellowship
Theme	Well-being support
Champion type	Community leaders
	A key aspect of the Echoing Green Fellowship's support package is providing ongoing support for mental and emotional well-being through self-care workshops, delivered by professionals. Traditional social incubators tend to focus primarily on building leaders' technical skills, but Echoing Green has recognized that prioritizing well-being at the start of a social entrepreneur's journey can pay dividends, given the significant burnout social entrepreneurs often struggle with due to the challenging problems and environments they address. Echoing Green asks Fellows to describe what support they may need and offer self-care workshops in areas of common struggle faced by social entrepreneurs.

Expanding access

Support in expanding access might include access to networks and resources, as well as other opportunities for convening and fostering engagements, for example, through participation in conferences and other curated connections.¹³⁵ For example, one of the key aspects of TED's Audacious project is to support social entrepreneurs in engaging donors 'behind the scenes' of the annual TED conference.

Establishing a link to constituency-level priorities


Linking 'asks' to constituency-level priorities could support champions in advancing issues.

¹³² Ashoka et al, nd; Cody & Perkins, 2020; FHI360, 2010; Han, 2014.

¹³³ Transform Nutrition Consortium & SUN Movement, 2016).

¹³⁴ Lanfer et al, 2013

¹³⁵ Ashoka et al, nd; Cody & Perkins, 2020.

Initiative	United Nations Foundation's Nothing But Nets campaign
Theme	Combining grassroots and grassroots approaches
Champion type	All types
	<p>Constituency engagement is a key element of the United Nations Foundation's overall strategy. Constituents acting as grassroots champions often play a vital role in focusing Members of Congress' attention on the issues UNF works on. This engagement is important, especially for those who might naturally avoid talking about foreign assistance, as a way of showing how it may be relevant to the district they represent. Constituents' support can also provide 'political cover' for policymakers when they are trying to advance issues that are perceived as sensitive or controversial in certain contexts.</p> <p>To support this grassroots influencing, UNF organizes a flagship 'Annual Leadership Summit', which features two days of interactive programming and training on relevant issues and themes. The Summit culminates in an Advocacy Day. At the most recent event, in spring 2020, this involved more than 150 grassroots-led advocacy meetings on Capitol Hill. This one-off event is complemented by dozens of in-district meetings that take place over the course of the year.</p> <p>Supplementing the work of these constituency champions, UNF's Global Health Fellowship is building a campus-based network of advocates with global health affinities, with a focus on recruiting university students in target congressional districts.</p>

Importance of relationships and trust

Finally, trust is vital and comes from mutual investment in an ongoing, long-term relationship.¹³⁶

Champion building involves more than an instrumental relationship. As one interviewee noted, a two-hour chat on the phone might not advance anything specific, but it forms a part of the role of champion relation building. Time for this kind of engagement needs to be factored in. This seems very much the approach BMGF uses in its ongoing engagement with champions. For example, one informant, a prominent leader in his field, considers his long-term engagement with the foundation a "partnership: it has been a major supporter over many years, you can't question its commitment...it's truly a partnership, in both our best interests to succeed".

Initiative	Open Society Fellowship
Theme	The value of trust-building
Champion type	Community leaders
	The Open Society Foundations' relationship-based approach to engaging with champions is based on its belief that long-term engagement (>10 years),

¹³⁶ Young & Quinn, 2012; Cassim, 2016; Cody et al, 2020; Itad, 2017; Aston, nd; Shephard et al, 2018; Cody & Perkins, 2020; Ashoka et al, nd).



and community and trust building should be at the core of any champion building program. **The Open Society Fellowship** invests heavily in ensuring that there is a relationship of trust between the organization and its champions by holding a series of community building events aimed at making champions feel supported by both OSF's internal staff and its peer community.

Workshops provide a forum for Fellows to share details about their current work, how it has evolved, and what challenges they are facing. Often, one Fellow will be assigned to interview another to foster peer connection. Other activities include bringing Fellows together in panel discussions around a common theme. The Fellowship also provides more "unstructured" opportunities for Fellows to get to know each other such as site visits and field trips.

The commitment to engaging with champions in the long-term has also allowed OSF to learn from the people it collaborates with and better understand its own organizational health, effectiveness, strengths, and challenges.

All the elements explored above reinforce each other: "Champion Building is not a linear process. It is up and down. It is sustainable."

The right support package will vary by champion type and the best approach will be different for each individual, but there are some commonalities across champion types that make it possible to group the balance of support needed according to champion type. For example, subject experts in most cases are likely to already have the necessary research skills and content knowledge, but they may lack the resources to be able to give an issue or theme priority. Others – such as celebrities, those in the media, faith leaders, etc. – may have interest and commitment, but may lack content knowledge. Some champion types will already be well placed in terms of access, while others will need support to be able to access the right people. All these different variables are summarized in Table 14.

Table 14: Likely support needs by champion type

Champion type	Resources	Recognition	Networks	Skills	Content	Learning opportunities	Well-being	Access	Link to constituency	Relationships & trust
Subject experts										
Political officials										
Political advisors										
Parliamentarians										
Former senior politicians										
Private sector leaders										
Philanthropists										
Faith leaders										
Media										
Celebrities										
Community leaders										

Key

Likely to be a high priority area	Likely to be a medium priority area	Likely to be a low priority area	Likely not to be needed

A summary analysis indicates that these types of support contribute to bolstering champion characteristics in the following ways (Table 15):

Table 15: Type of support for key characteristic

Type of support	Influential	Aligned	Committed	Capable
Resources				
Recognition				
Networks				
Skills				
Content				
Learning opportunities				
Well-being				
Access				
Link to constituency				
Relationships & trust				

Key

May help bolster this element	Is designed to bolster this element
-------------------------------	-------------------------------------

Another way to categorize the different types of support is according to (a) how structured the support is, and (b) over what timescale it operates. Sometimes, a formally structured approach will be appropriate (such as a fellowship scheme or the establishment of a formal network, such as a high level panel).

At other times, support will be more ad-hoc and one-off (such as a training offer or supporting people's attendance at a conference); or it may be ongoing, but not fully structured (such as through peer learning initiatives). These variables can be summarized as follows in Figure 7:

Figure 7: Distillation of interventions by formality and timescale

		Formality of intervention	
		Formally structured	Informal
Timescale of intervention	Long term (4+ years)	Alumni networks All Party Parliamentary Groups (APPGs) High level panels focused on an issue or theme	Ongoing support and learning opportunities, including through one-to-one engagement, and peer to peer and multisector networks
	Medium term (1-3 years)	Fellowship programs Project specific high level panels and coalitions	
	Short term (under 1 year)	Study tours Accelerator programs Training Conferences	One-off support and ad-hoc learning opportunities, including through one-to-one engagement and peer to peer and multisector networking

Source: Itad (2021)

There was little in the literature relating to either costs of different elements within champion building programs, or providing commentary on their replicability. However, we generally find that structured programs are more easily replicated than less structured programs. Structured programs typically have a standardized core and involve a mix of standardized and tailored support such as in **fellowship programs**. Packard Foundation, for example, found that effective programs include a technical assistance or coaching element, where content was tailored to leaders' specific needs.¹³⁷ Tailoring support comes at a cost, however, which helps explain one organization's adoption of a hybrid approach: "More of a FedEx approach, with different boxes, a menu of support that people can reach into and use as they need" as one interviewee described it.

Separately, **study tours** are a particularly costly intervention that require significant human and financial resources to plan and execute successfully. For the reasons given above, they are commonly identified as one of the most impactful pathways to building a champion and accelerating and locking in their support. Various sources in the literature allude to their effectiveness,¹³⁸ although clearly there are challenges in seeking to isolate and measure the cost/benefit of a single intervention as part of a wider strategy.¹³⁹

Initiative	European Parliamentary Forum
Theme	Study tours
Champion type	Parliamentarians
	<p>Study tours have been described as a 'pivot point' that lead to greater engagement on an issue.¹⁴⁰ The power of tours is in exposing the participants to first-hand evidence, hearing and seeing individual stories.¹⁴¹</p> <p>As the European Parliamentary Forum has found, it can be highly beneficial to bring together parliamentarians from different countries and with a diverse range of perspectives to have one's assumptions constructively challenged. Including seasoned champions, who can take on a leadership role within the group, alongside new members can be a good way to create positive dynamics that continue to reverberate after the tour itself has concluded.</p>

Less structured support needs to be specifically tailored to individual needs and contexts; thus, generalized costing is not possible. This reflects the difficulty of drawing conclusions that can be widely applied, given that choices about what kinds of champion building approaches are appropriate for which individuals and which champion types will depend on purpose and context.

Initiative(s)	Echoing Green; Co-impact; Skoll Foundation; Schwab Foundation
Theme	Fellowship and accelerator programs


¹³⁷ ORS Impact, 2018.

¹³⁸ CARE (nd).

¹³⁹ Cody & Perkins, 2020.

¹⁴⁰ Cody & Perkins, 2020.

¹⁴¹ Clarke, 2019; Roma & Levine, 2016; Ray, 2018.

Champion type	All types				
	<p>Fellowship programs are a common way to invest in champion and leadership development, by offering a structured program that provides assistance across a range of areas. They support cohorts with a structured, time-bound package of support and are typically awarded to people, who can demonstrate achievement or at least potential to achieve success, in their field.</p> <p>As well as resources, fellowships typically provide networking opportunities and greater access to key audiences, mentoring and advice, skills building, support to well-being, along with ways to show recognition, as in the following prominent examples:¹⁴²</p> <table> <tr> <td> <p>Echoing Green</p> <ul style="list-style-type: none"> ▪ Personalized leadership development and well-being support ▪ Networking events ▪ Expert advice </td><td> <p>Co-impact</p> <ul style="list-style-type: none"> ▪ Support for capability development ▪ Access to networks and resources </td></tr> <tr> <td> <p>Skoll Foundation</p> <ul style="list-style-type: none"> ▪ Skoll Award for Social Entrepreneurship ▪ Convening ▪ Supporting Skoll Awardees' outputs ▪ Providing mutual support and personal growth opportunities </td><td> <p>Schwab Foundation</p> <ul style="list-style-type: none"> ▪ Advocacy platform: raising awareness of the social innovators and their work ▪ Partnership and knowledge networks ▪ Capacity development ▪ Peer support </td></tr> </table> <p>Accelerator programs are a variant of Fellowship programs that provide more intensive and time-limited support for cohorts of entrepreneurs to accelerate their ventures. As with fellowship programs, accelerators provide practical support and facilitate connections. In the Village Capital Model, for example, support includes resources, skills building, access and networking opportunities:¹⁴³</p> <ul style="list-style-type: none"> ▪ Fifteen entrepreneurs are recruited and go through the program as a group. ▪ They are given three months of intense training and mentorship, including hypothesis testing and investor engagement. <p>At the end of the program, entrepreneurs that are top ranked by their peers receive seed capital.</p>	<p>Echoing Green</p> <ul style="list-style-type: none"> ▪ Personalized leadership development and well-being support ▪ Networking events ▪ Expert advice 	<p>Co-impact</p> <ul style="list-style-type: none"> ▪ Support for capability development ▪ Access to networks and resources 	<p>Skoll Foundation</p> <ul style="list-style-type: none"> ▪ Skoll Award for Social Entrepreneurship ▪ Convening ▪ Supporting Skoll Awardees' outputs ▪ Providing mutual support and personal growth opportunities 	<p>Schwab Foundation</p> <ul style="list-style-type: none"> ▪ Advocacy platform: raising awareness of the social innovators and their work ▪ Partnership and knowledge networks ▪ Capacity development ▪ Peer support
<p>Echoing Green</p> <ul style="list-style-type: none"> ▪ Personalized leadership development and well-being support ▪ Networking events ▪ Expert advice 	<p>Co-impact</p> <ul style="list-style-type: none"> ▪ Support for capability development ▪ Access to networks and resources 				
<p>Skoll Foundation</p> <ul style="list-style-type: none"> ▪ Skoll Award for Social Entrepreneurship ▪ Convening ▪ Supporting Skoll Awardees' outputs ▪ Providing mutual support and personal growth opportunities 	<p>Schwab Foundation</p> <ul style="list-style-type: none"> ▪ Advocacy platform: raising awareness of the social innovators and their work ▪ Partnership and knowledge networks ▪ Capacity development ▪ Peer support 				

¹⁴² Ashoka et al, nd.

¹⁴³ Roberts et al, 2016.

It is important to note that the individual elements explored in Figure 7 each form part of a wider package of support, rather than operating in isolation. As we explore [section 10](#), it is best to think about interventions, especially short-term ones, as one part of a longer-term program. In all cases, informal engagement is important as part of maintaining the ongoing relationship. Different champion types will also benefit from more structured and formalized support, in the kinds of combinations outlined in this summary mapping of support and champion types (Table 16).

As we discuss below (Table 21), depending on the context, the organization engaging with the champion may directly provide or fund these elements; in other situations, they might encourage others to do so; or more simply, link champions up to existing initiatives and programs.

Table 16: Elements of support appropriate for different champion types


Champion type	Formally structured		
	Long term	Medium term	Short term
Subject experts	Peer networks Alumni	Peer networks Fellowships	Training/skills building Conferences
Political officials			Participation in conferences
Political advisors			Participation in conferences
Parliamentarians	All Party Parliamentary Groups (APPGs)		Study tours Training/skills building Participation in conferences
Former senior politicians	Thematic high level panels	Project specific high level panels	Participation in conferences
Private sector leaders	Peer networks		Study tours Participation in conferences
Philanthropists	Peer networks		Study tours Participation in conferences
Faith leaders	Peer networks		Participation in conferences
Media	Peer networks Alumni	Peer networks Fellowships	Study tours Training/skills building Participation in conferences
Celebrities			Study tours
Community leaders	Peer networks Alumni	Peer networks Fellowships	Training/skills building Participation in conferences

Key

Likely to benefit from

Not likely to benefit from



Initiative	African Center for Economic Transformation
Theme	High level panels
Champion type	Former senior politicians, political officials
	<p>The African Center for Economic Transformation (ACET) based in Ghana conducts analysis and research, and provides advisory services to African Governments on areas such as investment, financial inclusion, and skills development. In 2019, ACET established the Transformation Leadership Panel, a body of 17 eminent figures from Africa and around the world who are collectively seeking to influence, support and advise leaders on action to achieve transformative change in Africa. The Panel is currently chaired by former Liberian President Ellen Johnson Sirleaf.</p>

Other variables apply, in addition to champion type, when considering the best support packages. One relates to how well developed as a champion someone is. **Potential or emerging champions are more likely to benefit from a structured package of support, through fellowship schemes for example. Those who already exhibit champion characteristics, will be more likely to benefit from more one-off and tailored support.**

Recommendation 10

Those working with champions should consider the following support elements as a framework for considering - and continually plotting - the support a champion is likely to need in their development journey.

- Resourcing
- Creating opportunities for recognition
- Networking and relationship building
- Skills building
- Content support
- Learning opportunities
- Well-being support
- Expanding access to networks and resources
- Establishing a link to constituency-level priorities

Ringfencing time to invest in ongoing relationship building as an integral part of champion programs should be encouraged and valued.

10. Sustainability and timescales

Timescales of change

There is strong consensus that champion building involves a long-term commitment, and that it is important to be realistic about the timescale of change. As one internal interviewee described it, “You

invest over many years, after five to seven years you might see the pay offs. We shouldn't fall over ourselves to get impact too quickly". Another interviewee argued that:

"We should aim for a maturity model – it happens over time where you can see the change. It takes time. A lot of high touch investment that leads to a deeply mature relationship...If we build the right exposure, they get to be champions for life. They become super influential, the top of the hierarchy... it is long term. They need to end up as an independent voice."

Champion building is "more a long haul than a short track race".¹⁴⁴

This is consistent with what is known about policy change; while the specific timescale of change depends on the issue and context, issues are rarely resolved in the short term. A meta-evaluation conducted by CARE found that in most of the examples reviewed, "efforts took more than five years before the desired change was achieved" for example.¹⁴⁵ Along similar lines, a study of the policy environment in the U.S. identified that most policy issues being tracked showed no change over a four-year period.¹⁴⁶ In exploring the dynamics of policy change, John Kingdon has noted how 'softening up' of policy communities (which tend to resist change) and wider public audiences (whose acceptance may be gradual) can take "years and years".¹⁴⁷ In BMGF's own advocacy portfolio, decision makers' support for the Global Fund was based on over a decade of cultivation and influencing efforts by grantees, the BMGF and the Global Fund itself.¹⁴⁸

In addition to the uncertainty around timescale, the likelihood of results is not always predictable. The evaluation of the New Voices Fellowship program, for example, found that:¹⁴⁹

"Engagement during the fellowship ... does not necessarily predict fellows' eventual output: some fellows who seemed less engaged during the fellowship turned out to be quite active in alumni groups and produced more media content after the fellowship ended."

There are only a few references in the literature to specific timescales, in terms of champion outcomes and when they might be expected.

Considering the short and medium term, the CGP has explained how the organization might spend a year building a relationship with a potential champion: "They've got to feel they trust you, that they believe in your project,"¹⁵⁰ while the United Nations Foundation has found a similar time lag in activity: "Between years one and two [they've] seen the number of treatment offices [i.e., Members of Congress with whom UNF has engaged] double in both activity and scope of action."¹⁵¹

Thinking about the different timescales of change, GALI operates to a framework of expectations as follows:¹⁵² 1) Outcomes for entrepreneurs, during the program; 2) Outcomes for firms (i.e., within which

¹⁴⁴ DSW, BMGF Learning Session, 2019.

¹⁴⁵ Aston, nd.

¹⁴⁶ Baumgartner et al, 2004.

¹⁴⁷ Kingdon, 2003.

¹⁴⁸ Itad, 2017.

¹⁴⁹ Arabella Advisors, 2018.

¹⁵⁰ BMGF Learning Session, 2019.

¹⁵¹ Dalberg, 2017.

¹⁵² GALI, nd.

the champions operate), 1–2 years; 3) Outcomes for society, 5+ years post program. A review of multiple fellowship programs by Ashoka also found, “the majority of systems change approaches is expected to need more than five years of funder support to achieve their goals”.¹⁵³

Finally, in the very long term, the New Voices Foundation program evaluation found that:¹⁵⁴

“Some fellows secure opportunities to interact or partner with policy influencers during the fellowship year—but for many, the events that ultimately have policy impacts, or reach policymakers, unfold in the years following the fellowship...Most said impact could start being evaluated after about five years, though some think it takes longer to start seeing the range of outcomes that fellows affect.”

While contexts are different, aggregating these findings reveals some possible commonalities. We have summarized possible expected timescales below (Table 17).

Table 17: Summary collation of expected timescales of change

Timescale of change		What results an effective program might reasonably expect	Commentary
Short term	Under 1 year	Few if any results	Early focus is likely to be on establishing and building relationships, rather than on external results.
Medium term	1-3 years	Early results	Some early signs of champions’ effectiveness may be available, especially in relation to how they engage with those closest to them - but again this is likely to be too soon to meaningfully validate, or not, the overall investment.
Long term	4+ years	Evidence of the investment paying off	More meaningful results should be apparent over this timescale, with contribution to more systemic change evident - and the absence of evidence of this would be problematic.
Very long term	10+ years	Increasing effectiveness and independent action	If healthy and meaningful relationships have been established (and where a very long-term change horizon is relevant), then expect to see a flourishing engagement between mutually effective partners.

While these are all different programs and contexts, the evidence points to some common conclusions in understanding how long it takes to build a champion:



Funding should reflect the timescales of change. Foundations should consider longer life-cycle investments and that short funding horizons may work against achieving sustainable change.¹⁵⁵ As

¹⁵³ Ashoka et al, nd.

¹⁵⁴ Ibid.

¹⁵⁵ Cody & Perkins, 2020; Ashoka et al, nd.

part of its fellowship program, Ashoka makes “life-long commitments” to its partners in the form of ongoing network access, for example.



Pay attention to champions’ possible difficulties in maintaining focus on an issue. There are various indications that maintaining focus can be difficult and that strategies to prevent or address fatigue are needed;¹⁵⁶ however there is less concrete advice about how to do this. One key aspect is to maintain openness in the relationship¹⁵⁷ and this might involve recognizing that maintaining a relationship may at times be an outcome in itself; contact does not always need to be tied to specific asks. For MPs, this challenge highlights the value of combining personal engagement with constituency-level activity. The latter can give a prompt to continuing action, as well as restating ‘permission’ to act. It also means being sensitive to changes in people’s own lifecycles and how that may affect their ability to engage. This might include professional strain (such as demanding jobs, or career changes) and as well as life events (such as health problems and family emergencies).¹⁵⁸

Relevant to the timescales of change, it is important to consider the balance of investment in existing or potential/emerging champions. Working with new constituencies is beneficial as issues evolve, contexts change, and the dynamics of influence can shift over time. As one interviewee put it:

“Champion building is an ongoing process; you constantly need to be rethinking, ‘who are the voices, whatever’s next...what additional voices do we need to build and cultivate?’”

Some interviewees strongly felt that the focus of champion building should be on working with existing champions – “the focus should be more about leveraging voices that are already there; it’s resource draining to engage with ‘new’ voices”. Furthermore, one grantee’s experience was that, despite casting a wide net, the people taking action were the ones who were already champions. Working with those who already have influence is the CGP’s stated approach; but German NGO Deutsche Stiftung Weltbevölkerung (DSW) has made the case for investing in building new champions over a long period.¹⁵⁹ **Ultimately, the question about the balance of investment in existing or emerging champions will have a different answer depending on the timescale of change.**¹⁶⁰ Different champion building investments may be appropriate depending on the timescale of investment being considered. Organizations investing in champion building can work both towards achieving shorter-term wins, while still building champions’ capacity for future influence, which manifests in the long-term.¹⁶¹ **The importance of thinking in the long-term is likely to be even greater when seeking to build new leadership rather than simply working with existing leaders.**

Initiative	Echoing Green Fellowship
Theme	Alumni support
Champion type	Community leaders

¹⁵⁶ Petruney et al, 2009; FHI360, 2010; Cody & Perkins, 2020.

¹⁵⁷ FHI360, 2010.

¹⁵⁸ Arabella Advisors, 2018.

¹⁵⁹ BMGF Learning Session, 2019.

¹⁶⁰ National Journal, 2015.

¹⁶¹ Han & Argyle, 2016.



Echoing Green provides lifelong support to its Fellows, who are considered Fellows ‘for life’. After the two-year Fellowship is over, alumni are offered myriad opportunities to remain connected to the organization and their peers, joining a global community of emerging and established leaders. Alumni are offered opportunities to specialize in a specific area of interest by participating in thematic retreats and applying to other cohort-based programs (lasting 18 months) centered around an **‘inflection’ point**, e.g., raising impact capital, transitioning from direct service to policy and advocacy work, etc.

The content of alumni support activities is developed in consultation with Fellows to determine their specific needs. Some of the main needs that have emerged over the years include:

- Sending a newsletter to keep Fellows and alumni updated on opportunities and/or achievements of other Fellows on a regular basis and create opportunities for Fellows to connect with each other;
- Hosting and/or participating in events where Fellows could present their ideas and/or organizations and engage a wider audience;
- Organizing cohorts and helping Fellows catalyze their networks.

The package of support provided through the Fellowship represents only the start of people’s leadership development journeys. The alumni scheme ensures aspiring entrepreneurs continue to be supported in their personal growth and in building and scaling their enterprises.

Recommendation 11

To be consistent with timescales of change, foundations and others supporting champion building should commit long-term funding (4+ years) to champion building investments wherever possible.

Recommendation 12

Where appropriate, champion building should operate on an explicit twin-track timeline, working with existing champions while also developing new ones. When investing in emerging champions, be intentional about expanding the diversity of voices advocating for an issue or set of issues in order to (a) avoid reinforcing existing power relations and (b) open up new opportunities for influence.

Developing sustainable relationships

In addition to timescales of change, it is important to consider how best to build genuine relationships and avoid an ‘orchestration mindset’ that can stand in the way of sustaining champions’ commitment. As one interviewee described it, “We have to...devote resource and the energy necessary. It is difficult to be consistent because strategies change with priorities and attention, we are too busy etc., and we don’t devote consistent support that we need to give to individuals, and their incentives fade with time. And it becomes opportunistic. We need a two-way relationship that is consistent. Those relationships are built over time...personal connection is...so important...you’re asking something quite personal, so you need to be able to offer that in return as well.” In designing its fellowship program, the Barr Foundation has sought to balance the need for some structure around shared agendas with the desirability of maximizing more distributed leadership, in an approach described as **‘ambidextrous philanthropy’**: “rooted in strategy yet also in values; focused on outcomes, yet also responsive...On one hand, it looks

technocratic...A detailed logic model makes explicit its core assumptions and theory of change for how an investment in a group of leaders...will translate into positive impact...The fellowship also exhibits clear humanistic qualities...Barr has never prescribed outcomes or specific collective actions. It has not insisted on a common agenda. Instead, it has focused on investing in and strengthening relationships.”¹⁶²

Having ownership and space for self-direction encourages champions to stay engaged and can foster their individual creativity,¹⁶³ **by “tapping into the collective intelligence”.**¹⁶⁴ The leaders of the March For Our Lives movement, for example, were greatly aided by a hands-off approach from those supporting them: “these people putting the money in - not a single one of them has said anything along the lines of ‘I’ll donate but you have to listen to what I say’. Nobody is pulling the strings for these kids ... [George Clooney, who donated £500,000 to the cause] is not directing them, nor is anybody.”¹⁶⁵ The same principle of supportive facilitation underpins PATH’s stated approach: “Instead of entering engagements with predetermined policy goals, we support participants, whether new or experienced advocates, to assess local needs and determine which objectives best advance their health objectives.”¹⁶⁶

This may present a challenge for some foundations, for example, who may be reluctant to cede control, but one interviewee stressed that “you need an open strategy – you are working with people so it should be more organic.” Another remarked that, in its champion building work, organizations like BMGF:

“...should not try to ‘over-engineer’ tactics like champion building...Believe in champions...You need to maintain distance to allow people to find their feet.”

Initiative	BMGF’s India philanthropic partnerships
Theme	Developing sustainable relationships
Champion type	Philanthropists
	<p>BMGF’s champion engagement in India has focused on building trust and establishing long-term partnerships. Its collaboration with EdelGive Foundation, a Mumbai-based philanthropic organization, has evolved over time. In its early phase, the focus was on building a strategic relationship to strengthen the philanthropic organization. As the partnership evolved, gender equality emerged as one of the programmatic areas to focus on. BMGF’s country office has provided support by making connections with knowledge partners, funders, philanthropists, as well as other experts on gender and women’s empowerment.</p> <p>Since the start of their partnership, EdelGive Foundation has helped support and build 15 NGOs on women’s empowerment, violence, and social agency in India. With support from BMGF, the organization has expanded its work across a variety of stakeholders and a broad group of grassroots organizations.</p>

¹⁶² Lanfer et al, 2013.

¹⁶³ Faustino & Booth, 2014.

¹⁶⁴ Mogus & Liacas, 2016.

¹⁶⁵ Cullen, 2019.

¹⁶⁶ PATH, nd.

In relation to this, various sources highlight the need for, and value of, unrestricted funding as a way to build in flexibility.¹⁶⁷ This would help in embedding a sense of trust that leaders know best what they need.¹⁶⁸ One review of fellowship programs makes a clear recommendation to “get rid of funding gates (i.e., where further funding is dependent on certain milestones or metrics being fulfilled)”.¹⁶⁹ **Institutionalizing the relationship would also mean that it is more than just an individual relationship between the champion and one staff member.** If multiple staff members are involved, as appropriate, and understand the history and structure of the relationship, this can help sustain the relationship over time, and as turnover occurs.¹⁷⁰ This has also been reflected in the focus on maintaining good documentation and monitoring which we explore further in [section 13](#).

Recommendation 13

Foundations supporting champion building work should provide unrestricted funding where possible, to maximize flexibility and encourage and embed trust. This reflects the finding that maximizing champions’ latitude comes with substantial advantages and restricting their independence or seeking to over-manage the relationship can be problematic for the champions’ credibility.

11. Networks of champions

It is often effective to consider grouping cohorts of multiple champions as networks. For the purposes of this report, we define networks as “any combination of actors who have come together through shared interests or values for the main purpose of seeking to influence the policy process”.¹⁷¹

Networks are evolving entities, continually developing processes aimed at producing results that move towards the network’s ultimate purpose, and typically in existence until a shared goal is achieved (or there is a judgement that the network’s existence is no longer essential or beneficial). A network relies for its effectiveness on the capacity of its members: “A network is essentially a complex of human relations, and they determine its success.”¹⁷² As we explore, networks come with a set of advantages, but can be difficult and time-consuming to maintain. Illustrative examples of champion networks include the following (Table 18):

Table 18: Champion networks

Networks	Champion type
All Party Parliamentary Groups (APPGs)	Parliamentarians
High level panels	Former senior politicians
Alumni networks	Miscellaneous
Knowledge networks	Researchers (working on common issues)

As we explore, tighter groups will be appropriate to some circumstances and looser configurations in others – this will depend on purpose and champion type. **While networks will not always be appropriate, it is clear from the literature that they come with a set of advantages that individual champions operating alone do not benefit from:**

- **Networks help generate a sense of community.** As stressed above in relation to networking and relationship building ([section 9](#)), a sense of community can be vital to maintaining motivation and sustaining engagement. Networks can be a good way to build a sense of trust and community,¹⁷³ as

¹⁶⁷ Cody & Perkins, 2020.

¹⁶⁸ Kellogg Foundation, nd.

¹⁶⁹ Ashoka et al, nd.


¹⁷⁰ Roma & Levine, 2016.

¹⁷¹ Perkin & Court, 2005.

¹⁷² Wilson Grau and Nunez, 2008.

¹⁷³ Tsui et al, 2014.

well as be a vehicle for peer support.¹⁷⁴ Networks can also help build a sense of ‘safety in numbers’. As one interviewee described it, “Having a group is a safe space...in instances where there is pushback, they see solidarity”.

Initiative	SheDecides Initiative
Theme	Fostering network solidarity and support
Champion type	Parliamentarians, private sector leaders, community leaders
	<p>The SheDecides Initiative has evolved into a global political movement, fuelled by a network of champions, to advance sexual and reproductive health and rights. It brings together political and other leaders from the non-profit, private, and academic sectors with young emerging voices within and across geographies.</p> <p>Because SheDecides champions often face stiff opposition from governments, politicians, religious organizations and powerful individuals due to the sensitive issues they advocate for, SheDecides facilitates close working relations among champions to foster solidarity.</p> <p>For example, MP Esther Passaris was under attack for championing for women and girls’ rights to access safe and legal abortion at the 9th Africa Conference on Sexual and Reproductive Health and Rights in Nairobi, Kenya. SheDecides mobilized online support and linked her up with the SheDecides Zimbabwean champion, MP Dr. Ruth Labode, who as a chairperson of the Southern African Development Community (SADC) faces tremendous opposition in her work. Ruth helped Esther with strategies to overcome opposition and invited her to Zimbabwe to meet with her personally.</p>

- **Networks create opportunities for peer exchange and learning.** Networks can provide effective vehicles for identifying, filtering and sharing information,¹⁷⁵ as well as promoting mutual learning.¹⁷⁶ The value of peer learning lies behind the pitch from Ashoka that “fellows join a diverse and trusted 3,900-member-strong community of peer entrepreneurs from over 90 countries”.¹⁷⁷ Similarly, a recent review of working with parliamentarians found that providing platforms and opportunities for peer exchanges is a very effective way to engage parliamentarians and cultivate champions.¹⁷⁸ This represents an example of how diversity of experience and perspectives can be useful to all members (in this case through the mechanism of All Party Parliamentary Groups, allowing for exchange from across the political spectrum). Peer networking also allows younger champions to draw on the experiences of elders. As Bob Moses of the Student National Coordinating Committee put it, “our young generation was dynamically linked to a rooted older generation who passed on wisdom [and] encouragement”.¹⁷⁹ Finally, more experienced champions can also learn from those who may not be held back by existing assumptions about how things are done.

¹⁷⁴ Transform Nutrition Consortium and SUN Movement, 2016; McGonagill & Reinelt, 2011.


¹⁷⁵ Tsui et al, 2014.

¹⁷⁶ Transform Nutrition Consortium and SUN Movement, 2016.

¹⁷⁷ Ashoka et al, nd.

¹⁷⁸ Cody & Perkins, 2020.

¹⁷⁹ Moses & Cobb, 2001.

Initiative	Organization of African First Ladies for Development
Theme	The value of peer exchange
Champion type	Community leaders
	<p>A key advantage of being part of a network is the opportunity to exchange knowledge and experience with other champions and share learning (e.g., what has worked in the past and/or in different countries).</p> <p>First Ladies who have been members of the Organization of African First Ladies for Development (OAFLAD) for a long time would invite new First Ladies to visit their countries to see how they run their programs and visit the projects they support. Over the past decade, OAFLAD has seen a gradual shift in attitudes toward topics of sensitive nature, such as family planning, breast cancer, or early child marriage, that would not have been spoken about publicly. Champions are now able to advocate publicly for policy reform on these issues, in part due to the experience sharing of different countries, and the influence other member states have had on topics previously considered taboo in their countries.¹⁸⁰</p>

- **Networks facilitate collective leadership.** Transformational change comes through collaboration and partnership¹⁸¹ and networks are an effective vehicle to enable people to better engage with problems that require collective action.¹⁸² Sources recommend shifting the focus from individual champions of change to broader and more sustainable coalitions for change.¹⁸³ Specifically, they recommend promoting the value of collective and collaborative leadership by challenging the narrative of the heroic individual leader and addressing leadership development from a more collective frame.¹⁸⁴
- **Networks of actors are typically needed to overcome the barriers to change.** A review of leadership changes in Africa, for example, has found that despite initial enthusiasm about changes in individual leadership, political and structural constraints mean that positive change often does not result.¹⁸⁵ This illustrates a wider point that the structures of society set the parameters within which change is possible. **Individual champions may create change, but they do not act in the circumstances of their own choosing.**¹⁸⁶ **It is through the interplay between societal structures and individuals' agency that change can occur.**¹⁸⁷ And it is easy to overestimate the role that individuals play in securing change: as Alicia Garza has reflected in considering the development and antecedents of the Black Lives Matter movement, "The real story behind any successful movement is many people coming together to create the change they want to see in the world. This truth has been obscured by popular narratives of successful social change that tend to resolve around the courageous actions and moral

¹⁸⁰ Organization of African First Ladies for Development (OAFLAD) Strategic Plan, 2019-2023.

¹⁸¹ Ibid.

¹⁸² Leftwich, 2009.

¹⁸³ Faustino, 2012; Cody & Perkins, 2020.

¹⁸⁴ Meehan et al, 2015; ODI, 2009.

¹⁸⁵ Cheeseman, 2020.

¹⁸⁶ Marx, 1852.

¹⁸⁷ Giddens, 1984.

clarity of one person.”¹⁸⁸ This speaks to the importance of collective leadership, given the need for coalitions that have the necessary power, legitimacy and influence to overcome barriers to change.¹⁸⁹

- **Networks amplify influence.** Networks can increase the capacity and effectiveness of their members¹⁹⁰ and extend their reach, influence and voice,¹⁹¹ allowing members of the network to complement each other's roles in achieving change at scale.¹⁹² For example, a review of the Barr Foundation's Fellowships program found that the program has resulted in a “web of collaboration that is rippling through Boston's nonprofit community with increasing effect”.¹⁹³
- **Networks can improve decision making.** Groups tend to make better decisions than individuals under the right conditions, for example, where there is **(a) diversity of opinion within the network, (b) independence of network members in reaching judgements, (c) an ability to draw on different sources of knowledge, and (d) some way in place to be able to reach a collective judgement.**¹⁹⁴

Despite these substantial advantages that a network approach can bring, including to members themselves, **networks can be difficult to maintain, because of tensions between members or from a lack of interest in, or commitment to, operating as part of a network.** Creating, building and managing a network can be time-consuming.

Multi-directional connectivity is key to network effectiveness. One model (Table 19) differentiates between three different structures of network.¹⁹⁵

Table 19: Chapman & Fisher's network model

Structure	Description
Pyramid	Information flows up and down to a coordinating Secretariat.
Wheel	Has one or more focal points, but also with considerable flow of information directly between member organizations.
Web	Information flows in all directions.

An alternative categorization (Table 20) demarcates between:¹⁹⁶

Table 20: ORS Impact's network model

Structure	Description
Hub and spokes	One central connector links to all members.
Many channels	Members are connected with each other in various configurations.
Dense cluster	All members are directly connected to all others.
Branching	Multiple networks are connected to each other, through central nodes.

In both the models summarized above, the key variables appear to relate to (a) **level of connectivity amongst network members**, and (b) **the extent to which information and connectivity flows through a central hub or is more fluid and inter-directional.**

¹⁸⁸ Garza, 2020.

¹⁸⁹ Hudson et al, 2018.

¹⁹⁰ Tsui et al, 2014.

¹⁹¹ Transform Nutrition Consortium and SUN Movement, 2016; Cody & Perkins, 2020.


¹⁹² Miech et al, 2018; Enright, 2006; McGonagill & Reinelt, 2011.


¹⁹³ Lanfer et al, 2013.

¹⁹⁴ Surowiecki, 2004.

¹⁹⁵ Chapman & Fisher, 1998.


¹⁹⁶ ORS Impact, 2020.

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Sources stress **the value in encouraging member-to-member interactions**. Not everything should come through a central hub. Some networks may start with an active centralized secretariat and evolve towards a more fluid exchange. In this case, the coordinator's role is to facilitate and encourage members to interact and collaborate.¹⁹⁷ This requires being willing to let go of control and adopt more of a 'network mindset' based on shared decision-making, collective intelligence and open learning.¹⁹⁸ In other cases a more fluid way of operating can be built into a network from the start. Either way, the guidance is to "focus on connectivity, and trust in the possibility of emergence".¹⁹⁹
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Network members should share a common purpose, but with room for diversity. Aligning multiple champions across sectors around a shared goal is a good way to generate results.²⁰⁰ Networks "provide the mechanism for like-minded groups and individuals to work together across a particular issue or constituency."²⁰¹ A review of fellowship programs, for example, stresses the value in convening champions who are working on related problems and supporting dialogue and exchange.²⁰² Networks can benefit from some levels of diversity however, and can operate as a mechanism to bridge across differences. In fact, "more often than not, new approaches to persistent challenges come from leaders able to break out of silos and the groupthink of homogeneous networks."²⁰³

Initiative	European Parliamentary Forum's partnership with APPGs
Theme	Diversity in networks of champions
Champion type	Parliamentarians
	<p>All Party Parliamentary Groups (APPGs) are informal groups that bring parliamentarians together, across parties, on issues of common concern to members. They represent a good example of networks that bring people, who share common values, together but remain diverse by mixing parliamentarians across the political spectrum.</p> <p>There are currently 31 APPGs across Europe focused on sexual and reproductive health. The European Parliamentary Forum partners with NGOs at the country level and provides Secretariat support, as well as technical assistance, training, and tools to assist them. Not only does this create more routes for influence, but it can also be beneficial to the members themselves, who come into direct contact with different worldviews and can have their assumptions constructively questioned.</p>

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Network structure and membership should follow purpose. When trying to mobilize broad-based support (e.g., to demonstrate an issue has salience and there is demand for it to be resolved), it makes sense to ensure the participation of a wide range of actors that can build a

¹⁹⁷ Gehringer, 2015.

¹⁹⁸ Searce, 2011.

¹⁹⁹ Lanfer et al, 2013.

²⁰⁰ McGonagill & Reinelt, 2011.

²⁰¹ ORS Impact, 2020.

²⁰² Ashoka et al, nd.

²⁰³ Lanfer et al, 2013.

strategic alliance. However, if the aim is policy-specific, particularly on a contentious issue, then it may be rational to keep the size small, to help ensure that messages do not become diluted.²⁰⁴

Therefore, networks vary widely, according to how formally structured they are, and the timescale of their operation (which can vary from one-off moments of connectivity - bringing peers together to discuss areas of common interest for example - to very long-term, as in alumni networks for example). **Decisions about best structure and timescale are defined by context and purpose.**

Some foundations may be well placed to play different support roles to networks, in different combinations, according to context. Typical roles that funders play in networks include the following (Table 21):²⁰⁵

Table 21: Roles that foundations can play in networks

Role	Description
Catalyst	Establishing the value proposition(s) and initial connections
Sponsor	Providing resources for forming and developing the network
Weaver	Working to increase connections among participants and growing the network
Coach	Providing advice, as needed
Participant	Participating in the network without assuming a direct leadership role
Assessor	Diagnosing network achievements and needs

Individual funders and grant making organizations can play single or multiple roles in a network, depending on context. In some cases – such as study tours – a foundation’s best role is likely to be as a ‘hands-off’ funder for example. In other cases - such as more formalized networks – a foundation may be best equipped to fund and support champions’ participation in the program, and sometimes to initiate it where there is a gap in existing initiatives. With more fluid and ad-hoc networks, there is likely to be focus on foundation staff as participants, fully involved in the initiative and willing to share knowledge and insights in a peer role, as well as potentially providing resource support to the process (to the extent that this dual role does not create problematic power relations).

In each case, network development can be supported through:²⁰⁶

- Establishing the means and motivation for individuals and organizations to connect.
- Establishing or illuminating shared/complementary interests, activities, or agendas.
- Establishing mechanisms for managing relationships and information exchange.
- Building/harnessing capacity of those in the network to interact with one another and spread information or ideas to others outside the network.
- Building/expanding the infrastructure to sustain and grow connections and communication.

Recommendation 14

Where there is opportunity to bring people together, as peers and/or across champion types, and where there is good reason for thinking that potential benefits can be exploited, foundations should consider ways to encourage networking and networks, through a connecting and convening role, and

²⁰⁴ Leftwich & Laws, 2012.





²⁰⁵ Scarce, 2011.

²⁰⁶ Stachowiak et al, 2020.

providing resources as appropriate. This recommendation reflects that networks come with a set of advantages that individual champions operating alone do not benefit from, such as enhanced peer learning, improved information flows, and greater collective leadership.

12. Engaging skeptics and opponents

As in all engagements, when thinking about skeptics and opponents, it is important to understand and respond to the motivations that they have for the positions they hold and for their behaviors. Some guiding principles for work in this area are set out below:

-  **Treat skeptics and opponents differently.** Some interviewees stressed that strategies for engaging with skeptics are likely to be qualitatively different to engaging with opponents. **Essentially the aim should be to encourage skeptics, while seeking to 'neutralize' opponents.** The sense was that skeptics can be 'converted' through the power of first-hand testimony and personal stories for example.²⁰⁷ In contrast, the best hope for opponents is likely to be that they become less vocal in their opposition (rather than becoming more supportive) given how hard it is to shift people's values and opinions that dramatically.²⁰⁸
-  **Be realistic about expectations.** It is very rare that people adopt different values or accept positions that are not aligned with their values, and efforts to change people's minds face many barriers. There are some signs that concerted efforts to engage skeptics and opponents can work on some issues. For example, an evaluation of UNF's Nothing But Nets campaign found that Republicans (USA) with whom the campaign sought to proactively engage demonstrated a much higher level of engagement with malaria eradication than those who were not targeted. But there are limits too, as illustrated by the UK government's recent decision to abolish the Department for International Development (DFID) as an independent department, despite years of assiduous cultivating of senior Conservative politicians on this specific issue.
-  **Work through others.** A most common way that people change their minds on issues is by interacting with other people.²⁰⁹ Hence, one recommended approach is to find and work through indirect channels, such as with those who might be close to them or have key things in common with them, who can make an approach and act as persuaders.²¹⁰ Hence, the strategy to 'recruit key allies, then build out'²¹¹ is deployed by groups who manage and support APPGs, for example. **Given the importance people assign to the behavior of peers, drawing in support from across all parties can create important space for others in parties, not traditionally associated with support for issues funders are seeking to take forward.**²¹²
-  **Seek to depolarize the issue.** When trying to change minds, social psychologist Jonathan Haidt points to **the importance of creating environments that increase similarity, not diversity, by downplaying differences and focusing on shared goals and mutual inter-dependencies.**²¹³ This is behind the strategy of positioning an issue as non-partisan, as far as that is possible. Itad's review of BMGF's Global Fund Advocacy Portfolio, for example, found that "in the US...global health and the three diseases were positioned as nonpartisan priorities for US global leadership...A range of advocates, including constituent advocates and well-connected insiders, supported by grantees, were critical to creating this policy agenda."²¹⁴

²⁰⁷ Clarke, 2019.

²⁰⁸ Kahneman, 2011.

²⁰⁹ Haidt, 2012.

²¹⁰ Mendizabal, nd; PATH, 2014.

²¹¹ CGP, BMGF Learning Session, 2019.

²¹² Cody & Perkins, 2020.

²¹³ Haidt, 2012.

²¹⁴ Itad, 2017.



Offer something valuable. This may create a future opportunity for influence, as well as building up credibility and credit. One interviewee explained how it can be effective to position yourself as an asset to the champion you are hoping to cultivate, by being able to offer them something useful - information or access they might not otherwise have. For example, The Organization of African First Ladies for Development (OAFLAD) supports First Ladies, members of OAFLAD, by helping them coordinate and streamline funds for their 'passion' community projects, and recognizes their valuable contributions as champions during high level advocacy platforms such as the UN's General Assembly and African Union Heads of State Summit.



Think about the best messengers. Finding the right messenger for the audience is vital because:²¹⁵

"Influence or impact doesn't have to come about as a result of the content or the wisdom of the message itself, instead it comes about as a result of a trait that the messenger delivering the message is perceived to possess."

When working with skeptics and opponents, this may mean identifying unusual allies who can be effective messengers with the relevant audiences. This is an explicit strategy of CGP, for example, which seeks to engage those not traditionally associated with support for development, such as senior military personnel.²¹⁶



Consider messaging that is targeted to key audiences' concerns. Messages should be based on an understanding of audiences' concerns and, specifically, of their reluctance to support particular positions. One way to do this is to look at public criticisms of the advocacy goal and shape counterarguments that directly address them,²¹⁷ researching individuals in order to target messaging as much as possible. To reach different audiences you must understand their moral frames and how best to appeal to them.²¹⁸ CGP for example, seeks to frame aid as 'soft power'.²¹⁹

Initiative	European Parliamentary Forum
Theme	Engaging with conservative politicians
Champion type	Parliamentarians
	<p>One key principle underpinning the European Parliamentary Forum's approach is the need for, and advantage of, developing and securing cross-party consensus around SRHR policy. This specifically means finding ways to appeal to more socially conservative or centrist politicians. EPF does this in a number of ways:</p> <ul style="list-style-type: none"> By making clear the linkage between SRHR and maternal, newborn, and child health.

²¹⁵ Martin & Marks, 2019.

²¹⁶ Clarke, 2019.

²¹⁷ Ellis, 2007.

²¹⁸ Haidt, 2012.

²¹⁹ Clarke, 2019.

- By engaging with champions who can navigate the tensions and find ways to operate within this culture of contestation.
- By investing in understanding the value base of the parliamentarians EPF is seeking to engage – both their personal values and those of the different political parties and blocs – and then framing and articulating messages that are consistent with these values. This might mean, for example, talking about reproductive freedoms and liberties, rather than reproductive rights, or stressing the cost benefit of investing in family planning.
- By being thoughtful to the tensions the sensitivities can create for some politicians, whose influencing might best happen behind the scenes, rather than by making bold public statements, for example.

Recommendation 15

Principles for working with skeptics and opponents should be consistent with the following:

- Treat skeptics and opponents differently.
- Work through others.
- Seek to depolarize the issue.
- Offer something valuable.
- Think about the best messengers.
- Consider messaging.
- Be realistic about expectations.

Chapter D: Measuring champion building

This chapter reviews existing practices in monitoring and evaluating champion building and draws conclusions and lessons from them.



As part of champion building programs, it is important to consider how monitoring, learning and evaluation (MLE) can support understanding of the effectiveness of champion building programs, and help capture lessons learned allowing for adaptation of programs, as appropriate.

13. Considerations in developing an overall approach

The value and importance of ongoing monitoring is strongly and widely stressed in champion building measurement approaches. Regular tracking is recommended because it supports ongoing learning and adaptation,²²⁰ encourages experimentation²²¹ and creates space to make collective meaning of experiences.²²² It is also important for institutional and shared knowledge.²²³

As an integral part of advocacy, champion building is a low control/high uncertainty intervention, where the best strategy is an emergent one, which means constantly customizing or adapting approaches to reflect the changing social and political context.²²⁴ The emphasis here is on the value of ongoing monitoring as a tool for learning: “[talking] through the policy positions of different decision makers, taking the time to reflect on influence, and even deciding who and how to rate individuals has led to strategic insights that have felt additive and useful for advocates’ work.”²²⁵

According to many accounts, information gathering and assessment should be “continual”.²²⁶

Information is likely to be derived from a mix of (a) direct observation (b) information supplied by champions themselves and other partners and (c) evidence from wider sources, including media, social media and the internet more broadly (e.g., captured through Google Alerts). Excel is commonly used as a tool to record and track data about champions and their positions, updated whenever there are substantive interactions, as recommended in Save the Children’s Champions toolkit, for example.

²²⁰ Devlin-Foltz & Molinaro, 2010; Blagescu & Young, 2006; Shephard et al, 2018.

²²¹ Faustino, 2012.

²²² Arensman, 2019; Meehan et al, 2015.

²²³ Transform Nutrition Consortium & SUN Movement, 2016.

²²⁴ Ebrahim, 2019.

²²⁵ Stachowiak et al, 2016.

²²⁶ Devlin-Foltz & Molarino, 2010; Clarke, 2019; Cody & Perkins, 2020.

When and how this information should then be used to reflect on progress and adapt as needed may depend on the frequency of activities and the intensity of the advocacy effort taking place.²²⁷ Different sources reference monthly,²²⁸ quarterly²²⁹ or biannual²³⁰ check-ins, where updated information is reviewed and considered. Others suggest holding more substantive reviews annually.²³¹

In assessing both actual influence and future potential, as we established in [section 10](#), it makes sense to take a long-term view. However, approaches to monitoring and evaluating champions have tended to focus on the shorter term, even while acknowledging that this misses crucial longer-term outcomes.²³² The constraint is that organizations typically lack both the tools and time horizon to assess long-term outcomes.²³³ Over time, it becomes increasingly difficult to understand the contribution an individual or program has made, given that contribution inevitably becomes increasingly diffuse as effects ripple further from their cause and inter-mingle. Practically, too, it may become more difficult to elicit updates (for example from former fellows) as time passes.²³⁴

This all points to the need to plot out an overall approach across a range of different timescales. This might typically look like the following (Table 22):

Table 22: Components in an overall approach to MLE

Timescale		Focus	Commentary
Ongoing		Information gathering and storage	Gather information as it becomes available, through observation, self-reporting, Google alerts, etc. Capture and store information in Excel or similar.
Short term	Under 1 year	Reflection on progress, every 3-12 months	Step back and deploy reflective processes such as After Action Reviews, to consider what is working, what is working less well and what needs to change.
Medium term	1-3 years	More substantive reviews of projects and programs	Conduct a more structured look for signs of champions' development and effectiveness.
Long term	4+ years	Strategy reviews	Conduct reviews that allow for evaluation and development of strategic approach to champion building.
Very long term	10+ years	Longitudinal reviews	Institute reviews that make sense of champions' roles in change over time, using a combination of techniques (Table 23 below).

These different components would ideally come together to form a coherent whole. For example, EPF undertakes systematic monitoring of its programs on an ongoing basis and ensures there is space for periodic reflection about what it reveals. This is supplemented with regular commissioned external program-wide evaluations (conducted every few years), within which the champions' role is considered. This offers a means to dig deeper into the dynamics of change and draw better-founded conclusions, as well as identifying strategic lessons for future work.

²²⁷ Roma & Levine, 2016.

²²⁸ Ray, 2018.

²²⁹ Center for Lobbying in the Public Interest, nd.


²³⁰ Kellogg Foundation, nd.

²³¹ National Journal Membership, 2015; PATH in Cody & Perkins, 2020; Stachowiak et al, 2016.

²³² Kellogg Foundation, nd.

²³³ Orians et al, 2018.

²³⁴ Arabella Advisors, 2018.

Initiative	Open Society Fellowship
Theme	Measuring effectiveness from multiple sources
Champion type	Community leaders
	<p>The Open Society Fellowship Program²³⁵ assesses the effectiveness of the Fellowship through reviews of interim and final grantee reports, the participation of Fellowship staff in annual portfolio reviews, and frequent check-ins with colleagues who have had significant interactions with Fellows. These mechanisms allow staff to take an in-depth, retrospective look at a subset of grants and make a judgment about the effectiveness of their investments. The Program has historically preferred an open approach to measurement due to its ability to capture unintended outcomes. More linear approaches are considered inappropriate as they could encourage a myopic way of thinking about change.</p> <p>Monitoring that goes beyond the Fellowship term is considered crucial in measuring success and methodologies that assume realistic timescales are favored over short-term result frameworks. The Fellowship expects alumni engagement to be an area of future focus in order to more effectively capture the long-term progress of Fellows. The standard expectation is that the impact of the Fellowship will “come into effect in the next few years, maybe even a decade”.</p>

Recommendation 16

Budgets allowing, champion programs should include a plan that:

- Sets out how information is going to be gathered and captured and how and when that information will be drawn on, at key moments, to reflect on progress and consider any need to adapt the approach.
- Builds in more substantive reviews over the medium and longer term, allowing for deeper consideration of questions about effectiveness and results.

The following methods for information gathering feature in literature specific to champions (Table 23):²³⁶

Table 23: Monitoring and evaluation methods

Method	Relevant to ongoing monitoring	Relevant to medium (1-3 years) and long term (4+ years) reviews	Relevant to very long term (10+ years) reviews
Key informant interviews	Yes	Yes	Yes

²³⁵ The Open Society Fellowship Program is a key individual grants program within OSF’s network. The Open Society Fellowship is one of four initiatives in the Program.

²³⁶ The table draws on the following: Kellogg Foundation, nd; Stachowiak & Mumford, 2010; Meehan et al, 2015; Transform Nutrition Consortium & SUN Movement, 2016; Moffat, 2018; Mendizabal, nd; Arabella Advisors, 2018 as well as interviewees’ inputs.

Surveys		Yes	Yes
Social listening	Yes	Yes	Yes
Case studies		Yes	Yes
Social network analysis	Yes	Yes	Yes
360 feedback surveys		Yes	Yes
Timelines		Yes	Yes
Experimental studies		Yes	Yes
Observation	Yes	Yes	
Stakeholder maps	Yes	Yes	Yes

As we note above, longer term reviews are particularly challenging to implement, given the practical difficulties (such as access), the conceptual challenges (of making sense of change over long timescales) and the fact that there are many disincentives to operate outside of project and program cycles. We are not aware of any examples of longitudinal reviews of champion building for example. But whilst this is not surprising, it does represent a clear and significant evidence gap considering the finding in [section 10](#) that meaningful, substantive change might be expected (only) in the long and very long term. In the absence of other actors stepping up, it may be that foundations could play a role in considering how longitudinal reviews could be conducted, thus contributing to wider learning.

Recommendation 17

Organizations that have made long term investments in champion building should consider commissioning - and making public - retrospective longitudinal reviews of relevant programs that have been operational over the very long term. This could help establish a sense of what methodologies are appropriate and what, ideally, needs to be in place for such reviews to be effective.

14. Review of monitoring frameworks and approaches

14.1. Focus

In this section we have drawn from the following resources that propose various approaches to tracking champions:

1. [CARE's Champion scorecard](#)
2. [The Aspen Institute's Champions toolkit](#)
3. [Save the Children's Champions toolkit](#)
4. [The National Collaborating Center for Methods and Tools' Champion behavior measure](#)
5. [ORS Impact's reflections on measuring political will through using policymaker ratings](#)
6. [The National Journal Membership's Congressional Relationship scorecard](#)
7. [ODI's outline of a proposed political will monitoring tool](#)
8. [PATH's Champion Tracking tool](#)

More detail on each of these is set out in [Annex 5](#).

In addition, we draw on working frameworks shared by BMGF grantees (i.e., UNF), as well as on other documents that set out guidance in relation to tracking champions. The full list of main sources is shown in Table 24:

These sources reveal that existing monitoring frameworks focus on a range of elements, in different combinations. We identified seven elements that feature in these frameworks.

1. **Actions:** Tracking verifiable actions provides an objective measure in contrast to some of the other areas being assessed, where judgement must be part of the assessment.²³⁷ However, the interpretation of actions and their significance is, at least partially, subjective. There are various ways used to rank, rate and score the ‘champion-ness’ of different actions, to capture a sense of progression, as discussed below.
2. **Quality of champions’ relationship with the organization:** Elements of some frameworks and suggested approaches address the quality of relationship between the organization and the champion.²³⁸ Save the Children’s Champions toolkit, for example, recommends assessing how well champions are being supported.²³⁹
3. **Influence:** The level of influence of those involved is widely assessed.²⁴⁰ In some cases, frameworks do not include ‘level of influence’ as a measure but note that factoring it in could allow a more meaningful champion assessment.²⁴¹ Attention to this area in monitoring replicates the suggested focus at the champion identification and assessment stage, as discussed in [section 6](#).
4. **Issue alignment:** Assessing a champion’s position on the relevant issue and how it is evolving features in several monitoring frameworks and discussions of champion monitoring.²⁴² As with influence, focus on this area also replicates the attention given to alignment at the champion identification and assessment stage (see [section 5](#)).
5. **Skills/capacities:** There are some references in the literature of tracking aspects relating to skills, knowledge and leadership capacity.²⁴³
6. **Relationships:** Multiple sources stress the importance of connections and relationships, and so the importance of measuring and tracking these.²⁴⁴ Many of these sources, and others²⁴⁵ specifically reference the value of mapping network relationships and their evolution: “The maps can be used to identify network hubs, [people who bridge across networks] and other types of people in a network who are critical to the flow of ideas, resources and...energy within a network.”²⁴⁶
7. **Signs of increased political will:** Political will can be defined as the combination of three factors: opinion about a particular issue, intensity of that opinion, and the degree of salience, or importance, of an issue.²⁴⁷ Various frameworks highlight a champion’s political will as being a

²³⁷ Ray, 2018.

²³⁸ National Journal, 2015; Conciliation Resources, 2011.

²³⁹ Roma & Levine, 2016.

²⁴⁰ Transform Nutrition Consortium & SUN Movement, 2016; Faustino & Booth, 2014; Stachowiak & Mumford, 2010; Tilley et al, 2018.

²⁴¹ Devlin-Foltz & Molarino, 2010.

²⁴² Transform Nutrition Consortium & SUN Movement, 2016; Faustino & Booth, 2014; National Journal, 2015; Kellogg Foundation, nd; Stachowiak et al, 2016.

²⁴³ Kellogg, nd; Young & Quinn, 2012; Orians et al, 2018.

²⁴⁴ Transform Nutrition Consortium & SUN Movement, 2016; Orians et al, 2018; Lanfer et al, 2013; Kellogg Foundation, nd; Coalition Resources, 2011.

²⁴⁵ Lanfer et al, 2013; Rolfe-Redding, 2019.

²⁴⁶ Meehan et al, 2015.

²⁴⁷ Stachowiak et al, 2016.

fundamental element of champion-ness, and so one that champion building programs aim to develop. Political will is expressed in willingness to invest personal capital in support of change²⁴⁸ and in “the transformation people experience in how they feel ‘called’ to lead.”²⁴⁹ One framework is described as a ‘champion behavior tool’ but is relevant to political will, because it does not measure specific actions, but is designed to measure enthusiasm and persistence, as proxies of political will.²⁵⁰

Table 24: Summary of elements tracked in champion monitoring frameworks

Source	Actions	Organizational relationship	Influence	Issue alignment	Skills/capacities	Relationships	Signs of increased political will
Comprehensive frameworks							
CARE Champion scorecard							
Aspen Institute Champion scorecard							
Save the Children Champions toolkit							
The National Collaborating Center for Methods and Tools							
ORS Impact, Measuring political will							
National Journal Membership Champion scorecard							
ODI, Monitoring the effect of advocacy on changing political will							
PATH Champion Tracking tool							
BMGF grantees’ information sharing							
UN Foundation, Champion building at the UN Foundation							
Other relevant approaches							
ODI, AAIM Matrix							
Mobilization Lab, Measuring people power							
Conciliation Resources, Advocacy Capacity Building training toolkit							
Open Society, A Guide to policy advocacy in transition countries							

²⁴⁸ Cody & Perkins, 2020; Faustino & Booth, 2014; Tilley et al, 2018.

²⁴⁹ Kellogg Foundation, nd.

²⁵⁰ National Collaborating Center for Methods and Tools, 2017, please refer to [Annex 5](#).

ORS Impact, American Evaluation Association presentation							
GHV, Accelerating progress in partnership with parliamentarians							

These results show that actions are by far the most tracked element. They also suggest there is a limit to how many of these elements can be tracked, with the most common approach being able to track up to two to three elements in total; attempts to track more could prove unwieldy.

Table 25 shows how these elements relate to and map onto the key champion characteristics:

Table 25: Monitoring framework elements and their mapping against champion characteristics

Element	Committed	Influential	Aligned	Capable
Actions				
Quality of champions' relationship with the organization				
Influence				
Issue alignment				
Skills/capacities				
Relationships				
Signs of increased political will				

14.2. Rating approaches

These frameworks are designed as tools to show what progress there is, if any, within the elements under review. In doing so, they take two different approaches to tracking and rating champions and their progression: using either **checklist** or **scorecard approaches**.²⁵¹ These can be distinguished as follows in Table 26.²⁵²

Table 26: Checklists and scorecards

Approach	Description	Key features
Checklist	Tracks the prevalence of specific behaviors. Scores are based on the number of behaviors observed. There is some scope to 'weight' behaviors (by assigning points to specific behaviors).	Provides an objective measure of observed behavior. Is time consuming to maintain.

²⁵¹ For examples of each, please refer to [Annex 8](#).

²⁵² National Journal, 2015.

Scorecard	<p>Framework operates to a standardized rating scale (e.g., 1-5).</p> <p>Champions' scores are determined based on subjective assessments of the extent to which these ratings are met.</p>	<p>Assessment of results is subjective.</p> <p>Involves a more streamlined process.</p>
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In our assessment, various checklist approaches tend to involve a fairly complicated approach to selecting behaviors, categorizing them, and then rating and scoring the results. For example, the starting point for one framework based on a checklist approach²⁵³ is that there are three possible categories under which support can be defined (Demonstrates Awareness; Promotes Awareness and Understanding; Advocates for Improved Policy and Practices). The approach then involves:

- Establishing a full list of relevant 'traits' under each category of support (the paper provides examples of these but not a comprehensive set).
- Ranking each of these traits according to the level of engagement they exemplify, based on a scoring system 1-5.
- Generating a score for each of the three categories, based on information gathered (the category score is the highest score the champion receives on any trait in that category).
- Distilling results into an overall score (defined as the highest category score generated).

Choices at all of these stages (which behaviors to focus on, how to categorize them, and then how to score them) are all at least partly subjective, somewhat limiting the putative advantage of this method (which is notionally that it provides an objective measure). Given the various concerns expressed – in interviews as well as in the literature – by those who have implemented these kinds of monitoring approaches, about the time needed to undertake them, and how burdensome it can be, **the simpler scorecard method may well be preferable.**

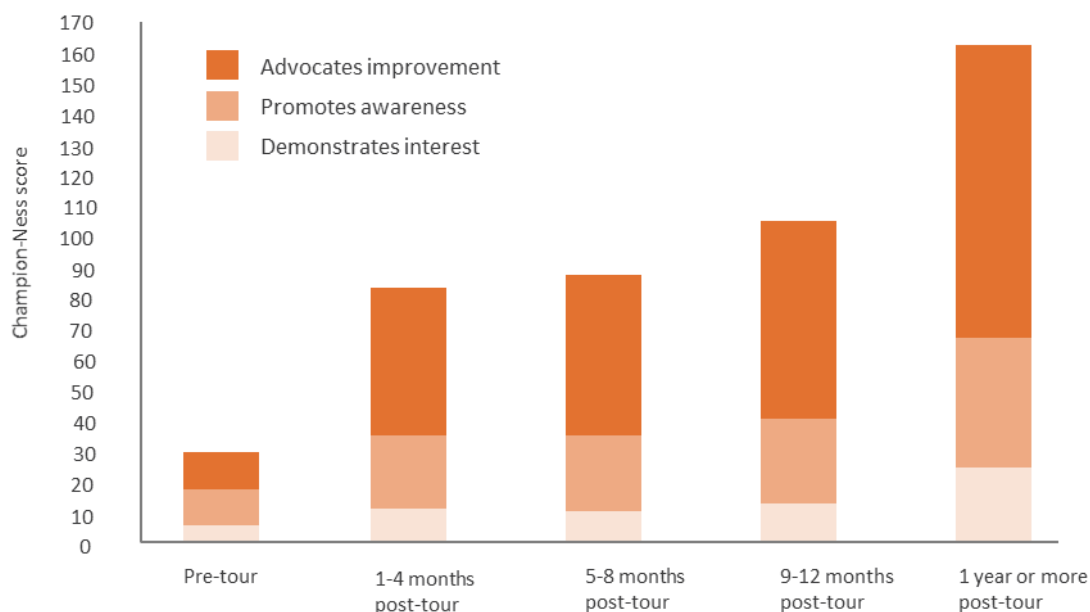
14.3. Visual representation of progress

One advantage of the kinds of data collection illustrated in the frameworks above is that they lend themselves to visual representation, as in the following examples, tracking individual and aggregate change over time. In both cases, the charts summarize progress through visualization of changing rating scores (Figure 8; Figure 9):

²⁵³ Devlin-Foltz & Molinaro, 2010, please refer to [Annex 5](#).

Figure 8: Tracking an individual's champion-ness over time

Lynn Woolsey's Champion-Ness Over Time



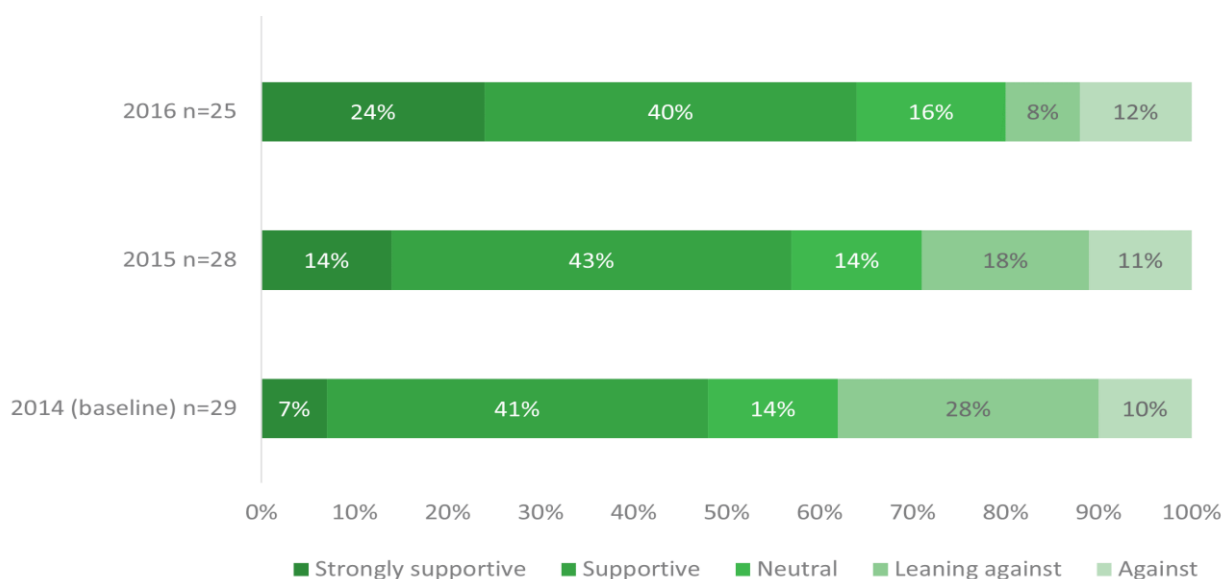
Source: CARE (nd)

In this example, CARE has set out “a scorecard that demonstrates how your target policymaker is engaging on your issues over time”. It shows how the organization tracked the ‘champion-ness’ over time of a former member of the U.S. Congress following their participation in a study tour. Scores reflect their subsequent individual’s actions, based on an assessment of the level of “champion-ness” of those actions, ranked according to three categories:

- Demonstrates interest – through “relatively low-effort activities”.
- Promotes awareness and understanding – through “activities that show increasing commitment to relevant policy issues”.
- Advocates improved policy and practices – through focusing on “policy-specific actions such as drafting legislation, implementing or funding policies, adopting CARE’s recommendations, organizing government briefings, and personally lobbying colleagues to achieve desired outcomes in line with CARE’s advocacy objectives”.²⁵⁴

²⁵⁴ CARE (nd).

Figure 9: tracking overall levels of support over time



Four policymakers in the sample left their positions between the baseline and 2016 ratings

Source: Stachowiak, Afflerback, and Howlett (2016)

This example shows summarized results from a series of annual reviews in which targeted policymakers were rated against the following criteria:

- Against: Known to have made statements or had prior behaviors demonstrating a counter-stance on the issue.
- Leaning Against: Known to have made statements that indicated likelihood of support against the desired issue.
- Neutral: Known to have made statements indicating a position neither for nor against the issue.
- Supportive: Known to have made statements in support of the issue.
- Strongly Supportive: Known to have made statements, taken positive actions, and/or encouraged others to take positive action around the issue.²⁵⁵

15. Understanding champion building results

15.1. Links between inputs, outputs, and outcomes

In champion building, as we have stressed ([section 10](#)), it makes sense to think about parallel outcome areas, which can be summarized as follows in Table 27:

Table 27: Champion outcomes

Outcome area	Desired outcome
Champions' actual influence	(Contribution to) policy and funding changes
Champions' development	Champions are better placed to have influence on <i>future</i> policy and funding decisions

²⁵⁵ Stachowiak et al, 2016.

Considering this distinction, a review of the frameworks developed in the advocacy field – as summarized above – reveals that much of the focus tends to be on a champion’s development towards having ‘optimum champion characteristics’ for example through tracking the quality of relationships, their capacity and skills, etc. Tracking champions’ actions represents a kind of hybrid in that increasing action demonstrates increasing commitment (and so relates to champions’ development); actions are also the mechanism by which champions exert direct influence on policy and funding. But only a small number of these frameworks explicitly reference tracking actual policy/funding change as integral to the framework. In other words, they typically stop at the point of measuring and rating champions’ actions and not what those actions lead to.

This seems to be in contrast to the tracking frameworks associated with the leadership field. A range of outcomes are typically embedded within these, expressing the logic that individual outcomes (changes to the champion) then lead to champions having an effect on their networks (or the teams they are part of), the organizations within which they work, the communities they are part of and wider society beyond that.²⁵⁶

These leadership development frameworks seem to be predicated on a comparatively direct relationship: that developing champions as leaders - when successful - creates a cascade of outcomes. In contrast, this explicit logic is typically missing from advocacy frameworks, which only rarely incorporate consideration of policy outcomes. This could be because, in advocacy, the link to outcomes is less straightforward - because individual champions typically make a contribution as part of a much wider set of tactics and strategies. The consequence of this omission is that, in the advocacy frameworks, the links between inputs, outputs and outcomes tend to be assumed or claimed, rather than evidenced.

Measuring changes within the champions themselves does not in itself reveal anything about either the causes of those changes (‘what role did the champion building play in it?’) nor the effects (‘has it led to better outcomes?’).²⁵⁷ Various frameworks imply, or state, that laying organizational activities alongside champions’ actions – in a consolidated timeline for example – can show that one has led to the other.²⁵⁸ But, in fact the available information typically falls short of being able to make connections showing: 1) the influence of the program on the champion; and 2) the influence of the champion on broader outcomes. Clearly, without evidence of a *connection* between the levels, a causal relationship cannot be assumed, especially as champions are only ever one factor of many in bringing about change.²⁵⁹

Through a quasi-randomized-control-trial, the United Nations Foundation was able to demonstrate that ‘dosages’ of advocacy led to increased action by targeted policymakers (tracked against those in a control group who were not targeted). However, these results also highlight a lack of generalizability of evaluation findings beyond the specific issues and target groups under review.

Initiative	United Nations Foundation’s Experimental Design Advocacy Trial
Theme	Demonstrating causality in advocacy
Champion type	Parliamentarians
	Supported by BMGF, the United Nations Foundation conducted a trial based on an Experimental Design approach, as a way to explore the attribution of

²⁵⁶ Please refer to [Annex 9](#) for summary of outcome areas highlighted in leadership development frameworks.

²⁵⁷ Meehan et al, 2015.

²⁵⁸ PATH in Cody & Perkins, 2020; Tilley et al, 2018.

²⁵⁹ Mayne, 2019; Belcher & Palenberg, 2018.



changes in U.S. Members of Congress' behaviors to UNF's advocacy efforts. As part of this study, UNF divided members of the House of Representatives, who had not previously served in the House, into two groups, a treatment group and a control group: these two groups were similar across key characteristics so that the results are comparable. Only the treatment group 'received' advocacy, through a minimum 'dose' of five key activities. The control group acted as a counterfactual, accounting for the changes that would, anyway, have occurred in the absence of UNF's advocacy activities. Each activity undertaken by Members of Congress in the study was allocated a score (based on a formula that calculates weight of support by frequency), and then scores were totaled for each individual).

Findings confirmed that there was a higher level of activity from treatment (i.e., targeted) Members of Congress than from those in the control group.

Treatment districts took three times more actions to support vaccines and malaria prevention, a result that was assessed as being statistically significant. The study found that, in the treatment group, 48% of active offices were Republican, while in the control group, only 12% of active offices were Republican. This suggests that there is some latent potential to draw on Republicans' support (at least amongst newly elected Members of Congress, who were subject of the study), but that activation of this latent support requires proactive engagement.

Resource commitment to this experimental design was very high. The design process itself was time-consuming, involving data analysts, statisticians, and people from the advocacy field, who were considered well placed to design a robust scoring framework. In implementation, maintaining the levels of information necessary required a full-time dedicated staff member. Even so, there were inevitable methodological limitations with the attempt to apply control trial rigor to a social change context: the study was not double blinded,²⁶⁰ for example, nor could the likelihood of those in the control group experiencing extraneous 'noise' be eliminated.

The study generated some interesting and valuable results but when weighing the overall costs and benefits of such an approach, **lack of generalizability of the results represents a key shortcoming.** As the analysis of the findings indicate, the results cannot be extrapolated beyond the specific context: "The trial results only pertain to [the two specific campaigns being reviewed] and focuses on freshmen, who are not representative of all Members."²⁶¹ It is widely recognized that tactics that may have worked in one instance are not necessarily transferable to another.²⁶² Withholding 'dosages' of advocacy could potentially result in poorer outcomes (than if all decision makers were targeted) within the specific campaign being assessed and so this would need to be balanced by confidence that the knowledge generated through the study brings clear future benefit. At this scale, it was also difficult to get beyond headline findings, for example to explore in more depth the types and combinations of tactics that are likely to be most

²⁶⁰ In a single-blind study, participants do not know which study group they are placed. In a double-blind study, neither the participants nor the researchers know which study group the participants are in. The objective in the latter case is to minimise bias and maximize the validity of results.

²⁶¹ Dalberg, 2019.

²⁶² Teles & Schmitt, 2011.

effective, and about the best balance and interplay between constituency and Capitol Hill ‘dosages’.

Beyond this example, the champion building literature lacks information on how to connect the links between activities and results through champion building tracking approaches. Given the complexities, a more nuanced interrogation of the links in the ‘impact chain’ is unlikely to be possible solely on the basis of data collected through monitoring, as in the frameworks discussed above. Typically, this data lacks explanatory power when it comes to trying to make sense of the relationships between cause and effect, given all the other actors and factors at play.

This points to the need to supplement tracking approaches with more in-depth, qualitative assessments of the dynamics of change and how different actors and factors have contributed to it, or not. In other words, monitoring can provide a base level of information, and can inform a certain amount of decision making, but set piece evaluations are likely to be needed to generate deeper understanding.

15.2. Understanding development pathways

What also seems to be missing from the literature is a credible behavioral pathway around which to construct a case for how much progress is being made. Various frameworks set out development pathways that can be used to track champions’ progress (Table 28):

Table 28: Champion behavioral pathways

Source	Stages	Explanation
Coffman and Beer ²⁶³ Also used by Save the Children. ²⁶⁴	1) Awareness 2) Will 3) Action	<ul style="list-style-type: none"> Awareness: The potential champion or emerging champion is aware of the policy issue but has not shown interest in taking action related to it. Will: The potential champion or emerging champion is aware of and knowledgeable about the policy issue. He or she has demonstrated interest in taking action related to the policy issue but is not a leader on the policy issue Action: The potential champion or emerging champion is viewed as a leader advocating for the policy issue.
Stachowiak et al. ²⁶⁵	1) Lack of awareness or understanding 2) Understands, opposes 3) Understands, agrees 4) Understands, promotes	<ul style="list-style-type: none"> Lack of Awareness or Understanding: The decision maker does not demonstrate an understanding of the policy issue and/or proposal. Understands; Opposes: The decision maker demonstrates an understanding of, but disagrees with, the policy issue and/or proposal. Understands; Agrees: The decision maker demonstrates an understanding of, and agreement with, the policy issue and/or proposal. Understands; Promotes: The decision maker demonstrates an understanding of, and promotes or champions, the policy issue and/or proposal.
Tilley et al. ²⁶⁶	1) Understand 2) Support	<ul style="list-style-type: none"> Understand: Key actors demonstrate early positive responses, often, although sometimes no change may be expected.

²⁶³ Coffman & Beer, 2015.

²⁶⁴ Roma & Levine, 2016.

²⁶⁵ Stachowiak et al, 2016.

²⁶⁶ Tilley et al, 2018.

	3) Engage	<ul style="list-style-type: none"> • Support: Key actors are showing signs that the messages are being taken on board, reflecting more active and engaged behavior. • Engage: Key actors display transformative behaviors demonstrating either a profound change related to the policy objectives that will be sustainable in the long term, or the favorable status quo is successfully maintained, or there is lasting commitment to addressing and removing barriers or disincentives.
Devlin Foltz and Molinaro ²⁶⁷	1) Demonstrates awareness 2) Promotes awareness and understanding 3) Advocates	These stages are not defined, but examples are given of traits, or behavior, that would indicate which level a person has reached.

The shortcoming of all these stage models is that they bear very little resemblance to what is known about behavior change, and what motivates people to change behaviors. These frameworks all start from the premise that increasing someone's awareness and/or understanding leads to greater support, and that support then leads to action. There are many different behavioral change theories.²⁶⁸ However, one thing they have in common is the understanding that **individuals' behavioral choices are affected by a much wider set of factors than acknowledged in the models above**, including for example their "values, attitudes and skills, as well as the calculations [they] make before acting, including personal evaluations of costs and benefits".²⁶⁹

One prominent theory-based model, for example,²⁷⁰ identifies that behavior is dependent on:

- **Capability**—psychological or physical ability to enact a behavior.
- **Opportunity**—physical and social environment that enables the behavior.
- **Motivation**—reflective and automatic mechanisms that activate or inhibit the behavior.

It is important that models that seek to track behavioral development are based on a robust and theory-based hypothesis of the pathway of change, and that any measurement systems in place are organized around testing that hypothesis.²⁷¹ Existing frameworks do not offer templates for this.

It is also the case that most frameworks track champions' positions and actions in relation to a single issue. This ignores those champions who may operate across issues: "there is still a nut to crack for ratings that are not on one specific policy goal."²⁷²

Initiative	Echoing Green Fellowship
Theme	Defining 'success'
Champion type	Community leaders

²⁶⁷ Devlin Foltz & Molinaro, 2010.

²⁶⁸ Darnton, 2008, reviews over 60 social-psychological Behavior Change models for example.

²⁶⁹ Darnton & Horne, 2013.

²⁷⁰ Koleros et al, 2020.

²⁷¹ Koleros et al, 2020.

²⁷² Stachowiak et al, 2016.



Echoing Green has recently become more intentional in asking Fellows what *their* vision of success during the Fellowship looks like to them and their organization. Historically, the organization has measured Fellows' progress as both individual leaders and in building social enterprises. However, Echoing Green is revisiting its focus and now asking Fellows "what is the most important thing [*they*] will measure or track to assess [*their*] organization's impact or progress toward impact", as well as "what is a positive impact [*they*] envision [*their*] organization achieving in the next 1-2 years that is not measurable, or not measurable now?"²⁷³ By learning from Fellows' experiences and allowing for more flexibility in what 'success' looks like in their assessments, Echoing Green hopes to pivot its model in a way that will most effectively support emerging leaders. As they put it, in addition to "unprecedented challenges," the present times²⁷⁴ also provide an "unprecedented opportunity to influence change".²⁷⁵

16. Capacity considerations

There seems to be a disconnect between the monitoring frameworks we have reviewed and the anecdotal feedback to this review. The frameworks may make sense in theory but in practice they are operationally challenging for many organizations that lack extensive MLE capacity, given the resource required to be able to implement them.

Thus, it will be important for many organizations to find a way to keep things as simple as possible. In relation to this, tracking champions' actions provides an obvious focus. We have not uncovered an existing rating template that it would be possible to take off the shelf and use, but it seems reasonable to suggest a simple rating system – capturing actions in a way that shows whether there is increasing support – could look something like the following (Table 29):

Table 29: Possible ratings of champions' actions

Rating	Explanation
1	Has expressed support (e.g., through signing on to a declaration of support).
2	Has taken low level action in support (e.g., in response to a request to participate in an event).
3	Is proactive in undertaking advocacy (e.g., asking questions in parliament).
4	Is showing leadership (e.g., by generating media and political debate, requesting meetings with decision makers, etc.).

Recording information to this framework is relatively straightforward, but still time consuming given the need to stay on top of different champions' activities. One way to keep this manageable is to limit the number of champions being tracked. The maximum number of champions it seems reasonable to track is around 30 for one (small) organization – for example, both CGP and DSW referenced this number.²⁷⁶

²⁷³ Echoing Green Supplemental Report Questions, July 2020.

²⁷⁴ At the time of the research, the global pandemic caused by Covid-19 and the Black Lives Matter protests, sparked by police brutality in the U.S., were taking place.

²⁷⁵ Ibid.

²⁷⁶ BMGF Learning Session, 2019.

However, according to one study, rating only a small, defined group carries risk and may miss meaningful changes happening outside that group.²⁷⁷

Where capacity allows, a less minimalist approach may be possible. In those situations, it makes sense for organizations to develop an approach that **plots champions' development against the criteria that represent their effectiveness** (i.e., their influence, alignment, commitment and capability) to see how near they are to fully meeting them. This approach is consistent with wider practice and links to the one proposed for identifying and assessing champions, and so will facilitate tracking against a baseline established in planning. As we have noted, the scorecard method is more streamlined and simpler than the alternative checklist approach. An example of rating scales based on these is given below (Table 30):

Table 30: Examples of suggested scorecard methodologies

Criterion	Possible rating scale	Source
Influence	1 - The relevant audience would not be influenced by him or her 2 - The relevant audience could potentially be influenced by him or her 3 - The relevant audience could be very influenced by him or her	Save the Children (Annex 5)
Alignment	1 - Against - has taken a counter-stance on the issue 2 - Leaning against - has indicated a position against the issue 3 - Neutral - neither for nor against the issue 4 - Supportive - has expressed support for the issue 5 - Strongly supportive - is very closely aligned, including on policy detail	Adapted from ORS Impact (Annex 5)
Commitment	1 - Is taking minimal or no action in support of the issue 2 - Is visible in support of the issue 3 - Has shown practical willingness to invest political capital in advancing the issue 4 - Shows high levels of enthusiasm and persistence in support of the issue	Miscellaneous commentary on champion characteristics and on tracking champion support
Capability	1 – Not met - lacks some key skills/capacities 2 - Partly met – has some gaps in skills and capacities 3 – Fully met - has requisite skills and capacities	

Recommendation 18

Where resources allow, a champion building monitoring framework should relate to (a) influence, (b) alignment, (c) commitment, as shown by signs of increased activity and/or political will, and (d) how well placed they are, in terms of skills/capacities. These could typically best be tracked using a scorecard method in which standardized rating scales are applied.

Clearly, each organizational context needs to be considered on its merits, but the different implications for organizations according to (a) their MLE resource capacity and (b) the relative importance of champion building as part of their overall influencing strategy could look something like this (Table 31):

²⁷⁷ Stachowiak et al, 2016).

Table 31: Champion building MLE approaches according to organizational context

		Organizational MLE capacity	
		Relatively low	Relatively high
Relative importance of champion building	Champion building is central to influencing strategy	<p>Set up simple tracking (e.g., of champions' actions).</p> <p>Track a manageable number of champions and potential champions, focus on quality over quantity.</p> <p>Conduct/commission evaluations that focus on champions' influence on policy and funding outcomes.</p>	<p>Set up tracking that focuses on the extent to which champions characteristics are met.</p> <p>Consider reaching beyond the obvious targets in tracking champions and potential champions.</p> <p>Conduct/commission evaluations with a dual focus on:</p> <ul style="list-style-type: none"> How champions have developed and how well placed they are to have future influence. Champions' actual influence on policy and funding outcomes.
	Champion building is one approach in a broad range of influencing tactics	<p>Ensure some consideration of champions is included in wider MLE approaches.</p>	<p>Set up simple tracking (e.g., of champions' actions) to run alongside other MLE approaches.</p> <p>Conduct/commission evaluations that consider policy and funding outcomes and situate the role of champions (alongside other tactics) as part of that.</p>

Recommendation 19

Monitoring approaches adopted should be proportionate. Each organization's approach should be tailored according to (a) their MLE resource capacity and (b) the relative importance of champion building as part of their overall influencing strategy.

Given the finding that even simple tracking processes are time and resource consuming, and given that some foundations may support multiple organizations working with the same key audiences (such as parliamentarians) in the same geographies on linked and common issues, there is scope to consider whether individual NGOs' efforts to track progress could be deduplicated. A common tracking system could be feasible in those cases. This could involve a foundation (or collective of foundations) establishing a common resource focused on tracking a particular constituency of champions according to a standard rating approach, in order to produce intelligence that all relevant grantees can then access and draw on. This common information service would potentially be more efficient and effective than each organization investing in their own approaches in parallel.

Recommendation 20

Foundations that support multiple grantees working in specific geographies and with common audiences (such as parliamentarians) should consider the viability of – and demand for – the creation of a single information point that all relevant grantees and partners can access. This could be done by providing support to an NGO or other partner to operate a real-time champion tracking system that others can draw on (rather than each organization being responsible for setting up their own system).

Summary of recommendations

Figure 10: Summary of main recommendations



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Annexes

Annex 1: List of key informants

Name	Role	Organization
BMGF staff		
Daniel Green	Interim Director, Policy, Advocacy, and Communications, Africa	BMGF
Hari Menon	Director, India Country Office	BMGF
Vishal Gujadhur	Deputy Director, Development Policy, and Finance	BMGF
Hassan Damluji	Deputy Director, Global Policy and Advocacy, Middle East team	BMGF
Tobias Kahler	Germany Country Lead	BMGF
Bahati Ngongo	Senior Program Officer, Global Health R&D Policy & Advocacy	BMGF
Laura Dickinson	Senior Program Officer, Advocacy and Communications, Family Planning, Gender Equality and MNCH	BMGF
Miguel Castro	Senior Officer, Global Media Partnerships	BMGF
Min Pease	Senior Community Manager	BMGF
Este Griffith	Senior Program Officer	BMGF
Katie Lee	Program Officer	BMGF
Arnav Kapur	Program Officer, Policy & Philanthropic Partnership, India	BMGF
Erin Hohlfelder	Senior Program Officer	BMGF
Jennifer Stout	Deputy Director, Strategy, Planning and Management, Philanthropic Partnerships	BMGF

Erin Hulme	Philanthropic Partnerships	BMGF
Ken Duncan	Deputy Director, Discovery & Translation Sciences	BMGF
Kedest Tesfagiorgis	Deputy Director, Global Partnerships & Grand Challenges	BMGF
Partner Organizations		
Aleksander Zur-Clark	Operations & Evaluation Coordination	Coalition for Global Prosperity
Lauren Pizze	Advocacy and Events Officer	Coalition for Global Prosperity
Heather Ignatius	Director, Advocacy and Public Policy	PATH
Erin Fry Sosne	Deputy Director, Advocacy and Public Policy	PATH
Jamie Nishi	Director, Global Health Technologies Coalition	PATH
Jim Cowen	Executive Director	Collaborative for Student Success
Mike Beard	Global Health Director, Better World Campaign	United Nations Foundation
Margaret Reilly McDonnell	Executive Director, Nothing But Nets	United Nations Foundation
Colleen Teixeira Moffat	Managing Director, Strategic Planning and Implementation	United Nations Foundation
Neil Datta	Secretary	European Parliamentary Forum for Sexual & Reproductive Rights
Eliya Zulu	Executive Director	The African Institute for Development Policy
Others		
Stephen Hubbell	Project Director, Open Society Fellowship Program	Open Society Foundations
Thomas Hilbink	Director, Grant Making Support Group	Open Society Foundations
Erica Lock	Director, Fellowship Programs	Echoing Green
Liza Mueller	Vice President, Knowledge	Echoing Green

Andrea Davila	Deputy Director	Echoing Green
Muriel Kahane	Global Champion Advisor	The SheDecides Initiative
Rob Floyd	Director and Senior Advisor	The African Center for Economic Transformation
Mame-Yaa K. Bosomtwi	(Former) Executive Secretary	The Organization of African First Ladies for Development
Nardos Berhanu	Interim Executive Secretary	The Organization of African First Ladies for Development
Makhamokha Mohale	Executive Secretariat	The Champions for an AIDS-Free Generation
Dr. Kelly Chibale	Founder and Director of H3D	H3D Research Center
Naghma Mulla	President and COO	EdelGive Foundation
Kofi Rashid	Independent advisor	

Annex 2: List of case studies

Case study	Description
Open Society Fellowship	This case study draws on Open Society Foundations (OSF)'s long history of engaging with champions, focusing on the Open Society Fellowship, as one example of long-term engagement with advocates for a range of issues.
Echoing Green Fellowship	This case study explores Echoing Green's approach to building champions via a structured, cohort-based Fellowship program and alumni network.
The SheDecides Initiative	This case study focuses on SheDecides, a global political movement, to examine best practices around how and when to support networks of champions, especially when working on issues considered controversial such as sexual and reproductive health and rights.
European Parliamentary Forum for Sexual and Reproductive Rights	This case study examines the European Parliamentary Forum's organizational approach to working with parliamentarians on a politically sensitive issue, and explores its understanding and practice of countering opposition voices in pursuit of specific goals.
The United Nations Foundation's Nothing But Nets Campaign	This case study explores the United Nations Foundation's organizational approach to working with U.S. Members of Congress as part of the Nothing But Nets campaign, by focusing on the value of engaging constituents, as well as Congressional staff.
Champion Building Organizations across Africa	This case study explores how four Africa-based organizations, The African Center for Economic Transformation, The African Institute for Development Policy, The Organization of African First Ladies for Development, and The Champions for an AIDS-Free Generation, identify, build and sustain champions, drawing on their decade-long work in the space of advocacy and use of approaches such as officials' country visits and networks of champions to amplify their influence.
Partnership with Prof. Kelly Chibale in South Africa	This case study focuses on the work of Prof. Kelly Chibale and his partnership with the Foundation as a scientist and advocate to make drug discovery a reality in South Africa and the region.
Philanthropic Partnerships in India and Indonesia	This case study explores champion building with high level philanthropists from the private sector in India, where BMGF has an office and long-term investment across multiple issues, and Indonesia, where the Foundation does not have an office, to draw comparative insights on what support champions may require in different contexts.

Annex 3: Champion definitions

Term used	Definitions
Champion	<p>“Individuals that regularly advocate on behalf of policy that supports ... goals aligned with the organization’s strategy” (Stachowiak et al, 2016)</p> <p>“A policymaker who consistently advances the adoption, implementation and funding of improved policy and practice” (Ray, 2018)</p> <p>“Individuals who intentionally take action to support a cause” (Stachowiak & Mumford, 2010)</p> <p>“Anyone ... who works hard and well to start and/or support an initiative or intervention, to bring a program or idea to reality, or to otherwise improve the quality of life” (Transform Nutrition Consortium & SUN Movement, 2016)</p> <p>A “charismatic advocate of a belief, practice, program, policy and/or technology” (FHI 360, 2010)</p> <p>“[People who] have the ability to directly promote or affect policy” (Gardner & Brindis, 2017)</p> <p>“A decision-maker or influencer who takes a consistently active, leading role in advancing an initiative, commitment, or policy” (PATH, quoted in Cody & Perkins, 2020)</p>
Policy entrepreneur	<p>Someone who: “(1) has some claim to a hearing ... [because of] expertise, an ability to speak for others ... or authoritative decision-making position (2) ... is known for his [sic] political connections or negotiating skill ... (3) [is] persistent” (Kingdon, 2003)</p>
Elite leaders	<p>“[People] occupying formal or informal positions of authority and power in public and private organizations or sectors and who take or influence key economic, political, social and administrative decisions ... have a measurable impact on development outcomes and control over the productive assets and institutions” (Amsden et al, 2009)</p> <p>Someone who “shows leadership, that is their ability to mobilize people and resources in pursuit of agreed goals [through a] conscious and determined search [for solutions]” (Leftwich, 2009)</p> <p><i>NB The sense in which ‘elite’ is being used in these definitions is equivalent to the term ‘grasstops’, i.e., it reflects “their ability to directly influence the design and implementation of a certain policy” (World Bank, 2017).</i></p>
Development entrepreneurs	<p>“[Someone who is] committed to improving and transforming their societies ...[using] entrepreneurial thinking and principles to mobilize people, ideas, and resources and navigate the local terrain” (Faustino, 2012)</p>
Change agents	<p>People “who facilitate the work of groups in developing, applying, and advocating for new practices ... [they are] well connected and respected as opinion leaders and role models ... willing to take risks and try new things” (IBP Consortium, 2007)</p> <p>People who “[care] deeply about changing a practice ... transmit their commitment and enthusiasm ... getting others excited about the prospects for making a significant difference” (Management Strategies for Improving Health Services, 20014)</p>
Influential messengers	<p>People whose “expertise means that they can speak with authority from their experience ... [and who have] access to and credibility with [target] decision-maker. He or she is someone to whom [the target] decision-maker will likely listen” (PATH, 2014)</p>
Inside influencers	<p>People who have “a status of being recognized as a credible expert, and/or legitimately representing the interests of a segment of the public” (Shephard et al, 2018)</p>
Leaders	<p>“[Those who organize and mobilize] people and resources (economic, political and other) in pursuit of particular ends” (Lyne de Ver, 2009)</p>

Annex 4: Champion characteristics

Characteristic	References in the literature
Persistent	<p>“regularly advocate” (Stachowiak et al, 2016)</p> <p>“consistently advances” (Ray, 2018)</p> <p>“persistent” (Kingdon, 2003)</p> <p>“persisting under adversity” (National Collaborating Center for Methods & Tools, 2017)</p> <p>“Perseverance is basic” (Center for Lobbying in the Public Interest, nd)</p> <p>“Be persistent and assertive” (Transform Nutrition Consortium & SUN Movement, 2016)</p> <p>“persistence” (FHI360, 2010)</p> <p>“must be constantly engaged in the process and policy environment ... and prepared” (Faustino, 2012)</p> <p>“they are persistent” (Shiffman, 2007)</p>
Committed	<p>“Committed to improving and transforming their societies” (Faustino, 2012)</p> <p>“cares deeply... commitment” (Leading Change in Practices to Improve Health, 2004)</p> <p>“deep commitment to their work and have a genuine desire to make a difference” (Arabella Advisors, 2018)</p> <p>“demonstrating interest in the issues” (CARE, nd)</p> <p>“ready to sacrifice time and resources” (Transform Nutrition Consortium & SUN Movement, 2016)</p> <p>“commitment” (Easterling & McDuffee, 2019)</p> <p>“successful fellows demonstrate deep commitment to their work and have a genuine desire to make a difference” (Arabella Advisors, 2018)</p>
Connected	<p>“political connections” (Kingdon, 2003)</p> <p>“connectedness” (Martin & Marks, 2019)</p> <p>“being well connected ...the ability to build relationships, build trust” (Maxwell & Young, 2018)</p> <p>“champions are firmly rooted within social structures and act as anchors within policy and practice processes to promote change” (Transform Nutrition Consortium & SUN Movement, 2016)</p> <p>“uses his or her ... professional contacts” (FHI360, 2010)</p> <p>“getting the right people involved” (National Collaborating Center for Methods & Tools, 2017)</p> <p>“The ability to establish and maintain strong relationships” (Center for Lobbying in the Public Interest, nd)</p> <p>“the ability to create a network of alliances” (Biaggio et al, 2019)</p>
Politically expert	<p>“know ... processes” (Center for Lobbying in the Public Interest, nd)</p> <p>“good understanding of their community, programs, services, policies or legislation” (Transform Nutrition Consortium & SUN Movement, 2016)</p> <p>“uses his or her expertise” (FHI360, 2010)</p> <p>“solid understanding of different approaches to addressing the issue” (Easterling & McDuffee, 2019)</p> <p>“thinking politically” (Maxwell & Young, 2018)</p> <p>“knowing our targets (positions, roles, attitudes)” (Conciliation Resources, 2011)</p> <p>“navigate the local terrain” (Faustino, 2012)</p> <p>“they are aware of the critical challenges in their environments” (Shiffman, 2003)</p>

Has relevant skills	<p>“Knowledge of issue” (Stachowiak & Mumford, 2010)</p> <p>“communication, organizing networking” (Center for Lobbying in the Public Interest, nd)</p> <p>“the ability to tell a good story” (Maxwell & Young, 2018)</p> <p>“persuasiveness” (FHI360, 2010)</p> <p>““In-depth understanding of issue ... ability to design programs, work with data, work effectively in team, think strategically” (Easterling & McDuffee, 2019)</p> <p>“they have excellent coalition-building skills ... they are strong in rhetorical skills” (Shiffman, 2007)</p>
Credible	<p>“has some claim to a hearing” (Kingdon, 2003)</p> <p>“can speak with authority ... [have] access to and credibility with [target] decision-maker” (PATH, 2014)</p> <p>“recognized as a credible expert, and/or legitimately representing the interests of a segment of the public” (Shephard et al, 2018)</p> <p>“credibility/legitimacy with target population” (Stachowiak & Mumford, 2010)</p> <p>“credibility, trustworthiness” (Conciliation Resources, 2011)</p> <p>they have a credibility that facilitates the generation of resources (Shiffman, 2007)</p> <p>“respect of peers and support from superiors” (Transform Nutrition Consortium & SUN Movement, 2016)</p>
Proactive	<p>“intentionally take action” (Stachowiak & Mumford, 2010)</p> <p>“to start and/or support an initiative or intervention” (Transform Nutrition Consortium & SUN Movement, 2016)</p> <p>“shows leadership” (Leftwich & Hogg, 2008)</p> <p>“organize and mobilize people and resources” (Faustino, 2012)</p> <p>“promoting awareness and understanding of the issue to various groups; and advocating improved policies and practices” (CARE, nd)</p> <p>“takes a consistently active, leading role” (Cody & Perkins, 2020)</p> <p>“getting the right people involved” (National Collaborating Center for Methods & Tools, 2017)</p>
Influential	<p>“have the ability to directly promote or affect policy” (Gardner & Brindis, 2017)</p> <p>“mobilize people, ideas, and resources” (Faustino, 2012)</p> <p>“possess, or might claim to possess ‘elevated status’ ... Influence over policy decisions” (Stachowiak & Mumford, 2010)</p> <p>“influential political leader ... or other authority figure” (FHI360, 2010)</p>
Enthusiastic/ Passionate	<p>“[transmits] enthusiasm ... getting others excited about the prospects for making a significant difference” (Leading Changes in Practices to Improve Health, 2004)</p> <p>“expressing enthusiasm” (National Collaborating Center for Methods & Tools, 2017)</p> <p>“passion” (FHI360, 2010)</p>
Has integrity	<p>“they generate commitment by appealing to important social values” (Shiffman, 2007)</p> <p>“a strong sense of moral responsibility, ... and to lead by example” (Biaggio et al, 2019)</p> <p>“tell the truth ... live the truth [you are telling]” (Sachs, 2012)</p>

Annex 5: Main monitoring frameworks

CARE, Champion Scorecard

CARE ACTION! Power Tool: Advocacy Scorecards: Measuring Impact, Building Champions, and Promoting Transformational Change

Framework design

The first step is to conduct a stakeholder mapping or power analysis to map the actors who can help achieve your advocacy goals. Then build a list of actions that characterize a champion.

Examples given of relevant actions:

- Co-sponsored legislation
- Spoke favorably in the media or to the public on your issue
- Authored relevant media publication
- Attended/hosted relevant events
- Met with you or a partnering organization to discuss relevant issues
- Signed a relevant petition
- Board memberships or personal activities
- Requested additional information from you or one of your partners

Having done this, the next step is to assign a numerical score (1-5) among the actions - the lowest scores should be assigned to lower-effort actions, while the highest scores should be reserved for actions most closely associated with policy change or implementation.

Method of rating

Each selected action falls into one of three categories:

The first category – demonstrates interest – includes low-effort activities that highlight a champion's inclination to learn more about the target issues. Examples include requesting information from CARE and/or allied organizations on a policy issue, or visiting development projects related to a CARE-supported policy issue.

The second category of champion traits – promotes awareness and understanding – outlines a series of activities that show increasing commitment to relevant policy issues. Examples include interviews with local or national media outlets, speaking publicly in support of certain policies, and recruiting colleagues to visit development projects related to a CARE-supported policy issue.

The third category – advocates improved policy and practices – focuses on policy-specific actions such as drafting legislation, implementing or funding policies, adopting CARE's recommendations, organizing government briefings, and personally lobbying colleagues to achieve desired outcomes in line with CARE's advocacy objectives.

Monitoring process

Once the system is finalized, the scorecard then calculates a numerical score for an individual's actions represents the level of "champion-ness" on the target issue/theme.

The scorecard can be used to measure advocacy work, as well as an accountability tool to demonstrate to policymakers that they are being held accountable for their commitments, statements and actions. Including major moments of engagement can show correlation between an increase in support and advocacy activities.

In terms of process, this involves

- setting a Google alert so that notifications are received whenever the policymaker is mentioned in the news.
- creating a “live” google document that can be added to in real-time.
- assigning someone to collect updates on a regular basis.

Some statements and actions by policymakers may not be made public. It is impossible to fully gather all the data that exists to build your scorecard. However, the important thing is to be diligent as possible in gathering the data that is available.

Aspen Institute, Champions toolkit

David Devlin-Foltz and Lisa Molinaro (2010) Measuring Efforts to Create Champions for Policy Change

Framework design

Possible champion messages or actions should be specified, based on 3 broad categories of champion traits

- Demonstrates Awareness
- Promotes Awareness and Understanding
- Advocates for Improved Policy and Practices

Observable and measurable traits should be selected. The document gives examples rather than a full suite of options. Examples given of traits defined for the category “promotes awareness and understanding” are as follows:

Examples of Specific Champion Traits for “Promotes Awareness and Understanding”	
Sub-Category	Trait
Public speaking	Has delivered positive statements on a policy issue in an official policy setting (Congress, Administration) and on public record
	Has delivered positive statements on a policy issue, incorporating messaging consistent with CARE’s objectives, in an official policy setting (Congress, Administration) on public record
Directly approaches colleagues	Wrote a “Dear colleague letter” with no legislation or policy pending
Travel	Has recruited colleagues to visit development projects related to a policy issue
	Has (co)organized a trip to visit development projects related to a policy issue

The next step is to rank traits, from lowest to highest in terms of the level of engagement they exemplify.

Method of rating

Rating is done by assigning a point value to each trait based on the level of support it represented, using the following scale:

Score = 1: Interested

Score = 2: Somewhat supportive

Score = 3: Supportive

Score = 4: Very supportive

Score = 5: Extremely supportive

This score then applies to each champion trait, as shown in the example below.

Example Application of the Scale and Scoring System				
Sub-Category	Trait	Possible Score	Actual Score	Actual Champion Activity
Public speaking	Has delivered positive statements on a policy issue in an official policy setting (Congress, Administration) and on public record	3		
Directly approaches colleagues	Has delivered positive statements on a policy issue, incorporating messaging consistent with CARE's objectives, in an official policy setting (Congress, Administration) on public record	4	4	Spoke at colloquy on maternal mortality
Travel	Wrote a "Dear colleague letter" with no legislation or policy pending	4		
	Has recruited colleagues to visit development projects related to a policy issue	3		
	Has (co)organized a trip to visit development projects related to a policy issue	4	3	Recruited for future Learning Tours
SCORE Promotes Awareness and Understanding (maximum possible score: 4)			4	

A champion's total score in each category is the highest score he or she receives on any trait in that category, as in the following example:

Example Category and Overall Scores		
CATEGORY Score:	Demonstrates Interest (maximum possible: 3)	3
CATEGORY Score:	Promotes Awareness and Understanding (maximum possible: 4)	4
CATEGORY Score:	Advocates Improved Policy and Practices (maximum possible: 5)	4
OVERALL Score (maximum possible: 5)		4

Monitoring process


A baseline champion score for each participant can be created by conducting a search of media and other relevant records, and by searching the Web. Then, continuously scan major mainstream and social media for mentions of champions in relation to key issues and check with colleagues for updates on champion activities. Allow the scorecard to evolve as data is gathered. The level of data captured supports an analysis linking champions' actions to advocacy efforts, for example, by capturing specific mentions of Learning Tour experiences in Congressional testimony, records of floor debates, op-eds, or public appearances.

Save the Children, Champions Toolkit

Sarah Roma and Carlisle Levine (2016), Saving Newborn Lives [SNL] Champions Toolkit

Framework design

A stakeholder mapping tool is used to identify appropriate champions, assessing influence and engagement. The following checklist can then be used to determine which champions to choose to work with:

 CRITERIA FOR CHOOSING A CHAMPION <i>Based on your champion map, choose a few potential champions and work through the following checklist.</i>			
ADVOCACY OBJECTIVE:			
TARGET AUDIENCE:			
REASON FOR ENGAGING CHAMPION:			
CRITERIA	POTENTIAL CHAMPION 1	POTENTIAL CHAMPION 2	POTENTIAL CHAMPION 3
NAME AND POSITION:			
LEVEL OF INFLUENCE AND ENGAGEMENT			
What is the potential champion's current level of influence with the target audience or over the desired policy change — low, medium or high?			
What is the potential champion's current level of engagement with the policy issue — awareness, will, or action?			
If already highly engaged on the policy issue ("action"), what is the potential champion's current involvement?			
What are the relevant partnerships, networks, and associations of the potential champion?			
DEGREE OF ALIGNMENT			
What is the potential champion's alignment with your vision for change?			
Has the potential champion been vetted for value misalignments and possible risks?			
What is your current relationship with the potential champion — brand new, know somewhat, or know well?			
INTEREST AND CAPACITY			
What is the potential champion's current capacity — none, some, or expert? Please assess each category.			
a. Technical knowledge	a.	a.	a.
b. Advocacy skills	b.	b.	b.
c. Communication skills	c.	c.	c.
What are the potential champion's other obligations, and do they have an ability to prioritize this role and a long-term relationship?			
Do you have the human and financial resources needed to support the potential champion?			
Is the potential champion interested in being involved in advocacy related to newborn health — no interest, some interest, or high interest?			
Is the potential champion interested in partnering with you — yes, no, or maybe?			
Is this role beneficial or the potential champion — yes, no, or maybe? How?			
Other considerations (please list on separate sheet if needed):			

Rate the Level of Engagement:

How engaged is the champion or emerging champion on the relevant policy issue? Possible scores:

- Awareness — The potential champion or emerging champion is aware of the policy issue, but has not shown interest in taking action related to it.
- Will — The potential champion or emerging champion is aware of and knowledgeable about the policy issue. He or she has demonstrated interest in taking action related to the policy issue but is not a leader on the policy issue.

- Action — The potential champion or emerging champion is viewed as a leader advocating for the policy issue. Each staff member provides his or her perspective, backed up by evidence or examples.

Rate the Level of Influence

For a champion or emerging champion who is influential: How much influence does the champion or emerging champion have with the relevant audience? Possible scores:

- Low — The relevant audience is unfamiliar with the potential champion or emerging champion and would not be influenced by him or her, either as an individual or because of his or her position or affiliation.
- Medium — The relevant audience is familiar with the potential champion or emerging champion and could potentially be influenced him or her, either as an individual or because of his or her position or affiliation.
- High — The relevant audience is very familiar with the potential champion or emerging champion and could be very influenced by him or her, either as an individual or because of his or her position or affiliation.

Each staff member provides his or her perspective, backed up by evidence or examples. The group then comes to agreement on how to score the champion or emerging champion.

Rate how confident the team is in the ratings they have provided

- Low — The team assessing the potential champion or emerging champion has little confidence or agreement among themselves regarding the rating.
- Medium — The team assessing the potential champion or emerging champion has some confidence or agreement among themselves regarding the rating.
- High — The team assessing the potential champion or emerging champion is very confident and has high agreement among themselves regarding the rating.

Monitoring process

Monitor the following dimensions and how they relate to each other:

- SNL's support for and interaction with champions: Is SNL supporting champions in the right ways in order to help them maximize their engagement in and influence over a particular policy change?
- A champion's influence: How influential is a champion with the key target audience(s) or related to the target policy change?
- A champion's engagement on an issue: To what degree is a champion aware of an issue and willing to act related to the issue? What actions has the champion taken?
- A champion's progress in contributing to an advocacy objective: What activities has a champion undertaken, and what interim objectives has a champion been able to achieve as part of an overall effort to influence policy change?

The stakeholder map used in planning establishes a baseline level of a champion's engagement and influence. As part of ongoing monitoring, repeat the mapping and compare against the baseline to assess whether an existing or emerging champion's engagement and influence has changed. Given the speed and intensity of many advocacy efforts, monitoring approaches need to be light and timely so that they can directly feed into ongoing decision-making processes.

A simple Excel workbook can help track how you are interacting with or supporting a champion. On one worksheet, capture the relevant advocacy objectives, the date, its support and interaction with the champion and actual benefits of the support or interaction. This tracking sheet should be updated

whenever there is interaction with a champion. Reflecting on this information during staff or strategy meetings can help determine how to continue to nurture the champions.

On a periodic basis you should evaluate a champion's effectiveness, which, as part of overall evaluation of an advocacy effort, can examine to what degree and in what ways a champion was able to influence certain changes aimed at contributing to a targeted advocacy objective.

The National Collaborating Center for Methods and Tools, Champion behavior measure

National Collaborating Center for Methods and Tools (2017): identifying champions to promote innovation: A champion behavior measure

Framework focus

The champion behavior tool is a 14-item scale that measures three factors that are prominent in champion behaviors:

- expressing enthusiasm and confidence about the success of the innovation
- persisting under adversity, and
- getting the right people involved.

These behavior measures are based on assessment of psychometric characteristics of champion behavior; the factors being measured are “correlated with established measures of transformational leadership”.

Method of rating

The 14 items assess whether an individual:

- enthusiastically promotes the innovation's advantages expresses strong conviction about the innovation
- expresses confidence in what the innovation can do
- shows optimism about the success of the innovation
- points out reasons why the innovation will succeed
- keeps pushing enthusiastically
- sticks with it
- shows tenacity in overcoming obstacles
- continues to be involved with the innovation until it is implemented
- knocks down barriers to the innovation
- does not give up when others say it cannot be done
- gets problems into the hands of those who can solve them
- gets the right people involved
- gets key decision-makers involved

This 14-item champion behavior measure can be used to identify existing champions or champion behavior gaps. There are three steps involved with using this tool:

1. Assess relevant individuals using the behavior measure.
2. Collect and analyze responses to the measure to see if a champion exists, and to identify strengths or gaps in champion behaviors.
3. Use the results to inform planning. The results can show where they can build capacity to successfully implement planned programs.

Monitoring process

Not specified

ORS Impact, Measuring political will

Stachowiak et al (2016) Measuring political will: lessons from modifying the policymaker ratings method

Framework focus

The method involves facilitating a rating process to gauge three items:

- Policymaker level of support: Individual policymaker support for an issue based on his or her public behaviors or actions on behalf of the issue.
- Policymaker level of influence: Policymaker influence on the policy issue based on criteria that research shows relate to policymaker influence,
- Rate level of confidence: Confidence in the accuracy of ratings on the first two scales.

These ratings can be adapted to context. The report gives three different examples of how they were used.

Method of rating

In one example given, policymakers' support was rating using the following scale:

- Against: Known to have made statements or had prior behaviors demonstrating a counter-stance on the issue.
- Leaning Against: Known to have made statements that indicated likelihood of support against the desired issue.
- Neutral: Known to have made statements indicating a position neither for nor against the issue
- Supportive: Known to have made statements in support of the issue.
- Strongly Supportive: Known to have made statements, taken positive actions, and/ or encouraged others to take positive action around the issue.

In another example support was rated on a 'continuum of championing':




- Lack of Awareness or Understanding: The decision maker does not demonstrate an understanding of the policy issue and/or proposal.
- Understands; Opposes: The decision maker demonstrates an understanding of, but disagrees with, the policy issue and/or proposal.
- Understands; Agrees: The decision maker demonstrates an understanding of, and agreement with, the policy issue and/or proposal.
- Understands; Promotes: The decision maker demonstrates an understanding of, and promotes or champions, the policy issue and/or proposal.

A third example involved modifying the scale to account for those individuals who may not be aligned with the full set of goals for the organization, but could be counted on for certain policy goals:

- Overall Champion: Individuals that regularly advocate on behalf of policy that supports education goals aligned with the organization's strategy.
- Overall Supporter: Individuals that support education goals aligned with the organization's strategy.
- Single Issue Supporter: Individuals that support a single issue (e.g., assessments) though they may not be aligned with all the goals of the organization.
- Potential Supporter: Individuals that could be cultivated to support aligned education goals, but need additional attention from existing supporters.
- Desirable Supporter: Individuals that are not yet supporters of the organization's education goals, but would be valuable as such.

Approaches are summarized as follows:

Table 1: Overview of Original Tool and Three Modified Scenarios

	Original Method	 Scenario 1: Federal Farm Bill Advocacy <i>(Complete)</i>	 Scenario 2: State Environmental Policy <i>(In Process)</i>	 Scenario 3: Federal Education Advocacy <i>(Untested)</i>
Rating Focus	Particular policy proposal	Senators' support for conservation funding/programs in the U.S. Farm Bill reauthorization	Decision makers' support for a few key messages from each major publication released	Federal policymakers' level of support for an education movement
Sample	All policymakers in a decision-making body (e.g., state legislative houses)	Four Senators on the Senate Agriculture Committee	Primarily state decision makers (legislative and administrative)	List of federal policymakers developed generatively
Rating Scale	Support <ul style="list-style-type: none"> • Not At All Supportive • Somewhat Supportive • Supportive • Extremely Supportive Influence <i>(ranging from Not Very to Extremely)</i> Confidence <i>(ranging from Not Very to Extremely)</i>	Support <ul style="list-style-type: none"> • Against • Leaning Against • Neutral • Supportive • Strongly Supportive 	Support <ul style="list-style-type: none"> • Lack of Awareness or Understanding • Understands; Opposes • Understands; Agrees • Understands; Promotes 	Support <ul style="list-style-type: none"> • Overall Champion • Overall Supporter • Single Issue Supporter • Potential Supporter • Desirable Supporter Influence <i>(High only)</i>
Rating Process	<ul style="list-style-type: none"> • At least 3-5 advocates participate in the rating process; • Process is repeated over time 	<ul style="list-style-type: none"> • Facilitated calls (2) with ORS Impact and political consultants • Rated current and aspirational support • Measured at the start and conclusion of ORS Impact's evaluative efforts 	<ul style="list-style-type: none"> • Initially facilitated in-person by ORS Impact with 3-4 staff; process owned by rating team going forward • Measured twice, at publication pre-release and after six months 	<ul style="list-style-type: none"> • Intended to be facilitated in-person by ORS Impact with 10-12 individuals from 3-4 organizations; to be repeated annually
Takeaways	When used for a particular policy, process yields useful data for evaluators and advocates	Sample was too small to be useful	Finding the right level of granularity for ratings focus has been a challenge; new approach is useful for informing strategy but hard to "roll up"	For groups reluctant to rate legislators as unsupportive, this may be a useful modification, though it is untested

Monitoring process

The method is repeatable, to capture changes in political will over time. The tool supports assessment and tracking of individuals' support but also can be used to create a moving picture of the whole policy body, allowing for a calculation, over time, of the proportion of identified supporters within decision-making bodies. Assessing a whole decision-making body helps advocates and evaluators understand what was needed for a "win" and where opposition or lack of support was concentrated.

The National Journal Membership, Congressional Relationship scorecard

Framework focus

The first step is to define who the main targets are for tracking 'relationship health' are and on the basis of this creating a 'Member Tracker' list. There is then a choice to be made between developing:

1. A Behavioral checklist – which involves tracking 10-15 behaviors.
2. A tiered scorecard – which defines relationship strength on a scale 1-5.

These are outlined in turn:

Method of rating (1) Behavioral checklist

The Behavioral Checklist Scorecard is designed to assess the Member's relationship with the organization and the Member's relationship with the issue (or set of issues). Both relationships are divided into three sub-categories:

Components of a Successful Congressional Scorecard

Relationship with Organization	Shows Understanding <ul style="list-style-type: none"> Is familiar with the organization's lobbyists, acknowledges previous interactions Knows organization's mission, policy positions, advocacy interests 	Collaborates Actively <ul style="list-style-type: none"> Follows up on communication promptly and substantively Engages in exchange on policy, considers organization's opinion or recommendations 	Perceives as Leader <ul style="list-style-type: none"> Values organization as leading expert and is a trusted source of information and opinion Publicly supports organization
	Demonstrates Willingness to Engage <ul style="list-style-type: none"> Shows interest in issue, willingness to discuss and be educated Assigns staff member to cover issue 	Promotes Awareness and Conversation <ul style="list-style-type: none"> Actively participates in debates on issue Speaks about issue publicly or with colleagues 	Supports and Incites Action <ul style="list-style-type: none"> Publicly or privately works to draft legislation or rally colleagues' support on issue Takes public stance on issue

This then involves selecting up to four behaviors from the 'organizational relationship' longlist:

Relationship with Organization	Shows Understanding <ul style="list-style-type: none"> Is familiar with the organization's lobbyists, acknowledges previous interactions Knows organization's mission, policy positions, advocacy interests 	Collaborates Actively <ul style="list-style-type: none"> Follows up on communication promptly and substantively follows Engages in exchange on policy, considers organization's opinion or recommendations 	Perceives as Leader <ul style="list-style-type: none"> Values organization as leading expert and is a trusted source of information and opinion Publicly supports organization
	Pick List (choose up to 4)* <ul style="list-style-type: none"> <input type="checkbox"/> Says hello in the hallway on the Hill <input type="checkbox"/> Interacts with lobbyists on first-name basis <input type="checkbox"/> Attends event when invited by lobbyist <input type="checkbox"/> Participates in a site visit <input type="checkbox"/> Meets with advocates in district or during a fly-in <input type="checkbox"/> Is receptive to follow-up, policy-focused meetings with lobbyists <input type="checkbox"/> _____ 	<ul style="list-style-type: none"> <input type="checkbox"/> Returns calls/replies to emails within 24 hours <input type="checkbox"/> Invites lobbyist to an event <input type="checkbox"/> Sponsors briefing on organization's behalf <input type="checkbox"/> Reveals strategic information when requested <input type="checkbox"/> Attends organization's event as an invited speaker <input type="checkbox"/> Allows meetings to run longer than time requested <input type="checkbox"/> Participates in organization's town hall meetings <input type="checkbox"/> _____ 	<ul style="list-style-type: none"> <input type="checkbox"/> Proactively requests information from organization <input type="checkbox"/> Invites colleagues to learn about or interact with organization <input type="checkbox"/> Makes public comment specifically mentioning organization <input type="checkbox"/> Invites organization to testify at a hearing <input type="checkbox"/> Facilitates lobbyist meeting with party leadership <input type="checkbox"/> Voluntarily and preemptively offers strategic information <input type="checkbox"/> _____

This is supplemented by selecting up to 10 behaviors from the 'issue relationship' longlist:

<i>Relationship with Issue(s)</i>	Demonstrates Willingness to Engage	Promotes Awareness and Conversation	Supports and Incites Action
	<ul style="list-style-type: none"> Shows interest in issue, willingness to discuss and be educated Assigns staff member to cover issue 	<ul style="list-style-type: none"> Actively participates in debates on issue Speaks about issue publicly or with colleagues 	<ul style="list-style-type: none"> Publicly or privately works to draft legislation or rally colleagues' support on issue Takes public stance on issue

Pick List
 (choose up to 10)*

☐ Joins or actively participates in caucus focused on issue
☐ Meets with organization to discuss issue
☐ Member or staff attends briefing on issue
☐ Votes in favor of legislation related to issue
☐ _____

☐ Hosts policy event on issue
☐ Discusses issue with colleagues or shares educational information
☐ Speaks favorably about the issue or makes a comment to the press/ on social media
☐ Makes supportive statements about issue in a party or caucus meeting
☐ Recruits colleagues to participate in fly-out events
☐ _____

☐ Organizes or sponsors hearing on issue
☐ Asks relevant questions of expert giving testimony in hearing
☐ Writes Dear Colleague letter on issue
☐ Signs Dear Colleague letter on issue
☐ Drafts legislative language consistent with the organization's objectives
☐ Advocates behind-the-scenes in support of the issue
☐ Sponsors relevant, positive legislation
☐ Recruits co-sponsors or garners support for key vote
☐ Makes supportive floor speech
☐ Introduces priority legislation
☐ _____

Based on these choices, the behavioral checklist can then be populated:

Name: _____		Updated: Quarterly <input type="checkbox"/> Biannually <input type="checkbox"/> Annually <input type="checkbox"/>	
State/District: _____		Relationship Owner: _____	
	Behavior		Displays Behavior
Relationship with Organization	Shows Understanding	1. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Collaborates Actively	2. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Perceives as Leader	3. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		4. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
Relationship with Issue (s)	Demonstrates Willingness to Engage	1. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		2. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		3. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		4. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Raises Awareness and Promotes Conversation	5. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		6. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		7. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Supports and Incites Action	8. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		9. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
		10. _____	Yes <input type="checkbox"/> No <input type="checkbox"/>
Total Score*			
Goal Score			

Method of rating (2) Tiered scorecard

The tiered scorecard is also designed to assess the Member's relationship with the organization and the Member's relationship with the issue (or issue set).

In this case, assessment is based on rating system as follows:

	<i>Relationship with Organization</i>	<i>Relationship with Issue(s)</i>
Relationship Health Score	Shows Limited Knowledge of Organization and its Mission 1 <ul style="list-style-type: none"> Recalls interaction with lobbyists when prompted Is unable to recall or identify organization's issue set or previous collaboration 	Shows Limited Interest or Awareness of Issue <ul style="list-style-type: none"> Asks no questions during meeting with lobbyists Demonstrates unfamiliarity with the issue
	Engages Occasionally with Organization and Its Members 2 <ul style="list-style-type: none"> Meets with advocates during fly-in or in district Invites lobbyist to a fundraiser/attends fundraiser hosted by organization 	Expresses Interest in Learning Policy Position <ul style="list-style-type: none"> Joins or participates in caucus relevant to issue Attends briefing on issue (or staff attends) Takes a meeting focused on issue
	Promotes Casual, Regular Partnership with the Organization 3 <ul style="list-style-type: none"> Regularly responds to emails, phone calls, or requests within 24 hours Holds follow-up policy meetings with lobbyists 	Participates in Active Dialogue on Policy Issue <ul style="list-style-type: none"> Comments on issue to press or on social media Mentions issue to state delegation Asks relevant question of witness during a hearing
	Collaborates Actively & Supports Organization Objectives 4 <ul style="list-style-type: none"> Invites org. to testify at a relevant hearing Publicly comments on organization's policy work Participates in fly-out, site visit, or local town hall 	Promotes Conversation on Policy Solutions <ul style="list-style-type: none"> Invites colleagues to participate in event on issue Facilitates meetings for org.'s staff with colleagues Signs Dear Colleague letter
	Builds Trusting Relationship with Organization & Lobbyists 5 <ul style="list-style-type: none"> Shares strategic, insider information Facilitates meeting with party leadership Proactively seeks organization's opinion 	Moves Legislation <ul style="list-style-type: none"> Drafts Dear Colleague Letter Works to rally support, earn colleagues' votes Drafts supportive legislative language Introduces priority legislation

Ratings can be added to a members' chart, to identify target scores:

Monitoring process

In the case of both the behavioral scorecard and tiered, the monitoring process involves:

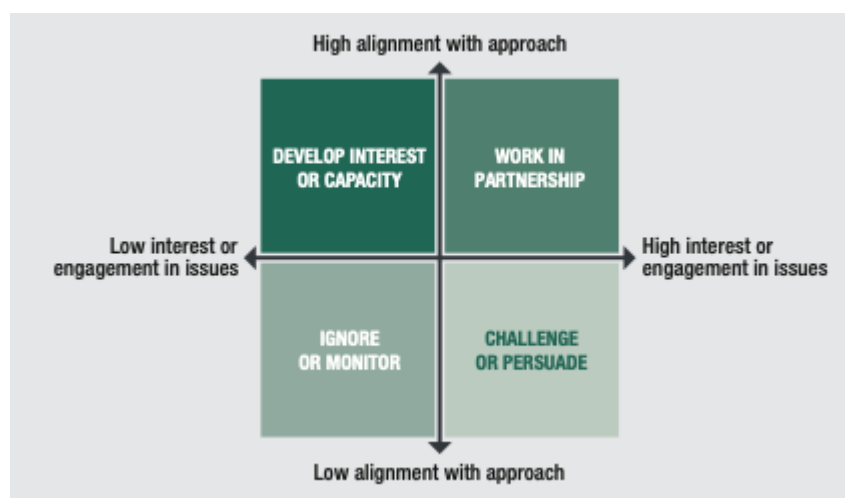
1. Establishing a baseline.
2. Tracking for 6 months then reviewing and making any adjustments to the system.
3. Assessing any changes after one year.
4. Developing tailored action plans.

ODI, Political will monitoring tool

Tilley et al (2018) Monitoring the effect of advocacy in changing political will

Framework design

Priority stakeholders are identified through a stakeholder mapping exercise, based on assessing their alignment with, and levels of interest/engagement in, the issue:



This then allows identification of those who are most important to the project and opens up the possibility of plotting how they might ideally move across quadrants. Each of these journeys represents a potential engagement strategy. On the basis of this, progress markers can be formulated for each stakeholder

Method of rating

This is based on three levels of behavior:

- Understand. Key actors demonstrate early positive responses, often reactive, although sometimes no change may be expected.
- Support. Key actors are showing signs that the messages are being taken on board, reflecting more active and engaged behavior.
- Engage. Key actors display transformative behaviors demonstrating either a profound change related to the policy objectives that will be sustainable in the long term, or the favorable status quo is successfully maintained, or there is lasting commitment to addressing and removing barriers or disincentives.

The next step is to establish five progress markers for each of these 'levels of behavior' that would show the stakeholder understands, supports and is engaged with your policy objective (creating a maximum of 15 'indicators'). These markers should be described in active language, so that it is clear what achieving them would look like. Setting progress markers can help in thinking through appropriate engagement strategies and tactics:

Baseline	What this change looks like	How to achieve this
Understand		
Support		
Engage		

Monitoring process

Monitoring is through a dual process of (a) creating an activity log and (b) tracking the relevant activities of key stakeholders.

The goal is to collect as many data points as possible and to provide supporting evidence where available. The evidence collated in the log is then used to tell a story about how the activities have contributed to the change observed.

PATH, Champion Tracking tool

Summarized in Cody & Perkins (2020), Charting a path to impact: accelerating progress in partnership with parliamentarians

Framework design

This tool tracks the actions of decision-makers (including parliamentarians) and identifies what makes them a key partner for a particular policy outcome. There are five different levels of action that are used to measure how parliamentarians and other decision-makers are progressing and to assess if they are increasingly expanding their level of engagement on an issue. Champions are tracked separately on each issue so the same champion may be tracked multiple times if they are expected to drive progress toward more than one outcome.

Method of rating

Actions are broken down as follows:

	Decision-maker actions
0	No actions taken yet.
1	Participates in consultative meeting and/or activity in support of target policy goal(s)
2	Publicly voices support and/or takes action to advance target policy goal(s) (e.g. writes an op-ed or blog; makes a public statement/speech; organizes an event; initiates a sign-on letter).
3	Consistently— at least once a quarter for two or more quarters—voices support and/or takes action to advance target policy goal(s).
4	Sponsors or participates in action in support of target goal(s).
5	Initiates action or authors policy in support of target goal(s).

Monitoring process

The tracking schedule is as follows:

Activity	Frequency
Stakeholder Mapping: During annual work planning, each team identifies champions that will help them achieve their primary outcomes and places them in the champion tracker. Teams will note their baseline level of engagement on the advocacy objective and the target level at the end of this grant, in 2020.	Annually
Tracking interactions between PATH and Champions: Teams will record critical interactions between PATH staff and champions on an ongoing basis.	On-going
Monitoring actions: Staff will be asked to monitor the actions champions take that are related to our primary outcomes—whether PATH influenced or self-initiated. This will help us understand the sustained impact of our advocacy work.	On-going
Quarterly review and update of champion status: Teams will be asked to update the tracker with the information that they have collected, and a new number ranking of champion-ness, on a quarterly basis.	Quarterly

Annex 6: Policymaker rating scale example

Scale	Rating	Definition
Support	Not at all supportive	No evidence that this person has spoken or taken any action in support of the policy issue
	Somewhat supportive	Has indicated being favorably disposed to the policy issue
	Supportive	Occasionally takes action either publicly or behind the scenes beyond voting in support of the policy issue
	Extremely supportive	Has a well-known reputation for being a champion of the policy issue and regularly takes leadership on advancing it
Influence Criteria 1. Majority party member 2. Relevant content expertise 3. Seniority/experience 4. Reputation/respect 5. Key committee member 6. Formal leadership position	Not very influential	Meets none or only one criterion
	Somewhat influential	Meets at least two criteria
	Influential	Meets 3 or 4 criteria and/or is on a key committee
	Extremely influential	Meets 5 or 6 criteria and/or holds a formal leadership position in the legislature and/or chairs a key committee

Annex 7: Champion development plan template

Congressional Target:		
Relationship Owner:		
Baseline Assessment		
Describe the organization's relationship with this Member of Congress:		
What is the organization's current interaction with this Member (frequency and types of touches)?		
Engagement Plan		
What are the Member of Congress's current interests/priorities?		
Next three touches:	1) 2) 3)	
PAC Contribution:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount: _____
Notes & Results		
Notes:		
Results:		

Annex 8: Actions tracked in monitoring frameworks

Source	Actions being tracked
UN Foundation (Dalberg, 2017)	<p><i>Expressed public support</i></p> <ul style="list-style-type: none"> • Posted content to high quality internet source (blog, Twitter, Facebook) regarding malaria or global vaccinations • Issued press release, or press conference regarding malaria or global vaccinations • Wrote letter to the editor, op-ed or interviewed by a newspaper on the issue • Spoke about malaria or global vaccinations at a public event • Attended a UNF event or briefing • (Co) Hosted an event related to malaria or global vaccinations <p><i>Expressed general legislative support</i></p> <ul style="list-style-type: none"> • Delivered floor statements (e.g., questions) on the issue to the Administration/Senate • Participated in a caucus relevant to malaria or global vaccinations • Urged other Congressional/Administration colleagues to act on issue specific policies (e.g., Dear Colleague letter) • Any of activities above, but with messaging specific to UNF's campaign messages <p><i>Expressed specific legislative support</i></p> <ul style="list-style-type: none"> • Caucus leadership or introduction • Urged influential Administration officials or key Congressional/Parliamentary colleagues to act on issue specific policies (e.g., Letter to Administration, "Dear Colleague letter" with legislation or policy pending) • Introduced or co-sponsored (original or otherwise) legislation, or language / line item / statutory revision to ensure successful implementation • Voted for issue specific legislation
Save the Children (Roma & Levine, 2016)	<ul style="list-style-type: none"> • Publication of research • Coalition or network building • Constituency mobilizing • Briefings or presentations • Participation in working groups or technical committees • Engagement with traditional or social media • Meetings with relevant policymakers to educate them and encourage their engagement
Aspen (Devlin Foltz & Molinaro, 2010)	<p><i>Public speaking</i></p> <ul style="list-style-type: none"> • Has delivered positive statements on a policy issue in an official policy setting (Congress, Administration) and on public record • Has delivered positive statements on a policy issue, incorporating messaging consistent with CARE's objectives, in an official policy setting (Congress, Administration) on public record <p><i>Directly approached colleagues</i></p> <ul style="list-style-type: none"> • Wrote a "Dear colleague letter" with no legislation or policy pending • Has recruited colleagues to visit development projects related to a policy issue • Has (co)organized a trip to visit development projects related to a policy issue
PATH (Cody & Perkins, 2020)	<ul style="list-style-type: none"> • the number of statements a parliamentarian made in support of the issue, • the number of questions asked, • the number of speaking engagements, • signing a declaration or petition
ODI (Mendizabal, nd)	<ul style="list-style-type: none"> • Are they committing time and money to this issue? • Are they going to events on the subject? • Are they publicly speaking about this?
CARE	<ul style="list-style-type: none"> • Co-sponsored legislation

(CARE, nd)	<ul style="list-style-type: none">• Spoke favorably in the media or to the public on your issue• Authored relevant media publication• Attended/hosted relevant events• Met with you or a partnering organization to discuss relevant issues• Signed a relevant petition• Board memberships or personal activities• Requested additional information from you or one of your partners
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Annex 9: Summary of outcome areas in leadership development frameworks

Source	Individual	Network (or team)	Organization	Community	Society	Field	Collective leadership	System
GALI Accelerator Program (GALI, nd)								
International Fellowships Program (Institute of International Education, 2017)								
Review of leadership programs (Kellogg, nd)								
Evaluating leadership (Orians et al, 2018)								
Barr Foundation leadership program (Lanfer et al, 2013)								
Review of leadership approaches (Meehan et al, 2015)								
Framework for leadership development support (McGonagill et al, 2011)								



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