SHIFTING THE DIAL

How to take an impact-focused approach to your policy change campaigns

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CONTENTS

INTRODUCTION

Campaigning is a way to create lasting social change. Charities have long been at the forefront of movements that have changed policies and laws—from the <u>Disability Discrimination Act to the smoking ban</u>[1]. Some charities advocate for change by directly targeting policymakers, while others galvanise support for policy change from the public. But how can they know if their campaigns are effective?

Understanding the impact of campaigning can often be more challenging than the impact of service delivery. Campaigners work in complex environments; the pace of change is hard to predict; and the contribution of one campaign is hard to distinguish among many other influencing factors, including other campaigns.

Many charities have been campaigning for years. But they may often look at the impact of these campaigns in an ad hoc and unfocused way, or only once the campaign comes to a close. Yet being rigorous and robust about planning and evaluating the impact of campaigns is key to learning and improving, and to eventually bringing about change. Tracking your impact can help you to strengthen your campaign, adjust your strategy, and respond to changes in the policy landscape.

In our publication _Closing in on change: Measuring the effectiveness of your campaign_[2], we highlighted a number of readily available evaluation resources and explained how _NPC's four pillar approach_[3] can help you integrate measurement as part of your campaigning work. This follow-up guide zooms out wider than simply attempting to measure your impact once the work is complete. Throughout, we argue that impact should be a focus while planning a campaign, executing and adjusting this plan, and evaluating once the campaign is finished. We provide guidance on how charity campaigners can:

- plan an impactful campaign;
- pick the right tools to evaluate your campaign; and
- learn and improve.

We draw on examples of several organisations' campaigning work as we go along.

What do we mean by 'policy change campaigns'?

In _Closing in on change_, we distinguished between two different goals of campaigning: policy change and behaviour change. The first is about changing or protecting policies, while the second is concerned with changing the attitudes, opinions or actions of 'the public' or specific groups.

This paper focuses on campaigns that aim to change policy. There are many ways to influence policy—from advocacy and lobbying work to research, advice and recommendations for policy content or processes, and direct activism. But it also includes tactics that aim to influence the actions and attitudes of the public, the media or policymakers. So behaviour change can be a means to achieving policy change.

What this paper does not look at is campaigns where behaviour change is the end goal—for example campaigns to encourage more exercise, purchase of particular products, or to stop an unhealthy behaviours, such as smoking.

PLAN AN IMPACTFUL CAMPAIGN

Understand your environment

Campaigning does not take place in a vacuum. The most effective charity campaigners understand the environment for policy change and how best to influence it. Their planning and evaluation is grounded in this understanding—but they also continuously challenge and update their thinking as the environment changes.

Understanding your environment can take a range of formats. It could be a simple stakeholder map—one that identifies your different audiences and what level of engagement is appropriate—or a complex system diagram (as in Figure 1). How extensive this process is will need to be proportionate to the size and nature of your campaign. Here we outline some approaches that help understand the issue you are addressing, the policy landscape, and the actors within it.

Identify the root causes of an issue

Most charities campaign on issues that they are passionate about and they often already have a deep understanding of the issue. Some bring their insights from service delivery while others amplify the voices of people affected. Yet most charities can benefit from gathering together these insights in a systematic way and analysing the implications for campaigning.

Many campaigners decide how they want to bring about change by immersing themselves in the lives of people affected by an issue and understanding what would make a difference. For example, The Children's Society, which campaigns for change for vulnerable children, suggests that its work with young people *'is integral to helping [them] identify the issues where legal, policy and regulatory change is really needed.'*[4]

Systems mapping can help you to identify the root causes of issues, points of leverage, and therefore which part of the system you will want to influence in order to bring about the desired change, for instance: whether you should focus on a small part or try to influence the wider system.

Figure 1 is an example of a system diagram from NPC's publication on systems change[5]. It shows different system boundaries in the housing sector. A charity concerned about rising rents could look at this system diagram and decide to campaign about the unregulated private rental market. Equally, it could campaign to increase access to housing benefit for working people. Either approach is trying to affect an element of the system with the same goal: to increase people's access to housing.

Figure 1: A system map for the housing sector
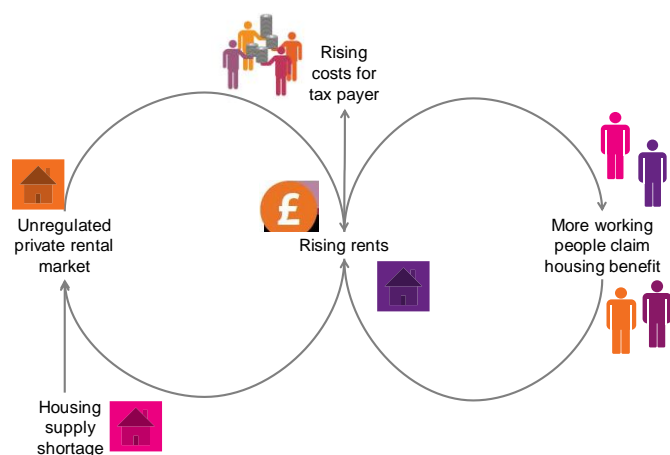
Map the policy landscape

The policy cycle is made up of various stages—including agenda setting, policy design, policy implementation and monitoring and evaluation—but this is not always a linear cycle, and stages will often overlap.[6] Effective campaigning tactics and desired impact will be different at each stage. Considering the policy cycle when planning for impact will help you articulate the change you want to see at each stage and apply the right tactics at the right time.

As well as a non-linear policy cycle, there is a changing political landscape to navigate. Some issues will rise or fall on the agenda depending on current events, challenges or opportunities. A 'policy window' is when parts of the policy process become connected—a policy is created to help solve an issue that is currently high on the political agenda, for example. This is a campaigner's opportunity to create change.[7] Considering your internal resources as well as external factors at this point will help you to understand if and when you are able to act during policy windows. Being aware of how small events or large scale shifts such as a change in government can shift the policy landscape will help you plan ahead.

Experienced campaigners will know that the policy cycle and political landscape is not set by politicians alone. They are greatly influenced by other actors, such as the public, academics and businesses, and the media. Identifying other actors and their influence on the policy cycle will clarify where your campaign fits into this bigger picture of what's bringing about change—which could help you see where your campaign might have the biggest impact and inform your tactics. For example, how current affairs are framed in the media has a huge effect on how the public interpret issues and therefore what people want the government to address through policy.[8] So this may mean your campaign should involve trying to affect how issues are framed.

Look at other actors

Because your campaign is unlikely to be the only influence on policy, it is important to understand other actors and to adjust your strategies and tactics in response.

The Alignment, Interest, Influence Matrix (AIIM) tool is useful for mapping other actors and understanding how they might affect a political initiative.[9] The tool helps you to identify which stakeholders are aligned with your campaign's approach and its objectives; how engaged they are with the political issue already; and what power they have to influence change. Identifying where particular stakeholders sit, and then how you might work with (or at least around) them, will improve your chances of success. It will enable you to avoid obstacles and harness the work of others to help bring about change.

Those stakeholders that hold similar goals and approaches to yours, and who are already engaged in the issue, may be great partners for helping you bring about change. This could even form a major part of your strategy. For example, Crisis Action acts as a catalyst and coordinator for organisations working together to protect civilians from armed conflict. The charity brings organisations and individuals together to take on challenges that are too complex to tackle alone, drawing on the expertise of a global network, and crafting bespoke campaigns to compel the most powerful people to protect the most vulnerable. Crisis Action operates as a 'systems entrepreneur', staying behind the scenes and advocating for change through different players in order to achieve its goals.

See *Creative coalitions: A handbook for change*[10] for tips from Crisis Action on playing the role of an effective strategic convenor, designing effective coalitions, building your network to expand the range of innovative campaign tactics, and organising in a way that maximises your impact.

Articulate how you expect your campaign to create change

Before you can assess progress towards your goal, you need to know what progress looks like. Creating a theory of change will help provide clarity on this. Here, we take a look at theory of change and beyond, at what charities we have worked with have found important when planning campaigning activities.

Break down goals into more short-term, measurable outcomes

Campaigns concerning policy often seek large-scale changes, can be radical, and will likely take time. The final goal may not be realised for many years. This makes it all the more important to articulate how you think your campaign will create change so you know whether you are on the right track. It also means you cannot rely on policy change alone as an indicator of your campaign's impact over a given period of time—just because the policy has not changed, does not mean your campaign has had no impact.

For any organisation, creating a theory of change always requires thinking through the intermediate outcomes that need to happen in order to achieve the identified goal.[11] So you need to think about the different steps to the policy change. This will enable you to measure progress towards that policy change.

Articulating how you plan to achieve this goal involves spelling out the steps that you think need to happen beforehand, and will force your organisation to understand *how* your campaign could create change. It will also give you a good starting point for measuring this change.

For example, The Elders is an independent group of leaders working together for peace and human rights. The group's goals are ambitious, broad and will mostly take years to realise. Developing a theory of change helped The Elders' secretariat to break down the different outcomes they needed to achieve in order to reach their goals—encouraging them to articulate exactly how they hoped to accomplish them. This made the path to change clearer. It also gave them more measurable outcomes with which to mark progress towards their long-term goals.

Figure 2 illustrates an example of the different components of a theory of change, showing how outcomes may be broken down. The diagrams for your actual campaign will look much more complex.

Figure 2: An example of identifying intermediate outcomes needed for policymakers to change policy

Identify your audiences and map out how they interact

Targeting policymakers directly—often referred to as 'the inside track'—is not the only route to achieving your goals. As we've already said, policymakers are influenced by what the public think, what the media are saying and what organisations are doing. So campaigning can navigate different routes to influence policymakers and ultimately affect policy change.

Coffman (2008)[12] describes three key audiences that campaigning strategies can target:

- **the public**, or particular groups of the public;
- **policy influencers**, meaning any institution or actor that has a significant influence on policy change such as the media, large corporations, employers, regulatory bodies, political advisers, other campaigns, advocacy organisations; and

- **decision-makers**—policymakers in this case.

Each of these audiences will be engaged through alternative activities, so inside track campaigns will look very different to movement building campaigns. Figure 3 has been adapted from Coffman's framework[13] and shows how various audiences can be targeted through a range of activities. Campaigners may choose to target one audience, a couple, or a combination of all three types depending on the nature of their campaign, their strategy, the current environment and their resources.

Figure 3: How different campaigning strategies can target different audiences—adapted from the advocacy strategy framework (Coffman, 2008)
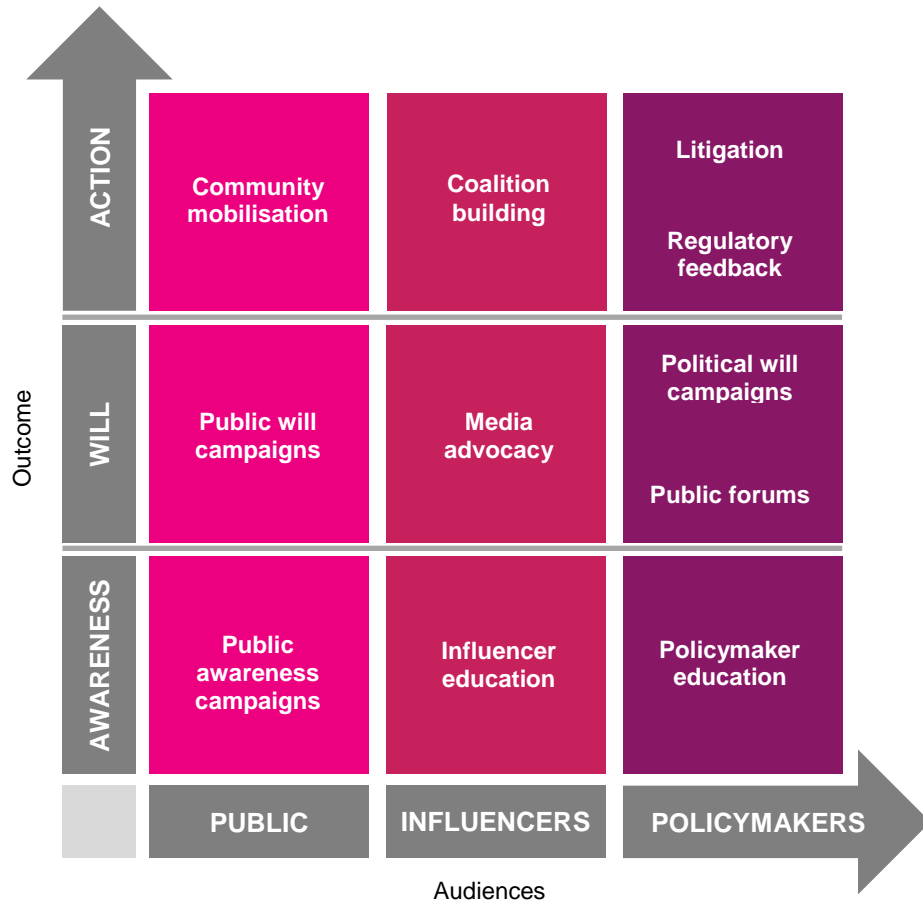
Having identified the different audiences that your campaigning targets, the next step is to identify intermediate outcomes for each audience and how these interact, as illustrated in Figure 4.

Figure 4: An example of how outcomes for the media and the public might influence policymakers to enact policy change
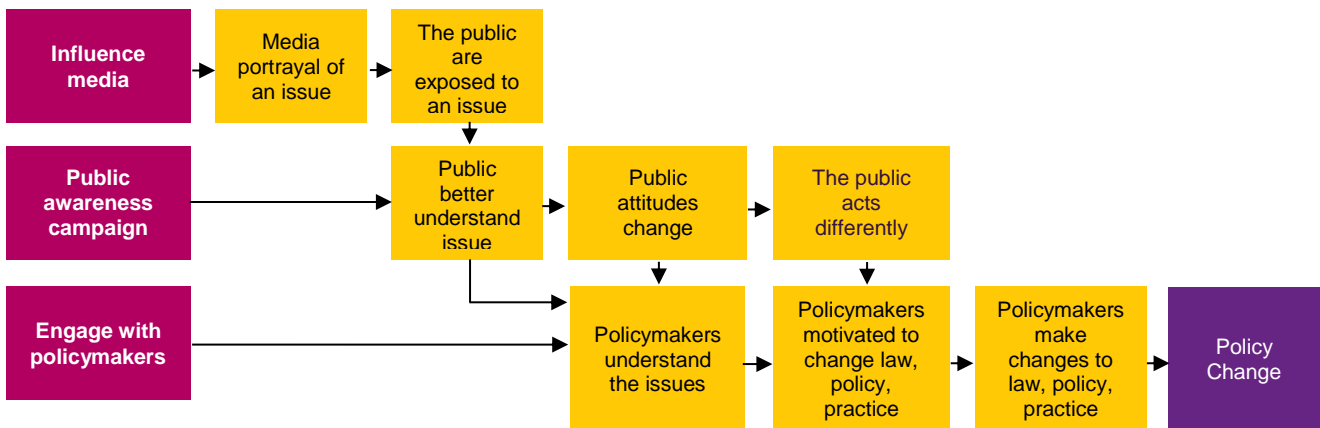
Not only will these steps allow you to highlight pathways to change, but it will also help you think through which activities might be the most influential on policymakers or other key audiences. Knowing this can be pivotal to your campaign and will help you to decide where to focus your efforts. For example, creating a theory of change for the whole organisation allowed The Elders' secretariat to better understand their points of leverage and prioritise their efforts with different audiences. Meanwhile, a theory of change for their universal health coverage initiative highlighted some of the key links between different audiences: a mix of international, national, civil society and other audiences.

Consider what attitudes you may need to change and how this happens

An attitude is a settled way of thinking or feeling about something. Attitude change[1] is often needed to achieve policy change, because policymakers' own attitudes, the attitudes of the public, and the attitudes of other actors, all ultimately contribute to how policy is made. Therefore attitude change is likely to be a consideration for your theory of change.

To articulate how you hope to change attitudes you need to understand what the attitudes are and how they are formed. It helps to try and understand this while you are identifying intermediate outcomes. Some of the key questions to ask are:

- What are the specific attitudes you are trying to change or influence?
- Why do these attitudes exist? What causes them? Where do they come from?
- What are the different components of attitude? How can your campaign affect each one?
- Which of your activities influence which attitudes?
- What positive outcomes occur if these attitudes change?

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[1] For more of an introduction to how attitudes function and are structured see https://www.simplypsychology.org/attitudes.html or for a summary of how attitudes form and how they can be changed see https://www.verywell.com/attitudes-how-they-form-change-shape-behavior-2795897

PICK THE RIGHT TOOLS TO EVALUATE YOUR CAMPAIGN

Once you have planned your campaign—where you expect to make an impact and the various outcomes for your audiences—you will need to think about how you will monitor and evaluate your progress. Remember, you will want to monitor and measure as you go along—and make course-corrections based on emerging findings—rather than wait until the end to work out if you've have an impact.

There are a range of tools available depending on the audiences you want to collection information on. Below we break tools down by audience and outline practical steps for each that you can take for evaluating impact.

Chose the right tools for your audiences

Policymakers

Tool	Description
Policy tracker	An internal way of tracking where something might be on the policy agenda or in the policy cycle. Monitoring changes to policy—or changes that affect the policy you are trying to influence—enable you to identify opportunities like 'policy windows' (see page 5) or track the impact your campaign is having.
Policymaker survey	A survey administered to policymakers to gather information on their understanding, perspective and opinion on an issue.
Parliamentary monitor	A tool to track MPs' engagement with a charity and/or a campaign. Some charities use bespoke in-house tools. Many use nfpSynergy's Charity Parliamentary Monitor[14], which contains a set of standard questions about MPs' contact with listed charities, their awareness of campaigns, and their rating of the effectiveness of different charities.
Policymaker interviews	Interviews with policymakers or key decision-makers to understand how and why their thinking has changed on particular policy issues. Ideally, these will be confidential interviews conducted by an external evaluator, which may encourage more honesty from interviewees and reduce bias in any qualitative data gathered.
Bellwether interviews	Interviews with stakeholders whose thoughts and opinions have an influence on policy (this is not necessarily policymakers, but would include them). The interviewee is aware that a range of policy issues will be discussed, and does not know the specific campaign or policy issue which the research is for. Bellwether interviews[15] can help determine where a policy issue or proposal is positioned in the policy agenda queue, how policymakers and other influencers are thinking and talking about it, and how likely they are to act on it.
Observation and ethnography	Ethnography[16] involves the systematic monitoring and recording of behaviours of people in their environment. Used for policy research, it can explore the processes through which policy is created and highlight contradictions between what people say and what they do. Observation can be useful in recording information, including on behaviour, that is otherwise difficult to obtain with other research methods.

Quantitative content analysis	The extent of linguistic changes within selected channels such as media, speeches or policy documents can often form an important part of measuring your impact. If you can show that policymakers or the media has adopted a certain language (for example, 'female genital mutilation' instead of 'female circumcision') after you started your campaign to push for it, you have built a cornerstone for your impact evidence. A list of relevant tools and software can be found here[17].

Influencers

Tool	Description
Stakeholder interviews	Interviews with key stakeholders to understand how and why they have been influenced by the campaign, and what they think the impact of the campaign has been. Key stakeholders could include those in the media, relevant charities and other organisations close to the issue, and those you have worked with on the campaign. Ideally, these will be confidential interviews conducted by an external evaluator.
Media monitoring	Analysis of the output of print and digital media to monitor how often the campaign is mentioned and where coverage appears. There are many external providers of this—a list can be found here[18]. It may also include social media monitoring—see below.
Media content analysis	In-depth analysis of media content, looking at how issues are framed, whether coverage is positive or negative, and the sources reporters use.
Evidence of change spreadsheet	Other information about the impact of your campaign can be captured in a simple spreadsheet. This could take a variety of forms, for example: • A spreadsheet that tracks anecdotes about the impact of the campaign, such as stakeholders saying that it has made them think or act differently about an issue. • A spreadsheet capturing information from reports by government, academics or business literature, and other intelligence from stakeholders and partners, to help you identify any changes that your campaign may have influenced. This can be done for all audiences, but is particular relevant for the influencers.

The public

Tool	Description
Social media monitoring	Monitoring the output of social media such as Facebook and Twitter to identify quantitative information like number of likes, mentions, followers, retweets and impressions. There are many external providers of this—a list can be found here[19].
Attitude surveys	Distributed to a sample of the general public, or a particular group, to understand their feelings towards a particular issue or policy.
Awareness survey	Distributed to a sample of the general public, or a particular group, to understand their awareness of a particular issue.

Decide what information is most useful when

The tools listed above vary in terms of who you are collecting information, but also the resources required to use them, the richness of data captured, and type of data captured. Deciding what information is most useful to capture when will help you understand and improve the impact of your campaign.

Thinking carefully about the tools you will use can also ensure that the time spent on evaluation remains proportional to the size of your campaign. The point of evaluating and learning is for your campaign to have more impact. So striking the right balance between time spent reviewing and time spent doing is important as spending too much time evaluating could distract from doing—which could make the campaign less effective.

Little and often

Simple, in-house tools can be used to track real-time engagement and outcomes on an on-going basis, and can help you capture less descriptive but important information. Social media monitoring, for example, may be used more frequently to gather information that is useful to have on a regular basis. This can be used alongside more detailed methods and can help to build a picture of your impact. It can help you monitor whether your campaign is on track towards the intermediate outcomes you identified in the planning stages.

The Children's Society developed a simple and helpful in-house tool to measure the level of engagement of key influencers. It lists in a spreadsheet all of the key stakeholders and actions that they might take in support of a particular campaign. It records any engagement, action and quotes from these stakeholders in this spreadsheet.

Rare but rich

Some of these tools can be used for more in-depth evaluations and would therefore be used less regularly (eg, Bellwether interviews). These tend to be time intensive, but gathering more qualitative data can reveal how and why people think and behave in particular ways, and so deep and rich insights can be gathered.[20]

Often for campaigning, qualitative interviews can provide detailed feedback, allowing a clearer understanding of *how* change happened. The Children's Society interviews between 6–10 external stakeholders per campaign. For particularly large or important campaigns, or sometimes because of the nature of the subject, the way interviews are conducted can be altered. For The Debt Trap campaign, it received rich and detailed feedback from confidential stakeholder interviews conducted by an external consultant.

Giving deeper insight, qualitative tools can be resource intensive, and are therefore only likely to be used at particular milestones within a campaign.

See our short guide *Stories versus numbers* (2016) for more on these different types of data and what they can be used for.[21]

LEARN AND IMPROVE

The point of evaluating your campaign is to learn and improve. The success of a campaign is very reliant on (often rapid) changes in the policy landscape, so it is particularly important for campaigners to respond to impact data and adapt quickly.

Campaigns often involve a range of tactics running in parallel: meetings with politicians, public campaigns, and media engagement. Gathering real-time impact data will help you to learn what works best in different circumstances and prioritise future activities. Collecting—and learning from—impact data in a structured way, using tools such as those in the previous chapter, will help you to work in a more evidence-based way.

Many of the challenges in evaluating and learning from your campaign are similar to those of service delivery evaluation and will therefore not be repeated here—please see _NPC's four pillar approach_[22] for a further description. However there are a few challenges particular to campaigning, which are discussed here with some examples on how to help overcome these challenges.

Stay flexible and adapt to an ever changing environment

Due to rapid changes in the external environment, the intermediate outcomes and how you achieve your goal may change many times over the course of your campaign. This means you need to do three things:

1. Keep an eye on progress

Having regular check-ins will allow you to reassess that you are targeting the right stakeholders, measuring the right outcomes and using the right tools to do so. This does not have to be done according to a formal structure, but should be discussed regularly between teams. For example, the campaigning team at The Children's Society have regular discussions about which stakeholders they need to monitor. This helps them to check in on their strategy and make sure their campaigning remains relevant and targeted. Make sure the time you take reflecting on your progress is proportional to the campaign's size.

2. Look out for the things you didn't plan for

You will have already articulated your desired outcomes for the campaign at the outset, but it is important that you remain open to these changing and to recording different outcomes. This includes recording both _unexpected_ outcomes—positive or negative—that may not have been articulated at the beginning of your campaign, and _unachieved_ outcomes where tactics have failed. Both of these help measure your impact and are key to learning. This is true for all impact measurement, but perhaps even more so for campaigning. That's because the route to change is less certain and more variable, and so the outcomes are likely to shift over the course of your campaign.

Amnesty International—an organisation that stands up for humanity and human rights globally—has used this approach, developing an impact and learning system to provide a consistent way of measuring its impact across the world. At the beginning of a campaign or advocacy initiative, staff are asked to think of the outcomes that they would expect, like, and love. At periods throughout and at the end of the initiative, they report against their progress towards these outcomes. Reporting is open and flexible: both additional, unexpected outcomes and unachieved outcomes are also reported, discussed and considered valuable findings.

3. Make adjustments based on what you're learning

Use learnings from impact evaluation to inform your strategy and you should have a bigger impact. Doing this regularly can help you stay relevant and influential in an ever shifting context. That's because what works well in one place may not work in another, just as what worked last year may not work well next year—there is unlikely to be a silver bullet formula that will work in every context.

It is possible to do this in a systematic way. For example, Amnesty International works globally and has different impact based on varying approaches in different locations. It collects the most significant three outcomes from projects undertaken in Amnesty sections all over the world. These are then 'coded' into one of about 20 categories of outcomes, and so give Amnesty an overall picture of its impact. This has given the organisation a consistent global framework and a more composite view of it's progress and challenges. It has enabled it to look at any patterns and differences across different countries and projects, and given the staff *'a more nuanced sense of what change means for Amnesty'*.

Talk about contribution, not attribution

There are several challenges with attributing change to a particular campaign. A campaign is almost always only partly responsible for a policy change. A variety of external factors influence policy beyond the control of the campaign, and other organisations may be advocating for the same goal. This makes it impossible to be certain you were entirely responsible for the change.

What's more a the campaign may also be unintentionally working towards negative outcomes or impact—such as the prevention of policy change, or to the reduction of benefits to a certain group. It may be making things worse. What's more, you will almost never have counterfactual evidence—evidence that shows what would have happened if you had *not* advocated for this change. Therefore, rather than talking about *attribution*, campaigning organisations should try to identify their *contribution*. That means asking: to what extent did your work feed into the change you've identified? Try to ask about how your campaign has influenced people in interviews and surveys, hold regular internal debriefs about your impact, and capture any impact anecdotes you hear in a spreadsheet. These can all help to build a picture of your contribution to change.

Aim for a culture shift

Implementing an impact framework into your campaigning can be time consuming and difficult initially, especially as those implementing it are often stretched for time as it is. It requires a culture shift in the organisation to really do it properly. It requires a new way of thinking about things, of asking people, of capturing data regularly; an open mind and questioning approach. And it requires the organisation to be receptive to bad news, ready to admit when something isn't working, and open to change.

A strong impact culture should empower everyone in an organisation—and beyond—to learn and improve. This may spread the balance of power to different points, as the power to learn, improve and influence change is gained by the wider organisation or movement. The culture needs to be one where campaigners think about impact as part of the main body of the work—from start to finish—not just something that they do at the end. It should be part and parcel of planning, doing and improving your campaign, as well as assessing its success.

Crisis Action suggests that by celebrating progress towards impact—and embracing the risk of failure in the pursuit of impact—a team will remain ambitious and focused on what matters. It says that seeking out constant feedback is key to creating a *'culture that's hungry for impact'*.[23] Amnesty International, meanwhile, primarily talks about evaluating impact as a means to understand and learn, rather than being about judgement or accountability. This has helped get staff on board with evaluating impact.

CONCLUSION

The complexity of the campaigning and policy environment requires charity campaigners to be clear about their strategies, goals, and achievements. Campaigners that understand their environment, work with others to achieve change, learn and improve as they go, and keep their eyes fixed on impact will thrive.

This paper builds on our previous report *Closing in on change: Measuring the effectiveness of your campaign*[24] to open up wider conversations about how campaigners can maximise their impact in a context of complexity. Planning, evaluating, and learning from your campaigning can seem daunting. But by using some of the tips in here, you should be able to start to make your campaigns more effective.

Tell us what you think

NPC's mission is to help charities and funders improve the lives of their beneficiaries. We seek to help them become more effective and efficient, through a range of services, advice and research. As we are on the journey to improve, we would very much like to hear your views on what is helpful and not so helpful about this guide to measuring the impact of your campaign.

We are always keen to hear from charities trying to measure the impact of their campaigning work. If you would like to speak to use about the successes and lessons learned through your campaign, or have any comments or suggestions about what might be missing from this paper, please get in touch with us via info@thinkNPC.org.

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TRANSFORMING THE CHARITY SECTOR

NPC is a charity think tank and consultancy. Over the past 15 years we have worked with charities, funders, philanthropists and others, supporting them to deliver the greatest possible impact for the causes and beneficiaries they exist to serve.

NPC occupies a unique position at the nexus between charities and funders. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success.

Increasing the impact of charities: NPC exists to make charities and social enterprises more successful in achieving their missions. Through rigorous analysis, practical advice and innovative thinking, we make charities' money and energy go further, and help them to achieve the greatest impact.

Increasing the impact of funders: NPC's role is to make funders more successful too. We share the passion funders have for helping charities and changing people's lives. We understand their motivations and their objectives, and we know that giving is more rewarding if it achieves the greatest impact it can.

Strengthening the partnership between charities and funders: NPC's mission is also to bring the two sides of the funding equation together, improving understanding and enhancing their combined impact. We can help funders and those they fund to connect and transform the way they work together to achieve their vision.

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