



**“WHAT IS ADVOCACY”**

**HANDBOOK**

**FOR CIVIL SOCIETY ORGANIZATIONS**

**“WHAT IS ADVOCACY”**

**HANDBOOK FOR CIVIL SOCIETY ORGANIZATIONS**

Handbook Author: **Khalfan Khattak**  
Editor: **Qamar Naseem and Sana Ahmad**  
Cover illustration: **Arsalan Ahmad**  
Published by: **Blue Veins**  
Copyrights: **© Blue Veins**

**Disclaimer:**

This publication has been produced by Blue Veins to equip civil society organizations with the basics of effective advocacy planning. This handbook aims to encourage good advocacy practices however, Blue Veins and The Australian Government cannot be held responsible for the outcome of any actions taken as a result of the information contained in the handbook and does not necessary reflect the views of Blue Veins and The Australian Government.

***May, 2019***

## Foreword

Dear Friends,

On behalf of Blue Veins, I am very pleased to introduce this 'Handbook on Advocacy'. This handbook has been produced to support, encourage, challenge and inspire civil society organization to come forward in ending Sexual and Gender Based Violence and bring about positive change and contribute to building a better world through their improved outcome-driven advocacy strategies.

I hope that this handbook, and tips will inspire you to think about the difference you can make, and how you can speak out and bring about change in your world. Change does not often happen overnight, but as the examples we can influence decision-makers to take the required actions to improve people's lives, if our efforts are sustained and united.

There are many areas where you can get engaged, like raising awareness of how a problem should be tackled, taking action to address an issue, or reminding your decision-makers of their commitments and promises. Each effort, short or long term, local, national or international, counts and is vital to improve the rights of vulnerable communities and creating a violence free society.

Advocacy is a continuous process which enables people to become more empowered and responsible citizens and contribute actively to the world around them. Advocacy helps in identifying and expressing their own needs and desires, and by developing the skills to influence decisions which affect them.

I strongly believe that advocacy does not have to be confrontational and it does not have to be political. As a responsible citizen it is natural to engage in the democratic processes in your country and contribute to the community. Blue Veins can support an idea without supporting an ideology. Blue Veins is a non-political organization, but to build a better world you might need to engage with politicians and decision-makers

I would like to thank the Australian Government for their financial support which made the production of this handbook possible, and our project staff who contributed in the editorial process of developing this toolkit.

**Shaheen Quresh**  
**Chairperson**  
**Blue Veins**

## Table of Contents

- What is advocacy
- Types of Advocacy
- Activities for Advocacy
- How advocacy differs from campaign?
- How Advocacy differs from Lobbying?
- Development & Advocacy
- Benefits of advocacy
- Risks of advocacy
- What advocacy strategy should contain?
- Proposing solutions
- Basic Steps in Advocacy Planning
- Who can be involved in change?
- Understanding multiple paths to influence your stakeholders
- An effective advocacy planning cycle
- What kind of messages can have impact?
- Understanding and analyzing who are the stakeholders?
- Constituency Building
- Key principles for managing an advocacy project
- DOs of successful advocacy meetings
- DON'T for advocacy meeting
- Monitoring and evaluating advocacy! Integral part of advocacy plan
- Top Tips for successful advocacy campaign
- Conclusion

## What is Advocacy

Advocacy is defined as any action that speaks in favor of, recommends, argues for a cause, supports or defends, or pleads on behalf of others. Advocacy is a continuous process, which involves variety of activities with the purpose to advance the issue and bring about a change in public policy or system by influencing decision makers.

The word 'advocacy' comes from the Latin 'advocare' and literally means 'to call out for support'. Today it is used to describe a particular democratic process, where individuals or groups of people take different actions to try to influence those who make decisions that affect our lives. Advocacy is also about standing up for an issue or cause you believe in, and trying to change people's lives to build a better world.

Some Definitions of advocacy:

'A systematic and strategic approach to influencing governmental and institutional policy and practice change'.

"Advocacy is the deliberate process of influencing those who make decisions about developing, changing and implementing policies". By Care International

"Advocacy is the pursuit of influencing outcomes – including policy and resource allocation decisions within political, economic, and social systems and institutions – that directly affect people's lives". The Advocacy Institute

"Advocacy is the act or process of supporting a cause or issue. An advocacy campaign is a set of targeted actions in support of a cause or issue. We advocate a cause or issue because we want to:

- Build support for that cause or issue;
- Influence others to support it; or

try to influence or change legislation that affects it.” — definition by International Planned Parenthood Federation IPPF.

“Advocacy is speaking up, drawing a community's attention to an important issue, and directing decision-makers toward a solution. Advocacy is working with other people and organizations to make a difference.” - Centre for Development and Population Activities (CEDPA)

“Advocacy is the strategic use of information for the purpose of influencing policies, practices, attitudes and beliefs that affect the lives of people - particularly the lives of the disadvantaged. Advocacy is the key non-violent tool thanks to which marginalized voices and excluded agendas are heard.” By International Land Coalition.

Advocacy is a process of:

- Identifying a problem
- Problem analysis
- Coming up with a solution to that problem
- Identification where change is required
- Identifying target audience and stakeholders
- Establishing strong internal and external support for that solution
- Implementing an effective plan

What Advocacy is not:

Advocacy is not a single activity on speaking out, taking action or educating that stands on its own without the wider context of aiming to influence people who take decisions that improve our life and the lives of others. Some activities may be part of your advocacy initiative, but none of them in their own right aims to influence decision-makers to introduce changes which will improve people's lives.

These activities, for example, are not advocacy if they stand by themselves:

- Producing leaflets about your organization
- Participating in a training on advocacy

- Raising awareness and bringing about behavior change in individuals
- Fund-raising for your camp
- Promoting your organization
- Campaigning

Advocacy actions are concerned with achieving change. Each of the activities listed above may be part of your communication and external relations activities. They might play a role in your advocacy effort, if you are trying to influence decision-makers to bring about change, but they are not advocacy actions in their own right.

## Types of Advocacy

Advocacy is a very broad concept or process which exists in different types. The strength of each advocacy type depends on how well the individual, group or organization's advocacy efforts meet the key elements expressed in the definition of advocacy. The types of advocacy have been categorized in different ways.

Following are the different kinds of advocacy:

- Individual Advocacy
- Citizen Advocacy
- Systems Advocacy
- peer advocacy
- Self-Advocacy
- group advocacy
- professional advocacy
- Grassroot Advocacy?

### **Individual Advocacy:**

Individual advocacy involves supporting people to exercise their rights by providing assistance to: voice concerns, access information, resolve issues or to identify available support options. Individual advocacy involves advocacy on behalf of others who cannot speak out their vulnerabilities.

### **Citizen Advocacy:**

It is generally community-based advocacy which aims to promote and defend rights of particular community. Citizen advocacy concentrates involving people from the community by enabling them to have a voice for their rights and to make decisions about the things that affect their lives. Citizen advocacy partnerships are long term, not time-limited, and last for as long as the citizen advocate and the individual want them to.

**System Advocacy:**

Most common type of advocacy adopted and practiced by the civil society organizations which aim to benefit public at large by influencing decision making. System advocacy primarily is concerned with influencing and changing the system (legislation, policy, rules and practices) in ways that will benefit people at large. System advocacy can be directed at local, provincial and national level.

**Peer Advocacy:**

Peer advocacy refers to one-to-one support provided by advocates with a similar environment or experience to a person using services. Peer advocacy approach is adopted by people who have experienced the same things and challenges and have develop better understanding on the issue and feel can be more supportive for a cause and can trigger change.

**Self-Advocacy**

Self-advocacy is considered as the best type of advocacy when people come together and speak out for their rights. Self-advocacy refers to an ability for individuals to effectively communicate interests, desires, needs and rights. Self-advocacy is undertaken by person or group who share the same characteristics or interests on behalf of the same person or group. Self-advocacy is considered very encouraging form of advocacy which can help to build confidence so that people feel more able to speak up for themselves.

**Group Advocacy**

Group advocacy involves people with shared experiences, positions or values coming together in groups to talk and listen to each other and speak up collectively about issues that are important to them. These groups aim to influence public opinion, policy and service provision.

**Professional Advocacy**

This type of advocacy support people with understanding their rights, in speaking up for themselves, and in helping them to make informed choices by professional advocates.

### **Grassroot Advocacy**

Most people are so busy in their day-to-day jobs that they have little time to think about how legislations and polices affects their lives or how they might be able to influence the policies and legislations. A major misconception of many Pakistani citizens is that there is little or nothing they can do to affect laws made by policymakers. Grassroot advocacy is the process by which an organization empowers its members to contact their elected officials to influence their views on an issue of importance.

Understanding advocacy and how to use advocacy approaches and tools can help organizations to increase their impact. However often the technical language that surrounds advocacy, and concerns about risk, can make it seem more difficult and complicated than it really is.

Although the focus in advocacy is often on changing policy and practice (the implementation of existing policies) there is often an effort to strengthen the capacity of civil society to engage with policy makers and to try and transform power relations.

## Activities for Advocacy

Following can be the activities for advocacy:

- Preparing a briefing note or position paper
- Writing and using a press release
- Strike
- March
- Court cases
- Poster campaign
- Round table
- Pamphlets
- Survey/Opinion Poll
- Theatre
- Workshop
- TV or radio
- Carrying out a media interview
- Engaging with experts and academics.
- Persuading through drama
- Writing and delivering a presentation
- Letter writing
- Petitions
- Public forum
- Conference
- Press release
- Policy research/ policy analysis
- Research
- Exposure tour
- Lobbying or face-to-face meetings
- Flyers
- Website
- Networking Coalitions or networks
- Newsletter

### How Advocacy Differs from Campaign?

People usually confuses advocacy with campaigning. For an organizations or persons working or involved in advocacy is very important to understand difference between advocacy and campaigning. Campaigning is basically one of the activities of advocacy.

Campaigning is mobilizing public concern in order to achieve a social, political or commercial aim. It is a series of activities designed to influence the policies and practices of public or private bodies (e.g. governments, institutions, companies).

Campaigns primarily aim to raise awareness on the issues in support of a cause. Campaigning is an engine for social change which not only educates the public about the issue, but also motivates them to speak and act in support of change. 'Raising awareness of an issue' is not the same as advocacy to change things. Awareness of the issue is just the first step in the engagement process and to trigger change at wider scale, building public support is essential. While trying to influence policy and decision-makers through advocacy we can try to achieve our advocacy goals and actions by persuading the general public to support our cause through campaign.

If decision-makers and policy-makers can see that your advocacy initiative is supported by number of people living in your community, or country, this can sometimes persuade them to change their decisions or policies.

Campaigning is also sometimes called 'indirect lobbying'. When you organize a campaign, you are trying to use the pressure of public opinion to persuade people who take decisions to listen, and take action.

### How Advocacy differs from Lobbying

Lobbying is defined as Strategic, formal and informal means of influencing specific decision makers on a specific issue.

The aim of advocacy and lobbying are same but both are different in process. Lobbying is also one of the kinds of advocacy which is used to influence key decision makers i: e policy and legislation makers on a particular issue. Lobbying includes one-on-one meetings with the key influencers to persuade them to take particular position about a piece of legislation or policy. Mostly lobbying is confused with advocacy but two differs in scope. Advocacy involves large number target audience or stakeholders while lobbying involves communication with legislators or decision makers.

Advocacy is a broad term which covers broad range of activities which might include lobbying or not. One way of differentiating between the two, it is important to understand that lobbying always involves advocacy but advocacy does not necessarily involve lobbying.

#### **How effective lobbying works and contributes in advocacy efforts:**

To lobby effectively following practices should be adopted:

- Establish and maintain good contacts with politicians, legislators, policy maker and key individuals who are influential and hold key role in decision making.
- Know how to place your particular interest within a broader framework of others' agendas.
- Do it at the right moment.
- Be able to negotiate, and provide evidence-based data, argument or statistics of the problem which will be of interest to those whom you are seeking to influence.
- Ability to communicate, knowledge, background and contents of the policy you want to influence.
- Monitor the implementation of all decisions, laws, policies and rules.
- Maintain your outreach to the contacts.

## Development & Advocacy

It is important to understand advocacy as the next step in development work. Development work concentrates on the visible problems at ground level and their immediate solution by providing relief while advocacy looks into the invisible reasons and challenges of the problems. The following table can help us understand the relationship between perspectives of development and advocacy in more detail:

### Development Sees:

Problems  
Basic needs  
Symptoms  
Poverty and welfare  
Projects  
Beneficiaries and clients  
Education and information  
Consultation and partnership  
Satisfaction  
Outputs

### Advocacy Sees:

Issues  
Basic rights  
Systemic causes  
Unequal distribution of power  
Strategies and actions  
Citizens, constituencies and allies  
Consciousness-raising and organizing  
Joint decision-making, local leadership  
Transformation of power relations  
Political and social change to benefit vulnerable

### **Benefits of Advocacy**

The benefits of advocacy can be understood to include the following:

Increased impact for beneficiaries through:

- Creating sustainable change anchored in institutional policies or law not in service delivery by organizations.
- Challenging the structural underpinnings of disadvantage (transforming power relations, increasing people's awareness of their rights and government's responsibilities).
- Helps your community's voice to be raised and heard.
- Helps you to expand outreach to influential actors of the society who understand the issue and can support your cause.
- Helps you to get more information, understanding on available frameworks and the invisible challenges of the grass root issues.
- Provides broader reach to the organizations, alliances, departments and involve them in collaboration in your advocacy campaign.
- Involvement of more actors adds credibility in your work and sustain ability to your advocacy campaign.

### **Risks of Advocacy**

Organizations can be concerned about the potential risks of advocacy, particularly in contexts with constrained or limited civil society space. Where their activities and demands may be considered e 'political' or 'controversial'. In some instances, there may be concerns about safety and security of staff and communities if the government or other key stakeholders are opposed to the advocacy topic and agenda.

## What Advocacy Strategy Should Contain?

There are five key questions to ask when thinking about advocacy and developing an advocacy strategy:

1. What do you want to change?
2. How will change happen?
3. What is your core argument/message?
4. How are you going to win the argument or deliver the message?
5. How will you know if you are making progress or have succeeded?

### Putting together your advocacy strategy plan

An advocacy strategy should contain:

**1. Aims:**

The aim is the general declaration of intent, which guides the advocacy campaign. It is what the advocacy campaign seeks to achieve in the long run.

**2. Objectives:**

The objectives are among the most important and difficult aspects of the campaign strategy. Objectives need to be SMART (Specific, Measurable, Achievable, Realistic, Time bound)

**3. Targets:**

These need to be individuals not institutions.

**4. Main audiences:**

These need to be influential with the target. There are two types of audience for advocacy work i.ee primary and secondary. Primary are the direct decision makers, legislators, policy makers who hold key decision-making authority while secondary type of audience are the individuals or groups who have access to the decision-makers and who may be able to influence them. Influencers may become partners in the advocacy plan.

**5. Approaches:**

These need to be based on both the resources within the network and member access to different key audiences

**6. Action plans:**

An effective advocacy action plan should include all advocacy elements goals and objectives, target groups and the specific activities to be undertaken, as well as set out stakeholder roles and responsibilities, time frames, expected short-term and long-term outcomes, and available and needed resources.

**7. Resources & budgets:**

The process of effective advocacy strategy should contain clear identification of required resources including financial human or other. Identification of such required elements in turn will enable you to identify any gaps that need filling, and advocate for the resources needed for successful advocacy plan. Identification and analysis of resources includes looking into past advocacy work, partnerships which are already in place, and other resources like volunteers, staff and other people's skills and abilities. Often, as a result of this process, you will realize that you may already have resources available which you can use.

**8. Risks & Assumption:**

Advocacy campaign does come with various risks and assumptions. It's important for producing an effective advocacy campaign to identify potential risks and its mitigation strategy in advance. Before you will be able to manage risk in your advocacy strategy, you should spend some time identifying and analyzing potential risks.

### Proposing Solutions:

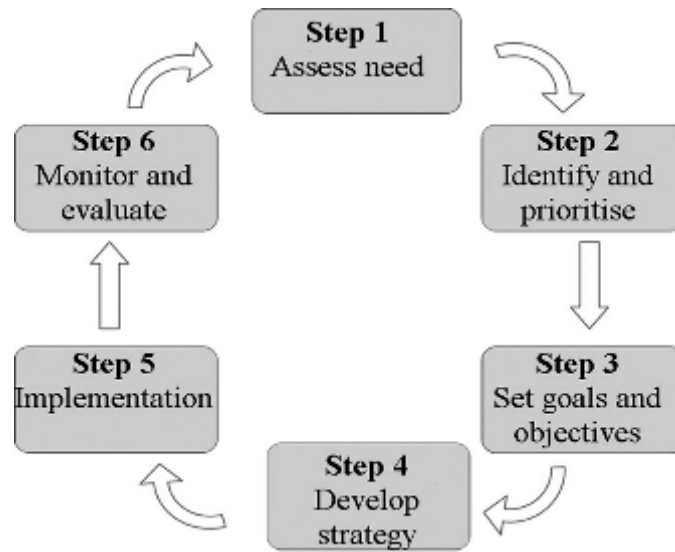
In general, when engaging in advocacy it is difficult to meaningfully engage in influencing change by just pointing out what is wrong with the current situation (the problem). It is helpful to have a proposal for change – a solution or recommendations. If you are going to engage in discussions with decision makers around your solution, it can be important to 'test' it for any weaknesses.

Key questions it can be useful to ask are:

- Is your solution/recommendation realistic?
- Can it be implemented without much expense?
- Is your solution simple and easy to understand?
- Could your solution/recommendation achieve tangible results in a short period of time?
- Who will oppose your solution/recommendation or be skeptical about it? Why?
- Will decision-makers like your solution/recommendation? Why? Why not?
- Are there other solutions to the problem that are more practical than your initial idea, and that will be more appealing to the decision makers? What are these solutions?

### Basic Steps in Advocacy Planning

An advocacy planning should involve the following steps:



### Who can be Involved in Change?

It is very important at the time of producing advocacy strategy to list down all of the potential primary and secondary stakeholders that are involved in the issue raised currently and would need to be involved in the change you want to see. Relevant stakeholders are those who can be

The kinds of organizations/institutions you may want to include are:

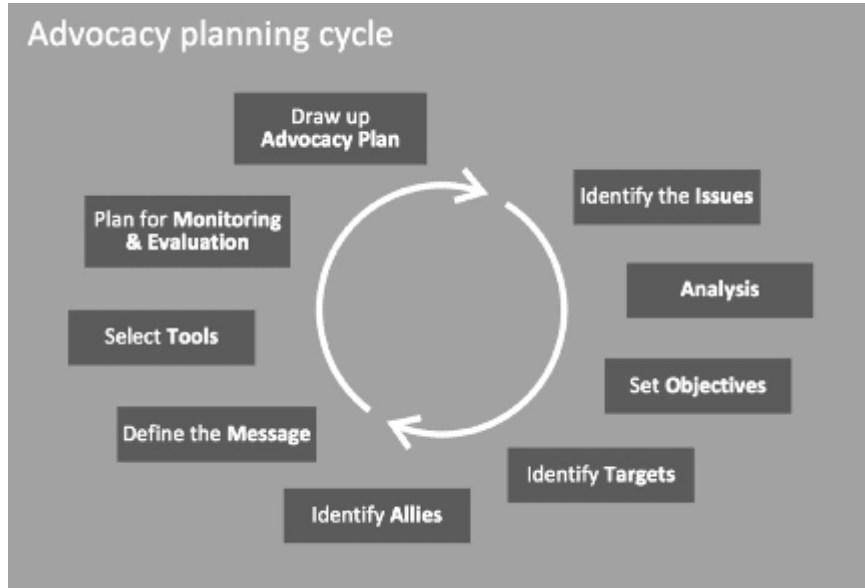
- National Government
- Provincial Government
- Local Government
- Business and the private sector
- Civil society organizations
- Professional bodies
- Religious or community leaders
- Media
- International donors and international organizations

### Understanding Multiple Paths to Influence your Stakeholders

- We can request a meeting with the relevant key decision maker directly.
- We can focus on increasing press coverage that will influence key stakeholders of the society in support of a cause.
- You can directly involve your secondary identified stakeholders in your advocacy activities/efforts.
- You can identify those who stand in the way of you achieving your advocacy goals and can expand your reach to them so that you can get more multi-sectoral support.
- Participation of stakeholders must be planned according to their interests, importance and influential role for different stages of advocacy planning and implementation.

The most effective advocacy strategy might be to use a combination of all the above approaches in order to develop momentum and pressure for change and does not necessarily need to be limited to the above.

## An effective Advocacy Planning Cycle



**1. Analyze your Organization**

A SWOT analysis of your organization is one way of identifying issues to work on. Assess the Strengths, Weaknesses, Opportunities and Threats of developing advocacy work for your aims and mission.

**2. Set your Objectives**

Identify and research the issue you will be working on. The objectives for the advocacy plan must be SMART (Specific, Measurable, Achievable, Realistic and Time bound). Either the objectives are for the short, medium and long term.

**3. Analyze Stakeholder**

Identify all stakeholders. Who will be affected? Who will influence? Define targets, allies, adversaries and internal stakeholders. Priorities key stakeholders as primary and secondary stakeholders.

**4. Build Alliances**

If appropriate to bring more resources and support on board. While doing stakeholder mapping it is equally important to identify targets, third parties and allies to work with for each objective. More allies and supportive actors can add strength and credibility to your advocacy efforts. Identifying more targets, allies and alliances are the most important/influenceable given the resources of the forum.

**5. Participatory Planning**

Involve participants i: e the identified stakeholders in identifying the issues and planning the strategy. Participation of stakeholders must be planned according to their interests, importance and influential role for different stages of advocacy planning and implementation. Planned participation should be followed accordingly to achieve the anticipated results of the advocacy plan.

**6. Assign Roles or Responsibilities to each Stakeholder**

While developing advocacy strategy the most important component of the process is the mapping, analysis and role description of the target stakeholders. Achieving change and your target results will be dependent in knowing in detail who has the power to make and influence change – both in theory and in practice. Assigning or defining roles and responsibilities for each stakeholder at the time of planning can be of crucial impact on advocacy campaign as it will enhance productivity through structured planning and leads to successful execution.

**7. Identify your Target Audience**

Identify your target audience keeping in mind who it is that can make the changes laid out in your objectives and who can be affected by the changes you are working for.

**8. Analyze the Target**

Complete a target analysis for each key target can also be very helpful. Following questions should be followed while doing target audience analysis: e who are they, what do they think, what's their current position on the objective, why, what is mostly likely to influence them? how do they make decisions? Who do they listen and how? Such analysis can help the organization in deciding how to relate to them, now and in the future.

**9. Define key Advocacy Messages**

To obtain support from key policy-makers and influential people to effectively implement your advocacy strategy and achieve your target objectives, you need develop impactful key messages. A strong overarching message will hold your entire advocacy strategy together. If you really want to influence decision-makers you should invest time in developing this message early in your advocacy planning. Your core message is a short summary of your advocacy issue and your strategy for addressing it. It tells the audience (the person you are talking to, who is reading your advocacy materials) what you want to achieve and by when. The core message should explain why the change is important and how change can happen. It should be short and persuasive.

#### **10. Identify Medium/Messenger for Delivering your Messages**

Our message can have a very different impact, depending on who is delivering it. It is important to identify tools or mediums for delivery of your messages to your target audience. Which media will be most useful in getting to your target? What 'spin' do you need to put on your story to get it in? such questions should be considered at the time of identification. Mediums or tools are the messengers and are those who may not have the direct power to make decisions or achieve your goals themselves, but have influence over your target audience and therefore may be best placed to deliver your message.

#### **11. Plan for Monitoring and Evaluation**

Monitoring and evaluation are integral part of advocacy plan as it's all about learning from what you are doing and how you are doing it, and taking action to adjust your strategy accordingly. Setting monitoring and evaluation plan in advocacy plan will provide clear understanding on regular monitoring and evaluation which will help you to assess how well you are doing against the target objectives, and impact you have set, and ensure you use your time and resources effectively.

#### **12. Develop Action/ Implementation Plan**

After analyzing and identifying all essential components of an advocacy planning, An effective advocacy action plan/ implementation plan is developed which contains the strategies and tactics how the specific activities will be undertaken, as well as setting out stakeholder roles and responsibilities, time frames, expected short-term and long-term outcomes, and available and needed resources.

### **What kind of Messages can have Impact?**

It is important to remember that advocacy messages are not just about informing your audience, they are also about persuading and influencing them. Your core message would include:

1. Statement of problems and action desired
2. Evidence – statistics and information
3. Example – focuses on the affected

Having developed your core message, it is critical to tailor your message to your audiences and also ensure that you are clear about what actions you are asking each audience to take.

## Understanding and Analyzing who are the Stakeholders?

Stakeholders in advocacy work are those individuals who have an interest in seeing the goals of the advocacy work being reached, or not. It is useful at the time of planning to break this large group down into smaller categories of like-minded people in order to recognize where participants fit into the campaign.

### **Allies**

People who are 'on your side' either because they will benefit directly from the changes you are trying to bring about, or because they want to help you bring about these changes as part of a broader movement.

### **Beneficiaries**

People whose lives will be improved by the successful achievement of your advocacy goals. Individuals in this group could also be called 'allies' because they have a vested interest in seeing the end result but a beneficiary is often a more passive stakeholder than an ally.

### **Adversaries**

People who are opposed to what you're trying to do. These people could become allies in time, with greater understanding of the issues, or could be standing in the way of what you're trying to do. Adversaries can become targets of your advocacy project if you are planning a series of activities to 'win them around'.

### **Internal Stakeholders**

A grouping used to define people within your own organization or network or alliance who are actively collaborating on the design, management and execution of your project. They will not necessarily all be allies because some people within your own organization will be skeptical about doing advocacy work at all, and reluctant to lend their time to it individuals in this group are usually people with whom you have regular contact need to be moving people between the boxes, i.e. turning adversaries into tools, allies into tools and tools into participants. People can be in more than one of these categories at any one time.

## Constituency Building

Advocacy is not just used to persuade policy-makers to address a problem (policy outcome) – an additional aim of your policy work can be to enhance the awareness and participation of citizens in policy-making.

Advocacy relies on a variety of leaders, activists and organizations with different skills and talents, as well as committed citizens willing to organize themselves to change their lives. Constituency-building refers to activities aimed at strengthening the involvement of those most affected by an issue in the design and leadership of advocacy to build their knowledge, capacity and agency so that they can effectively participate in public forums. Concerns, and contributing to enhancing awareness of a group of citizens at the same time.

With the inclusion of communities in your advocacy initiatives the success of your advocacy will have longer termed success as communities will ensure that the success is implemented and realized. A citizen-centered or constituency approach transforms the role of 'beneficiary' from a passive recipient to an active agent of change and adds sustainability to your efforts.

### Defining the Political Agenda

- Advocacy work doesn't have to be centralized and hierarchical.
- Participation can be used to build consensus amongst people with different vested interests. However, participation is not always about consensus. Where people have different views, it can mean agreeing to speak with a majority voice.
- When dealing with delicate political situations, participation can become 'the art of the possible' seeing how far you can go/what you can say, whilst keeping a delicate coalition together

### **Dangers & Pitfalls**

There are both benefits and risks in involving other people in your advocacy work. Working particularly takes time, can be often don't get to do everything your own way and rarely allows you to be opportunistic. But there is a moral imperative to be participative because more often than not you are advocating for change in the lives of other people and your actions and messages will affect their lives somewhere down the line. In addition, participative advocacy increases the credibility and legitimacy of your work. It can bring greater resources to bear on your objectives and has the potential to bring enemies on board.

### Key Principles for Managing an Advocacy Project

- Set up a multi-skilled team that covers all key areas.
- Get support from senior management and trustees.
- Keep internal and external stakeholders informed.
- Clarify work roles of all team members.
- Feedback to supporters - let them know the influence of their input.
- Start where people are - give everyone an entry point and a next step.
- Take advantage of short-cuts which present themselves.
- Set very clear objectives for your work.
- Use networks carefully - share of expectations and objectives.
- Focus on what you share, and how you can achieve shared aims.
- Be patient in your planning.
- With both allies and targets, focus on individuals, not organizations.
- Keep a balance between researching, planning, doing and evaluating.

### DOs of Successful Advocacy Meetings

- Research your members of parliaments. Familiarize yourself with their voting record, their stand on issues of importance to you, and which committees and subcommittees they serve on. Be cordial. If the member doesn't agree with your position, it's best to continue to foster the relationship. Members have been known to change their minds over time. They may agree with you on another important issue in the future even if they disagree with you on a current issue.
- Be prompt and patient. Arrive at the meeting on time and prepared.
- Keep the meeting short. Meetings are usually scheduled for 15–20 minutes.
- Be sure to engage the person you're meeting with. Don't just talk at them.
- Focus on only one or two issues during your meeting.
- Show evidence-based data.
- Use personal anecdotes when discussing the issue.
- Know the facts. Provide information on your issue that you can distribute to the member and/or staff. One-page handouts are generally best, as members and staff rarely have time to read longer materials.
- Know the position of the other side. Not everyone is going to agree with your thoughts. Be prepared to answer questions to support your opinion.

- Make specific and reasonable requests.
- When your meeting is finished, thank the member and staff for their time, offer yourself as a resource, and provide them with your contact information.

### **DON'T for Advocacy Meeting**

- Inundate the member or staffer with huge materials unless they request more follow-up information.
- Assume that your audience understands your specific problem or your jargon.
- Be afraid to say you don't know. If you are asked a question about which you are unsure, tell the member and/or staff that you will get back to them with the answer. Make vague requests.
- Be intimidated. Remember, key decision makers, policy and law makers work on behalf of you and your best interest. They want to meet with you to learn what they can do to help you and their other constituents.

## **Monitoring and Evaluating Advocacy! Integral Part of Advocacy Plan**

**Monitoring** is the collection of information about a project over time. It seeks to understand what is happening.

**Evaluation** is an assessment of the project at one point in time, including the successes and failures. It seeks to understand why what happened, and why.

### **Why Monitor and evaluate your advocacy work?**

The initiative to begin monitoring and evaluating your advocacy work may come from a variety of motivations. The reason why you are evaluating your work will determine the techniques you use.

1. So, you can produce credible funding reports.
2. To demonstrate to managers, colleagues and Southern partners that advocacy work is a cost-effective way of improving the lives of poor people.
3. To learn from experience.

What kind of monitoring indicators are there?

Try at least a couple of techniques and aim to monitor the change across a range of your stakeholders.

### **Monitoring your target**

- Record and observe changes in the rhetoric of your target audience. Keep a file of their statements over time.
- What are they saying about you and your campaign?
- Are they moving closer to your position, adapting to or adopting any of your language or philosophy?

### **Monitoring your Relationships**

- Record the frequency and content of conversations with external sources and target audiences.
- Are you discussing new ideas? Are you becoming a confidante or a source of information or advice?

### **Monitoring the Media**

- Count column inches on your issue and the balance of pro and anti-comment. Count the number of mentions for your organization.
- Analyze whether media is adopting your language.

### **Monitoring your Reputation**

- Record the sources and numbers of inquiries that you receive as a result of your work.
- Are you getting to the people you wanted to get to?

### **What to Evaluate?**

To evaluate the impact of your project you need to be clear about the model or process you are trying to follow and then decide on what information is available to enable you to assess each part of the process. Recent work by the New Economics Foundation suggests you think of the process as an Impact Chain. In each phase there are policy and grass roots activities, both of which need to be monitored. The relationship between these activities is also important, the more integrated they are, the more successful the project is likely to be.

**Grass roots activities are likely to involve capacity building activities, such as:**

- Group formation.
- Group activities.
- Group federation beyond village level.
- Movement launched which takes on vested interests.
- Groups of poor are involved in framing legislation. And have control over resources.

**Policy activities focus more on raising awareness and changing attitudes. For example:**

- Heightened awareness about an issue.
- Contribution to debate.
- Changed opinions.
- Changed policy.
- Policy change implemented.
- Positive change in peoples' lives.

**Who defines success?**

Different stakeholders will have different views on what success is, depending on where they are within the impact chain. To get an overview of how successful you were, you need to solicit the views of a range of stakeholders, such as the ultimate beneficiaries, local people and their organizations, staff involved, target audience, journalists and outsiders.

### Top Tips for Successful Advocacy Campaign

- Don't underestimate the time needed - advocacy is long term and policy change is slow and subject to reversal.
- Work as a team. Successful advocacy requires a range of skills, including research, communication, project management and policy skills.
- Have very clear objectives. Link your activities very closely to those objectives. Check that you are not kicking at an open door before taking up other people's time and setting up a confrontation.
- Work with southern partners from the start. This is essential if you are to root your advocacy in the experiences and views of disadvantaged people as well as understand and explain the impact that policy has on their lives.
- Think carefully about the potential implications of what you are doing for your partners, especially if you're asking them to 'put their head above the parapet'.
- But beware, successful advocacy work is complex, the numbers of stakeholders are often huge and each has a different perspective on how the issue should be approached. It is essential to establish early on whose agenda (North or South, within a coalition etc.) you are working to and what this means in practice.
- Define your primary targets, as those people who are in the best position to achieve what you want done. If your chosen route to the decision-makers is not working, take a step back and look for a new 'way in'.

- Spend time nurturing relationships with your targets. Think about targets in terms of individuals not institutions. Learn as much as you can about the individual, as well as organization.
- Follow-up on commitments you think people have made - in other words, beware of paper victories and false starts.

## Conclusion and Next Steps

We hope this handbook will help Civil Society Organizations to understand basic components and approaches to advocacy and that advocacy doesn't need to be complicated or resource intensive. It is just about thinking strategically about how to increase your impact through policy and practice changes.

Don't be daunted – just start by thinking about how you can integrate advocacy within your existing project or program activities, by following basic steps of advocacy planning cycle and applying outcome driven approaches and basic tools of advocacy.

***Good luck With Your Advocacy Work!***

### Helpful Resources and Links for Reading About Advocacy

Advocacy Toolkit: Understanding Advocacy Tear fund,  
<http://www.tilz.info/frameset.asp?url=topic.asp?id=7497&cachefixer=cf20325645073335>

An Introduction to Advocacy: Training Guide Ritu R. Sharma  
<http://www.preventioninstitute.org/component/jlibrary/article/id-104/127.html>

Advocacy – What's it all about? (including a section on mainstreaming)  
<http://www.wateraid.org/documents/advocacysb.pdf>

UNICEF (2010). Advocacy Toolkit: A guide to influencing decisions that improve children's lives.  
[http://www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

Identifying and Influencing Advocacy Targets  
<http://www.open.edu/openlearnworks/course/view.php?id=1690>

Power Analysis Briefing, review of tools and methods. WaterAid 2012  
<http://www.wateraid.org/~media/Publications/GTF-Power-Analysis-Briefing.ashx>

Planning your Advocacy Strategy  
<http://www.open.edu/openlearnworks/course/view.php?id=1690>

Developing and Communicating your advocacy message  
<http://www.open.edu/openlearnworks/course/view.php?id=1690>

Advocacy in Emergencies Guide and Tools (links at bottom of the link)  
<https://www.careemergencytoolkit.org/advocacy/>

Comprehensive thematic advocacy guide – can be adapted to other subject areas

<http://educationcluster.net/wp-content/uploads/sites/3/2015/02/GBV-in->

<http://www.bild.org.uk/about-bild/advocacy/advocacy-types/>

<https://www.scie.org.uk/care-act-2014/advocacy-services/commissioning-independent-advocacy/inclusion-empowerment-human-rights/types.asp>

<http://worldanimal.net/what-is-campaigning>

<https://eurohealthnet.eu/sites/eurohealthnet.eu/files/health-gradient/Advocacy-vs.-lobbying-and-campaigning.pdf>

