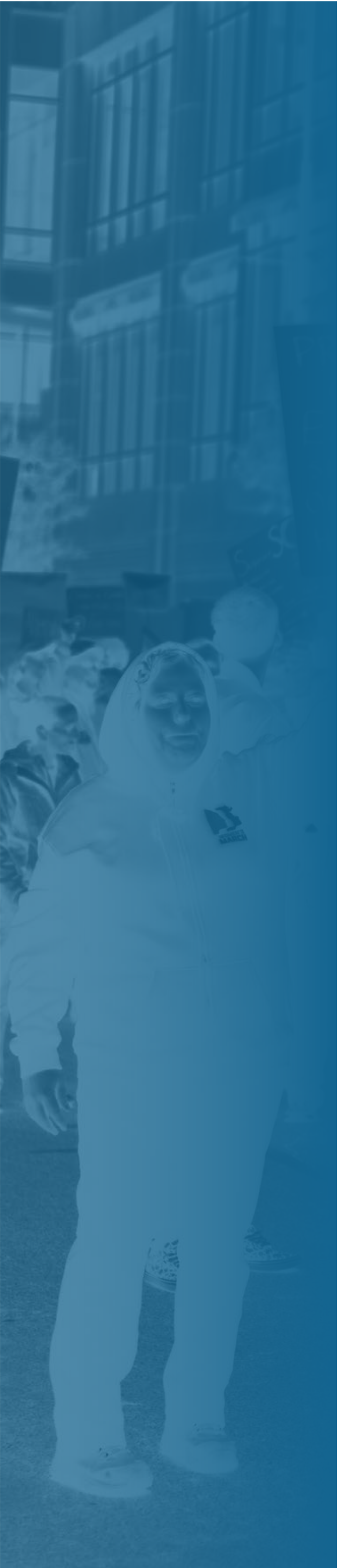
A Practical Guidebook to Managing Successful Advocacy Initiatives

binda consulting international

ADVOCATING CHANGE

ADVOCATING FOR CHANGE



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INTRODUCTION

In 2020, the worldwide spread of a deadly virus exacerbated a disturbing trend of closing and restricted civic spaces in many countries. In an environment where governments impose states of emergency and various restrictions due to the COVID-19 pandemic, civil society faces challenges in promoting fundamental rights such as freedom of expression and assembly and the right to access information.

Now more than ever, activists need mechanisms that enable the public to participate and effectively participate in the decision-making processes. Constructive advocacy is one avenue for citizens to engage in policy consultations and amplify marginalised voices.

Advocacy is constantly evolving and becoming more spontaneous to navigate complex political environments successfully and adapt to changing and new communications platforms: a campaign in 2021 is not as in 2010. But, still, the underlying principles of planning have not lost their importance. This toolkit offers a combination of examples that illustrate the current trends of in-person and digital advocacy and the core advocacy planning tools that have proven effective over the years.

The toolkit will provide practical guidance to activists as they select and research advocacy issues; identify viable solutions; define advocacy goals and objectives; map out decision-making processes and entry points for intervention; design campaign messages, strategies and timelines; form teams and coalitions; mobilise grassroots effectively to influence decisions; and monitor campaign achievements.

Although this toolkit was developed to support freedom of expression activists, the concepts, strategies and tactics are adaptable for advocacy activities in most fields.

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CHAPTER 1

ADVOCATING CHANGE

1. DEFINITIONS

1.1. THE ADVOCACY CONCEPT

Advocacy can be defined as the act of publicly supporting a particular cause or calling attention to an issue for which we are recommending change. Advocacy involves promoting the interests or cause of a group of people and means taking action to create the desired change. **An advocate** is a person who argues for, recommends, or supports a cause. Advocates organise themselves to tackle their selected issue and exert influence on decisions within political, economic, and social institutions. The verb "to advocate" means to add a voice of support to a cause or person[1] – it comes from Latin and implies "to plead in favour of", i.e. speaking up for and representing a person or a cause. In the ancient Roman legal system, the term described those who protected others: the lawyers and barristers.

Advocacy conducted by individuals or organisations is an effective instrument for communities to advance change, i.e. social or political improvements. It includes activities to influence public policy, laws and budgets by using facts, their relationships, traditional and social media, and messaging to educate government officials and the public[2]. Therefore, effective advocacy requires

1 Source: https://www.vocabulary.com/dictionary/advocate.

2 Source: https://en.wikipedia.org/wiki/Advocacy.

a strong understanding and analysis of a concrete problem and a coherent proposal for its solution.

ADVOCACY

a planned, collective action directed at advancing an agenda for change and improving the policies or programs of an institution or the priorities or behaviour of a population. Advocacy aims at building support for a solution to a problem that affects people's lives. Advocacy is about **understanding power** and **engaging citizens:**

- Who makes the decisions and who influences decision-makers;
- Who is affected by the problem, and how to facilitate their engagement in collective action.

Advocacy is about putting a problem on the public agenda and keeping it alive, suggesting a solution to that problem, and building support for acting on both the problem and its proposed solution. Advocacy can involve various specific short-term activities to reach a long-term vision of change. Therefore, advocacy consists of different strategies aimed at **influencing decision-making** at all levels. Typical outcomes of advocacy include changes in institutional policy and practice, in public attitudes and behaviour, in the political process or system, and/or **empowering vulnerable and marginalised communities**. To this end, CSOs that conduct advocacy initiatives do not limit their efforts to just engagement with decision-makers – they attempt to mobilise public support and act on behalf of the communities whose rights they defend. Therefore, advocacy widens **citizens' participation** in policy-making, which plays a vital role in ensuring a healthy political, economic and social life.

1.2. TYPES OF ADVOCACY AND ADVOCACY GROUPS

There are three main types of advocacy depending on the efforts' scope, complexity, and impact:

SCOPE OF ADVOCACY EFFORTS

1. Casework – solving a single problem at a time;
2. Issue Advocacy – solving a broader issue;
3. Policy Advocacy – seeking to create a sustainable solution.

CASEWORK

This is about solving a single, usually narrow problem of one person, family, or a small community at a time. For example, if Ahmed is unable to enrol his daughter in the local primary school, we work with the school headteacher, the mayor, and possibly with the Association of Parents to address this problem. Once Ahmed has successfully enrolled his daughter, the case can be closed. The beneficiary of our advocacy effort is Ahmed and his family. A few other families who encounter the same problem in that village may also benefit from the solution. Apart from civil society organisations and individuals, elected representatives such as members of parliament (MPs), communal councillors, and others also engage in casework to connect better with their constituents.

ISSUE ADVOCACY

This is about raising awareness around a broader issue. For example, suppose parents in a region cannot enrol their children in primary schools because of insufficient schools and teachers. In this case, we can launch an activism campaign to draw attention to this systemic problem and, as a result, create change by convincing the communal council to allocate more funds for schooling. In this case, the advocacy effort will be about speaking up, bringing the issue on the public agenda, and directing decision-makers towards a solution. In this case, the beneficiaries of issue advocacy would be many families throughout the region, including Ahmed's family. Issue advocacy, therefore, benefits a more significant segment of the community than just one or a few families.

POLICY ADVOCACY

This is the most sophisticated type of solution-based advocacy. Instead of solving one problem at a time (enrolling Ahmed's daughter in the primary school), or simply raising awareness (the communal council in our region should allocate a larger budget for education), in policy advocacy we seek to create a sustainable change. For example, we want to amend the Law on Public Education, define a list of specific requirements – through a governmental decree – on how communal councils allocate budgets for local schools and introduce annual audits of the number of school dropouts per region in the whole country. To set and achieve such ambitious advocacy goals, we should spend time and effort analysing the problem's causes and developing policy-based long-term solutions. Policy advocacy tries to alter how institutions manage issues or spend money. For example, policy advocacy may target establishing new policies and procedures, amending laws, decrees, regulations, budgets; or push for a better application and enforcement of the existing rules. As we know, in many countries, activists would say: "We have a good law, but it needs to be activated." This statement exactly characterises policy advocacy. The idea is to achieve less injustice for vulnerable or disadvantaged social groups – for example, low-income people who live in remote and rural areas and are unemployed – like Ahmed's family.

Around the world, various groups conduct advocacy to affect change: **civil society organisations**, syndicates, think tanks, formal or informal interest groups, media outlets, individual activists, private lobby firms, and even political parties. The most common advocacy groups are civil society organisations. CSOs have a degree of issue expertise, which gives them legitimacy and incentive to undertake thematic advocacy initiatives. For example, a CSO focused on environmental protection would more likely implement an advocacy campaign to ban smoking on public beaches than an organisation working on human rights. Some organisations have a single issue as their entire mission (protecting the cultural heritage in the town of X, defending the rights of rural women in the commune of Y, etc.). In contrast, others use occasional advocacy to affect change on specific issues that support their overall mission. For example, a CSO's core project activity on media literacy and civic education could be conducting educational seminars for teachers and students. A part of this project could include advocating to modernise the secondary school curriculum at meetings with senior ministry officials. Often, organisations conduct advocacy initiatives as part of their current projects depending on funding and donor priorities. For example, a CSO with an overall mission to protect wild animals may campaign specifically to protect turtles since funding is only available for such projects.

- Civil society organisations advocate for the causes they serve.
- It is essential to know the legal framework that regulates the work of CSOs in our country of operation.
- Through conducting advocacy, our organisation grows and builds internal capacity.

Nonprofit organisations advocate for the causes they serve, which they outline in their mission. There are **legal requirements** that govern how much advocacy these organisations can manage and in what specific ways. Importantly, in democratic countries, legislation that precisely regulates the functioning of all these organisations according to their type. Foundations, nonprofit organisations, and other entities have certain rights and obligations, both in terms of the tools they can use in their activism and in terms of taxes, accountability, transparency, and conflicts of interest – especially when they fundraise, accept donations, and operate with those funds. Therefore, it is recommendable that we consult with a legal advisor to make sure that our organisation is following all applicable laws before engaging in an advocacy campaign.

Each advocacy initiative is an opportunity for our organisation to **grow and expand**. Often, CSOs gain reputation and experience through engaging in casework, service-delivery, or awareness-raising on the local level. With time, organisations strengthen their internal capacities and start undertaking more ambitious advocacy initiatives requiring knowledge and skills to propose policy solutions and interact with senior decision-makers. To conduct more impactful advocacy campaigns, CSOs can sometimes seek partnerships or coalitions with other organisations, including trade unions, associations, and media outlets.

Conditions for CSO actors in the EU worsening

The European Union member states are obliged to respect the independence of civil society actors in line with the values and standards on freedom of association, assembly and expression. However, developments across the EU over the five past years have worsened conditions for CSO actors, especially for critical ones, a European Parliament study[1], released in 2020, shows. Using as a pretext the emergency laws in domains such as COVID-19 and migration and asylum, governments are limiting democratic accountability, restricting civil society space, and infringing on fundamental rights. The report highlights that human rights defenders have experienced various forms of policing, ranging from suspicion and harassment to disciplining and criminalisation. In 2017, **Hungary** introduced a law that depicted watchdog NGOs receiving funding from abroad as 'foreign agents'. A similar so-called NGO transparency law was also enacted in **Romania**, which led to silencing the critical voices of watchdog organisations. In early 2020, **Greece** introduced obligations for Greek and foreign NGOs working in the area of asylum, migration and integration to register in new databases, through which the government gained broader powers to refuse registration. In Poland, since 2017, a new unit under the Prime Minister's control distributes public funds to NGOs, thus favouring pro-government organisations and hindering the critical ones. New emergency laws announced during the COVID-19 pandemic have pressured LGBT+ associations, Roma, environmental activists, and anti-racist demonstrators to halt their activities. For instance, in **France**, volunteers helping those stuck in the Calais migrants centre were sanctioned for violating social distancing rules.

1 Protecting civil society space: strengthening freedom of association, assembly and expression and the right to defend rights in the EU (2020).

1.3. THE KEY COMPONENTS OF AN ADVOCACY CAMPAIGN

Advocacy campaigns are organised actions for influencing political change and raising public awareness around local, regional, or national concerns. An advocacy campaign is never neutral – it requires taking sides and defending the interests of those affected by the issue, thus empowering them.

AN ADVOCACY CAMPAIGN
an organised course of action by a group of people, designed to achieve change through influencing decision-makers and mobilising public support.

Usually, CSO **leaders** oversee advocacy campaigns and work with their teams to conduct the campaign. They would typically identify, mobilise and interact with a larger body of **supporters** – grassroots advocacy groups directly affected by the problem chosen for the advocacy campaign and have a particular opinion that we want them to share with decision-makers.

An advocacy campaign should have the following **key components**, which are crucial to its success:

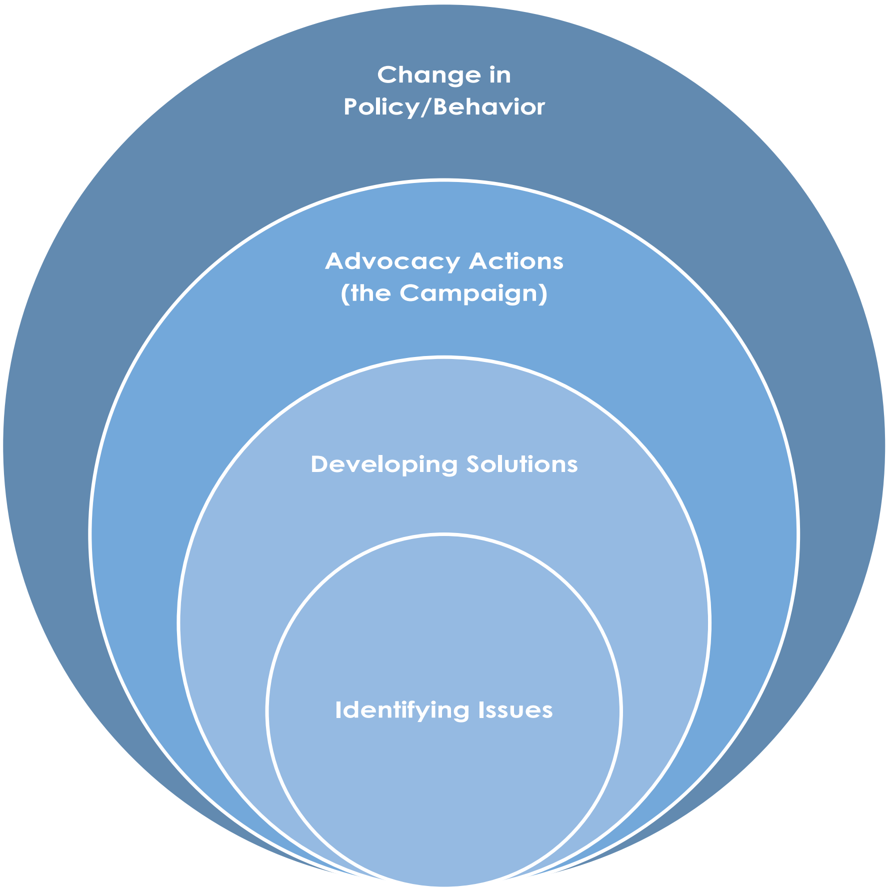
- **Research** that proves why the issue is crucial and should be addressed;
- **Goals and objectives**, based on an in-depth analysis of the issue and the surrounding environment. A clear result needs to be defined from the onset so that – when the campaign is over – we would know if we have won or lost;
- Intended **targets** that include beneficiaries, stakeholders and decision-makers;
- A set of well-defined campaign **messages** and a detailed communications plan;
- An implementation **plan** that details the advocacy tactics, activities, and timeline;
- An implementing **team** that is in charge of putting the plan in motion.

Each advocacy campaign utilises **tactics and communication activities** to persuade decision-makers and appeal to the grassroots to take action in support of the campaign's goals. For example, our goal might be to amend the law on public health to ban the selling of cigarettes in areas near schools – the decision-makers we would want to influence would be the MPs. In this case, our advocacy campaign's tactics would include direct meetings with legislators to convince them of the importance of protecting children's health. Still, we will need an additional push coming directly from the grassroots, to mobilise supporters such as associations of medical professionals, teachers, and parents throughout the country, urging them to send personalised messages to their MPs, calling for amendments to the public health bill. Like this, we will put pressure on the decision-makers from two sides. The larger the voice, the better the chance for success. If voters send 5,000 support letters to parliament, there is a better chance of amending that bill. In addition to writing letters to politicians, the typical tactics of such an advocacy campaign could include signing petitions, lobbying, sit-ins, media work, social media activities, and so on. Campaigns often need multiple strategies working in concert to increase the chance of success.

Practice shows that CSOs cannot develop solid campaign plans with the snap of a finger or with only one person typing everything from A to Z. It is advisable to form **a planning team** that would work collectively, **starting with the core elements** and then adding layers by reviewing and adapting each component. This toolkit will lead you through a step-by-step planning process so that each element can build upon the next.

1.4. STRATEGIC PHASES FOR ORGANISING ADVOCACY WORK: THE ADVOCACY CYCLE

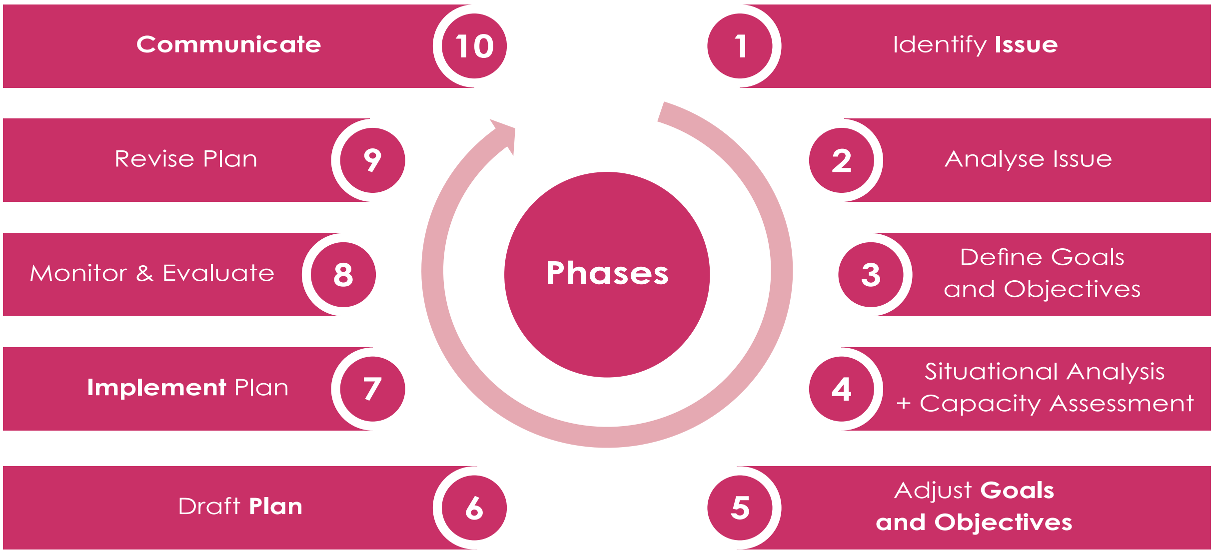
Unlike other CSO-led activities, advocacy is not a one-off or a single-step initiative; it is a long-term process in the form of a cycle that starts with the reflection and research phase. This phase includes identifying an issue, analysing its roots and consequences, and the prescription of "a remedy" – i.e., formulating a set of measures (solutions) to solve the issue. Next, the advocacy actions, or the actual advocacy campaign, follows. This phase combines well-planned activities that our CSO conducts during a specific time to promote or enforce the proposed solutions. To this end, we will need a timeline with clearly defined goals, actions and targets to guide us in implementing our advocacy campaign. Ultimately, all these efforts would lead to the desired change in the policy of an institution or the behaviour of a population:



As a whole, CSOs worldwide approach advocacy planning as a cycle because advocacy is an ongoing, repetitive process, not a one-time event. Therefore, the cycle's elements can be called **"phases" rather than "steps"**. The advocacy cycle that CSOs utilise as a guiding tool for organising their advocacy work can vary depending on the political environment, region, and organisation's experience. It typically starts with identifying the issue we intend to work on and developing an action plan for our campaign. It also includes a phase for examination and adjustment: i.e., assessing the effectiveness of our advocacy work that would allow us to readapt or recalibrate the action plan to ensure that we achieve our advocacy goals.

THE ADVOCACY CYCLE
provides a series of strategic phases for organising advocacy work that will guide our organisation in planning, implementing, and assessing our advocacy campaign.

Below is an adapted version of an advocacy planning cycle with brief explanations for each of its **ten phases**, based on the best practices from various contexts:



1. **Identify Issue:** Advocacy begins by identifying the problem we want to address and the specific populations affected by that problem. Our overall advocacy effort should reflect their perspectives.
2. **Analyse Issue:** This phase requires "dissecting" the problem into its causes and effects and seeing what kind of additional information we would need to make a persuasive case. Certainly, we will need to invest efforts in data collection (i.e. available scientific reports, reliable statistics, data from institutions, etc.) and conduct research on our own. Research methods that we can use here can include participatory needs assessment, focus groups, consultations and interviews, surveys, and others.
3. **Define Goals and Objectives:** This phase is about figuring out – based on the issue analysis – what types of change or improvements of the existing situation are achievable. The advocacy goal answers the question "What does success look like?", while the advocacy objectives describe how to reach that success. Here, we should decide who our target audiences will be: i.e., decision-makers, constituents/affected groups, other stakeholders, media, etc. Setting a goal and objectives for our advocacy campaign begins with determining solutions to the selected problem: this means putting down on paper what specifically needs to happen, who can make it happen, and how they can make it happen.
4. **Situational Analysis and Capacity Assessment:** In this phase, we should explore the external and internal "climate" surrounding our issue. We should map the policy context, or the operating environment, to decide what policies we want to affect. We should ask ourselves: What is doable? What are the constraints? How are decisions made and implemented? How has the selected problem been tackled in the past? Importantly, we should look inside our organisation and honestly assess its capacity, experience, reputation, structure, and staff to define why we are best-positioned to lead this particular advocacy initiative.
5. **Adjust Goals and Objectives:** Based on our review of the external and internal factors, we should go back to our initial goals and objectives and, if needed, refine or adjust them.

6. **Draft Plan:** This entails choosing advocacy tactics and activities to achieve our advocacy objectives and developing a timeline with milestones. Factors that will influence the composition of our plan include the potential for success in our operating environment, associated risk, timing, and resources – both human and financial. The typical components of an advocacy plan include a timeline (when?), roles (who?), a set of outreach activities for community mobilisation, and a budget. We should keep in mind that campaign planning is not always linear. Some steps in our plan will be sequential; others will run parallel. Therefore, the plan should be creative.
7. **Implement Plan:** This is the phase in which our plan is up and running, and our team is in the process of its actual implementation.
8. **Monitor and Evaluate:** Evaluating advocacy will help with tracking progress towards our goal and allow us to course-correct in a fluid environment.
9. **Revise Plan:** Based on different reactions by our targets, we can adjust our plan along the way.
10. **Communicate:** Much of the advocacy is about communicating effectively. Our advocacy plan should have a set of strategic messages that will resonate with our target audiences, such as policy-makers, media, and affected groups. The good messages will help us capture the public's attention and generate additional support.

THE ADVOCACY STRATEGY
describes what you want your efforts to accomplish and how you intend to get there. After identifying and verifying the problem and developing solutions, you should define an advocacy goal and a set of objectives for achieving that goal.

Now that we have introduced the fundamental principles and definitions of advocacy as a cycle, the following chapters provide practical explanations for each advocacy phase, as well as adapted sample templates (worksheets) to help you develop your advocacy package. The toolkit also offers several global examples to illustrate the advocacy phases. Remember that these examples are provided for inspiration only – you should tailor each advocacy initiative to fit the country-specific context.

CHAPTER 2

CHANGE
ADVOCATING

2. RESEARCH

2.1. IDENTIFYING THE ISSUE

Advocacy begins by selecting the problem we want to address and identifying the specific social groups affected by that problem so that our overall advocacy effort reflects their perspectives. There are usually dozens of problems that we as activists encounter in our daily interaction with people in our respective fields, so we can easily and passionately list a myriad of issues around which we would love to advocate. Each team member indeed prioritises a different problem close to her or his heart, beliefs, and work. So, will we select girls' school enrollment in rural areas, the construction of a new cultural centre, or providing access to public institutions for persons with disabilities…? From this multitude of problems that our CSO faces in its everyday work with people, its management team should define and prioritise those that deserve a potential advocacy response These decisions are crucial to both our organisation's reputation and the citizens affected by the issue. In addition, our organisation's whole team should reach a consensus on the problem's choice and put effort and time working on it. Therefore, choosing the exact issue to dedicate that effort to is of strategic importance to the organisation's leadership.

THE PRIMARY CHOICE OF THE ADVOCACY ISSUE DEPENDS ON OUR ANSWERS TO QUESTIONS SUCH AS

- Why is this the right timing for tackling this problem?
- Why is this the right angle for presenting the problem?
- Why and how are we best positioned to address this problem?
- What happens if we don't address this problem?

Problem identification requires a good understanding of the political, social, economic and cultural context of our country and its regions and the visible and invisible power dynamics that privilege, or isolate, specific social groups from the political and decision-making processes. In many countries, the problems are:

- Decision-makers do not have political will;
- There is no legal framework for solving the problem;
- The existing law or policy is an obstacle rather than helpful for solving the problem;
- The current law or policy is good, but enforcement or implementation is a challenge;
- Civil society is inexperienced in effectively influencing the authorities.

The choice of our advocacy issue would require in-depth internal discussion with the organisation's team members and conversations with both people in the field and subject-matter experts, whose perspectives would widen our horizons and help us shape our choice and angle. Below are a few **tips for problem selection**:

First-Draft Problem	*Comment*	*Tip*	*Improved Version*
Because of the COVID-19 pandemics, many important political processes are being either cancelled or turned into virtual assemblies or meetings, with the risk of excluding many parts of the population.	Too vague.	Expand and quantify the problem by adding specifics.	Since the COVID-19 lockdown was imposed in April 2020, all Communal Council's sessions have been conducted without the presence of CSO observers and journalists. No live broadcasting or meeting minutes are available from the Council's key debates and votes such as the municipality's annual budget. The distribution of the COVID-related emergency funds to healthcare providers is done without oversight by syndicates and civil society.
The government's decision on dissolving the independent media commission creates duplication in the application of the law, as the media outlets under the supervision of the Council of Ministers will be subject to rules different from those applied to the rest of the media under the supervision of other governmental bodies, which would further deteriorate the media landscape through the lack of clarity of the legal and regulatory framework.	Too complex, too many dimensions.	Narrow down: slice the big issue into a manageable sub-theme.	The independent media commission's dissolution and the transfer of its oversight responsibilities to different governmental bodies will put the media outlets in an unequal position – some will have to operate according to one set of rules, while others will be regulated under a different set of rules. This ambiguity leads to confusion, unfair competition, and, ultimately, deprives citizens from their fundamental right to access to information.

First-Draft Problem	*Comment*	*Tip*	*Improved Version*
The government dissolved the independent media commission. Oversight of public-service media outlets is in the hands of the ruling party. The government stopped disclosing decisions on granting licenses to private TV operators, and it exerted violence over journalists as they were peacefully protesting for higher salaries. The state of emergency gives too much powers to the Prime Minister.	Unfocused: too many problems in one.	Frame the issue: what leads to what?	The state of emergency, which entered into force on May 1, 2020, due to the COVID-19 pandemic, allowed the government to misuse its powers by dissolving the independent media commission and transferring its oversight powers to the executive; stopping to disclose decisions on granting licenses to private TV operators; and exerting violence over journalists, peacefully protesting for higher salaries.

Media Literacy Coalition

In the school year 2018-2019, the Bulgarian Ministry of Education formally introduced media literacy as a separate subject in the upper-secondary school curriculum. However, most teachers do not have the experience and tools for teaching media literacy. There are no guidebooks or a standardised methodology for teaching the subject or assessing whether the students have acquired skills and knowledge in media literacy. Several local CSOs and subject-matter experts, grouped in the Media Literacy Coalition[1], have chosen to tackle the problem from two perspectives in parallel: skills-building for teachers on the local level, paired with the drafting of a media literacy guide for educators, with which they can test the new subject with their students; and soliciting practical recommendations from teachers on what the standard national methodology should look like, as they pilot teach this subject. The final stage of the Media Literacy Coalition's advocacy effort, supported through an EU-funded project, was presenting a draft methodology to the Ministry at the end of the pilot school year that compiles direct cross-country feedback from classrooms. The initiative's ultimate goal was to influence the drafting and adoption of a unified national index for media literacy skills in high school and methodology for measuring these skills for the following school year.

2.2. PROVING THE ISSUE: METHODS FOR PROBLEM VERIFICATION

Once we have identified the problem, we need to measure its size, parameters and impact – in other words, to prove in which forms the problem exists by backing it up with credible evidence, including data and research. By doing this, we will ensure that the solutions to the problem that we will propose are adequate.

CSOs sometimes have strong feelings about the issues they work on – be it corruption, environment, freedom of expression, or another field. Activists tend to generalise by assuming that "the whole country is totally corrupt" or "the whole environment is damaged and everybody suffers from that". The problem verification effort is when we **go beyond assumptions** – we have to tackle the selected issue in a neutral way, without emotion; look at it from all sides, and describe how precisely the problem affects society and which specific groups in society.

1 Source: Media Literacy Coalition's website gramoten.li.

PROBLEM VERIFICATION

helps us confirm the selection of our problem and prove its impact and size. Key verification questions include:

- What is the problem's relevance to our organisation's principles and scope of work?
- How are the affected populations experiencing the problem, and what would improve for them if the problem is solved?
- How can we prove that an advocacy intervention would improve the situation?
- Will we be able to mobilise support around the issue?

A common problem verification technique is to collect all the information about the problem, which is formally and informally available to our organisation, and try to answer several **verification questions**, as illustrated in the checklist below[1]:

Indicator	*Clarification*	*Score*
Problem Description	A factual overview of the problem as we currently see it, based on evidence and experience, framed in a detailed way, with supporting facts that illustrate the problem's symptoms. How significant is it for us?	
Relevance	An explanation of why our organisation should address this particular problem and its relation to our scope of work, values, and principles. Do we have the capacity and expertise to handle it?	
Affected Groups	Who are the people affected by the problem? Types, size, and social, demographic and geographic characteristics of the populations.	
Problem Impact	How specifically does the problem affect these populations? Since when? What have the affected people and their community leaders told you directly about that problem?	
Solution Impact	How specifically would the affected groups benefit if the problem is solved? What have the affected people and their community leaders told you directly about the solutions?	
Environment	Is the political moment right for an advocacy intervention; why and what proof do we have that it will lead to a change?	
Potential	How will this problem generate interest among decision-makers and the other stakeholders? Can we mobilise support among the affected populations?	
	Total Score:	

After ensuring that the content in the chart's boxes addresses the issue from all sides and beyond assumptions, we can move to insert a score from 1 (lowest) to 5 (highest) for each item. If the total score is high, we are on the right track, and our advocacy effort has the potential for success. Lower scores would require redefining the selected problem or changing it.

1 Available as a worksheet template in Worksheets 6.1. Problem Verification Checklist.

OUR GUIDING QUESTIONS ARE

- How can we prove/measure/quantify this?
- What evidence do we have?
- Are there similar examples/situations in which this has worked well …?

Once we have framed the issue in a detailed, credible manner, with solid arguments and facts that illustrate the reality of this problem among the affected groups, we can confirm our decision that it is worth investing efforts in an advocacy initiative on that particular issue.

To fill in the problem verification checklist, we can collect the necessary information from a wide range of publicly available and reliable data sources such as scientific reports, surveys, statistics, and institutional publications from credible organisations. Still, it would be highly desirable also to conduct **research on our own**. There are several methods that CSOs can use, including in-person meetings, focus groups, surveys, and needs assessments:

- **Meet with prominent local community members** – Solicit the opinions of influential people such as civic, religious, tribal or other leaders, elected representatives, intellectuals, artists, business people and employers, and other reputable people. Meetings with the community leaders are an opportunity to start building support for our future advocacy efforts and establish key relationships.
- **Meet with rank-and-file community members** – Community meetings in the forms of public events (discussion gatherings, community cafes, or visiting homes in a neighbourhood) are an opportunity to canvass issues that are important to residents and build grassroots support for our future advocacy campaign. These meetings provide valuable information on local needs and on how people live. In some cases, we can use online tools instead of physical meetings.
- **Surveys** – These provide quantitative information about the public opinion and are conducted according to a scientific methodology, i.e. their outcomes are statistically representative.
- **Focus groups** – These are structured discussions with homogeneous groups that use open-ended questions to probe issues and ideas in greater detail and offer insights into how the community feels about a problem.

Libyan Centre for Freedom of the Press (LCFP)

On July 10, 2021, Libyan journalists and editors in chief were able to propose directly to decision-makers their ideas on a comprehensive reform of the Libyan media landscape. A local CSO, the Libyan Centre for Freedom of the Press (LCFP), convened a consultative discussion, bringing together representatives of the Libyan media sector and members of a committee, formed by the Prime Minister, to solicit feedback from the relevant stakeholders. This committee, some of whose members are representatives of Libyan civil society, was formed as a result of the pressure exerted by local and international organisations, in the form of an open letter and a public statement:

- On June 15, 2021, the Council of Ministers issued a decision for dissolving the Libyan Media Foundation and transferring its powers for overseeing the public-service media sector to governmental, i.e. not independent, bodies;
- On July 2, seven local and international organisations, including Article19, released an open letter[1] to the Prime Minister, stating that the decision does not respect freedom of expression standards. The organisations provided proof and evidence of how this decision would increase government control over public media and interference in media editorship and content. The letter calls for retracting the decision and handling the media reform after the elections;
- On August 11, 2021, the Council of Ministers issued a second decision that would put the government's hand on the entire media system in Libya; and, in response, on August 20, Article19 issued yet another statement[2] calling for retracting it since it undermines media freedom.

2.3. THE PROBLEM TREE ANALYSIS

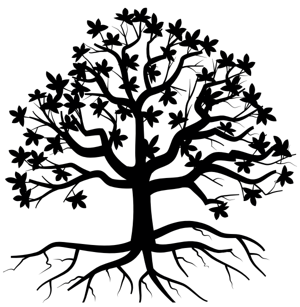
A successful advocacy campaign should consider the full context and complexity of the selected problem and address its root causes rather than just its symptoms. To this end, we will need to make an analytical effort in "dissecting" our problem, and isolate its causes and effects.

Problem, Cause, and Effect		
What is What?	***Example***	***Definition***
Effect – What happens **as a result** of the problem? What are its symptoms, impact, consequences, and outcomes?	• Young people rely on unemployment aid. • Young people only get low-income jobs. • Young people enter the labour market without a diploma.	Cause and effect is **the relationship between events**, where one occurs because of the other.
Problem – Facts, **significant aspects**, evidence, experience details, and specificity.	• In the last five years, more than half of the girls from rural areas and one-third of the children from low-income families have dropped out of school before finishing secondary education.	
Cause – What leads to the problem? What are its **underlying reasons**, sources and roots?	• Parents do not encourage their children to finish school. • Boys are forced to find work to support their families. • Girls get married at an early age.	

1 Source: Article19's website: Open letter in English and in Arabic (July 2, 2021).

2 Source: Article19's statement in English and in Arabic (August 20, 2021).

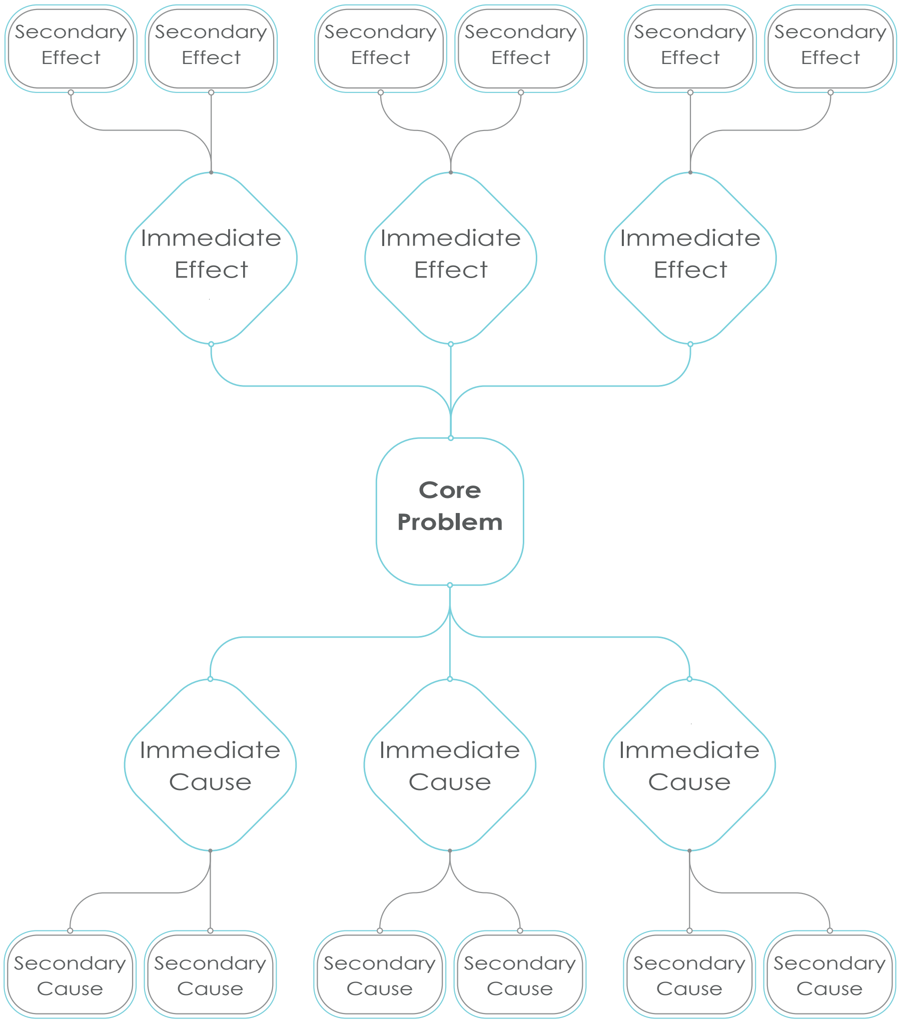
One tool for illustrating the cause-effect link and showing the relationships between the problem and its contributing factors is the Problem Tree Analysis. It helps to see a complex issue from varied perspectives by fitting them into a hierarchy: what leads to what. The Problem Tree method visualises the problem as a tree – each tree has roots that feed its leaves, and the trunk helps it stand upright. These three parts of the tree are interconnected. The same is applied to the problem: the trunk is our core advocacy problem; the roots are its causes; and the leaves are the effects.

	→ Effects	The leaves are the tree's most visible part: these are the effects, or consequences, or symptoms, of the problem.
	→ Problem	The trunk, which holds the tree and links the roots to the leaves, is our core problem.
	→ Causes	The tree's roots are deeply embedded; they feed the tree and are not visible. These are the problem's causes or sources.

THE PROBLEM TREE

provides an overview of all the known causes and effects of a problem. This analytical method helps us map out the anatomy of cause and effect around the problem through the perspective of our organisation's values. Breaking down problems allows us to see their potential solutions.

To undertake a Problem Tree Analysis, we will put our core problem in the middle of a sheet and list immediate and secondary causes and effects. The worksheet template – together with an example of a completed Problem Tree to illustrate the outcomes of the analysis – is available in Worksheets 6.2, and detailed instructions are listed below. We will fill in the information in the respective boxes on the worksheet by starting from the trunk of the tree; moving down, and then moving up:



1. We will write down the **core problem**, as we currently understand it – we can refer to your Problem Verification Checklist (Worksheets 6.1). We place the core problem at the centre of the tree. Clearly stated core problems are a crucial feature of practical Problem Tree Analysis. In this box, we will describe the significant aspects of our core problem. The description should be based on evidence and experience and should be specific to limit the number of causes below – i.e. instead of "polluted environment", we can narrow it down to "endangered wild species of birds in coastal areas".
2. Below the core problem, we will list what we consider the **immediate causes** or sources of the problem. To be able to articulate the causes, we will ask ourselves: "what leads to this? What is the underlying reason for this?" Cause statements are usually negative – i.e. "lack of…", "insufficient…", "poor management of…", etc. We will exclude overall and broad constraints such as "endemic corruption in governmental bodies" or "conservative local culture".
3. In the boxes above the core problem, we will place the **immediate effects**, consequences, or outcomes of the problem. We will ask ourselves: "What happens as a result of this? What is the impact of this?" Remember that sometimes the effects can appear to be causes – for example, "as a result of poverty, there is high level of

illiteracy" versus "as a result of illiteracy, there is high level of poverty". Therefore, we rely on a logic check – what comes first in the problem's hierarchy, what comes second, and why?

Then again, let us move down, and then up, to dig even deeper:

4. We will write down the **secondary causes** or sources – these are the immediate causes. For example, the immediate cause for students not finishing school can be that their parents do not encourage them to study. An underlying cause for the parents' attitude can be that they do not value education but prefer to push their children to start working early. The secondary causes are also called driving, underlying, or indirect causes. Often, the problems are complex and have more than one root cause.
5. Finally, we move to the top of the worksheet to write down the **secondary effects** or consequences – the same as in Step 3. If our primary effect of the school dropout problem is that teenagers cannot find decent jobs, our secondary effect can be that youth unemployment and youth poverty are increasing.
6. At the end of this analysis, let us look again at how we have described our **core problem**: we may need to refine or extend its definition to make sure it genuinely is at the core of the identified causes and effects.

Typically, groups construct their advocacy campaigns by transforming the identified core problem to become the campaign's overall goal and select some of the problem's primary causes – those closest to their scope of operations and to their experience and values – to become their advocacy objectives. In other words, advocacy addresses the actual sources of the problems. We will walk you through this process in the toolkit's next chapters.

ADVOCACY ADDRESSES THE ROOTS OF A PROBLEM

Complex problems have many interconnected causes. For our campaign, we should focus on just a few causes by transforming them into advocacy objectives.

At this point, we can conclude that different groups prioritise different sets of causes, effects, and solutions for the same problem, depending on their understanding of societal issues, ideology, and individual "signature" – especially when it comes to sensitive political issues that stir controversy and polarisation in society. Advocacy is not value-neutral. Take, for example, the problem of drug abuse among youth. Some groups can see the primary cause of this problem as youth unemployment and lack of prospects and can, therefore, advocate for solutions such as increased prevention, education and rehabilitation. Other organisations could claim that the primary reason for drug abuse is declining traditional values, blaming the "destructive influence of the Liberal culture that destroys our families" and could, therefore, see the solution in tightening police control and more severe punishments for dealers and users. Often, controversial views compete for public attention to persuade decision-makers to back different proposed solutions. Which side succeeds often depends on the degree in which we have managed to mobilise public support with our evidence.

Airbnb

Following accusations of discrimination by guests in 2016, Airbnb[1] changed its company policies by asking users to commit to treat everyone in the community with respect, regardless of race, disability, sex, and religion. This coincided with the eruption of the Syrian refugee crisis and with the U.S. Government's temporary travel restriction on several Muslim countries. These controversial developments inspired Airbnb to communicate its values on inclusion to consumers and mobilise people to fight prejudice and discrimination. The company launched a multi-platform campaign based on the hashtag #WeAccept[2], spanning all of its social media, paired with an aggressive advertising campaign during the 2017 Super Bowl – the annual championship game of the National Football League and the year's most-watched TV event. #WeAccept's 30-second video[3] shows a montage of faces of different nationalities blending into one another with a message of acceptance. The text reads, "We believe, no matter who you are, where you're from, who you love or who you worship, we all belong. The world is more beautiful the more you accept." The ad highlighted Airbnb's commitment to providing short-term housing for people in need, including refugees, victims of natural disasters and aid workers. In just the first weeks alone, the campaign generated 33,000 Tweets, 85% of which were positive, and 87 million impressions. Airbnb's call to the public to open their homes to displaced populations resulted in 15,400 volunteer hosts signups. #WeAccept grasped the attention of media outlets worldwide who praised it for its strong position and ability to align the Airbnb brand with a cause.

1 Airbnb is an international company that operates an online marketplace for lodging, primarily homestays for vacation rentals, and tourism activities (source: Wikipedia).

2 Source: Airbnb's website section, dedicated to the campaign, in Arabic, and in English (2017).

3 Source: Airbnb's YouTube Channel – the campaign's video clip, subtitled in English (2017).

2.4. IDENTIFYING SOLUTIONS

Now that we have isolated the causes and consequences of our selected advocacy issue, we are ready to identify the **solutions** or recommend the set of measures to solve our problem. These measures should be viable and sustainable; this is why we should **back the solutions up with research** and evidence and measure what it would cost to implement them. This phase involves gathering information about the policies, laws, regulations, programs, and budgets shaping our issue. We would also need census data, reports, research publications, opinion poll findings, statistics, and media articles. This information will help us prove our arguments with facts, make our advocacy clearer, and make our case in media, outreach, lobbying, and negotiations. In summary, there are three aspects to guide us in collecting the information we would need:

1. What are the **gaps** in our knowledge and experience with this problem?
2. Where does information on this problem **already exist**? Is it accessible? Is it credible?
3. Whom do **we need to discuss with** to understand all aspects of the problem and hear all sides – key players, subject-matter experts...?

A SOLUTION

typically describes the result or outcome that we want to achieve through our advocacy campaign. It shows what the situation would look like as a result of the change:

- **Problem:** 30% of children from low-income families drop out of school before the age of 17.
- **Causes:** Schools do not offer scholarships for low-income students; decreased state budget for secondary education.
- **Solution:** Through increasing the budget for secondary education by 11%, the 31 public schools in our region will be allocated sufficient resources to be able to provide 812 scholarships to students from low-income families for supporting them until they successfully finish their education cycle.

The solutions should be specific so that decision-makers know what we are asking them to do. When identifying solutions, organisations typically consider:

- Disadvantages of the current situation and the route to the change;

- Viability and cost – risks and value for money — where the funds would come from, which bodies will be in charge of implementation and oversight; and
- Best practices – similar solutions to similar problems in other regions or countries.

Sometimes, once a problem is defined, solutions may look self-explanatory, and most people would quickly understand what needs to change to improve the existing situation. "Decreased state budget for secondary education", one of the causes in our Problem Tree example, would imply "alter funding priorities" as the most natural solution. However, we need to explain how this will happen and describe all the **required actions** leading to a potential budget increase, which can be a lengthy process. One step, for instance, is to pass an amendment to the respective regulation at a session of the communal council. Here is an illustration of this potential solution and the required actions leading to it:

Problem: 30% of children from low-income families drop out of school before the age of 17.		
Cause	***Solution***	***Required Actions***
Schools do not offer scholarships for low-income students. Decreased state udget for secondary education.	Through increasing the budget for secondary education by 11%, the 31 public schools in our region will be allocated sufficient resources to be able to provide 812 scholarships to students from low-income families for supporting them until they successfully finish their education cycle.	Communal council's Committee on Education issues first draft of budget for communal schools. The Communal council's Committee on Education conducts consultations with NGOs on budget priorities. Communal Council discusses draft budget in plenary session, councillors propose amendments. The Communal Council approves the budget at first voting. The Communal Council's Committee on Education reworks the budget's first draft to reflect proposed amendments. The Communal Council adopts the budget at second reading. City Mayor signs and the budget enters into force.

Mapping out the required steps, or the route leading to the solution, helps us plan our advocacy campaign to know the right moment and the targets on whom we should focus. If our group is working to pass a new budget for communal schools, our campaign should consider at least six steps in the official process that need to happen before the new budget enters into force. In the beginning, we would rally the public to contact their communal council members; then bring in CSOs to submit proposals to the committee. Later, we would be convincing communal councillors and advocating for the Mayor to sign.

A solution to another cause of the same problem would have its own specific required actions and, therefore, we will adjust our advocacy effort to target different decision-makers: in the case below, the municipality:

Problem: 30% of children from low-income families drop out of school before the age of 17.		
Cause	**Solution**	**Required Actions**
Parents are unaware of available support by municipalities for schooling.	By opening up, promoting, and simplifying the application process for schooling aid, the municipality would enable more teenagers from low-income families to be involved in this program and successfully finish their secondary education.	Municipality publishes information about available schooling support on its website. The Municipality's Schooling Aid Directorate allows for applications for aid to be submitted online. The Municipality's Schooling Aid Directorate invites CSOs to monitor the aid applicants' approval. Municipality holds information sessions with school directors, teachers and parents to promote aid opportunities and clarify requirements. City Mayor and municipality representatives participate in (virtual) town-halls and give media interviews to promote aid opportunities. Municipality amends the requirements and eligibility criteria for enrollment for aid to enter into effect from the next school year.

In this case, the set of required actions can be a great starting point to design an advocacy campaign to convince decision-makers in the municipality to improve the existing system for providing schooling aid to teenagers in need with keywords such as transparency, accountability, involvement, and dialogue.

The worksheet template – Identifying Solutions, Reality Checklist, available in Worksheet 6.3, will help our planning team map out the solutions based on research evidence and check their feasibility with regards to existing driving forces and the current social and political trends. This mapping exercise may require revisiting and expanding our previous worksheets. We provide tips to each category with guiding questions.

Save the Children Action Network

Since 2014, the Save the Children Action Network (SCAN)[1] has worked to influence policy that affects the lives of children around the world, such as high-quality early learning and ending child hunger. The organisation's signature campaign, called "High 5 for Kids"[2], helps to keep child-related issues at the forefront of national political discourse by being "the political voice for kids" in the United States of America. Over the past three election cycles, High 5 for Kids has given children a voice on the political campaign trail. The campaign includes voter registration information, tools to help volunteers organise events, petitions, and educational videos. In 2020, SCAN sent more than 260,000 texts encouraging others to vote for kids; delivered 667,000 messages to lawmakers on behalf of kids; mobilised 400,000 online supporters; and contributed to passing the Child Care is Essential Act in the House.

1 Source: Save the Children Action Network's website.

2 Source: High 5 for Kids website.

As SCAN organisers explain in their impact brochures[1], "through High 5 for Kids, we train volunteers to directly engage candidates on our priority issues. Our grassroots activists educate campaign staff by meeting with them to discuss policy options and elevate children's issues in their community by organising debate watch parties." Their 2018 ten-page volunteer toolkit[2] offers practical tips and templates for identifying candidates; preparing to talk to candidates; how to ask a question on Twitter (including sample tweets and hashtag suggestions), on Facebook (including sample posts); and writing and submitting letters to the editor of local newspapers.

2.5. TRANSFORMING SOLUTIONS INTO ADVOCACY GOALS AND OBJECTIVES

The solutions that we have just developed would require a wide range of separate or inter-connected interventions to solve the problem. For example, the school dropout issue requires **interventions** on budget, schooling aid mechanisms, employment of minors, early marriage, crime and drugs, and even unemployment in the education sector. As a single organisation, however, we may not be able to address all of them. Therefore, we should **select just a few preferred interventions**, i.e. narrow down the scope of our advocacy effort. In other words, we will review the solutions and problem causes, outlined in our worksheets, and choose the ones on which we want to work. To inform our decision, we will explore the political and social environment surrounding our issue:

- Which aspect is our organisation best positioned to take the lead on?
- What is doable in this particular moment, and what are the constraints? How are decisions made and implemented, and where is our entry point?
- How has the problem been addressed in the past – have success stories or lessons learned been documented?

Once we answer these questions, we can transform the problem, its selected causes, and solutions into **advocacy goals and objectives**. Advocacy campaigns usually have one or two goals with several objectives to achieve each goal. The goals and objectives will serve as a basis for our campaign planning and determine our positions to convince decision-makers. Below is an example:

1 Source: SCAN's website, section on impact.

2 Source: High 5 for Kids volunteer toolkit (2018).

Goal	Objectives
Fundamental human rights for access to information and freedom of expression are protected through free and independent media and journalists with increased professionalism and ethics.	In the next 12 months, implement a certified training program for investigative reporters on key principles of journalism and the role of media as independent watchdogs, defending accountability.
	In the next 3 years, amend the curriculum of the State University's Faculty of Journalism to include legislative standards for protection of the freedom of speech, disinformation, and fake news.
	In the next 18 months, conduct roundtables with media executives, chief editors, and members of the National Media Oversight Committee to present and discuss international best practices in journalism, codes of ethics, and editorial guidelines.

THE ADVOCACY GOAL
answers the question, "What does success look like?" While the objectives describe the way to reach that success.

The goal addresses the problem that our campaign seeks to address in general terms: it provides a broader, long-term vision for the desired change – it can describe, for example, the benefits that the affected groups will see when the change is made, in contrast to today's situation. The typical phrasing that we see in an advocacy goal include "Improve…", "reduce", "build the capacity of", "facilitate", "provide access to", "transform", "ensure", and others.

The objectives address the problem's causes and solutions more practically. They are more specific than the goals and describe the practical steps our organisation or stakeholders will take to reach the goal. For example, suppose the goal is to build the capacity of journalists, as in the example above. In that case, the first objective will be to train journalists and convince the Faculty of Journalism. The second objective will be for the Faculty of Journalism to modernise its educational curriculum so that future journalists can receive a modern university education. The objectives spell out the desired changes in policy and decision-making structures. Typically, objectives include a time reference – "in the next 12 months", "within the next three years", etc. – and are about the changes in the way institutions or officials work or manage budgets by, for instance, passing a bill, amending a regulation or introducing a good practice. For example, if our goal is to open up the municipality's process of allocating schooling aid to teenagers from low-income families, the objectives to support that goal would be three-fold: introducing online enrollment to ensure more people can apply; include civil society in observing how aid is disbursed transparently; facilitate dialogue between municipality officials and teachers/parents to clarify requirements. In longer-term advocacy efforts, the goal remains unchanged, while objectives can be continuously refined after meeting (or failing to meet) the planned benchmarks.

The goals and objectives should always follow the SMART heuristic:

- **Specific:** "Improving the professional capacity of judges through certified training courses" rather than "Improving the professional capacity of judges";
- **Measurable:** progress and achievement can be assessed: "municipality starts accepting aid applications online" rather than "modernising the application process";
- **Actionable:** it can actually be accomplished with the time and resources available: "Organise five regional roundtables" rather than "Conduct a rigorous ongoing awareness-raising campaign with 12 regional roundtables across the country";
- **Realistic:** it is sensible and practical to try to achieve this: "Implement a nationwide ban on selling tobacco near schools by 2023" rather than "Convincing tobacco sellers not to sell tobacco to children";
- **Time-bound:** a specific time is set to achieve the objective.

SMART objectives are particularly helpful when planning grassroots advocacy campaigns. Our supporters in the field are ordinary people, not civil society professionals, so we need to offer measurable benchmarks for them to follow. For example, XX letters to be sent, XX signatures to be collected for the petition, etc. Our grassroots supporters may get distracted or discouraged if we cannot provide clear guidance, reinforcement, and milestones for success.

Food Allergy Research and Education (FARE)

Starting in 2023, food manufacturers in the United States of America will need to identify if their products contain sesame on their packaging and the food labels. After years of advocacy efforts, a law that changes labelling rules for sesame on packaged foods was passed in 2021 — the Food Allergy Safety, Treatment, Education and Research (FASTER) Act[1]. This law officially makes sesame the ninth food allergen that companies must indicate on packaging, thus bringing the U.S. into closer alignment with Canada, Australia, and the European Union, which already label sesame on their food packaging. The FASTER Act's objective is to decrease accidental exposure to sesame for those who are allergic – approximately 1.5 million people. The new law also supports food allergy research. The competent authority, the Food and Drug Administration, started considering sesame a top allergen in 2018 by launching a formal request for information. Then, an advocacy organisation stepped in and spoke out about the dangers of inadequate food labelling: The Food Allergy Research and Education (FARE)[2].

1 Adapted from original source: article in The Forbes (2021).

2 https://www.foodallergy.org

In 2019, FARE organised for the Subcommittee on Health to hear riveting testimony from parents, who described their children's life-threatening food allergies, stressing that food labelling changes will make it easier for parents to know what they are giving their children. Next, FARE convened more than 150 advocates from all over the country to Capitol Hill for an advocacy day to fight food allergies, called "Courage at Congress"[1]. The advocates held more than 100 in-person meetings with congressional leaders and their staff. Soon after, COVID-19 shifted the campaign to Zooms and phone calls, as volunteers met virtually with lawmakers throughout the year. The following "Courage at Congress" Day in 2021 drew 500 advocates to 200 meetings. Following the bill's signing by the President, FARE organisers commented: "*The exciting progress we've made together wouldn't have happened without the powerful voices of food allergy advocates who shared their stories and made their priorities heard. This victory belongs to our advocates, and we thank them.*"

2.6. DEVELOPING A VISION STATEMENT

Advocacy planning needs to be strategic, including carefully framing what we want to achieve in our long-term vision for social change — for example, respect for human rights and more consultative public decision-making. Constructing a vision statement means to depict what life will look like for society once we have solved the problem.

THE VISION STATEMENT
explains the result of a campaign victory and what it will do to solve the problem or fill the need we have identified.

To develop a vision statement, our planning team would start by looking at the goals and objectives, then review all the bits and pieces on our worksheets – specifically the elements that describe how people are affected by the problem – and try to reverse these in positive terms. We would use our imagination and creativity to figure out how a potential news article about our advocacy campaign, published a few years later, would look: this is a commonly-used technique. How do we want our achievements and impact described? What title and illustrations would we love to see?

1 Source: How FARE Advocates Helped Pass the FASTER Act, published on FARE's website.

An example would be something like this: "Children from low-income families can now more easily apply for the municipality's schooling aid and finish their secondary education without being forced to find a job and skip classes". For the vision statement, we should also consider:

- What value(s) do we want to convey?
- What signals will our campaign project?
- Are we going to be for or against something; provocative or reassuring?

Through the worksheet template, available in Worksheet 6.4 Defining Goals, Objectives, and Vision Statement, our planning team will select the preferred interventions, define the advocacy goal and objectives, and develop a vision statement.

FIRM vs. FAIR

Here is an example of how two fundamentally different organisations define their values, visions and policy principles on immigration – a sensitive topic in the United States of America. Both movements advocate for immigration reform but, since advocacy is not value-neutral, they push for different agendas. You will notice that, although their ideologies and principles are completely opposite, both organisations use similar ways to formulate their positions – these are explained clearly and visibly and are easily identifiable:

The Fair Immigration Reform Movement (FIRM) is driven by these values and principles[1]:	The Federation for American Immigration Reform's (FAIR) objectives[2]:
• Fighting for an America that is united and free for all people. No exceptions; • Full citizenship; • Strengthen and protect all families; • Embrace freedom and human rights; • Dignity, not detention; • Respect the safety and security of all during encounters with law-enforcement; • Establish opportunities for safe future migration and maintain worker protections; • Protect border communities and diversity; • Address the root causes of migration.	• Reduce overall immigration to a more normal level. Reducing legal immigration levels from well over one million at present to a very generous 300,000 a year over a sustained period will allow America to manage growth, address environmental concerns, and maintain a high quality of life. • Immigration, within proper limits, can be positive. Adhering to the rule of law is central to successful assimilation and citizenship. • Under any rational system of ordered entry, the demand will always vastly exceed available slots. Tough decisions will therefore always be necessary.

1 Adapted from FIRM's website.

2 Adapted from FAIR's website.

We need MORE, not FEWER immigrants in America. America is a beacon of hope for those seeking to make better lives for themselves and their families. Our strength as a country has always been greater when we open the circle rather than close it.	A well-thought-out and well-enforced immigration policy plays an important role in helping maintain the quality of life in America. Without common-sense limitations on immigration and the resulting population growth, virtually every social cause is a lost cause. FAIR seeks to reduce overall immigration to a level that is more manageable.[1]
It is not enough to end family separations. Families torn apart by detention and deportation across the country must be reunited and made whole. Bring our deported loved ones home.[2]	To genuinely improve our immigration system, family-based immigration must be limited to spouses and unmarried minor children of green cardholders. Immigration policies can determine what kind of America future generations will inherit – liveable or overcrowded, successful or overburdened.

1 Source: FAIR's website, "Legal Immigration" section.

2 Source: FIRM's website, "Vision" section.

CHANGE

CHAPTER 3

ADVOCATING

3. STAKEHOLDERS

3.1. TECHNIQUES FOR STAKEHOLDER IDENTIFICATION

In this phase, we will identify our campaign's target audiences or **stakeholders** – first, the decision-makers we want to influence to change the situation and second, those affected by our advocacy issue at the grassroots level whom we wish to mobilise.

STAKEHOLDERS

are all those connected to the problem — those who have an interest in, are affected by, or have the responsibility to solve it. Stakeholders are institutions, organisations, societal groups, and individuals from the public, private, and civil-society sectors.

- Our **primary audience is the decision-makers** — those who have the power and authority to make the change for which we are advocating, i.e. representatives of institutions.

- Our **secondary audience includes those who** can influence the decision-makers — their advisors and staff, the informal centres of power, the constituents (i.e. the people who hold them accountable), media, CSOs, the private sector, academia.
- Our **grassroots-level** audiences are those affected by the problem — the specific socio-demographic groups that are impacted directly or indirectly by the issue.

To illustrate various techniques organisations use to identify stakeholders, let us use the same example of a campaign focused on decreasing school dropouts. Our campaign calls for the communal council to increase the budget for education so that schools can provide aid to children from low-income families. Essentially, a first-draft stakeholder list could look something like that:

Initial Stakeholder List

Category	***Stakeholders***	***Examples***
1. Decision-makers	Those who have the responsibility and power to **take action** for solving the problem or parts of it.	Communal Council's Education Committee members, Communal Council members from the ruling party and the opposition.
2. Influencers	Those who can **influence** the decision-makers for the solution of the problem.	Constituents who can voice the issue with their communal councillors, Education Committee advisors, experts and staff, school headteachers, CSOs working in this field, popular online influencers and bloggers, media outlets and journalists.
3. Affected Groups	Those who are **affected**, directly or indirectly, by the existing problem.	Teenage students from low-income families who drop out of school, their parents, their teachers.

All these entities and individuals can be seen as either **allies**, or **opponents**, to our advocacy initiative:

Allies

- Who already works on solving this problem?
- Who has a positive track record on this issue?
- Who can contribute to making a difference through their political and social reputation?

Opponents

- Who works to keep the status quo?
- Who will perceive the change as a potential threat?
- How can we neutralise or minimise their pushback?

When identifying stakeholders, we should **be specific**: for example, instead of "Communal Council", put "Communal Council's Education Committee Members from the Opposition"; instead of "the poor" – "Low-income families in the rural areas of the Southern constituencies of X, Y, and Z"; instead of "women" – "Mothers of teenage children"; and instead of "Youth" – "Teenage girls and boys who drop out of school in constituencies X, Y, and Z".

It is also crucial to distinguish between **decision-makers and influencers**: influencers help us gain access to the decision-makers or exert influence on them. In our case, the communal councillors are the ones who actually decide. At the same time, school headteachers can only voice their opinions or influence the communal councillors since they do not have the power to vote for a new budget personally. The decision-makers are our **primary audience** but, in a restrictive nature of governance, we cannot always find direct access to them. In such cases, our approach should be to find connections with figures or sectors of society who are in the decision-makers' sphere of influence. These could include advisors, staff, trade unions, political parties, companies, or even voters or donors in their respective constituencies because elected officials typically care about the voices of those who have elected them or have funded their campaigns. Therefore, we should identify this **secondary audience** of influencers to whom we will reach out and ask them to contact our primary targets.

Decision-makers and influencers have varying levels of impact and influence (a famous blogger versus a parent), diverse attitudes and interests in the subject matter (ruling party versus opposition), and – importantly – **the decision-making mechanisms** can be different and often complex. To affect change, we need to understand well the stages of the decision-making process and enforcement of decisions so that our advocacy campaign can intervene in the right moments.

We have already laid the rudiments of our stakeholder identification effort: our worksheets so far, especially the "Required Actions" section, contain many of the names of institutions and individuals who are empowered to make the needed decisions. So, in this phase, we will use **the power mapping technique** to refine and expand the list of institutions and persons; categorise the decision-makers according to their importance, interests and attitudes; and choose tactics to interact with them as part of our advocacy plan. Successful advocacy campaigns identify their targets first before they create campaign messages or start reaching out to the grassroots. When advocacy efforts end up with very little success, it is often because the campaign focuses solely on mobilising grassroots support. So, it generates a loud voice but does not point that voice at the right target. We should infuse every aspect of our campaign with influencing our targets, so we need to understand these persons more thoroughly.

Letters to Mosul

Thousands of Iraqis were mobilised to send letters of support and empathy to the citizens of Mosul, living during the ISIS occupation in an information blackout, risking execution if found watching TV, listening to the radio or using the internet. The #LettersToMosul campaign was launched in 2016 by the Institute for War and Peace Reporting (IWPR)[1] on the day operations to liberate Mosul began – October 17, 2016[2]. Iraqis from all around the country wrote the letters to reassure the residents of Mosul, still held hostage by ISIL, that they are not forgotten and that the rest of Iraq is standing with them. Young Iraqi volunteers in Baghdad, Basra, Najaf, Babil, and Anbar set up kiosks in central areas of each city to invite Iraqis to write messages to the people of Mosul, allowing them to reach out directly, via paper letters, to those denied outside information by Islamic State. One letter of encouragement reads, "Our people in Mosul, we are with you in our hearts and souls, I do not find the right words to express to you but do not forget you are part of Iraq, and we will not abandon you." On December 22, this IWPR initiative culminated with 2,160 hand-written "Letters to Mosul," photocopied to total 4 million, released by the Iraqi air force over the city's skies, to the residents below. According to reports from inside Mosul[3], ISIL was so threatened by the airdrop that its fighters spent the whole night collecting the letters from the streets. The #LettersToMosul initiative was part of a long-running IWPR programme empowering youth groups in Iraq to play a role in reconciliation and social cohesion.

3.2. DECISION-MAKING PROCESSES AND DECISION-MAKERS: POWER MAPPING

We will start by **listing decision-making bodies and researching how they operate**. Depending on the advocacy theme, it could be just one body, such as a communal council. But campaigns typically deal with many entities because the decisions they want to influence are more complex. When asked who decides about the critical issues in our community, people would automatically respond, "the governor/politicians/notables…". Even if power and decisions are highly centralised and in the hands of one person or group (the ruling party, the local militia or other people with power), in almost every sphere, there is a formal mechanism used to make decisions. Ordinary people may be unfamiliar with this process or not believe in its effectiveness. Still, civil society organisations are obliged to study the decision-making process, acknowledge its legitimacy, and take advantage

1 The Institute for War and Peace Reporting (IWPR), an international not-for-profit organisation that works with media and civil society activists to promote positive change in conflict zones and areas of turmoil around the world.

2 Source: article, Iraqi Air Force Drops Letters on Mosul.

3 Source: IWPR's website.

of it and use it to their benefit in their advocacy initiatives. So, it is recommendable that we find, download, store in our database, and carefully read the fundamental documents that formally determine how decision-making bodies function:

- To whom is this body accountable/to whom does it report to? Which institution provides its budget and exerts oversight over its functioning? → Laws, decrees, executive orders, instructions.
- How has this body organised its operations? Where are the procedures defined? → Internal bylaws, rules of procedure, code of ethics, code of conduct, mission statement.
- How effective is this body in implementing its duties? → Activity reports, audit reports.
- What is its budget? → Download the latest annual budgets to see, compare, and analyse.

Next, based on the information in these fundamental documents and our in-house knowledge of the political landscape as insiders, we will try to **map out the consecutive stages of the decision-making process** and figure out when and how each step is supposed to take place:

Decision-Making Process Map	
Process	***Stages***
Bodies involved	Communal Council's Education Committee, Communal Council
What is the **formal** process, its steps and timings?	Education Committee issues first draft of budget for communal schools (FEB); Communal Council discusses draft budget in plenary session, and councillors propose amendments (FEB); Communal Council approves budget at first voting (MAR); Education Committee reworks budget to reflect proposed amendments (APR); Communal Council approves budget at second reading (APR); City Mayor signs, and the budget enters into force (MAY).
Which steps are open to **outside input**?	The Education Committee conducts consultations with CSOs on budget priorities (JAN).
Which **decision-makers** will play a role at each stage?	Education Committee Members X, Y, and Z who are in charge of the drafting; Education Committee's Head X; Communal Council members X, Y, and Z, Political Blocs Heads X, Y, and Z, Council President X.
What are the **informal** workings or "behind the scenes" actions?	Political blocs define budget priorities at internal meetings (JAN); The Education Committee's Head meets informally with school headteachers to discuss current issues (monthly); Among the CSOs, several are for, and others are against the budget increase; Last year, the Mufti's son started his first job as a junior teacher in a rural area with lots of students from low-income families.

As we see, we can categorise every decision-making process as having a **formal** and an **informal** side. The formal process includes committee hearings, debates and votes, public consultations – the elements defined in the respective regulations. In contrast, the informal process consists of unwritten interactions such as closed-door or "behind-the-scenes" meetings, where personal connections play a role. People whose opinions matter to the decision-makers, such as political or religious leaders, and funders, can exert influence through providing advice or lobbying for a specific decision. Even though these people do not have formal responsibilities in the subject matter, they can impact those in charge of the decisions. As advocacy activists, we should find our entry points through both the formal and the informal sides of the process. Our **entry points**, or the opportunities for us to intervene and influence the process of decision-making, are the cornerstone of the advocacy campaign. Let us expand our map by charting the potential entry points:

Entry Points for Influence

Stage	Time	Action	Players	Entry Point
1	January	Political blocs define budget priorities	Political blocs Heads X, Y, Z	Yes
2	January	Education Committee conducts consultations with NGOs on budget priorities	Committee Head X, Committee members X, Y, Z in charge of drafting	Yes
3	February	Education Committee issues first draft of budget for communal schools	Committee Head X, Committee members X, Y, Z in charge of drafting	No
4	February	Communal Council discusses draft budget in plenary session, councillors propose amendments	Communal Council members, Education Committee members, Education Committee Head, Council President, Political blocs Heads	No
5	March	Communal Council approves budget at first voting	Communal Council members, Education Committee members, Education Committee Head, Council President, Political blocs Heads	No
6	April	Education Committee reworks budget's first draft to reflect proposed amendments	Committee Head X, Committee members X, Y, Z in charge of drafting	Yes
7	April	Communal Council approves budget at second reading	Communal Council members, Education Committee members, Education Committee Head, Council President, Political blocs Heads	No

Entry Points for Influence				
Stage	**Time**	**Action**	**Players**	**Entry Point**
8	May	City Mayor signs, and budget enters into force	City Mayor	No
9	Ongoing	Committee Head discusses current situation informally with School headteachers	Committee Head X, Headteachers X, Y, Z	Yes

We should try to get the buy-in of our advocacy issue early. For example, at stages #3 (first budget draft issued), #5 and #7 (voting in plenary), we can do little to influence the outcome; it would be too late. If we start in January or before January, we can influence the political priority setting stages and solicit CSO feedback on the budget. Intervention prior to the actual start of drafting would affect the voting. Of course, we should also spend time thinking about our entry points to the informal side of the process (the school headteachers' meetings, the Mufti's son, etc.) and add those opportunities to the map. How exactly we will intervene depends on **the expected response** by decision-makers to our advocacy campaign and on the likelihood for them to support or oppose our proposals.

This leads us to the moment of constructing **a power map**.

POWER MAPPING

tells us how much support our advocacy case can expect from our allies and how much pushback from our opponents. The power map helps us assess each decision-maker's impact and their anticipated responses to our advocacy effort by visualising their influence in terms of direction (positive-negative) and strength (strong-weak).

To draw a power map, we will place the identified decision-makers within four quadrants, as illustrated below, according to their **strength** of influence (strong/weak) and the **direction** of their influence (positive/negative):

Power Map

Strength of Influence	Direction of influence: ◄ Positive	Direction of influence: Negative ►
Strong ▲	Opposition Party Bloc Head Education Committee Opposition Members Education CSO 1 (…)	Education Committee's Head Education Committee Ruling Party Members (…)
Weak ▼	School headteachers Mufti (…)	Communal Council President Education CSO 2 (…)

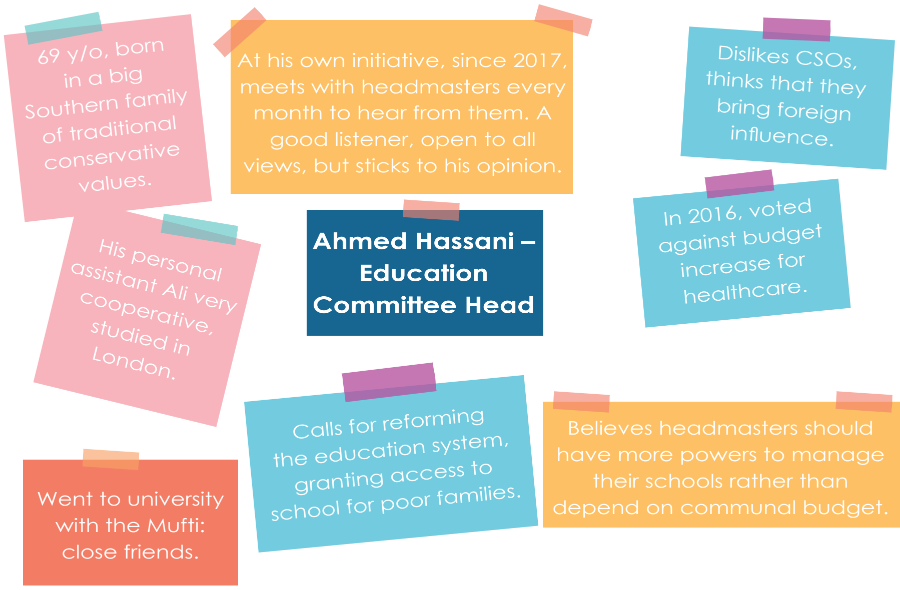
- The Education Committee's head and its members from the ruling party are against the budget increase – their influence is negative and strong. They have direct power over the voting. That is why we have placed them in the "strong negative" quadrant, marked in red. These are **the opponents** of our advocacy case – we will actively seek to **persuade** them through our campaign because they have the most power over whether we reach our milestone.
- In contrast, the opposition bloc's head and committee members are supportive of the budget increase, and their voice is strong. Therefore, we have placed them in the "strong positive" quadrant, marked in blue, together with one of the CSOs, which demonstrates strong support to the issue, and we expect that it will voice it during the planned consultation meetings. These are our **allies** — we will keep them actively **involved** in our campaign because their involvement is critical to its impact and outcome.
- The school headteachers and the Mufti are also supportive, but their influence over the decision is **weaker** than the opposition councillors and the CSO. We have put them in the light blue quadrant – "weak positive". The last quadrant, "weak negative", coloured in light red, is for stakeholders who disagree with our case, but whose influence on the budget voting is indirect or **limited**, such as the Council President and another CSO against the budget amendment. Our approach to the stakeholders in the "weak positive" and "weak negative" quadrants would be to **keep them informed**. We will only involve the "weak positive" stakeholders if time and opportunities are available because their importance to our campaign is secondary compared to the first two groups.

THE POWER MAPPING
exercise can reveal and help visualise hidden mechanisms of power and can give us ideas on negotiating and calculating campaign risks.

As a result of the steps outlined above, our initial list of stakeholders would become much more detailed and specific: we have filtered down our stakeholder audience; identified decision-makers (primary audience) and influencers (secondary audience); and figured out who of them are our allies and who – opponents. We can sum this information up into an updated list like this:

Updated Stakeholder List			
Name	***Position, Organisation***	***Decision-Maker or Influencer?***	***Ally or Opponent?***
Ahmed Hassani	Education Committee Head	Decision Maker	Opponent
Asma Khaleel	Opposition Bloc Head	Decision Maker	Ally
Mohammed Al-Jebouri	Council President	Decision Maker	Opponent
Aicha Ben Hassen	CSO 2 President	Influencer	Opponent
Ammar Hussein	CSO 1 President	Influencer	Ally

It can also be valuable to start forming profiles of these persons, containing any information that can give us more insight into how they make or influence decisions. One option for doing this is to put the person's name in the middle of a sheet and work out from there by adding bubbles with pieces of relevant information, as shown in the example below:



There is no limit to the information we can glean here, as long as the data are relevant to our advocacy campaign. The internet can be a great source along with insights by practitioners. Guiding questions for forming a profile include:

- Born in? Lives in? Tribe? Family?
- Age, faith, political affiliation?
- Friends? Business Partners? Donors?
- Colleagues, Advisors, Staff?
- World view/general philosophy?
- Policies s/he has supported/opposed?
- Generates her/his support from…?
- Motivation – who and what will move her/him to action?

Through the *Stakeholders and Power Mapping* worksheet templates, available in Worksheet 6.5, our planning team will identify the decision-making bodies and construct the decision-making process; list the complete set of stakeholders, draw a power map; and form profiles of the key players.

Access to Information (AIP)

In 2014, the Access to Information Programme (AIP) Foundation[1], a Bulgarian think-tank advocating for transparency and right to information, successfully impacted an amendment to the country's Law on Access to Public Information. The organisation adopted a soft, bottom-up approach to convince legislators. Its tactics prioritised public consultations and the drafting of policy papers to back the proposed amendments. First, AIP authored an annual report on access to information that included monitoring of institutions' transparency index. Next, AIP mobilised over 30 regional coordinators across the country — activists working in the media and CSO sectors — who then organised a cascade of five regional town hall meetings involving journalists, IT experts, bloggers, public-service officials, lawyers, and judges. Each town hall meeting debated if and how the law required amending. Organisers solicited recommendations for amendments and produced a memorandum at the end of each meeting. The consultations continued online. Once AIP collected all the suggestions from the public hearings and the online consultation, it systematised them into a policy document[2], which is presented to the policymakers at a national-level conference[3]. The documents produced as a result of the initiative were instrumental for the parliamentary committee's work. The amended law reflected many suggestions collected and presented by AIP.

1 Source: AIP's website.

2 Concept for legislative amendments – source: AIP's website.

3 News coverage of the National Conference – source, AIP's website.

3.3. TACTICS AND TOOLS FOR INTERACTING WITH STAKEHOLDERS

Now that we know who our decision-makers are, we need to select the tactics and approach for our advocacy campaign. We need to figure out how much pressure, and in what forms, we should exert to be heard. Do we want to prioritise behavioural change, awareness-raising, and participation in working groups on long-term amendments to a law, for example, or do we prefer to start straight by staging demonstrations and sit-ins calling for the government to resign? Our advocacy approach can be constructive; confrontational; or a combination of both, depending on the overall environment surrounding our issue:

Advocacy Tactics		
Approach	***What it Means***	***Examples of Tools***
Constructive	To collaborate with the decision-makers rather than see them as "enemies". To cultivate rather than ruin relationships.	Meeting regularly with decision-makers in various formats. Developing policy recommendations. Proposing solutions and strategies for change. Participating in public consultations on legislation. Speaking at conferences. Writing and disseminating research reports highlighting the issue and potential solutions. Participating in CSO coalitions (alliances) for voicing the issue and its solutions.
Confrontational	To exert pressure on decision-makers through adversarial means. To prioritise pressure through and criticism.	Organising public protests, demonstrations, marches, sit-ins. Launching petitions. Issuing media statements to criticise decision-makers.
Combined	To utilise constructive and confrontational approaches in parallel.	Interacting with the decision-makers on the policy development and consultation levels, but also organising public activities involving citizens who voice their dissatisfaction with the current situation.

To choose an influence strategy, we should try walking in decision-makers' shoes and understand what they think. To what extent do they comprehend the problem? Is it a priority for them? What is at stake? From what perspective are they seeing it? What are their beliefs and attitudes? For example, we are a CSO in a post-conflict country in the Middle East advocating for the respect of the African migrant workers' rights and their more effective integration into the host community. For us, improving the working and living conditions of the migrants is a priority, while the government may be reluctant to engage, claiming that the millions of internally displaced people are a more urgent priority than the migrants. Other decision-makers such as MPs may be willing to support solutions, seeing this as an opportunity to gain an advantage in the forthcoming elections. Companies employing migrant workers may see this from yet another angle; they can demand tax relief in exchange for agreeing to tighten the labour market regulations. In this situation, our audiences will perhaps be more likely to respond to a collaborative approach than to confrontation.

CHOOSING OUR ADVOCACY TACTICS requires understanding what our target audiences think about our issue and how they feel about the proposed solutions.

Our planning team should also discuss the answers to a set of strategic questions, such as:

- What reputation do we want to build for our organisation? What type of action best fits our vision, values, and desired image?
- Do the decision-makers know us personally? Do they consider us as friends, as adversaries or as experts? What type of relationship with them do we want to build in the long term?
- What type of behaviour would our identified influencers expect from us to support the campaign and be ready to take action — confrontational or constructive?
- What path will we take to mobilise our grassroots?

Often, using confrontational tactics in a campaign can seem effective for making our voice heard. Still, we should keep in mind that, over time, intense confrontation could limit our access to decision-makers, marginalise our organisation, and ultimately decrease our ability to influence. Well-established organisations that pursue long-term goals need to collaborate with decision-makers and, when the situation requires, sit down with them to work on solutions. If our stance is always confrontational, this would be challenging to achieve.

Some of the most typical **activities and tools for interacting with decision-makers** include:

Activities and Tools for Interacting with Decision-Makers	
Personal meetings	Regular communication with all levels of decision-makers to ultimately persuade them to act. This includes scheduling one-on-one meetings with policy-makers, legislators, and/or other officials and stakeholders.
Policy briefings and events	Presenting to decision-makers the facts and aspects of the problem, its impact on the affected groups, and the proposed solutions. This can include attending or convening public hearings, policy forums, and others.
Public meetings	Meetings at the community level that bring together citizens and decision-makers, so that they can hear directly from those affected by the issue.
Public gatherings	Decision-makers see affected groups publicly support the proposed solutions. Formats include rallies, marches, sit-ins, and demonstrations.

Activities and Tools for Interacting with Decision-Makers	
Roundtable discussions	The roundtable format allows decision-makers to hear directly from different stakeholders, including subject-matter experts, and thus make informed decisions.
Letter-writing/emailing initiatives and petitions	Advocacy campaign organisers mobilise constituents to send individual letters or emails to their elected representatives, urging them to act. Campaigns can also collect signatures on petitions — online or offline.
Campaign events	Advocacy campaigns usually organise larger events at critical milestones to mark their progress. For example, opening/closing conferences, network/coalition gathering, submitting a petition to parliament, etc.
Pledge cards	Advocacy campaigns can urge decision-makers to publically sign something to support the campaign or cause or make a pledge. Gathering expert testimony and statements of support from officials or celebrities can encourage public pledges from decision-makers.
Specialised literature	Advocacy campaigns produce documents in written form (available both in hard and soft copy) to describe the problem and the proposed solutions to educate decision-makers and the general public. These can include policy papers, recommendations, strategies, reports, surveys, distributed as brochures, leaflets, press releases, etc.
Media presence	Supportive stakeholders and influencers can give interviews and participate in TV debates and other media appearances to urge decision-makers to act. A media presence includes telling the stories of affected individuals through opinion pieces in the press, blogs, and social media. Solid media presence requires covering the campaign on the organisation's website and social media pages and maintaining consistent contact with relevant journalists.

Experience shows that **meetings with decision-makers**[1], although less visible than the other advocacy tools, play a crucial role in achieving our objectives. Meeting with decision-makers is where preparation meets opportunity. These are often brief moments – the officials are busy people and deal with many issues, not just our issue – so it is vital that any presentation is persuasive, inspirational and attention-grabbing. Often the MPs, councillors or ministers are not experts in the field of our advocacy issue (and they do not have to be – their job is to do politics). We should, therefore, be able to provide information and relevant data. The decision-maker should see us as a source of expertise that knows the problem's dimensions and how it affects the people in the field. This is where the policy briefs, elaborated based on the problem analysis, can help.

It is also helpful to prepare **talking points** for, and keep **meeting notes** from, every interaction with decision-makers. Documenting meetings is essential for following up. What did this person promise me when we last met a month ago? What exactly did we talk about? What progress did we achieve in the negotiation/persuasion? When preparing talking points, we can look up notes from past meetings in our database to refresh our minds about what has been said and decided. Usually, a team member is in charge of taking notes during the meeting and then enters the notes into the database.

Ideally, **each meeting should lead to something** — a commitment, a pledge, an agreement for tangible next steps. The reality is, of course, often far from that; we frequently get frustrated that this or that meeting has turned out to be a waste of time, or not

1 You can find more practical tips on conducting meetings with decision-makers in Worksheet 6.6 – Advocacy Tactics and Activities.

productive, or just "a meeting for the sake of the meeting". One way of tackling this is to be persistent and repeat several times during each meeting what commitment we expect from the decision-maker as a next step (Attend an event? Visit constituents? Raise the issue during a plenary debate? Invite us to consultations on a draft bill?). We should also articulate what we will do for the person we are meeting (Provide policy evidence? Bring more data? Summarise feedback from the affected? Organise a conference?). At the end of each meeting, always make sure to agree on how, when, and who will conduct the **follow-up action**: "OK, so my assistant will call your assistant early next week, right?" More generally, advocacy is about persuasion and negotiation, and these are lengthy processes. We should be prepared to hold many meetings, set realistic expectations for each and be persistent. Having many meetings is good for our organisation – they grant us access and exposure to the decision-makers' working environment. When we are consistently present, they will get used to seeing us and know the nature of our activities, and we will be able to establish more personal contact. We must, however, always make meetings worthwhile for those who agree to see us. If we do not, decision-makers will quickly stop taking our calls, let alone our meetings.

He For She – UN Women

In 2015, UN Women launched the #HeForShe movement[1] for the advancement of gender equality through involving men as defenders of that cause. The initiative seeks to change the stereotype of conceiving gender equality as a battle for women by women. In a widely circulated video, British actress Emma Watson, the UN Women Goodwill Ambassador, spoke about her own struggles and called upon men and boys to join the movement. Within 24 hours of its launch, #HeForShe saw an 82% increase in Twitter followers, a 305% increase in Facebook likes, and a 3,500% increase in Instagram followers. The hashtag created more than 1.2 billion conversations over major social media platforms. Within the campaign's first three days, it achieved the target of mobilising the first 100,000 men. The movement sought active support from political and business leaders. It organises regular in-person and online gatherings to welcome and engage new supporters joining the movement. The movement's approach is to highlight positive change and success stories that supporters bring. For example, in 2019, the world-famous Turkish football team Fenerbahçe joined #HeForSHe[2] and its president, Ali Y. Koç, commented: "We will start by cleaning our backyard first. Our players, technical staff, board of directors and all club members, including us, will be trained about gender equality. We aim to make our sports facilities family-friendly. Making this transformation a part of our DNA is not straightforward. Once we achieve this internally, we will then spread this cause to our entire community."

1 Source: He For She official website.

2 Source: He For She official website.

3.4. INVOLVING AND MOBILISING THE COMMUNITY

The engagement with the communities affected by our advocacy issue starts as early as the problem verification and analysis stage, as described in the previous chapters, through meetings with community leaders and ordinary people to understand the problem's impact and dimensions. It is important to continue reaching out to these groups and engage them in our advocacy effort, but also increase the number and scope of supporters to make the campaign more powerful. Community mobilisation enables people to feel ownership of the change – i.e. understand that they are playing a role in enforcing the solutions resulting from a collective, community-driven effort, and not simply an initiative "imposed by CSOs". Our choice of mobilisation activities would depend on the nature of the citizen groups. We need to identify:

- Who are they? Geographic location and type of region – rural/urban; dominant age/sex/education/employment categories; political and other affiliations connected to our advocacy issue.
- Who represents them: whom do they trust? Who are their community leaders? Are there civil society organisations that speak and act on their behalf? With whom could we seek cooperation? Which sources of information do they trust?
- Where are they reachable? – Where do they gather physically? Where do they gather online – which social media platforms, which groups? What are their interests: what topics do they discuss most?
- What is their understanding of the advocacy issue? – Do they have high, medium or low knowledge about the problem? Do we need to plan to raise their awareness and promote the understanding of the problem and the benefits of the proposed solutions, so that they can support the change?

COMMUNITY MOBILISATION
is the work of engaging constituents, partners and allies to come together and advance an agenda for change.

Some of the **activities and tools for community mobilisation**, such as public meetings and gatherings, campaign events, letters to decision-makers, and petitions are similar to those we use with decision-makers because we often target both categories in parallel. Following are a few additional ideas for grassroots-focused activities:

Activities and Tools for Community Mobilisation	
Distribute campaign literature to citizens in the grassroots communities	Hand out informational brochures, leaflets, and other campaign materials at tables/stands/booths located in central parts of the town and at public events. Alternatively, have canvassers walk in the streets and hand out materials directly to people passing by. Make sure that all this is allowed – if needed, secure the necessary permissions from the municipality or other organs.
Support and guide the grassroots-level campaign activists	Provide to those who will be organising campaign activities in the field everything they need: talking points/messages, scripts, templates, as well as useful contact information of decision-makers, influencers, and journalists. Provide briefings or training to ensure they know how to organise public events, handle citizen outreach, and educate the public about the advocacy issue.
Task your field campaign organisers with educating citizens on the campaign issue	If your target audiences in the field have insufficient knowledge about the advocacy issue, your local activists can conduct informal briefing sessions/meetings to educate citizens on the topic. Increasing the public's awareness can be particularly useful in campaigns that seek behavioural change.
Co-produce thematic talk-shows with local broadcasters	In many countries, traditional media outlets such as TV and radio still enjoy higher popularity than digital and social media. It is worth establishing a formal partnership with a local media outlet that is popular among your target audience for co-hosting a specialised programme, dedicated to your advocacy theme. For example, a weekly talk show on the community radio station that will host campaign activists, experts, and live call-ins by listeners. This broadcast can be an impactful tool for raising public awareness about your issue and for disseminating campaign updates.
Target popular social media platforms on the issue – drive supporters to engage online	Create dedicated campaign pages, groups and accounts on social media platforms that your grassroots like to use. Use these to post updates with specific hashtags and ask supporters to share comments or photos about their personal experience with the problem and to engage online in different ways. (More tips on online advocacy are provided in the following chapter.)
Organise thematic community meetings / dialogue sessions / town halls	Online-led campaigns have become increasingly trendy but the technology will never entirely replace "classical" face-to-face interactions. In-person activities remain a vital instrument for building your organisation's grassroots. Bring citizens affected by the problem together with their local elected representatives or other decision-makers. In many communities, the connections between elected officials and their constituents are often weak. Town hall discussions enable campaigners to speak directly with constituents and get authentic feedback.
Ask people to take action in support of the campaign	Initiatives urging the community to take action can be implemented both online and in-person, individual or collective, and should be easy to implement in people's everyday lives. A popular approach is to get people to write to their MPs – i.e. send out a personal electronic message to support a legislative amendment or sign a petition. Other examples include more creative initiatives such as: stop smoking for a day (healthcare), try to conduct your daily routines for two minutes with your eyes closed (solidarity with the people with visual impairments), turn off the electricity in your room on a specific day/hour (saving energy), clean up the local park from plastic bags (environment), donate a book to the local school's library (education and culture), etc.
Provide opportunities for active supporters to contribute as volunteers	In cooperation with local partners, create opportunities for your most dedicated supporters to volunteer — a more substantial form of engagement that goes beyond the "click-to-support" option. Such initiatives are about being a volunteer for a day/weekend/week at an institution that works in your domain. For example a rescue centre for animals, a public library, an integration centre for migrants, a company that delivers food to people with disabilities and the elderly.
Ask people to submit evidence for existing and for solved problems (encourage creativity)	Popular examples here include campaigns seeking better urban development to encourage citizens to send photos that illustrate unrepaired streets in their neighbourhoods or other "ugly" images that would be visible online for all to maximise the campaign's visual impact. Another option is to show contrast – illustrations of existing problems versus the situation when the problem is solved. Campaigns can organise these initiatives in the form of a competition where the most compelling photos win a symbolic campaign-related award.

Activities and Tools for Community Mobilisation	
Select the most appropriate visuals	The campaign's messages can be communicated visually in different formats, ranging from big billboards, posters, and handing out leaflets to smaller stickers that catch the attention in a more intimate, discrete way. For example, campaigns on sensitive topics such as domestic violence, human trafficking, civic liberties, racism, sexually transmitted diseases, etc. that seek to reach out to potential victims or persons at risk would prioritise small-size stickers on public transport and in bus stops to promote hotlines for those who need help.
Ensure constant and rapid response to those who contact you	Provide options for people to reach out to you as campaign organisers to ask a question, receive information/consultation, or share something on their minds. The campaign team should be easily reachable and rapid in responding to feedback that people give. The campaign should have "Contact Us" options such as email, phone number, messenger, or others. Hotlines that can guarantee anonymity are especially effective in campaigns related to violence, healthcare, or reporting corruption.

Town hall meetings or dialogue sessions are perfect opportunities to **use questionnaires** soliciting opinions by participants on our advocacy issue, measure their level of awareness about the topic, and test which proposed solutions they prioritise[1]. Participants can fill in a mini-survey as they enter the meeting hall and submit the questionnaires with their responses at the end of the activity. The questionnaires used for such formats are not a professional public opinion tool but a communication tool to engage the audience and demonstrate that people's opinions matter to the advocacy organisers.

Mobilisation is ultimately about expanding our network, which requires **tracking attendance and collecting contact information** of people willing to get involved or volunteer for the campaign. This may seem a minor technical element, but its importance is significant throughout all the advocacy activities. The CSO should find a technical solution for keeping contact information of people in an organised way through a database or a spreadsheet and create an internal protocol for managing the data – i.e., a system for processing **sign-in sheets from in-person activities**[2] such as town halls and conferences. It is essential to continue communicating with contacts we have in the database – by including them on our mailing list, sending them regular updates, newsletters, announcements of forthcoming events, etc.

Through the *Advocacy Tactics and Activities* worksheet template, available in Worksheet 6.6, our planning team will think through the profiles of the decision-makers and the grassroots supporters and, on that basis, select tactics and activities for the advocacy campaign.

1 A sample town hall questionnaire is provided in Worksheet 6.6.

2 A sample sign-in sheet template is provided in Worksheet 6.6.

Feed Supper

FEED[1], an upscale lifestyle brand actively engaged in charity and donates meals to needy people with every purchase, asked its followers and customers to collect donations from their friends by hosting dinner parties. Guests were encouraged to donate to the host's fundraising page to fight hunger. To help their supporters out, FEED even supplied a toolkit with paper placemats, decorations, name cards, hunger facts, and an Instagram-worthy banner, all designed to educate and inspire the guests. What FEED asked in return is that people use the #FEEDSupper hashtag when they shared images of their dinners. The campaign encouraged its supporters to collect donations through a community initiative — supporters invite their friends over for dinner, collect donations and then post their tagged photos online. Within a month, thousands were hosting dinner parties and spreading the word about #FEEDSupper. By the end of the campaign, FEED raised enough money to provide over two million meals for children and families in need. The initiative was such a success that FEED turned it into a year-round campaign. The purpose behind FEED's mission is outlined on their website: "*An enduring principle at the heart of what we do is that people's choices of what to buy and wear have the power to change the world. We offer meaningful ways for you to make a difference, from the bags you carry, to the places you gather, to the meals you share*".

1 https://feedprojects.com

CHAPTER 4

CHANGE
ADVOCATING

4. COMMUNICATIONS

4.1. CRAFTING A MESSAGE, THE MESSAGE BOX

This chapter's starting point is a recent real-life example from Europe. In the summer of 2021, the European Parliament passed a controversial regulation addressing the dissemination of terrorist content online[1]. The regulation seeks to prevent terrorists from spreading their messages, radicalise and recruit followers by requiring hosting service providers to quickly remove such content from social media and video-sharing platforms. Since it was first proposed in 2018, the regulation sparked fierce criticism by rights groups, who claim that it endangers freedom of expression. Before the proposal's passage in the Parliament, 60 human rights and journalist organisations wrote an open letter to the legislators urging them to reject the text, calling the rule "an automated censorship online". The free speech advocates' open letter below illustrates the typical structure of an advocacy message and the most common points it contains.

1 Regulation on addressing the dissemination of terrorist content online.

Message Example – the Civil Liberties Union for Europe [1]

Original Content	**Their Message Points**
Dear Members of the European Parliament, We are writing to you to share our concerns about the European Union's proposal for a Regulation on addressing the dissemination of terrorist content online. We urge the Members of the European Parliament to vote against the adoption of the proposal.	*Opening statement to engage their audience*
Since 2018, we, the undersigned human rights organisations, journalists associations and researchers, have been warning against the serious threats to fundamental rights and freedoms in this legislative proposal, especially for freedom of expression and opinion, freedom to access information, right to privacy and the rule of law.	*Presenting who they are and what they do; putting their mission and goals into words; stressing the existing needs and challenges*
Thanks to the work of the European Parliament's negotiations team, an extended debate and the involvement of civil society, a number of problematic issues of the proposal have been addressed during the trilogues between the European Parliament and the Council of the European Union.	
However, despite the outcome of the last trilogue negotiation, the final text of the proposed Regulation still contains dangerous measures that will ultimately weaken the protection of fundamental rights in the EU. It also has the potential to set a dangerous precedent for online content regulation worldwide.	*Presenting the problem and why people should care; providing examples of the problem's impact*
The proposed Regulation is headed for a final vote in the plenary of the European Parliament in April 2021. We urge the Members of the European Parliament to vote against the adoption of the proposal for the following reasons:	*Making their request: the "ask", the call for action, outlining the opportunity for a solution, and putting a name to the change they seek.*
1. The proposal continues to incentivise online platforms to use automated content moderation tools, such as upload filters (…) which cannot differentiate activism, counter-speech, and satire from actual terrorist content. (…) Platforms already remove massive quantities of content documenting violence in war zones, uploaded by survivors, civilians, or journalists, as tracked by the Syrian and Yemeni Archives, which can hinder accountability efforts; 2. There is a severe lack of independent judicial oversight (…) we believe that only courts or independent administrative authorities subject to judicial review should have a mandate to issue removal orders. The lack of judicial oversight is a severe risk to freedom of expression, assembly, association, religion and access to information; 3. Member States will issue cross-border removal orders without any checks (…) which does not contain sufficient safeguards against state overreach and abuse of power, and it won't solve disagreements among Member States over what constitutes terrorism, irony, art, or journalistic reporting.	*Providing proof of the problem's impact, including personal stories to illustrate. Providing arguments to support their vision of the issue's effects.*
We urge the European Parliament to reject this proposal, as it poses serious threats to freedom of expression and opinion, freedom to access information, the right to privacy, and the rule of law. Moreover, it will set a dangerous precedent for any future EU legislation regulating the digital ecosystem by distorting the law enforcement framework under the pretext of strengthening the Digital Single Market.	*Connecting the issue to the audience's values, concerns or self-interest, and highlighting the potential benefits.*
Therefore, the proposed Regulation on addressing the dissemination of terrorist content online as it stands now has no place in EU law. (Signatures)	*Reinforcing their values.*

1 Adapted from the original source: The Civil Liberties Union for Europe, March 2021.

A MESSAGE

is neither the campaign's slogan nor its title. It is an overarching positioning statement that brings together all the language that supports the campaign into a single framework or platform.

No matter in which form it is delivered — a letter, a press release, a poster, a media interview, a set of talking points for meetings with decision-makers, or others — the advocacy message will typically contain the same core elements or **message points**:

- The **problem** and the **proof/evidence** of its existence and impact from our perspective, ideally backed up with personal stories to illustrate people's **needs**. This message point also includes putting a name to the change we seek — i.e. stating **our vision** of how the situation around this particular problem should look like in the future;
- The **solutions** we propose, the specific **opportunities** to enact these solutions, and the **benefits** for the affected – i.e. linking the solutions to **the audience's values, concerns or self-interest**;
- The "**ask**" — i.e. our call for action, or what we urge the target audience to do. This message point includes **argumentation** about the decisions we want the decision-makers to take and the exact forms of support we expect from citizens.
- **Who are we** and for what are we advocating? This message point includes presenting ourselves, **our values** and world perspectives — the "**why this issue matters**" component. What are we working to accomplish through this campaign? (*For example – do we value freedom over safety and security? Do we see the EU Regulation as an instrument for keeping people safe from terrorist attacks or as an instrument in the hands of authoritarian governments for banning people from accessing specific content online?*)

We can structure these message points in any order we choose depending on what we want to stress for this or that specific audience or the purpose and format of the particular advocacy activity we are conducting. Below is a common message structure:

STEPS FOR CRAFTING AN IMPACTFUL MESSAGE

1. Open with a lead-in statement that gets the audience's attention right away;
2. Present the problem, whom it affects, and its impact in line with the campaign's goals and objectives:

a. Provide impressive facts and data that prove the problem exists to support your position;
b. Consider what stories the campaign is telling – vivid examples will put a human face on the issue;

3. Align the narrative to resonate with:
   a. The audience's feelings, values, attitudes, concerns, motivations, or self-interest – what benefits will this action bring them?
   b. Your organisation's values and mission;
4. Make the call for action: define the "ask".

Our message needs to be communicated to **two audiences**: the supporters and the decision-makers. The work that our advocacy team has accomplished so far through the worksheets in the preceding planning stages has already provided quite a lot of information about these two audiences:

Supporters should know who we are, what we stand for, and how they can contribute. Our message to the grassroots should be understandable, i.e. if we use very technical language, overloaded with legal terminology and complicated statistics, the grassroots, who have less expertise than the decision-makers, may get confused. Therefore, we need a broader initial message to engage them; then, we can further expand to those who have already become supporters with a more complex message.

Decision-makers have their specific feelings, sensitivities, concerns, and self-interest that will motivate them to act or prevent them from acting. We should conduct press reviews, i.e. research on the history and track record of how these persons have behaved (voted) and commented on the issue in public and through media statements and interviews. More specifically, we should conduct **opposition research**, anticipate arguments against our position, and prepare responses to those arguments in advance.

OPPOSITION RESEARCH

- Whose message is getting the most traction: those who speak in favour of the change, or those who want to keep things as they are?
- Know the opposition's talking points: scan their websites, social media channels, and media statements.

Coming back to the example of the open letter to the European Parliament, here are the short statements that three European officials made after the Resolution was adopted despite the CSOs' pressure:

Arguments For and Against	
Statement	***Decision-Maker***
"I strongly believe that what we achieved is a good outcome, which balances security and freedom of speech and expression on the internet, protects legal content and access to information for every citizen in the EU, while fighting terrorism through cooperation and trust between states."	*Legislator who opposes the advocacy (European Parliament)*[1]
"This regulation can indeed strengthen the position of authoritarians. European Pirates[2] as well as dozens of NGOs were pointing out the issue for a long time, but most political groups ignored our warnings. We are likely to see Europe undermine its fundamental values."	*Legislator who supports the advocacy (European Parliament)*[3]
"With these landmark new rules, we are cracking down on the proliferation of terrorist content online and making the EU's Security Union a reality. From now on, online platforms will have one hour to get terrorist content off the web, ensuring attacks like the one in Christchurch cannot be used to pollute screens and minds. This is a huge milestone in Europe's counter-terrorism and anti-radicalisation response."	*Representative of the Executive who opposes the advocacy (European Commission)*[4]

Often, the motivations and attitudes of decision-makers depend on their political affiliations (e.g. conservative versus liberal) or values (e.g. freedoms first versus safety first; more government regulations versus more free market), as well as on their level of understanding of the issue. There may be a need to dispel common myths or misunderstandings about freedom of expression, censorship and the fight against radicalisation. Rather than telling people they are wrong, we should try to reframe the issue with information that will gain their interest. For example, stress the risks for depriving citizens of news content online, highlight the increasing incidence of content removal orders, or explain the lack of judicial oversight.

Our advocacy campaign should develop a consistent core message that we will repeat over and over to the target audiences. In practical terms, this would mean to assemble all the information in our heads and from our worksheets elaborated so far and organise it per theme. Having everything organised systematically in a message platform will allow us to easily pull out the most relevant bits and pieces to tailor our message ahead of an activity, a media appearance, or another form of interaction with our audiences. To organise the message points by theme, it is common for advocacy organisers to create a message platform in the form of a box, divided into four squares or quadrants.

1 MEP Patryk Jaki (ECL, PL), source: EP's Website.

2 The European Pirate Party was founded in 2014 as an anti-establishment movement and has now four MEPs.

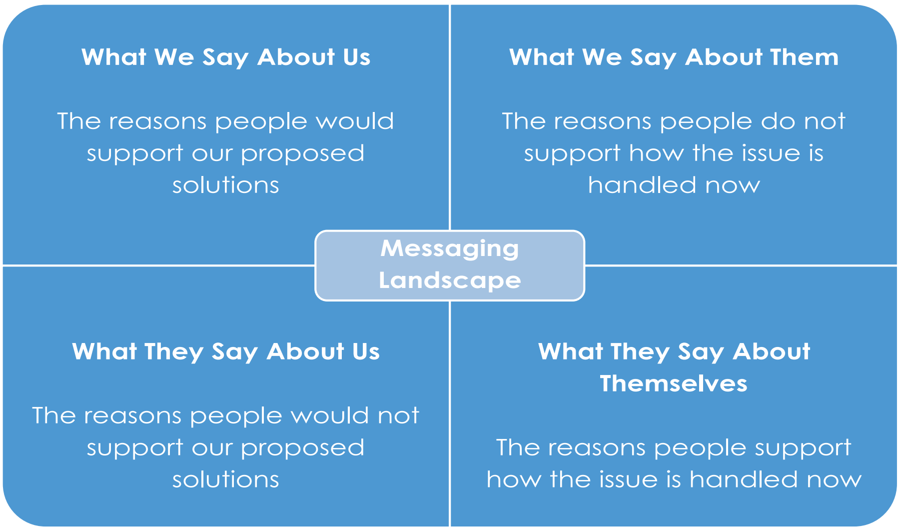
3 EP Vice-President Marcel Kolaja, source: MEP Patrick Breyer's Website.

4 European Commission Vice-President Margaritis Schinas, source: "EU Reporter".

THE MESSAGE BOX

is a communication tool that helps craft our message by organising all the right language surrounding the advocacy issue into a consolidated grid. The message box allows the advocacy communication to remain consistent: it keeps us "on message".

With the message box, we can map out the messaging landscape surrounding our issue, including the clear contrasts between our positioning and our opponents. Even if there are no apparent "opponents" to a proposed solution, there are often unspoken positions that stand in the way of success — these can be simply decision-makers who currently handle the issue and are not eager to change their approach. Crafting a message box will help bring those barriers to the surface. It actually is a simple square with four separate quadrants, each of which covers a specific aspect of the debate between the organisation that defends the advocacy goal and their loudest opponents:



The two quadrants at the top of the box — "What We Say About Us" and "What We Say About Them" — are **what we are saying** in our campaign:

- "What We Say About Us" focuses on the message we have already constructed based on our research, values, strategy and what we want citizens and decision-makers to think and feel about this issue.
- Next to it, "What We Say About Them" is what we might choose to say about the current situation and the way decision-makers handled it — essentially their weaknesses and vulnerabilities, and the reasons why we are challenging them.

The bottom half focuses on **what the opponents to our campaign are saying**:

- In the "What They Say About Us" quadrant, we list how those who disagree with our solutions, or prefer the status-quo, typically describe our weaknesses and vulnerabilities.
- In the final column, "What They Say About Themselves", we list how they typically speak about themselves — their strengths, values, and what they want citizens to think and feel about how they currently handle this issue.

The message box will help us test our message for contrast to highlight what makes our proposed solutions different and a better choice vis-a-vis the current situation. More practically, the message box gives us the "cheat sheet" for advocacy meetings, public events, interviews, and media appearances: it is the place we bridge and pivot back to from hard questions and damaging frames.

Once we have a solid message box developed, we can further **distil our arguments** and prepare a set of messages that will resonate with decision-makers, capture the media attention, and generate grassroots support. Let us consider the following categories:

- **Problem, Challenges:** A clear statement of the problem we are trying to address so that everyone can see their stake in addressing the issue. What language will people use to oppose or undermine the campaign? What language can we use to put people at ease?
- **Solutions, Benefits:** The solutions we are proposing and the outcomes the solutions will achieve. What are the benefits for the people from our suggested solutions?
- **Values, Needs:** These are the answers to the "Why this matters?" question. Which needs of the people does the solution address? Which social values or norms exist in society that support the proposed solution?
- **Vision, Action:** Our vision for the community, state, society. A sense of purpose and goal that drives us to seek the change for which we are working. Our aspiration and inspiration. What is our request for action to decision-makers and citizens?

Here is how this can look like in a real-life advocacy campaign:

Example: Emergency Housing and Homeless Assistance (2013)[1]

Problem, Challenges	**Solutions, Benefits**
The economic crisis is still being felt by too many Oregonians. Prolonged unemployment means that too many of our families and neighbours can't afford to pay their rent and may experience homelessness. They need critical assistance. Too many Oregon families don't have personal safety nets to protect them during these times. • Today, too many Oregon families have to choose between paying rent or putting food on the table. • Today, too many Oregon families struggle to pay the rent and keep food in their fridges. • More than eight in ten Oregon families with the lowest incomes pay more than half their income for housing. • Last school year, nearly 20,000 school children in Oregon were homeless at least once during the school year, and nearly one in four Oregon children lived in poverty in 2011. • A worker earning minimum wage in Oregon had to work more than ten hours a day, seven days a week, just to afford the rent for a two-bedroom apartment in Oregon. • The Emergency Housing Account and the State Homeless Assistance Program do work: a recent audit shows that of each $10,000 we spent helping people meet their basic needs, only $2 of it was found to be questionable.	Ending and preventing homelessness for families and individuals should be a high priority. We do have proven and effective mechanisms that can respond to the needs – the Emergency Housing Account and the State Homeless Assistance Program that work across Oregon. With restoring funding to 2007-2009 levels, we will help people experiencing homelessness and families needing emergency rent assistance. • We have two programs that provide short-term assistance to help prevent or end homelessness. These programs also help people fleeing domestic violence to quickly enter safe, stable housing. We need more stable funding to keep people in housing. • We need to make sure that programs that help provide the basics — housing and food — are fully funded. • Programs addressing homelessness in Oregon do work: periodically, they are audited to ensure they are being managed well and that benefits are being delivered accurately to eligible applicants. As you can imagine, these systems have been under considerable strain as many more people have needed assistance. The recent audit by the Oregon Health Authority has done what it is supposed to do: highlight areas where the system can be improved.
Values, Needs	**Vision, Action**
We believe in an Oregon where families and individuals live in healthy communities and have opportunities to succeed in life. We believe that housing provides children with an opportunity to succeed in life. We believe in an Oregon where we pull together as a community during hard times. • Fortunately, here in Oregon, there are safety net systems that help people meet their basic needs: to help them put a roof over their heads or put food on the table. These systems are efficient.	Everyone deserves a safe place to call home. We believe in an Oregon where families and neighbours are supported in times of crisis and given opportunities to contribute. • The Legislature should restore funding to 2007-2009 levels, plus inflation. • Hard Working people should be able to afford housing and still have enough money for groceries and basic necessities. • Children deserve an opportunity to succeed in school and life, which is tied to having a stable home. • Housing gives people an opportunity to build better lives. To succeed, you need a place to call home. • It is only fair that everyone has a safe, decent place to live.

In Worksheet 6.7 – Messaging and Communications, we can see a practical example of how these message points can be tailored to fit into a testimony in parliament that an advocacy group representative can make on this topic, and in a letter by a grassroots activist, urging their legislator to support the legislative amendment for grinding funding to the homeless assistance programme.

1 Adapted from original source – Oregon Housing Alliance, an advocacy group that works on addressing the housing needs of citizens of Oregon, USA.

Postcards from the Future

#PostcardsFrom2050, led by Concord Europe[1], is an advocacy initiative that urges people to imagine that they are in the middle of the century; to draft a short, positive text about the impact of important decisions made 30 years before, i.e. in 2020; and to send it through a postcard to an EU official. This creative storytelling campaign focuses on the EU's recovery plan: "*Imagine the world that is possible if our leaders take action now to create a future of equality!*" The objective is to demonstrate that European decision-makers must make important decisions about the world's future to secure universal access to public health systems and social protection, tackle inequalities and the drivers of climate change, build sustainable and inclusive economies, and make people-centred decisions.

4.2. STORYTELLING

Much of the communication in modern advocacy is about putting forward the personal stories and examples of the groups affected by the issues we are working on or benefitting from the proposed solutions. As in the advertising industry, the **storytelling approach** in advocacy provides direct, visual evidence of our key messages and affects the audience's feelings. The power holders base the decisions they make on facts and proof. Our advocacy planning work so far supports precisely that aspect, but emotions that connect with their values and beliefs can also trigger a decision. Our grassroots, too, can be intrigued by our issue if we show them authentic stories or witnesses that best speak to our case. Initially, people may see our issue as distant, complex, too technical or having little relevance to their lives. However, once they see stories that provide context, they will realise the issue's relevance and be more willing to engage and support.

STORYTELLING

An approach that goes beyond the facts and works in a dramatic narrative to engage a wider audience. The stories paint a visual picture and add to the answers to the question "Why does this matter?" The more our audience can relate to our message, the more likely they are to take action.

1 CONCORD is a European confederation of relief and development NGOs with more than 2,600 members. Source: Concord's website.

Many organisations collect and share stories that, for example, **connect policymakers to the personal impact** that a broken system is having on people. Consider an example from Great Britain below that uses storytelling to influence decision-makers:

Keep Families Together – Scrap the Minimum Income Requirement Campaign (The Joint Council for the Welfare of Immigrants, United Kingdom, 2020)[1]

- **Issue, Message:** All families belong together, and nobody should be separated from their loved ones because of what they earn. But current rules keep thousands of families apart and restrict everyone's right to love. These rules stop British people who earn below £18,600 from living here with a partner from outside Europe. They keep people from their loved ones and hold back families who are desperate to build a life together, work and raise children. That's why we're fighting for change.
- **Text and Audio** – The story is published in text and audio – a shareable Soundcloud link – together with Laura's picture. At the bottom, there is a "Take Action" button that allows readers to connect with the advocacy organisers:

Laura's story

Laura and her 2-year-old son Elijah live in Rugby, a small town in Warwickshire. Her partner Biniyam, father to their little boy, is stuck nearly 4,000 miles away in Addis Ababa, the other end of a crackly phone line. Elijah is growing up without his father, a father who is desperate to be with the family.

- "This policy is an attack on people on a lower income, and does not reflect the country I know and grew up in – and it certainly does not reflect British values."
- "I understand that change won't happen overnight. But we want to be a family, and nothing will stop us."

Why? Laura's work with a small charity earns her less than £18,600 a year, putting her among the 60% of women in the UK who don't earn enough to fall in love across borders.

- We believe that no family should be kept apart because of its income. Let's work together to demand change, and help families like Laura's build a life together.

- **Video Example** – A two-minute video with subtitles is published on the organisers' website and shared through their YouTube channel. The video's first part presents the advocacy issue with key facts and stats. The second part features two personal stories in the form of quotations – Tasha, a former nursery worker, and Temi, a medical assistant. The video ends with the campaign's value messages and a call for action.

1 Adapted from original source: website of The Joint Council for the Welfare of Immigrants (2020).

In other cases, the objective of telling a story can be to mobilise support. For example, in 2021, the US-based Fair Immigration Reform Movement (FIRM)[1] created a video about families being torn apart because of "the injustices" of America's immigration system as part of the #WeAreHome campaign against xenophobia, anti-Blackness, and Islamophobia[2]. Under the *slogan Together, we can hold this administration accountable*, the organisers urged their Facebook page viewers: "watch and share our video with five of your friends today to show them that, together, we can change immigration in this country."

Yet another approach is **to show success stories rather than problems**. In 2019, a CSO[3] implemented a project to boost social acceptance of and tolerance to the integration of migrants granted asylum in Bulgaria. The objective was to showcase stories of successful integration and to decrease the negative stereotypes in society by demonstrating how immigrants can contribute to the host society regardless of their skin colour and faith. This six-minute documentary features the story of 23-year old Mohammed from Palestine, who fled from the war, settled in Europe in 2016, and became a basketball coach. Mohammed speaks about what happened, how he felt, and why he feels at home.

STORYTELLING

- Connects policymakers to the personal impact of broken systems on people.
- Mobilises support.
- Showcases success stories.

TO USE STORYTELLING

- Identify authentic storytellers.
- Produce videos with available free software.
- Test the videos online.

If we want to use storytelling in our campaign, we should first identify the storytellers. We can make **a list of people and groups** – real people from among our grassroots supporters but not professional actors – who can illustrate our issue from various angles and are willing and able to speak up. This list of names and phone numbers should be kept handy as part of our plan. Additionally,

1 Fair Immigration Reform Movement (FIRM): a national coalition of grassroots organisations fighting for immigrant rights.

2 Source: #WeAreHome Campaign's Website. The campaign urges the Biden-Harris administration and every member of the US Congress to take immediate action "to protect all immigrants who call this country home".

3 Source: European Institute Foundation's YouTube channel, Bulgaria (2019).

we can collect testimonials online from users through our website or Twitter account.

We can bring storytelling and witness statements to life through social media, video-sharing platforms, and websites. If the budget allows, we can get our most important videos produced by a professional company. However, the available free software in our smartphones **allows in-house filming and editing** with decent quality. In those self-made videos, we need to make sure to include the campaign's logo, website address, contact information, subtitles, and music background or sound effects. Voiceover is rarely necessary; we can limit it to the clip's intro and outro if we use it. **The script**, which should be short, can be conveyed through subtitles, including a few eye-catching figures or statistics to support the topic, as seen in the examples provided. The narrator will be the storyteller — our hero, filmed in her or his natural surroundings.

We can also seek **media partnerships** with friendly TV and radio stations. If they are interested in covering our advocacy topic, we can provide them with contacts of eager people to tell their stories.

4.3. COMMUNICATION STRATEGY AND CHANNELS, TARGET MEDIA

Once the messages are defined, our advocacy planning team should decide how we deliver them to our target audiences. A **communication strategy** defines our campaign's overall identity, level of visibility, forms of offline and online presence, and core communication channels it will use to interact with its audiences, including social media groups, public gatherings, meetings in institutions, etc. All these elements should reflect the nature and specificities of our target audiences and our organisation — much of this information is already available from the preceding planning phases and can be summarised in the following way:

Communication Channels		
Target Audience	***Messages***	***Channels***
Decision-makers	Key campaign messages to them: ...	Communication channels: ...
Influencers	Key campaign messages to them: ...	Communication channels: ...
Grassroots-level audience	Key campaign messages to them: ...	Communication channels: ...

At this point, we can add one more layer: identifying our messengers and storytellers by having a closer look at the influencers and the grassroots supporters:

<table>
<tr><th colspan="2">Messengers and Storytellers</th></tr>
<tr><td>People pick up on signals such as who stands beside us at a press event or who joins our coalition. Who could serve as our messengers?
• The influencers, community and opinion leaders, issue experts, champions of change …</td><td rowspan="2">• Identify messengers and storytellers by name and clarify their potential roles throughout the campaign.
• Plan for reaching out early enough to ask them to take on the desired roles.</td></tr>
<tr><td>Among the grassroots audiences are also our storytellers – the faces of people who can tell personal stories about our issue:
• Who are they?
• How can their peer groups be influenced in-person and online?</td></tr>
</table>

Below are listed the building blocks of our communication strategy – these points are both of strategic and of practical importance and will require decisions by our advocacy planning team:

Name and slogan:

- These can come at the very end of the planning process or sometimes at the very beginning. In general, they should stem from the campaign's messages, objectives, and goals. Be creative and come up with something catchy, similar to the various examples from around the world, presented in this toolkit.

Level of visibility:

- It depends on the tactics and the types of activities we have chosen. It can be a quiet, insider campaign, or a public effort with a louder tone; standing for or against; being provocative (aggressive, confrontational) or reassuring (soft).

Visual identity and materials:

- The campaign will need a branding logo with predetermined colour(s) and fonts. If only one organisation is conducting the campaign, the branding is that of the organisation. If we run a joint campaign with other organisations, we will need a common visual identity.
- We will need to decide about the scope and types of campaign materials. Apart from statements, press releases, policy briefs and canvass questionnaires, will we use posters? Brochures? Petitions? For each type of material, we should produce a master template so that the campaign sticks to its visual identity.

Offline/in-person presence:

- We should confirm the types of in-person activities we will conduct, such as town-hall meetings, one-on-one meetings, consultations, sit-ins, conferences, engagement events with grassroots volunteers, etc. What else?

- What will be the proportion of in-person activities versus online presence?
    - When making this decision, we should consider the COVID situation, the security realities, and other country-specific aspects – what is doable, what is allowed? as well as our staffing and budget realities.

Online presence:

- **A website** should be the campaign's core reference point, or "official meeting point" on the Internet. **Social media accounts** will play the role of campaign vehicles, but they are auxiliary. The primary information hub is our website. All the content shared through our accounts in social media and video-sharing platforms will originate from our website through hyperlinks to increase traffic to the website.
- It is not always necessary to create a separate website for each advocacy campaign — we can use the organisation's homepage and have a special section dedicated to the campaign. Having a solid homepage is a question of reputation for every organisation, especially if it values transparency, accountability, and access to information. Before launching the campaign, we should put efforts into building or strengthening our website as a primary hub and make sure it contains:
    - **ALL** the information **about our organisation**: who we are, what we are doing, what we believe in, our team, contact details, mission, vision, reports, news, profiles on the social media, etc.
    - **ALL** the information **about the advocacy campaign**, located in a section called "Our Campaigns" or "What We Do". The campaign's vision, mission, values, goals, objectives, briefing documents, policy reports, statements, etc., should be made available on the website, ordered nicely, and searchable. Feedback options such as "Contact Us", an action form such as "Click-to-Engage", and an option for joining such as "Subscribe" / "Become a Member" should be located centrally on the page.
- Our choice of **social media platforms**, in which the campaign will be active, should reflect the platforms in which our target audiences are engaged.
    - Consider assigning people in charge of managing the website and social media accounts to do ongoing content updating and filtering/responding to comments.
    - The toolkit's following sections focus in more detail on online advocacy and software.

Media presence:

- We should decide on the focus and frequency of our outreach to media and journalists throughout the campaign and – importantly – on what is shareable with the media and what aspects of the campaign should remain confidential. For example, we may prefer to not publicly expose aspects of our negotiations with decision-makers. How many press conferences? To which events will we be inviting journalists?

- Make a list of media outlets and individual journalists, whom we will actively keep informed about and engaged in the campaign;
- Plan for drafting and disseminating regular press releases[1] to provide updates on the campaign's achievements and milestones.

COMMUNICATION STRATEGY TIPS

- Confirm communication channels for target audiences.
- Identify campaign's messengers and storytellers.
- Build your website to become the campaign's official online hub.

Part of the work in an advocacy campaign is to systematically follow the news and the media coverage in our domain. To **get the media to cover our issue**, we must present it in a way that meets the needs of the media, and be true to your own priorities and values. Just because a story is "worthy" does not mean that it is "newsworthy". News travels faster than ever; most of the "breaking news" is now reported first on social media and the amount of bad information is exploding. As an advocacy organisation, our opportunity to attract the media's attention is by **showing less visible, less vocal perspectives** on the significant problems in society. Journalists generally do not have the time to do in-depth research, so they appreciate organisations and individuals who give them reliable insights that reveal unexpected voices or less overexposed angles of a story. We are more likely to get coverage if we are **field-oriented** rather than inviting the media to "conventional, CSO-style" activities, centred around "boring" words (clichés) such as projects, objectives, outcomes, target-groups, conferences, discussions, roundtables, or any others of this kind. The "project language" must be translated into stories!

More and more often, **the media are dependent** in their editorial choice on their owners' interests, political and economic affiliations. Therefore, we should not expect that the media will tell our story the way we think it should be told, especially if our story is about topics that are sensitive for the media. If we are an organisation defending freedom of expression and we claim the media are not free, then the media are not just covering our work — they become a stakeholder. Still, a biased reportage is

1 A sample press release is available in Worksheet 6.7 – Messaging and Communications.

better for us than no reportage at all. If viewers, listeners, and readers are intrigued by our topic – even if the coverage is negative – they will look us up in Google and find on our website the full information, presented from our perspective. To this end, as explained earlier, we should make sure that our **website** is solid and that the search engines will list it, so that readers can easily access it.

MEDIA RELATIONS TIPS

- Build relationships of trust with reporters covering your field.
- Provide new perspectives, opinions that are not overexposed.
- Ahead of interviews, prepare a list of anticipated difficult questions and their answers.
- On topics about freedom of expression, the media are not just providing coverage — they become stakeholders.

It is essential to build good relations with the individual reporters who cover topics related to your work, including **international media and foreign correspondents** and develop a list of contacts. We are very likely to convene at least a few press conferences during the campaign, so having a contact list will be helpful. In between **press conferences**, we must keep all the journalists informed of campaign-related news and events by sending **press releases**, through which they can follow our campaign's progress. Meeting **informally** for coffee for chats to discuss updates is also beneficial to building trust with reporters, editors, and producers. Another more formal approach is to organise **tours and visits**. For example, take journalists to visit communities affected by the issue to interview individuals and take pictures. Perhaps the tour could have decision-makers travelling with the journalists too.

When **participating in media programmes**, debates, or interviews, we should anticipate difficult questions and criticism. A good way to prepare for reacting adequately to such situations is by writing, in advance, a list of **potential "hard" questions** and their answers in line with our message box.

4.4. ONLINE ADVOCACY

In today's world, literally, every advocacy campaign has a presence online – social media, blogging, email. Twitter and Facebook are the most frequently used channels by advocacy organisations, followed by LinkedIn, Youtube, Instagram, and Tik-

Tok. No matter how active and experienced we are online, we cannot achieve success in our campaign if we entirely neglect the in-person side. One-on-one meetings with decision-makers and influencers, events with grassroots, or even sit-ins, protests and marches still have as much impact as they once did. The key is to have the digital and traditional presence work together and be organised in such a way so that they can bolster each other. Social media provides an opportunity to reach **more people** who think alike and thus amplify their voice. Hashtag activism helps people unite over a common issue. Knowing how to take our cause online can determine the campaign's overall reach and impact.

Our campaign can use social media to provide **a common platform for sharing stories**. Many people out there are experiencing the same problem and would have the courage to share, provided that someone takes the lead and triggers a conversation. Twitter gives them a place where they can be heard and get a response.

Why I Stayed

A movement that helps and rallies for women in abusive relationships, called "Why I Stayed", started in 2014 from a popular hashtag, #WhyIStayed[1], about why the victims of domestic violence cannot just leave. Beverley Gooden, an author, started a debate on Twitter[2] and told the world her story as a survivor of domestic violence. She spoke about why 'just leaving' is not so easy for someone in an abusive relationship. The #WhyIStayed hashtag sparked a floodgate of tweets from women all over the world. They came together and shared their personal stories online. #WhyIStayed became one of the top 10 hashtags that started a meaningful and long-lasting Twitter conversation: in 2018, the initiative expanded by adding new hashtags such as #WhyILeft, #AndSoIStayed, and #AndSoILeft.

1 Source: Wikipedia.

2 Tweet Link.

Social media can help our campaign with **quicker turnaround time** – encouraging users to respond quickly to calls for action — i.e. introducing an element of urgency to act before time passes. It can be particularly effective for campaigns that demand a rapid response and for situations that need real help before they get out of control.

Last Selfie

The World Wildlife Fund (WWF) ran a campaign on Snapchat, called the #LastSelfie[1],for people worldwide to share selfies of animal species in danger of extinction. Each message would be on the platform for only ten seconds, but before the messages fade, WWF would urge the user to share it, adopt an animal, or make a donation. The key to the campaign is that the images were viewable for only 10 seconds and before they disappeared, users had to act – either re-share, donate, adopt the animal, or help in other ways for the cause. The campaign highlights that time is running out for endangered species, creating an emotional impact in viewers' minds, as if the animals were telling them, "Don't let this be my last selfie". #LastSelfie became an active awareness and donation channel. After one week, 50% of all active Twitter users were exposed to the campaign globally, and WWF hit its monthly donation target in just three days.

Although social media is great for creating awareness and engagement, we should remember that social media does not allow us to reach out to non-supporters and convince them. People exposed to our content are already supporters since social media **algorithms** show users content based on what they like — they live 'in a bubble' that only echoes their thoughts. Another typical **downside** is that **it is hard for some causes to get heard** on social media. Some of the hashtags are too overused and trolled, so it is quite tough for organisations to cut through the excessive content unless they have a social media expert on their team. It is also **challenging to measure the impact** social media has on a cause. Measuring likes, shares and comments is all good, but this does not tell us which channel had the most impact in boosting attendance for an advocacy event.

1 Source: #LastSelie campaign page.

Twitter and Hashtag Tips[1]

- The best way to get followed on Twitter is to follow first: follow activists and reporters. Utilise Twitter often: communicate where you will be and your thoughts on news and information.
- The hashtag is a way to categorise a tweet to a specific topic, e.g. #Jan25 #socialmedia #EgyptElection.
- Hashtags can drastically boost engagement in your social media accounts and increase your visibility in Google search results if someone searches for that hashtag.
- Keep the hashtag short, simple, memorable, and tap into a feeling of personal connection with supporters.
- Look at hashtags included in the most popular posts or posts from other organisations you follow and join the conversation by using those tags in your own posts.
- Include hashtags as part of your message: "You can #sign the petition by clicking the link".
- Create customised hashtags for an event or campaign name: #MediaFreedomOrg2021TownHall.
- The maximum number of hashtags allowed on Instagram is 30. Engagement decreases after 11 hashtags.
- Tweets with no more than two hashtags increase engagement by 200% and are 55% more likely to be retweeted. The same trend is valid for Facebook posts.

4.5. ADVOCACY SOFTWARE

Advancements in technology are increasingly transforming how advocacy groups organise and conduct campaigns. Advocacy software helps campaigns reach their true online potential. For example, we can use advocacy software to create a movement, send updates on policy issues, use email and social publishing to coordinate protests, marches, or other events, and use event registration tools to drive participation and commitment.

However, all this is **not free**; there exist different providers of advocacy software platforms. Purchasing and training our team on how to use such software is an investment of time and money. An important consideration here is whether we can find a platform that fits our organisation's needs.

1 Adapted from Ultimate Guide to Hashtags, Quicksprout (2019).

Below is a list of features advocacy software can provide campaigns. Remember, we can also achieve the following with free-of-charge applications, tools and platforms, available online. If you are enthusiastic about embracing technology, we encourage you to seek advice from peer organisations and colleagues who have successfully integrated technology in their advocacy work, and you can start with small steps by following their example.

- **Online petitions** – Advocacy technology allows us to disseminate our petitions to a virtually unlimited audience, and signing takes just seconds. Software can insert the names of signers automatically and then send each of them follow-up emails to inform them about our cause and engage them further.
- **Messaging** – Software solutions can enable us to send automatic messages or letters to decision-makers, keep track of the correspondence sent (who sent it, did the recipient receive it, etc.), as well as send action alerts (i.e. instant messages, announcements, instructions, or other updates) to our advocacy team members that show up directly on their mobile devices.
- **Click to call** – This application enables supporters to make direct phone calls to their legislators with the click of a button. This gives supporters the exact person they need to reach, without having to go digging for contact information.
- **Social advocacy** – Software allows us to craft and schedule messages on social media platforms like Facebook, Twitter, and LinkedIn. We can post messages that enable our supporters to tweet or Facebook-message their legislators directly from our post. We can add social sharing buttons to our online petition forms or thank-you emails to encourage supporters to share our campaign details with their friends and family. Software also helps recruit supporters online and do supporter segmentation.
- **Content management** – This means to manage our content across all social media networks, i.e. organise, plan and post content as needed.
- **Campaign organisation** – Various tools can be used to store data, generated throughout the campaign, and be able to track data and analyse progress, including to create events and track registration all within one system.
- **Research** – Software can allow automatic research of opposition to our advocacy issue or creating lists of elected representatives per district.

Through Worksheet 6.7 – Messaging and Communications, our planning team will craft campaign messages by utilising the message box; identify communication channels for the target audiences; draft a communication strategy; and identify messengers, storytellers, and journalists to be engaged.

Public and Commercial Services Union (PCS)

The Public and Commercial Services Union (PCS), the United Kingdom's most prominent civil service trade union, used special software to collect 100,000 signatures on a petition urging the government to raise the civil servants' pay. In the first few weeks, PCS's activists collected 60,000 signatures through traditional methods such as phone calls and emails, but after that, the petition plateaued. So, the organisation purchased peer-to-peer texting software from a commercial provider and secured 10,000 signatures in just one day, easily reaching their target of 100,000 in the following days, thanks to the high response rates of texts.

CHANGE

CHAPTER 5

ADVOCATING

5. PLANNING

5.1. LONG- AND SHORT-TERM PLANNING. INTERNAL ORGANISATIONAL CAPACITY

An advocacy campaign is never a one-off initiative; it is a short-term action designed for a specific moment or opportunity within our organisation's larger change strategy. Advocacy planning is about developing our long-term vision and short-term campaigns that lead us to achieve our bigger goals.

ADVOCACY PLANNING

The **long-term** vision reflects where we are, where we want to go, and how we can go there.

The **shorter-term campaigns** are specific plans with activities to influence one or another aspect of the policy environment/ public opinion around our issue.

Here is an illustration of how a campaign fits into the larger context of the missions and values of an organisation:

An example, adapted from Reporters Without Borders (RSF), 2020:		
Campaign	**Activities**	**Values**
#Tracker_19 – live updates of Covid-19 impacts on press freedom "Tracker 19" is a tool named in reference not only to Covid-19 but also Article 19 of the Universal Declaration of Human Rights. This project aims to evaluate the pandemic's impacts on journalism. It will document state censorship and deliberate disinformation and their impact on the right to reliable news and information. It will also make recommendations on how to defend journalism.	• We provide information about the media freedom situation worldwide; • We mobilise public and government support by means of eye-catching protests and awareness campaigns; • We protect journalists and bloggers in danger; • We put pressure on governments and organisations; • We train – new media, media independence.	• Guaranteeing all the freedoms; • Guaranteeing human dignity; • Promoting democracy; • Promoting development; • Guaranteeing individual capacities.

Planning for political and social change is more complex than putting a set of activities that lead to a straightforward measurable result, such as building schools, providing health services, or cleaning public parks. Advocacy planning needs to be strategic for achieving our short-term objectives – for example, tracking state censorship during Covid-19 and producing recommendations on defending journalism – and our long-term vision for social change, such as guaranteeing civic freedoms and human dignity. This means that, after every action or campaign, we should adjust our tactics in planning our next step. At each stage, we learn more about our issues and how policymaking works, and this new knowledge informs our next step. In other words, **planning and doing advocacy happen side by side**.

In this planning phase, our team should assess the organisation's level of preparedness for advocacy to figure out if it would be necessary to seek partnerships with others to form an advocacy coalition. We will look inside and explore the internal "climate" surrounding our future campaign. Here is a basic **capacity evaluation checklist** – a full version that includes guiding questions is available in Worksheet 6.8 – Organisational Capacity and Partnerships, Team, and Timeline:

Internal organisational Capacity Checklist			
Category	***Discussion Points***	***Strengths, Assets***	***Gaps, Needs, Challenges***
Capacity	Capacity to mobilise grassroots-level supporters		
	Relationships with decision-makers		
Experience	Organisation's profile: research, fieldwork, providing services, capacity building, etc.		
	Expertise in legislation		
	Expertise in politics and decision-making processes		
	Expertise in media and public relations		
	Expertise in conducting polling/public opinion research		
Reputation	Mission statement, values, and vision		
	Ideological and political affiliations?		
Structure, Budget	Main office, local branches, leadership body, staff		
	A system for storing, keeping and organising information, data, and documents		
	Budget resources, funding sources		
Staff	Human resources – number and experience of staff		

The content of the "Strengths, Assets" column will show our organisation's main advantages in the advocacy campaign's roles: organisers, grassroots mobilisers, policy recommendations and research reports drafters, negotiators with decision-makers, media relations handlers, social media promoters, etc. Our answers in the "Gaps, Needs, Challenges" column will show us what kind of partners we need to ask to join so that our team meets all the requirements for conducting a solid campaign.

5.2. ADVOCACY COALITIONS

As a result of our internal assessment, we may decide that we need partners to fill in the gaps in our capabilities and connections. Often, advocacy CSOs seek collaboration with other CSOs and entities to generate more political will and maximise their impact. The scope and forms of partnership can vary significantly. For example, a national-level network of 20 local organisations can conduct awareness-raising initiatives throughout the country in parallel, in the same form and with the same message; or an individual CSO can involve a group of university researchers in one single phase of the campaign, for example in issue research. To identify partners, we can revisit our planning worksheets of stakeholders and further extend with new names. Here is a chart that helps to find out where to look:

Identifying Partners		
Expected Contribution	**Profile**	**Where to look**
Amplify impact among grassroots and mobilise support	Organisations that are well-connected to local or professional communities or specific socio-demographic groups and have a stake in this issue.	• Like-minded CSOs, our peers, who do similar to our work on this issue; • Other CSOs that do different from our work but have local branches; • Organisations with a large membership base: trade unions, syndicates, professional associations, students, youth, women's movements, business organisations.
Raise Credibility	Figures and entities with a good reputation who have conducted research and/or successfully navigated the decision-making process and are ready to take a stance on this issue.	• Academia, research institutions, think-tanks, individual thinkers or issue experts, lawyers, pollsters.
	Influential figures in specific communities who have taken or can find a motivation to take a stance on this issue.	• Religious figures; • Community leaders; • Political leaders.
Facilitate access to decision-makers	Groups that have access to decision-makers and are ready to take a stance on this issue.	• Former elected representatives and ministers, or other officials; • Entities and persons who have worked with and have professional relationships with the decision-makers.
Raise visibility	Celebrities who can bring more public attention to this issue and are ready to take a public stand on this issue.	• Cinema, music, literature, culture, sports, media; • Media outlets that would be interested in partnering with the advocacy campaign.

Working with others means being part of local, national or international networks, coalitions, forums, platforms, or alliances. We can either form a new alliance or join an existing one. When embarking on a new partnership, we need to be clear about mutual expectations, and each partner should have a say in the advocacy planning process.

Formal coalitions or alliances between civil society organisations doing joint advocacy are like the coalitions in politics — they are challenging to manage because many competing interests are at stake, and egos, rivalries and emotions may weaken the alliance's sustainability. A key consideration here is that CSOs that work in the same domains often **compete for the same funding sources** and therefore aim at taking as much ownership as they can to win the donors' attention. In other cases, donors may encourage like-minded CSOs to form coalitions and implement projects collectively. Here the challenge is establishing clear mechanisms for joint work and especially for decision-making – because each CSO can have its own agenda. When reaching out to peer organisations to invite them to form a new coalition to implement a well-funded advocacy project, there is a risk that we are imposing our agenda through our funding power, directly or indirectly. We should be cautious when introducing the idea of advocacy to partners so that their participation is based on their values and not being funding-driven.

COALITIONS

Increase the advocacy effort's credibility and allow campaigns to become more audible so that decision-makers are hearing the same messages from multiple sources. Coalitions can bring us more:

- Political weight;
- Citizen support from various social groups;
- Media attention;
- Resources – financial or others; and
- Increased experience and learning opportunities for our organisation.

Ideally, coalitions, alliances or networks should evolve naturally and not be forced to emerge because one or another funding opportunity is available specifically for coalitions. They can be formal or informal, tightly organised or decentralised, depending on the type of issue and the individual styles of the people involved. Sometimes competition between members wanting to take credit for achievements or the dominance of one or two members, squeezing out the voices of others, can become an obstacle that requires a lot of energy to overcome. Coalitions can only work if everyone shares the vision of what the alliance is for and how it functions. To minimise potential tensions, some **minimum safeguards** are usually defined in writing from the onset:

1. Purpose, scope, priorities, and mission that state clearly what the organisations have in common and what they do not. Members should have the same understanding of the coalition's purpose and their role in it;
2. Membership criteria and mechanisms for including/excluding members;
3. Rules of procedure that clarify the coalition's structure; and the exact responsibilities for decision-making, operations, and all financial aspects;
4. A leadership: usually a small group, such as a steering committee, composed of each partner organisation's leader or another senior representative;
5. An executive team: this is the larger group of representatives of each organisation that are in charge of the actual implementation of the advocacy campaign. Each organisation participates with inputs that reflect its expertise (i.e. one for research, another for outreach, a third for facilitating access to power-holders, and so on). Tasks and responsibilities should be clearly defined and assignments – equitably distributed;
6. A code of conduct: to ensure mutual respect internally and a unified message externally.

Policy Working Groups

In 2016, the National Democratic Institute for International Affairs (NDI)[1] assembled a cross-party policy working group in Iraq to jointly develop recommendations for decision-makers on solving pressing concerns of Iraqi citizens. Forty-four young activists of ten political parties and five CSOs came together in an informal coalition and received coaching and training by NDI. Throughout 2016-2017, the group analysed unanswered issues such as agriculture, school dropouts, primary school curriculum, fundamentalism, corruption, and unemployment. The policy group consulted with over 2,250 stakeholders, citizens and experts on feasible solutions and, as a result, developed a comprehensive policy report, available in Arabic and in English, with 25 long-term and 34 short-term recommendations targeted to various institutions. The policy working group members continue to bring their solutions to public debate and influence the policy agendas of Iraqi decision-makers.

5.3. BUILDING A TEAM

Now it is time to build our team with the right people who will help make our campaign great. We should make sure to invite team members who can provide insight into how our targets think, what they care about, and their decision-making process. This knowledge will work its way into our messaging and increase our chances of success. If the campaign is led by a coalition, every organisation should be represented by members on the team. The team's first task will be to distribute and assign the roles and responsibilities of its members; then develop the timeline (see Chapter 5.4 below); lead its implementation; and participate in the evaluation of the campaign's achievements. Following are some of the **essential roles** that members of an advocacy campaign team should play. The number of people you will assign for each position will depend on the campaign's scale.

1. **Grassroots coordination** – This role covers the outreach to and engagement with people from your demographic groups, whom the campaign wants to mobilise, i.e. your support base in the regions, among professions, age targets, etc. The responsibilities include identification of campaign activists in the regions, orienting and training them – i.e. providing them with instructions and guidance, advocacy tools, campaign materials, template messages and everything else the activists will need to organise activities in the field on behalf of the campaign – town halls, signing petitions, sending letter to legislators, and others. This role also includes volunteer coordination, i.e. orienting supporters when they assist for campaign-related events and meetings.

1 Source: NDI's website.

2. **Communications** – This role covers media and social media presence and activities: interviews, statements, press releases, press conferences, the full range of social media activities, etc. The objective is to keep consistent messages widely disseminated and to ensure message discipline. We will want someone who crafting the message, handling communication templates, dealing with the press, and monitoring media coverage.
3. The campaign's **digital presence** (website, social media) and **branding and marketing** (logo, campaign materials) are roles of crucial importance – they can be part of the communications portfolio or a separate responsibility of one or several campaign team members.
4. **Technology** – This role covers the systems and tools that the campaign will use – from producing, storing and organising meeting notes and talking points to the advocacy software. An essential aspect of this role is to keep a database of campaign events, activities, and evidence of achievements: sign-in sheets, photos, statistics about online and offline attendance, and others.
5. **Administration and Logistics** – Distribution of materials, driving the vehicle(s), note-taking, accounting, and dealing with budgets/expenses/payments to vendors, etc.
6. **Leadership** – These will be the most senior people in charge of making the strategic decisions. Usually, one person serves as **campaign director** who personally leads the team in their day-to-day operations, coordinates, and oversees. When it comes to decisions, he or she would decide jointly with the other leadership members. We'll also need someone coordinating with the coalition members – usually, the CSO's director does this.

You have noticed that the "Leadership" bullet is placed at the bottom of the list rather than on top. The reason for this is that, sometimes, when organisations develop plans, they are obsessed with the idea of holding and exerting power and neglect the actual work and functions needed for the campaign. This is why we recommend listing the whole workload first, assign people to oversee the necessary tasks, and deal with the power and the hierarchy at the end. In many organisations, the campaign directors and leaders personally take part in the administrative work – to save resources and set a good example to motivate their staff.

In addition to the core campaign team, we will need the so-called input givers – i.e. our go-to persons with knowledge inside or outside our organisation, whose opinions we can seek in the course of the campaign. The key domains of required expertise include:

- **Subject-matter expertise:** this is the person or group of people who can inform our team about the subject of our advocacy: which proposed solutions do (not) work and how the policy change can happen in practice. These may be academics who do research on the topic or people who do practical work in the same field;

- **Legislation**: this is the person or group that thoroughly knows the laws and regulations in our domain and who can provide hands-on consultations on the legislative side of the decision-making process, tips on the wording of our policy documents, recommendations or proposals, and advice on who really holds power in the institutions we are interested in contacting. Last but not least, we will need legal advice on what is (not) allowed when conducting public gatherings – for example, what kind of permissions we need to secure from the local authorities in case we want to hold a town hall, a sit-in, or a march.

5.4. CREATING A TIMELINE

Now that we have all the elements of our advocacy plan, we should take the final step and plot these into a timeline – this means defining **what happens when and who is in charge of making it happen**. The timeline should include clear milestones for the required actions. We should keep in mind that campaign planning is not always linear: some steps will be sequential; some will run in parallel with others. Factors that will influence include:

- the potential for success in our operating environment;
- the associated risks;
- the timing; and
- the resources – both human and financial.

Therefore, it is essential to remain creative. We should still start with a timeline but be prepared to amend it as the campaign runs.

We typically develop a timeline in the form of a grid with rows for each month (for example, covering 12 months) and columns for the following components:

- **External Events** – these are the cornerstone actions that the decision-making institutions will conduct regarding our issue, as well as public holidays or other big dates on the calendar (e.g. *parliamentary committee conducts consultations with CSOs on draft legislation between 1-10 March*);
- **Advocacy Activity** (e.g. *one-on-one advocacy meetings with legislators*);
- Target Audience (e.g. *committee members, parliamentary advisors*);
- **Milestone to be Achieved** (e.g. *convince 50%+1 of committee members to support the amendment to the bill on education*);

- Person in Charge (e.g. *campaign leader, grassroots activists from Southern region, sociologist Mohammed – a campaign messenger and influencer*);
- **Resources** (e.g. *policy brief on soft-copy and printouts, a petition with signatures, driving to the capital city and back, lodging for five people*);
- **Risks** (*cancellation of in-person consultations due to COVID restrictions; sociologist Mohammed travels abroad for an international conference and is unavailable*).

The determining factor that will drive the composition of our timeline will be **the external event calendar** – or the planned timings in which the various steps of the decision-making process are supposed to take place[1]. Examples include institutional schedules, policy cycles, and parliamentary seasons/sessions. We should sketch out the advocacy activities to occur accordingly – before, during and after each stage – so that they can bring maximum impact. If we have gaps in defining those schedules when we plotted the previous planning phases, now is the time to fill these gaps in. We should also consider significant public holidays or periods of recess, such as Ramadan, during which it would be challenging to conduct large-scale public gatherings.

To illustrate how we can develop a campaign's timeline, let us imagine the following situation: we are a CSO that defends freedom of expression and media pluralism in a country that does not have a Law on Media. Yet all decisions in this domain are made and enacted through governmental decrees. The parliament has included a law on media on its agenda for October the following year. We are now in November in the current year. Our team is willing to conduct a year-long advocacy initiative that leads to the adoption of a good law that reflects the recommendations of the professional community, other relevant stakeholders, and the public at large and meets the international press-freedom standards. In terms of steps, we assume that the parliamentary committee on media will have a first draft of the law by September, which will, hopefully, be preceded by a round of consultations with CSOs to offer suggestions for its content – tentatively in August. We also assume that parliament will debate the first draft, in plenary, in October; then, the committee will amend the text and re-submit it to the plenary for a final vote and endorsement in November. Our campaign's objective is to facilitate the collection of recommendations on the law's content by stakeholders and lobby for them to be included in the law. We envisage doing this through a series of roundtables throughout the country to solicit input by regional-level actors. We also want to lobby lawmakers in the media commission throughout all stages. It is typical for our country that the political class pays particular attention to how they look in the eyes of the international community. Every year, in April, the Annual Press

1 See the mapping of your decision-making process per stage, outlined in Worksheet 6.5 – Stakeholders and Power Mapping; and the "Entry Points for Influence" chart, Chapter 3.2 Decision-Making Processes and Decision-Makers: Power Mapping.

Freedom Index[1] is released, and our country is traditionally at the bottom of the ranking, so, we want to use this as an opportunity to ring an alarm bell and emphasise the need for a good media law. We plan to organise a few press conferences throughout the campaign and a final national conference to take place straight after the law is enacted.

A first draft timeline for such a campaign would look something like this:

Sample Timeline

Month	External Events	Campaign Activity	Target Audience	Milestone	In Charge	Resources	Risks
January	Winter recess	Issue research		Develop basic recommendations (deskwork)			
		Identify partners		Form a coalition			
		Campaign planning		Develop a 12-month plan with partners			
February		E-platform launch	All stakeholders	Soliciting inputs for law via website, social media			
		Advocacy meetings	All stakeholders	Present first-draft recommendations			
March	Parliament in session	Press conference		Launch advocacy campaign			
		Advocacy meetings	MPs, Media Committee	Present first-draft recommendations			
		Regional town-hall meetings – first round		Soliciting inputs for law via public gatherings in the field			
April	RSF issues Annual Press Freedom Index	Press conference		Present recommendations solicited so far in light with Index findings			
		Online petition		Urge MPs to reflect recommendations in new law			
		Letters to MPs		Organise citizens to send letters to MPs to reflect recommendations in new law			

1 The World Press Freedom Index is an initiative of Reporters Without Borders (RSF).

Sample Timeline

Month	External Events	Campaign Activity	Target Audience	Milestone	In Charge	Resources	Risks
May		Advocacy meetings	MPs, Media Committee	Present petition, citizen's letters			
June	Ramadan; Summer recess	Policy proposal paper drafting		Consolidate recommendations (deskwork)			
July				Finalise policy paper (deskwork)			
August	Parliament in session	Advocacy meetings	All MPs	Submit policy paper			
	Public hearings in media committee	Participate in public hearings	Media committee members				
September	Media committee submits draft law to plenary for debate	Issuing a position statement		Comment on draft law's content			
October	Plenary debate, MPs suggest amendments	Issuing a position statement		Call for including freedom of expression safeguards			
November	Committee reworks law and submits second draft to plenary	Advocacy meetings	Media committee members	Lobby for specific amendments			
	Plenary enacts draft law into bill through voting	Conclusive conference	All stakeholders	Comment on the new law			
		Regional town-hall meetings – second round		Follow up with supporters in the field			
December	Winter recess	Issue statement on next steps		Engage supporters in follow-up action			

We still have several empty boxes in the grid, and our planning team will take the time to complete, review and amend them as needed. One way for developing the timeline is to work backwards from the ultimate deadline (e.g. the law is enacted), taking care to add enough time for each task or required action. We should make sure to **clearly mark deadlines on the calendar** and that the whole team is aware of the activities that need to happen before that deadline approaches. We should keep in mind that any task that requires education or information dissemination will need extra time. We cannot expect people to write letters to their MPs if they do not know what to say about the issue. We might need anywhere from a few days to a few weeks to create the info, email it to advocates, train them on it, and hold conversations. We also need to ensure time for preparations and logistics for the field visits and the town-hall discussions.

5.5. CAMPAIGN SUCCESS INDICATORS AND METRICS

As we plan our campaign, we should consider the metrics that will help us track progress and define success. To be sure, achieving our ultimate goal, such as passing a good law, is a very satisfying reward for every campaign. Still, even campaigns that are not lucky to see that ultimate achievement can positively impact society and the organisation itself. After all, advocacy is an ongoing process of learning and reflection, and the context in which we work is fluid.

Tobacco-Free Kids (TFK)[1]

A 2014 campaign by TFK to end tobacco sales in the retailer chain of shops Walmart did not conclude with the original result they planned. However, TFK's lobbying and advocacy efforts paid off in the years to come. Many stores have since ended the sale of tobacco products, and the legislators that were part of TFK's original campaign are still calling for others to follow suit. A recent update from 2019[2] is that Walmart raised the age for purchasing tobacco and electronic cigarette products to 21 at all of its U.S. stores. Previously, the retailer's minimum age for these purchases was 18. Walmart also is discontinuing the sale of fruit- and dessert-flavoured electronic nicotine delivery systems.

The metrics we choose to follow will depend on our campaign's goals and objectives and on the type of activities we will organise offline and online. For example, suppose the objective is to raise awareness of MPs about the need for the new media law to meet the international standards of freedom of expression. In that case, a simple metric like the number of petition signatures and letters sent by constituents may be good to track along the way. a campaign on passing a new law that includes letter-writing by citizens and submitting policy recommendations to policymakers by stakeholders might have additional metrics to track, such as:

- # letters by constituents sent to MPs – by region/age/gender/political affiliation;
- # stakeholders involved in developing recommendations – by category, type, region, age;
- # recommendations for the new law collected from stakeholders – by type;

1 The Campaign for Tobacco-Free Kids (TFK) is a leading advocacy organisation, established 25 years ago, working to reduce tobacco use and its deadly consequences in the United States and around the world.

2 All Walmart stores now require tobacco buyers to be 21: Supermarket News, 2019.

- # recommendations reflected in the bill – by type;
- # parliamentary votes "for" and "against" – by political group/region.

Here are the other typical indicators that advocacy campaigns usually measure:

- # petition views;
- # petition signatures;
- # campaign supporters/advocates;
- # actions taken/engagements by campaign supporters;
- # town-hall meetings conducted – by region;
- # attendees of town-hall meetings – by region/gender/occupation/age.

As to key metrics for digital campaigns, they include:

- # "like this" and # "talking about this" on Twitter;
- # positive versus negative reactions to the campaign on social media;
- # posts and shares with the hashtag # [your campaign] across all social media platforms;
- # volunteers that signed up to host an event as part of your campaign;
- # and the amount of donations collected throughout the campaign.

Through the worksheet templates, available in Worksheet 6.8 – Organisational Capacity and Partnerships, Team, and Timeline, our planning team will assess the organisation's capacity; identify partners for the advocacy campaign and decide on the form of partnership; distribute roles and responsibilities for the campaign team; create a timeline for implementation; and define indicators for measuring the campaign's success.

Indicators, Small Environmental Project

Below are examples of the types of indicators that were measured in a five-month environmental advocacy project with a total budget of USD 14,790, implemented by a small-scale CSO[1]. The extracts are taken from the project's final report to the donor:

- Generated 50 proposals for zones to be included under environmental protection;
- Generated a full proposal for 225 zones under environmental protection;
- Sent advocacy letters to nine public institutions and decision-makers;
- Developed and disseminated a policy report on the environmental threats;
- Convened one town-hall meeting bringing together CSOs and decision-makers from ministries;
- Convened one public discussion with 44 participants from six institutions and CSOs;
- Collected 48,950 petition signatures;
- Disseminated 10,000 brochures, 2,000 stickers, and 100 T-shirts;
- Conducted five press conferences, a street march, and 70 media statements and interviews.

1 Based on data from the "Advocacy campaign for the natural heritage as a basis for sustainable development in Bulgaria" project, Bulgaria, 2006. Source: Biodiversity Foundation's website.

WORKSHEET TEMPLATES

6. WORKSHEET TEMPLATES

6.1. WORKSHEET – PROBLEM VERIFICATION CHECKLIST

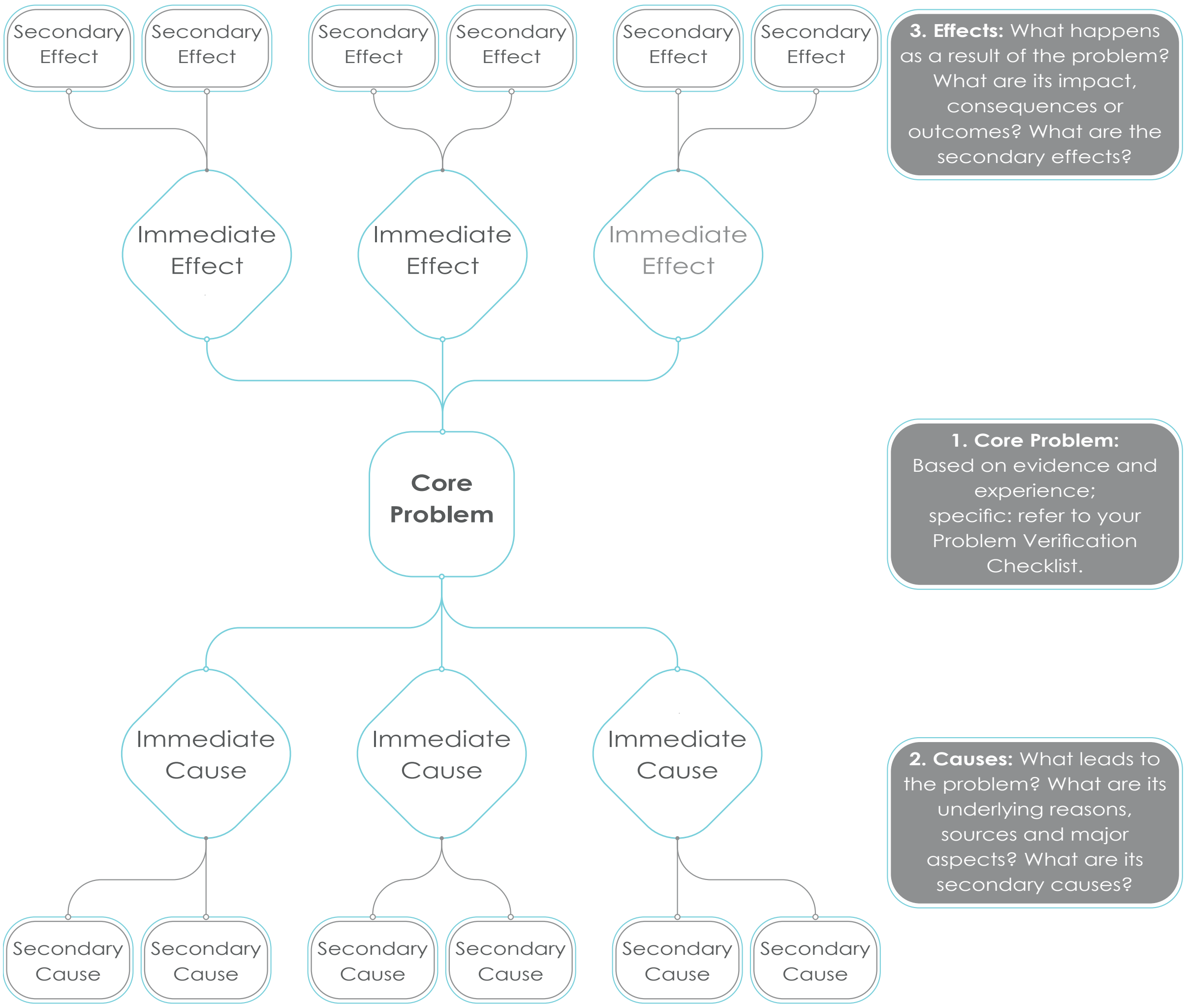
See Chapter 2.2 – Proving the Issue: Methods for Problem Verification[1].

Indicator	*Answer*	*Score*
Problem Description A factual overview of the problem as we currently understand it, based on evidence and experience, framed in a detailed way, with supporting facts that illustrate the problem's symptoms. How significant is it for us?		
Relevance Why should our organisation address this problem? How does it relate to our scope of work, values and principles? Can we legitimately speak on behalf of those affected by the issue?		
Affected Groups Types, sizes, and social, demographic and geographic characteristics of the populations directly affected by the problem.		
Problem Impact How specifically does the problem affect these populations? What happens if we don't address this problem?		
Solution Impact How specifically would the affected groups benefit if the problem is solved?		
Environment Is the political moment good for an advocacy intervention? What is the state of the issue: hot on the agenda, off the agenda, or stuck in limbo?		
Potential How will this problem generate interest among stakeholders? Can we mobilise support among the affected populations?		
	Total Score:	

1 Use all the information available to your organisation to fill in the boxes describing the problem's size and parameters and proving its impact on the affected groups. Next, read your answers and make sure that you've gone beyond assumptions and you've tackled the problem in a neutral manner. To complete, insert a score for each indicator with 1 being lowest and 5 – highest. Higher scores suggest a strong campaign. Lower scores would require redefining the selected problem, or changing it. For further instructions, see Chapter 2.2 – Proving the Issue: Methods for Problem Verification.

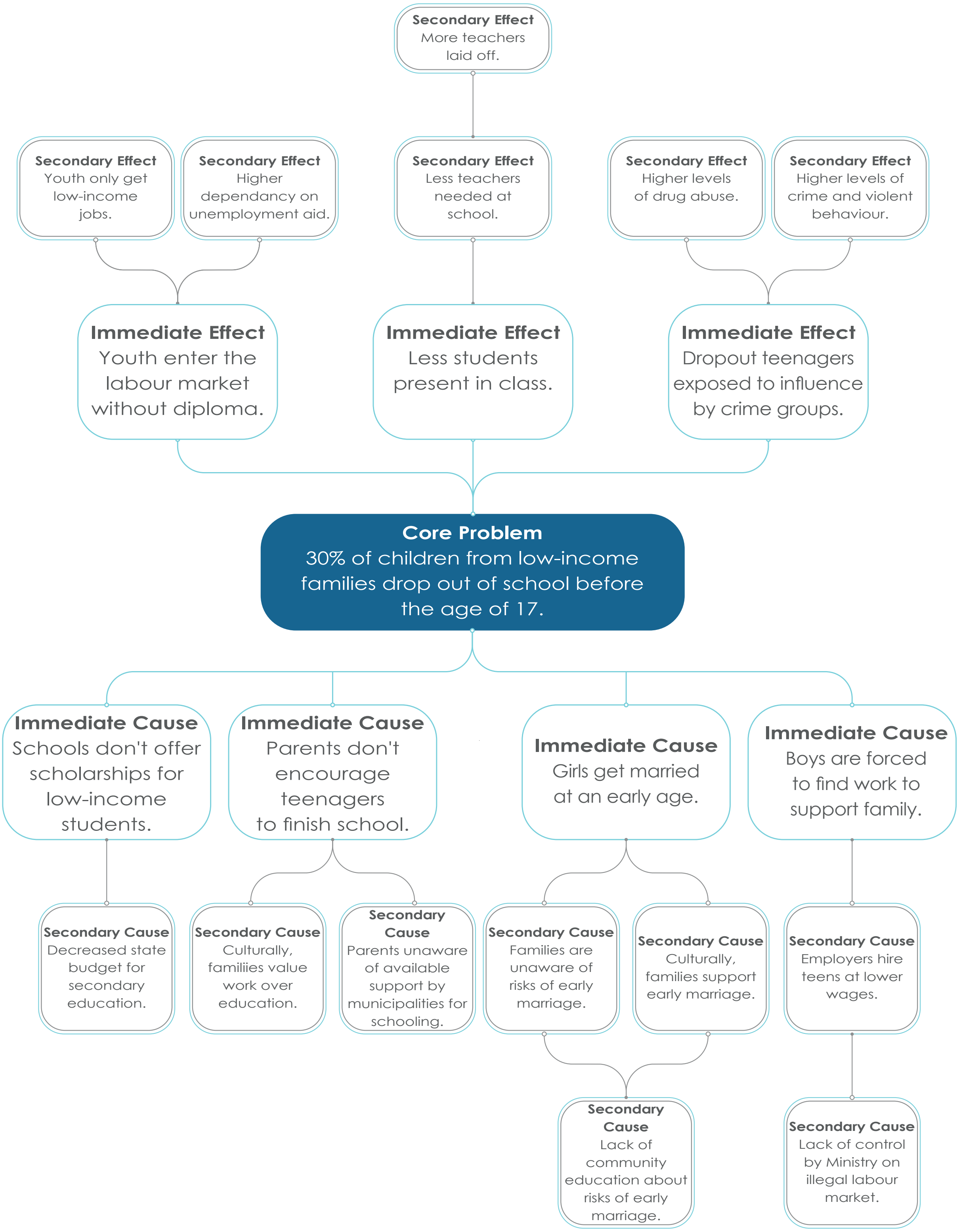
6.2. WORKSHEET – PROBLEM TREE ANALYSIS TEMPLATE

See Chapter 2.3 – The Problem Tree Analysis[1].



1 Fill in the worksheet by starting from the trunk of the tree (core problem), moving down (immediate causes), and then up (immediate effects). Next, move again down (secondary causes), and then up (secondary effects), to complete. Add or delete boxes depending on your problem's specificities. At the end, refine the problem's description to ensure it really is at the core of the causes and effects. See the example below and the detailed instructions in Chapter 2.3 – The Problem Tree Analysis.

PROBLEM TREE ANALYSIS SAMPLE



6.3. WORKSHEET – IDENTIFYING SOLUTIONS, REALITY CHECKLIST

See Chapter 2.4 – Identifying Solutions[1].

Backing Up Solutions with Evidence		
Organisation's knowledge of and experience with the problem		Describe our issue expertise, field experience, past and current projects, and interaction with key players. Are there any gaps?
Publicly available information		Where is credible information on this problem publicly accessible? List the available sources. Examples include but are not limited to: laws, regulations, census data, research publications, reports, opinion polls, statistics, media articles.
Insiders' information		Do we have unofficial (confidential) information from insiders?
Go-to persons		Whom do we need to discuss or consult with in order to understand all aspects of the problem and hear all sides – key players, experts...?

Identifying Solutions		
Problem, Cause		Revisit our previous worksheets on problem verification and analysis.
Solution		Define the results/desired outcomes that we want to achieve – reverse the problem/cause statement to describe what the situation would look like as a result of this solution. What specifically will change? What are the disadvantages of the current situation or process?
Required Action		Map out the required steps, or the routes, leading up to the solution: bills to be passed, decisions to be made, made, etc.
Viability		What makes this option better than alternative options? What are the risks? Were similar solutions applied to other problems or in other regions/countries?
Cost		Is this solution economically sustainable under current conditions? Where will the budget come from, and which institution will manage and oversee it? What is the value for money?

1 This worksheet will help your planning team in mapping out the solutions. The information that you'll fill in for each category will require revisiting and expanding your previous worksheets. Tips are provided for each box in the form of guiding questions. For further instructions, see Chapter 2.4 – Identifying Solutions.

Reality Checklist		
Driving Forces		What are the broad driving forces at play such as culture, political system, social norms and realities, living standards, etc.? Driving forces are more permanently rooted and require longer time to change.
Current Trends		What are the current trends influencing the situation? For example, current events, public attitudes, the security situation, healthcare/COVID, etc. Currently, existing trends are easier and more likely to change with time.
Politics		Is the solution politically feasible? Do we have the relationships with decision-makers we need to make this happen?
Society		Is the solution socially feasible? Can we mobilise public support in favour of it?

6.4. WORKSHEET – DEFINING GOALS, OBJECTIVES, AND VISION STATEMENTS

See Chapter 2.5 – Transforming Solutions into Advocacy Goals and Objectives and Chapter 2.6 – Developing a Vision Statement.

Selecting Preferred Interventions		
1		From the range of solutions and problem causes, what will be the focus of our advocacy campaign? Which aspects is our organisation best positioned to take the lead on? What is doable in this particular moment? How has the problem been addressed in the past?
2		
3		
4		

Defining an Advocacy Goal		
A broad, long-term vision for the desired change – what will the change look like?		Consider the core problem and the selected preferred interventions. Stress on the benefits for the affected groups: "Improve…", "reduce", "build the capacity of", "facilitate", "provide access to", "transform", "ensure"…

Defining Advocacy Objectives		
1		Once the goal is defined, we set the objectives: how, practically, can we reach the goal? What steps should stakeholders take? What steps should our organisation take? Include time reference. Specific, measurable, actionable, realistic, and time-bound. Refer to "required actions" in the previous worksheets.
2		
3		
4		

Developing a Vision Statement		
Explains the result that a campaign victory will bring about and what it will do to solve the problem		What does success look like? What value do we want to convey? Are we going to be for or against something, provocative or reassuring? If a newspaper was to write a headline on the impact of our campaign, what would it say? If a beneficiary was to give an interview, what would he/she say about our achievements?

6.5. WORKSHEET – STAKEHOLDERS AND POWER MAPPING

See Chapter 3.1 – Techniques for Stakeholder Identification and Chapter 3.2 – Decision-Making Processes and Decision-Makers: Power Mapping[1].

Decision-Making Bodies
List the institutions that are in charge of making the decisions, related to the advocacy issue. Identify and download the documents that outline the functioning of these institutions: law, decree, executive order, instruction, internal bylaws, rules of procedure, code of ethics, code of conduct, mission statement, annual activity report, audit report, annual budget… Add or delete rows as needed.

#	Decision-Making Body	Guiding Documents
1		
2		
3		
4		

- To whom is this body accountable/whom does it report to? Which institution provides its budget and exerts oversight over its functioning?
- How has this body organised its operations? Where are the procedures defined?
- How effective is this body in implementing its duties?
- What is its budget?

Decision-Making Process
Describe the formal and informal decision-making process stage by stage, indicating the expected timings, the action what will happen at each stage, and the bodies and officials, or players, who will take that action. For each stage, identify your opportunities or entry points for intervention. Add or delete rows as needed.

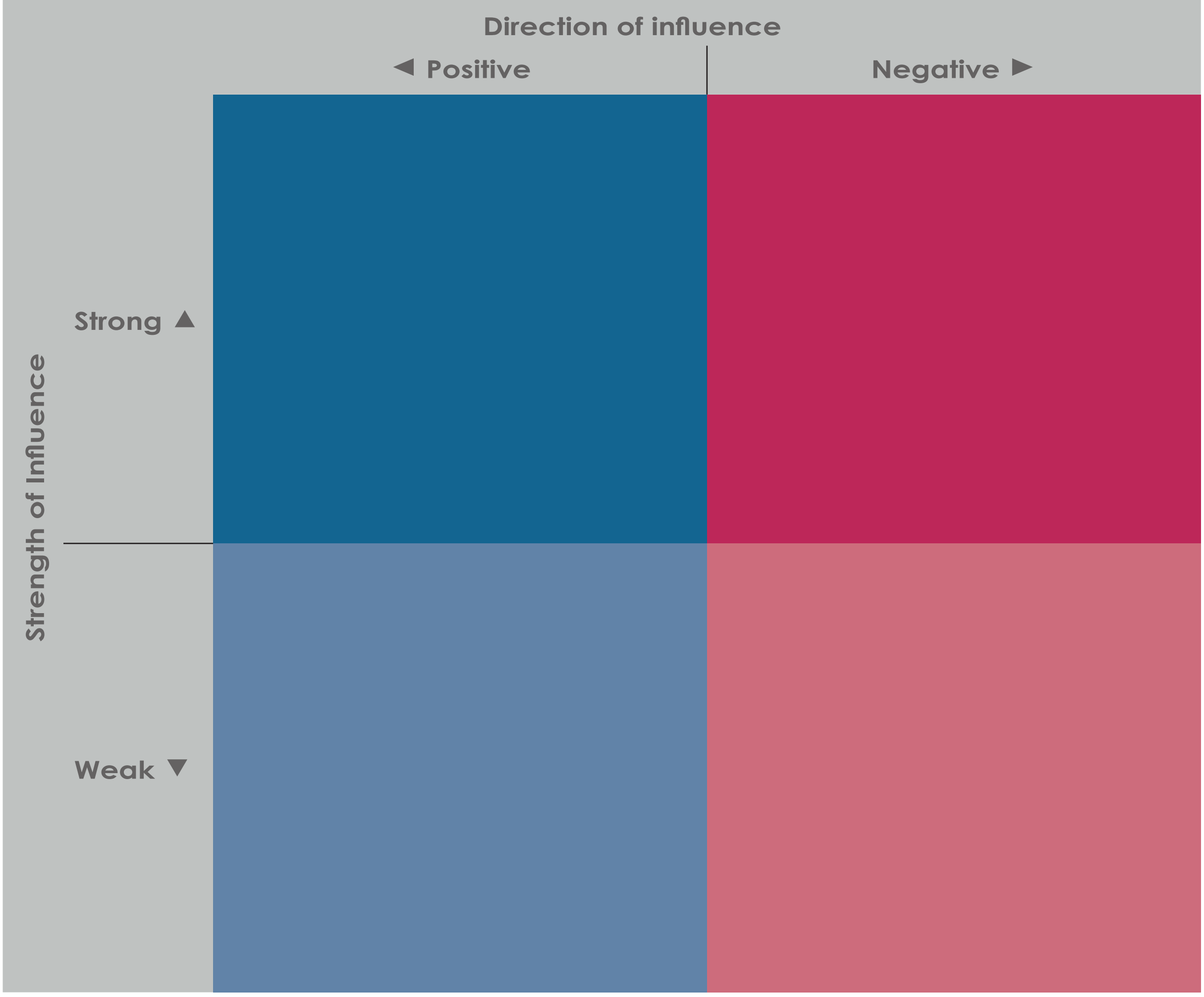
Stage	Time	Action	Players	Entry Points
1				
2				
3				
4				

- What is the formal process, its steps and timings?
- Which steps are open to outside input?
- Which decision-makers will play a role at each stage?
- What are the informal workings or "behind the scenes" actions?

1 Through the Stakeholders and Power Mapping worksheet templates, available in this appendix, your planning team will identify the decision-making bodies and construct the decision-making process; list the full set of stakeholders, draw a power map; and form profiles of the key players. For further instructions, see Chapter 3.1 – Techniques for Stakeholder Identification and Chapter 3.2 – Decision-Making Processes and Decision-Makers: Power Mapping.

Power Map

Review the list of decision-makers you made in the previous chapter and think through their likely response to the issue and your efforts. Place each key decision-maker within the four quadrants below, according to their strength of influence (strong/weak) and the direction of their influence (positive/negative):



Stakeholder List

Create a detailed list of stakeholders as individuals, using the chart below: add or delete rows as needed.

Name	*Position, Organisation*	*Decision-Maker or Influencer?*	*Primary or Secondary?*	*Ally or Opponent?*

Stakeholder Profiles

Form profiles of the key decision-makers and influencers, containing any information that can give you more insight into how they make or influence decisions. Put the person's name and position in the middle of the sheet and work out from there by adding bubbles with pieces of relevant information. Add or delete bubbles as needed:

Motivation – who and what will move him/her to action?

Other insights ...?

Born in? Lives in? Tribe? Family?

Generate his/her support from ...?

Name, Position

Friends? Business Partners? Donors?

Age, faith, political affiliation?

World view/general philosophy?

Colleagues, Advisors, Staff?

Policies he/she has supported/opposed?

6.6. WORKSHEET – ADVOCACY TACTICS AND ACTIVITIES

See Chapter 3.3 – Tactics and Tools for Interacting with Stakeholders and Chapter 3.4 – Involving and Mobilising the Community.

Tactics and Approach
Choosing advocacy tactics requires understanding what our target audiences might think about our issue and how they may feel about the proposed solutions, as well as thinking through our own organisation's positioning. Look at the information in your previous worksheets and fill in the boxes in the chart below.

Category	*Your Answers*	*Guiding Questions*
Decision-Makers		How well do the decision-makers understand the problem – is it a priority for them? What is at stake? From what perspective are they seeing it – what are their beliefs and attitudes? Do they know you personally? Do they consider you as friends, as adversaries, as experts…?
Our Organisation		What reputation do you want to build for your organisation: what type of action fits best to your desired image? What type of relationships do you want to build in the long term?
Our Grassroots		What would mobilise your grassroots supporters? What type of behaviour would they expect from you in order to be ready to take action?
Our Tactics and Approach		What path will you take and why – collaborating and building constructive relationships; confronting and prioritising pressure and criticism; or a combination of both? Describe your tactics and approach.

Activities for Engaging Decision-Makers
Based on the tactics and approach selected above, what do you think will be the most effective means for engaging the decision-makers? Put down the five most effective types of activities in the boxes below. You can use some ideas from the list in the below box.

#	*Title*
1	
2	
3	
4	
5	

- Personal meetings
- Policy briefings and events
- Public meetings
- Public gatherings
- Roundtable discussions
- Letter-writing, petitions
- Campaign events
- Pledge cards
- Specialised literature
- Media presence

Profiling the Grassroots *Think through the groups of people affected by the advocacy issue who are likely to benefit from the solutions. Review your previous worksheets. What do you think will be the most effective means for engaging them?*		
Category	**Your Answers**	**Guiding Questions**
Who are they?		Geographic location and type of region – rural/urban; dominant age/sex/education/employment categories; political and other affiliations that are connected with our advocacy issue
Who represents them?		Whom do they trust? Who are their community leaders? Are there civil society organisations that speak and act on behalf of them, with whom we could seek cooperation? Which sources of information do they trust?
Where are they reachable?		Where do they gather physically? Where do they gather online – which social media platforms, which groups? What are their interests: what topics do they discuss most?
What is their understanding of the advocacy issue?		Do they have high, medium or low knowledge about the problem? Do we need to plan for raising their awareness and promoting the understanding of the problem?

Activities for Mobilising Grassroots *Based on the tactics and approach selected above, what do you think will be the most effective means for mobilising the grassroots communities? What will we ask these people to do? Put down the five most effective types of activities in the boxes below. You can use some ideas from the list in the below box.*		
#	**Title**	• Distribute campaign literature • Support grassroots-level campaign activists • Educate citizens on the campaign issue • Co-produce a TV/radio show • Drive supporters to engage online – social media • Organise town-hall meetings • Ask people to take action in support of the campaign • Provide opportunities for volunteering • Ask people to submit evidence for the problem • Use visuals – stickers, billboards, etc. • Create "Contact Us" options
1		
2		
3		
4		
5		

Sample Questionnaire to Solicit Opinions from Audience at Town-Hall Meetings

Campaign Logo and Name

Organisation's Logo and Name

Thank you for attending the meeting today! As organisers, we are interested in your opinions on the issue that was discussed.

A short definition of the problem ………………..

How important is this problem for you personally?

☐ Very important ☐ Important ☐ Not important

Are you or your family personally affected by this problem?

☐ Yes ☐ No

Below are listed different measures that could contribute to the solution of the problem. In your opinion, how effective each of these measures is?

Measure 1 ………..

☐ Very effective ☐ Effective ☐ Not effective

Measure 2 ………..

☐ Very effective ☐ Effective ☐ Not effective

Measure 3 ………..

☐ Very effective ☐ Effective ☐ Not effective

If you could give an advice to the decision-makers about the steps that they should take to solve the problem, which one from the measures below would you choose?

- Measure 1 ………..
- Measure 2 ………..
- Measure 3 ………..

What is your personal suggestion for solving this problem?

……………………………………………..

Are you interested in participating in similar discussions in the future?

☐ Yes ☐ Maybe ☐ No

Are you interested in organising activities with us in the future?

☐ Yes ☐ Maybe ☐ No

Gender/age ………………..

Name and contacts (optional) …………………

Contact us

Website/Social Media

Sample Sign-In Sheet Template for Tracking Attendance in Campaign Events

Campaign Logo and Name

Organisation's Logo and Name

Topic of Event ………………… *Date, Venue ………………….*

Attendance List

Name	Gender	Year of Birth	Occupation/ Job	Neighborhood	Phone Num-ber	Email

Contact us

Website/Social Media

TIPS FOR MEETINGS WITH DECISION-MAKERS

Before the Meeting

1. Make sure your team has been consulted, agrees, and knows that this meeting will be taking place. Solicit input from your team members on the meeting's content.
2. Decide who else will attend. It is good to have more than one person representing your organisation. Assign roles for those attending with you: one person (the most senior) will do most of the talking and occasionally give the floor to others for brief additions. Consider including a grassroots stakeholder or constituent affected by the issue — someone who can put a "face" to the problem or solution. Make sure you brief this person before the meeting! Also, include one person from your organisation who (usually the most junior) will take detailed notes and possibly a few pictures for your records,

if appropriate. Remember that if you want to use any photos for public distribution, you should get the decision-maker's consent.

3. Prepare your talking points for the meeting: this is usually a one-page paper with bullet points that should not be forgotten on the table after the meeting! In the **talking points**, include information about:
   - The person you will meet – make sure you don't confuse his/her name and position, and know about the history of communication you have had,
   - Most recent interactions/past meetings with him/her: see past meeting notes, requests made, promises made/kept, follow-up done/not done…,
   - Write down the update you are going to provide and the points you want to cover: your facts, request for action, question(s) you want to ask, exact forms of follow up your message,
   - Your responses to anticipated questions, counter-arguments or other pushback/most typical excuses.
4. Share the talking points with the relevant persons on your team – particularly with the people who will be joining you for the meeting and the most senior person in charge of the advocacy campaign – for their comments and suggestions.
5. Decide what supporting documents you will bring to the meeting. We assume that decision-makers do not have time to read through volumes of information, so leaving a fact sheet that outlines and supports our position is usually sufficient.
6. Schedule an appointment: call or email the decision-maker or his/her assistant and explain the purpose of the meeting request. If required, send an official letter following the phone call. Consider attaching a fact sheet that outlines and supports your position (for example, an extract of a document that you are going to provide during the meeting, or a link to an interesting publication on your website).
7. Ahead of the meeting, read what is new about your issue on the traditional and on the social media, check the decision-maker's website/social media profiles for most recent statements, and update your talking points to reflect the new developments.

During the Meeting

Do:

- Be on time!
- Try to briefly talk with the assistant prior to entering the meeting hall to figure out what will be the meeting's duration.
- Be courteous, polite, and patient.
- Be brief and precise in your speaking.
- Dress appropriately.
- Debate, don't argue.

Don’t:

- Interrupt.
- Argue: debate instead.
- Alienate the person.
- Take too much of the person’s time.

Meeting Scenario:

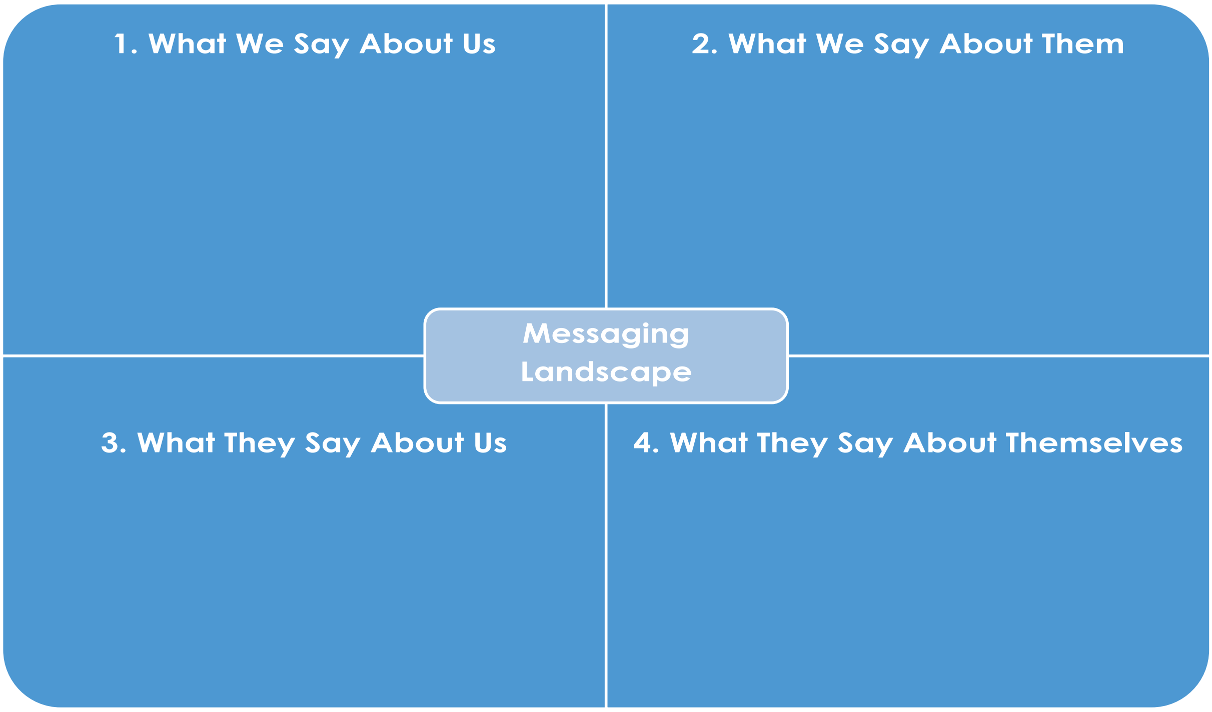
1. **Making introductions**, thanking the person for meeting with you.
2. Your core update: in about 10 minutes, cover your talking points. The other representatives from your team will jump in as planned. Two main objectives of this element: first, convey your message and make your request; second, announce what you’ve done since the last meeting to demonstrate that you have done your part of the work.
3. **Decision-maker’s comments** to what you’ve brought up. Listen carefully.
4. **Give to the decision-maker the material you’ve brought:** a fact sheet, a report, or something else. Giving the papers earlier may distract the person.
5. **Time for questions and answers:** if you can’t answer a question, promise to check and to provide your answer later.
6. **Informal part:** if there is time, the conversation can finish with less formal topics over a cup of tea: this is your opportunity to break the ice, cultivate relationships, and build trust. Share something interesting outside the topic.
7. **Wrapping up:** Ask your team if we have missed anything. If not, in 1 minute, repeat the key things that you’ve agreed on today – who will do what and when. Make sure the decision-maker confirms. Ask whom to contact for follow-up. Leave your card.
8. **Closing** the meeting/thanking the person.

After the Meeting

1. Type down your notes from the meeting and upload them to your database. Make sure to clearly document what has been agreed – who shall do what as follow-up, and when.
2. Brief your team about how the meeting went, share the meeting notes, and assign the follow-up tasks accordingly.
3. Send a thank-you note to the decision-maker and his/her assistant.
4. Complete the things that you have promised to do during the meeting and re-contact the decision-maker’s office to report about that and to ask about progress in implementing what he/she has promised to do.
5. Schedule the next meeting(s) and steps in line with the advocacy campaign’s plan.

6.7. WORKSHEET – MESSAGING AND COMMUNICATIONS

See Chapter 4 – Communications.



1. **We on Us:** what do we want citizens and decision-makers to think and feel about the issue? What are we saying in our campaign: what are we trying to solve, how, and why? Why should people support our proposed solutions? What are the most impactful research findings? What summarises our organisation's values and beliefs?
2. **We on Them:** How is the current situation handled by decision-makers? What are the vulnerabilities and weaknesses? Why are we challenging the status-quo? Why should people not support the way in which the issue is handled now?
3. **They on Us:** How do decision-makers describe and react to the solutions and changes that we are proposing? How do they see the weaknesses and vulnerabilities of the change we are proposing? Why should the situation remain unchanged according to them? When people disagree with the proposed solutions, what reasons do they point out?
4. **They on Them:** What do decision-makers want for citizens to think and feel about the issue and about the way it is currently held? How do they describe their strengths, achievements, values? When people support the status quo, what reasons do they point out?

Message Box – Organising All the Right Language *Review the information in the worksheets from the past planning phases and from the message box above, and pull out campaign language that supports the themes in the four quadrants of the chart below.*	
Problem, Challenges • … • … • … A clear statement of the problem we are trying to address in a way that everyone can see their stake in addressing the issue. What language will people use to oppose or undermine the campaign? What language can we use to put people at ease?	**Solutions, Benefits** • … • … • … The solutions we are proposing and the outcomes they are designed to achieve. What are the benefits for the people from our proposed solutions?
Values, Needs • … • … • … These actually are the answers to the "Why this matters" question. Which strong needs of the people does the solution address? Which social values or norms exist in society that support the proposed solution?	**Vision, Action** • … • … • … Our vision for community, state, society. A sense of purpose and goal that drives us to seek the change we are working for. Our aspiration and inspiration. What is our request for action to decision-makers and citizens?

Crafting a Core Message

Review all the message points, organised per theme in the chart above and transform them into a core, generic message for the advocacy campaign. After the chart is filled in, assess – is this language clear and compelling to target audiences and does it connect them to the issue? If necessary, refine the language.

Message Point	***Your Answers***	***Guiding Questions***
Lead-In		Open with a lead-in statement that gets the audience's attention right away
Issue, Impact, Solutions		Present the problem, whom it affects, its impact, and the proposed solutions in line with the campaign's goals and objectives
Supporting Arguments		Provide impressive facts and data that prove the problem exists to support your position
Stories		Consider what stories the campaign is telling – vivid examples will put a human face on the issue
Align with Audience		Align the narrative to resonate with the audience's feelings, values, attitudes, concerns, motivations, or self-interest – what benefits will this action bring them?
Align with Organisation		Align the narrative to resonate with your organisation's values and mission
Define the "Ask"		Make the call for action

Communication Strategy
Consider the points in the chart below and fill in the boxes. Brief explanations are provided in the last column. More detailed instructions can be found in the guidebook.

Element	***Your Answers***	***Explanations***
Name and slogan		In general, they should stem from the campaign's messages, objectives, and goals. Be creative and come up with something catchy
Messengers and Storytellers		Who could serve as our messengers from among the influencers, community and opinion leaders, issue experts, champions of change…? Who are the people who can tell their personal stories about our issue and serve as our storytellers?
Level of Visibility		A quiet, insider campaign, or a public effort with a louder tone?
Visual Identity and Materials		Branding logo, colour(s); apart from statements, press releases, policy briefs and canvass questionnaires, will we use posters? Brochures? Petitions?
Offline/In-Person Presence		Confirm the types of in-person activities that will be conducted: what will be the proportion of in-person activities vs. online presence?
Online Presence		A website as the campaign's core reference point – new website, or a sub-section of the existing site? What needs to improve on our organisation's website prior to launching the campaign? Which social media platforms will the campaign use and how? Who will be in charge of website? Of the social media?
Media Presence		Focus and frequency of campaign's media exposure: how many press conferences and press releases? To which events will we be inviting journalists? What info will remain confidential? List of journalists to be engaged. Who will be in charge of media relations?

Example of a Press Release [1]

Campaign Logo and Name

Organisation's Logo and Name

September 20, 2021

To protect human rights, newly elected MPs must repeal repressive laws

Newly elected members of parliament must not shirk their duty to urgently address the country's increasingly dismal human rights record by amending repressive legislation and resuming parliamentary scrutiny of the executive, **OUR ORGANISATION** said today.

OUR ORGANISATION set out what it considers to be key human rights priorities for members of Parliament elected yesterday, including rights to freedom of expression, peaceful assembly and association which are currently being crushed in the Kremlin's crackdown on opposition figures, independent media and human rights groups.

"These relentless attacks on human rights in our country demand urgent action. There must be comprehensive reforms of the country's legislation to meet its obligations to respect, protect, promote and fulfil human rights. Newly re-elected deputies who have previously voted for repressive bills, must seize this opportunity to reverse the damage done to human rights in **COUNTRY**," said **NAME, OUR ORGANISATION**'s Director.

OUR ORGANISATION is calling for parliament to reverse the catastrophic restrictions on the right to freedom of expression by abolishing the executive's powers to block online content without judicial review, decriminalising libel which has been used as a pretext to clamp down on dissent and repealing the laws on "offending religious feelings" and "fake news" among other measures.

Notes to Editors

OUR ORGANISATION is ...., committed to .... **[PRESENT MISSION]**.

Find more about **OUR ORGANISATION**'s advocacy work, related to freedom of expression, here **[HYPERLINK TO WEBSITE CONTENT]**.

For further information, please contact **NAME/POSITION/EMAIL/PHONE NUMBER**.

Contact us

Website/Social Media

1 Adapted from an original press release by Amnesty International on Russia, dated September 20, 2021.

EXAMPLE OF TESTIMONY IN PARLIAMENT[1]

Parliamentary committees provide opportunities to civil society organisations and other stakeholders to express opinions on draft legislation by inviting them to testify and answer questions by committee members. Securing an invitation for testimony is a huge opportunity for an advocacy group to convey its message straight to the decision-makers in the right moment, i.e. influence the content of the draft law/decision before the committee sends it to plenary for voting. Below are the four guidelines that the Oregon Housing Alliance utilises for preparing testimonies, followed by a model testimony on the issue of emergency assistance to homeless families[2]:

1. Testimony should be a complete message. Lead with vision and values, end with values.
2. Facts, figures, details can be attached as handouts. Use your time to reinforce the big message.
3. Remember that legislators have limited time and attention – be brief.
4. Coordinate with allies so that together you tell a landscape story.

Chair **XXX [NAME]**, vice-chair **XXX [NAME]**, members of the Committee. Thank you for allowing me to testify today. For the record, my name is **XXX [NAME]** and I am the deputy director of the civic group **XXX [NAME]**.

I am here today to speak in support of the bill **XXX [NAME]** and its amendment, which would restore services and make improvements to the Temporary Assistance for Needy Families program. This program is designed to help families with children with their basic needs. It provides a small level of cash assistance plus supportive services to help families address barriers, and return to employment.

Here in Oregon, right now, families are struggling to survive – facing choices like paying rent or buying food and medicine. Our Temporary Assistance program is a life-raft for kids and parents. We need to make sure that assistance is available to help families get back on their feet. The program really does work: the recent audit shows that of each $10,000 we spent helping people meet their basic needs, only $2 of it was found to be questionable.

These positive changes, plus reinvestment in other areas of the program, will truly help protect the families to return to employment. We urge you to support the bill's amendment. Thank you, and I'd be happy to answer any questions you may have.

1 The two examples are adapted from the original source – Oregon Housing Alliance, an advocacy group that works on addressing the housing needs of citizens of Oregon, USA.

2 See toolkit, Chapter 4.1 – Crafting a Message, the Message Box.

EXAMPLE OF INSTRUCTIONS FOR GRASSROOTS ACTIVISTS ON HOW TO WRITE A LETTER TO THEIR PARLIAMENTARIAN

The Oregon Housing Alliance *provides the tips and templates to its grassroots supporters for them to use then writing letters to the parliamentarians in support of passing a legislative amendment that grants future funding for the assistance program for homeless people:*

1. First, find out who your MP is, using the respective website;
2. Include your name, address, and phone number;
3. Mention the reason for your letter in the first sentence;
4. Limit the contents to one or two key points, avoid jargon;
5. Say why it matters (values), describe the need (problem), specify what needs to be done, and ask those with the power to make it happen (responsibility).

- **Introduce yourself** – talk about your concern for the people experiencing homelessness in your neighbourhood;
- Next, in one or two sentences, briefly share the problem you see – families needing emergency assistance. If you don't have your own story of need, feel free to use one of these sentences:
  - Today, too many Oregon families have to choose between paying rent or putting food on the table. More than eight in 10 Oregon families with the lowest incomes pay more than half their income for housing;
  - A worker earning minimum wage in Oregon had to work more than ten hours a day, seven days a week, just to afford a two-bedroom apartment in Oregon.
- Next, **use a value statement** talking about the importance of having a safe, stable place to call home. Try to use values like opportunity, safety, and protection. Write your own, or use one of the examples below:
  - Hard-working people should be able to afford housing and still have enough money for groceries;
  - Housing gives people an opportunity to build better lives. To succeed, you need a place to call home.
- Now, **propose the solution** in your letter:
  - To keep people in housing, we need more state funding for the Temporary assistance program. We need to make sure that the program is fully funded.
- Last, **thank your legislator for their service** to our state **and sign** your letter!

6.8. WORKSHEET – ORGANISATIONAL CAPACITY AND PARTNERSHIPS, TEAM, AND TIMELINE

See Chapter 5 – Planning.

Internal Organisational Capacity Checklist
In an honest participatory internal conversation with your leadership and planning team, discuss the points, outlined below, and fill in your answers in both the "Strengths, Assets" and "Gaps, Needs, Challenges" columns.

Category	*Discussion Points*	*Strengths, Assets*	*Gaps, Needs, Challenges*
Capacity	How many names of grassroots-level people and opinion-makers do we have in our database? How many were we able to mobilise in our most recent activities?		
	Do we have relationships necessary to secure meetings and engagement with decision-makers on this particular advocacy issue? How many of the decision-makers have we personally met/ worked with?		
Experience	What is our organisation's expertise: researchers/ scientists, practitioners, service providers, capacity-builders/educators, observers…?		
	Are we good at legislation?		
	Are we good in politics and decision-making processes?		
	Are we good in media and public relations?		
	Are we good at conducting polling/public opinion research?		
	Do we have past experience with advocacy coalitions; who were our partners; and were we happy with this cooperation?		
Reputation	Do we have a written mission statement, values, and vision? Are they published?		
	What are our ideological and political affiliations?		
	Do we have previous successful campaigns? What are our accomplishments in the same field?		
Structure, Budget	Do we have a main office, a leadership body, and local branches?		
	Do we have a common electronic system for storing, keeping and organising information, data, and documents?		
	Are our budget resources sufficient for this advocacy campaign? Where is our funding coming from?		
Staff	Are our human resources sufficient and experienced for this advocacy campaign? How many staff?		

Identifying Partners

Revisit your planning worksheets of stakeholders and identify organisations and individuals who could contribute to the advocacy campaign and list these down in the respective column. You can further extend with new names. The last column provides tips on where to look.

Expected Contribution	*Potential Partner*	*Where to look*
Amplify impact among grassroots and mobilise support		Organisations that are well-connected to local or professional communities or specific socio-demographic groups and have a stake in this issue: • Like-minded CSOs, our peers, who do similar to our work on this issue; • Other CSOs that do different from our work but have local branches; • Organisations with a large membership base: trade unions, syndicates, professional associations, students, youth, and women's movements, business organisations.
Raise Credibility		Figures and entities with good reputation who have conducted research and/or successfully navigated the decision-making process, and are ready to take a stance on this issue: • Academia, Research Institutions, think-tanks, Individual thinkers or issue experts, lawyers, pollsters.
		Influential figures in specific communities who have taken, or can find a motivation to take stance on this issue: • Religious figures; • Community leaders; • Political leaders.
Facilitate access to decision-makers		Groups that have access to decision-makers and are ready to take a stance on this issue: • Former elected representatives and ministers, or other officials; • Entities and persons who have worked with and have professional relationships with the decision-makers.
Raise visibility		Celebrities, who able to bring more public attention to this issue and are ready to take a public stand on this issue: • Cinema, music, literature, culture, sports, media; • Media outlets that would be interested in partnering with the advocacy campaign.

Deciding on Partnership

At the end, review the identified targets and decide on the form of their engagement in the campaign you will seek:

Type of Partnership		Who from the list above did you decide to contact? What kind of partnership do you want to embark on? • Just inviting individuals/organisations to join in their personal capacity, or forming an alliance? • Forming a new one, or joining an existing one? • What kind of alliance: network, coalition, forum, platform?
Expected Benefits from Partnership		If you have chosen a formal partnership, describe the benefits that you believe it would bring to the campaign: • Political weight; • Citizen support from various social groups, domains, and regions; • Media attention; • Resources – financial or others; and • Increased experience and learning opportunities for our own organisation's growth.

Building a Team *Review the available human resources for your advocacy campaign and form a campaign team by assigning specific roles and responsibilities, listed in the chart below. Fill in the "Leadership" box at the end, after you have completed assigning the other roles. You can modify, add or delete categories depending on your campaign's specificity. Further clarifications are provided in the toolkit's Chapter 5.3 – Building a Team.*		
Role	***Names***	***Description***
Grassroots Coordination		Engagement with support base – regions/professions, etc.; orienting and coaching campaign activists on how to organise activities; coordinating volunteers
Communications		The full range of press and social media engagement; message development and delivery
Digital Presence		The campaign's digital presence: website, social media
Branding		Campaign materials, logo, branding and marketing
Technology		Database, electronic systems, software
Admin and Logistics		Distribution of materials, driving the vehicle(s), note-taking, accounting and dealing with budgets/ expenses/payments to vendors…
Leadership		In charge of making the strategic decisions; includes a campaign director and coordination with the coalition members
Input Givers: Subject-Matter Expertise		Which proposed solutions do/do not work, and how the policy change can work in practice
Input Givers: Legislation		Consultations on the legislative side of the decision-making process, wording of policy documents; legal advice on what is (not) allowed in terms of conducting public gatherings.

Creating a Timeline *In the chart below, collate the activities you have chosen for influencing the decision-makers and for community mobilisation onto one list. Begin with filling in the government calendar; next sketch out where the activities would occur within a 12-month timeline. You can modify the months' names, and enlarge, add or delete rows depending on your campaign's specificity. Further clarifications and examples are provided in the toolkit's Chapter 5.4 – Creating a Timeline.*							
Month	***External events***	***Campaign Activity***	***Target Audience***	***Milestone***	***In Charge***	***Resources***	***Risks***
January							
February							
March							
April							
May							
June							
July							
August							
September							
October							
November							
December							

Campaign Success Indicators
Review your campaign's timeline, the planned advocacy activities, and the campaign's objectives. In the chart below, list the key indicators, or metrics, that the planning team will follow throughout the campaign in order to measure its achievements and success. Define how the indicators will be measured and set approximate targets that you want to achieve for each indicator. Add or delete rows depending on your campaign's specificity. Further clarifications and examples are provided in the toolkit's Chapter 5.5 – Campaign Success Indicators and Metrics.

#	Indicator	How Will We Measure It?	Target
1			
2			
3			
4			
5			
6			
7			

Examples

- # of campaign supporters/advocates/people involved
- # actions taken/engagements by campaign supporters…
- # of town-hall meetings conducted by region
- # of attendees of town-hall meetings by region/gender/occupation/age…
- # petition signatures
- # petitions views
- # campaign website clicks

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