ABC of advocacy



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What is advocacy?

"Advocacy is a process to bring about change in the policies, laws and practise of influential individuals, groups and institutions"

"Advocacy is an on-going process aiming at change of attitudes, actions, policies and laws by influencing people and organisations with power systems and structures levels for the betterment of people affected by issues."

"Advocacy is the process of building strategic communications to educate people about a need and mobilising them to meet it. This process should be concluded by a change."

"A systematic approach to influencing governmental and institutional policy and practice change. But effective advocacy is about individual people as decision-makers, not structures."

10 principles for effective research-based advocacy¹

- 1. Select the issue that is right for you.
- 2. Compile strong and compelling evidence.
- 3. Understand your different target audiences.
- 4. Be clear about what you are trying to achieve; identify objectives.
- 5. Use a range of tactics, according to the situation.
- 6. Increase your legitimacy by involving beneficiaries = children and adults with SB/H.
- 7. Create partnerships with allies and work to minimise the influence of opponents.
- 8. Combine reactive and proactive communication techniques and be consistent in your message.
- 9. Stay with the issue through to resolution, including viable exist strategies.
- 10. Promote an advocacy, change-oriented, learning cultures.

1 Adapted from SOS Children's Villages Vienna September 2012 training

Touch some lives today	Change the world tomorrow!
Philanthropic, charity-based	Political, rights-based
Meeting the direct needs of identifiable beneficiaries	Calling for changes in policy, funding and practice
Results are more modest but achieved sooner	Results are more ambitious but take longer to achieve
Direct benefit to the (relatively few) identifiable beneficiaries	Potential for indirect benefit to a significant number of people
Uncoordinated, sporadic	Coordinated, planned, continuous
Emotions-based	Evidence-based

Two approaches to achieving change

Are we too busy saving drowning babies from water to understand why they keep falling there in the first place?

Cycle of advocacy

I. Define the issue

IX. Monitor and Evaluate II. Do situational analysis, get informed

III. Set your goals and objectives

IV. Identify your target audience

VII. Develop an action plan

VIII. Engage media

interest

V. Establish the key messages

VI. Gather your allies, build your network

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I. Define the issue

Approach researching your issue very seriously. Knowing the issue from inside out is the key to successful advocacy. The more you know, the better you are prepared for challenges and the more creative you are in finding solutions. As the first step, focus on three elements: **core problem, its causes, and its consequences.**



Practical exercise

(best done in a small group with the use of visual aids, such as a flip chart, post-it notes, coloured markers)

- 1. Identify the **core problem** you are working on. This is the trunk of your problem.
- 2. Brainstorm the list of causes. These are the roots of your tree.
- 3. Brainstorm a list of **consequences** of the core problem. These are the branches of your tree.

Once you have finished the initial mapping, revisit the Problem Tree and ask yourself:

- Does this represent the reality? Are the historical, economic, political, medical and sociocultural dimensions to the problem considered?
- What are the main trends and developments? Which causes and consequences are getting better, which are getting worse and which are staying the same?
- What are the most serious consequences? Which are of most concern? What criteria are important to us in thinking about a way forward?
- Which causes are easiest / most difficult to address? What possible solutions or options might there be? Where could a policy change help address a cause or consequence, or create a solution?
- · What decisions have we made, and what actions have we agreed?

After this exercise, the main trends and opportunities should be clearer to you. The Problem Tree is your 'skeleton'. You are now ready to to put some 'meat' on the skeleton.

Example of a Problem Tree process

As part of designing an HIV/AIDS activity in Kenya, a DFID design team needed to have a deeper understanding of various issues and constraints related to the epidemic. Before moving to a large log frame workshop the team decided to conduct **focus group interviews** with potential target groups and service providers. Through the focus groups the team gained a much deeper understanding of HIV/AIDS-related problems, constraints and opportunities.

At the same time, participants in the groups learned much about common problems they themselves were facing and their possible solutions. Counselling and testing groups discovered they all faced a critical issue about how to protect the confidentiality of HIV-positive clients. Through the discussion they were able to exchange ideas of how to achieve this. Some had a policy focus and helped understand where changes in government practise and legislation could help.

These issues were brought into the log frame workshop, where they were integrated in the design through an activity output dealing with improved counselling and testing services.

II. Do situational analysis, get informed

Environment assessment: SWOT analysis

Strengths internal strengths of the organisation and its partners	Weaknesses internal shortcomings that may prevent you from carrying through your work
Committed and trained staff; secured funding; expertise in the issue; good relationship with sponsors; active membership support	Lack of knowledge about advocacy; no paid staff; competing internal priorities; a weak communication strategy; unrealistic demands from membership
Opportunities external hooks that you take advantage of to	Threats
present your message	external dangers that you need to be aware of and mitigate

Gather action-oriented and up-to-date research

Remember to:

- Diversify the sources of your research. This will help you have arguments for each target group: medial arguments for doctors, economic arguments for the private sector, human rights arguments for the government, real-life stories for the media.
- Focus on good practices. If you ask someone to contribute to a change, it is encouraging to know that the similar process has already taken place elsewhere in a similar situation. Concrete examples of good practices are very beneficial!
- Research produced by your target (government body, health authority) is a particularly powerful way of strengthening your message. So is research produced by an authoritative international organisation (such as the European Union, World Health Organisation, or the United Nations).

What sources of information to use? Collect real-life stories

- Analyse national law and policy: legislation on healthcare / social protection / disability; national public health strategy.
- Statements by the national authorities: did the prime minister recently say in his speech that the wellbeing of children is the most important priority in the field of social affairs? Has the government publicly committed itself to taking measures to respect the UN Convention on the Rights of Persons with Disabilities? Has the mayor of the city acknowledged the problem of accessibility of public spaces to people with reduced mobility? Has there recently been a court case that supports your cause?
- International law that your country is party to. You can find out online whether or not your country has ratified a certain human rights treaty (also see IF's "ABC for Equality" that accompanies this guide). Have the international committees of experts overseeing the implementation of these conventions condemned your country for non-respect of the right to healthcare? Has your government internationally committed itself to doing more on the rights of children?
 IF secretariat will be able to proactively help you with this!
 - NGOs and academia. These often produce policy and analytical documents on issues such as health, human rights, disability, rights of children, accessibility of health care services, the impact of the financial crisis on social services, social justice, etc. Do not focus only on materials that specifically focus on SB/H but expand your search to topics such as disability, children, economic, social and cultural rights, public expenditures, etc..
 - **National media**. Collect media clippings that are both supportive and undermining of your issue. Gauging the national media position on your issue will help you capitalise on positive views and control the damage created by the negative ones. Whenever possible, you should also try to respond to the media attention by writing to the editor, or publishing an open letter, or mobilising attention on social media.

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Remember to:

- Focus on people
- Make an emotional appeal without being too emotive or focused on small details
- Strike the balance in portraying problems and solutions

III. Set your goals and objectives

Goal is your main aim – your vision of the future when all your objectives have been attained. The goal will probably take more than one advocacy cycle to be fully attained. The goals mirror the long-term vision of your organisation.

"No children with disabilities have to live in institutions. All institutions are closed." "Multidisciplinary clinics for adults and children with SB/H are freely accessible and widely available in all municipalities of the country."

Objectives are the milestones your organisation wants to achieve in the current advocacy cycle. A realistic advocacy strategy can have 2-3 objectives (never more than 4). Your objectives should be SMART:

- S Specific. For example, the objective "Children have better access to healthcare services" is not specific enough. What is better? Better than what? Access to what healthcare services? Do "children" include both newborn babies and adolescents?
- M Measurable. If your objective is "to train 3 paediatricians, each in a different hospital, about the multidisciplinary SB/H care", you know exactly how much work you need to do, and will be able to measure the outcomes of your work.
- A Achievable. "All hospitals in my country provide multidisciplinary SB/H to all children by next year" is probably not realistic that will set you up for a failure. You need to set an achievable objective that you can realise with your actual resources.
- R Relevant. There are probably many problems that persons with SB/H experience in your country. Your research (remember the Problem Tree, p.5) and members will help you choose the one that is the most urgent and important. If you are aware, for example, that there is a lack of information about SB/H, you may initially need to focus on tackling the common misconceptions and lack of information. Once this has been achieved, achieving other objectives will be easier.
- T Timebound. Don't forget to set a time limit on the achieving your objective. "By 2016, 3 paediatricians are trained" is timebound. Halfway through this time limit, you can revisit your objective and see if you will be able to achieve it, and re-formulate it if necessary. "By 2016, the cost of shunt and the related medical procedure are fully reimbursed by the national health insurance"." By 2015, the government of XXX approves of a decision to train [how many] special education teaching assistants and earmarks dedicated budget to it."

IV. Identify your target audience

Potential decision-makers	Potential influencers	Interest holders
Members of the parliament	Civil society organisations	Children and adults with SB/H
Government: prime minister, ministers of health, finance, education, social affairs	Media, especially social media	Families with members with SB/H
European Commission	Medical community	Medical community
Members of the European Parliament	European Union	
Donors / funders	Businesses and corporations	Businesses and corporations
Judiciary	Judiciary	
Civil servants	UN	
Political parties	Professional bodies	Professional bodies
Municipalities	Teachers and researchers	

Power Interest Matrix

Using a power interest matrix, it is possible to systematically map the power and interest levels of individual and groups of stakeholders. Not only does this allow you to compare stakeholders in relation to your strategy, it allows you to plan how to manage relationship with them and to potentially change their position in the matrix by applying the correct pressure techniques (communication plan, bilateral meetings, submission of evidence, presentation of real-life stories).

Referring to the Problem Tree, list all those who are (or should be) involved in the process of change. Are some of these listed below? All these people and organisations are stakeholders.

Now think where these stakeholders would find themselves in this Power Interest Matrix?



Stakeholders with high power, and interests aligned with your ideas, are the people or organisations it is important to fully engage and bring on board. If trying to create policy change, these people are the targets of any campaign.

V. Establish the key messages

A key message is the most significant element in determining how an audience perceives you and your arguments. It must be:

- Clear, convincing, brief, consistent
- Easy to understand and straight
- Repeated and reinforced by different people and associations
- Crafted to your audiences rather than just simply communicating what you want to say

How to create your key message? Step by step!

- 1. Considering your objectives, what do you want to achieve?
- 2. To what extent are the stakeholders already working on your issue? Are you introducing a completely new issue?
- 3. What influences the stakeholders' decision-making? International/European pressure? Authoritative medical report? A public manifestation?
- 4. What can YOU do to influence the stakeholders' decision-making? If your decision-maker is influenced by the European Union pressure, don't spend energy organising public manifestations – instead, reflect on how you can reach out to the EU and inform it about your problem. NB! This is what IF Secretariat is there for!
- 5. What kind of messages do different stakeholders best respond to?
- A human rights case? = "This is a human right of all people with SB/H to...."
- A medical case? = "Provision of this treatment is the best recommended way..."
- An economic case? = "Provision of this treatment makes good business sense..."
- A judicial case? = "Provision of treatment is necessary because the law requires it..."
- A mix of arguments?
- 6. Remember the power of real stories: combine the rational with the emotional in order to appeal to people's heads and hearts.
- 7. Don't overcomplicate: use simple language and avoid jargons or acronyms.
- 8. Make sure that the language and tone are consistent with the message and audience.

Ideally, you should have one primary key message, two or three key secondary/supporting key messages, as well as arguments to respond to criticism of your proposal.

Primary message:

- Interesting to all audiences
- The theme that will hold your advocacy campaign together
- Simple and direct in order to gain maximum attention

Secondary/supporting messages:

- Support the primary message and explain how it can be achieved
- Be targeted to the needs, perceptions and preferences of your target audiences (answering their question "what does this have to do with me?"

Examples of target-tailored messages

Decision-maker	Your primary key message	Your secondary key messages	Arguments to respond to criticism
Minister of Health	"Establishing multidisciplinary teams for people with SB/H must be an important priority of the new government, supported by adequate budget."	 Our country will be held accountable for its respect of CRPD. MD teams are an efficient and cost- effective use of public money. The EU and international partners has funding and expertise to support us. 	 "Finance ministry is responsible for the money – I don't have any" "Let's meet the Finance ministry together and build the case" "This is a very complex issue and we first need to research it, this will take time" "There is a lot of research available, incl from neighbouring countries"
National media	"Children with disabilities are not provided with proper healthcare despite the government's promises and international obligations"	 Our children are abandoned and segregated. Other countries in our region are doing better. Show the difference of outcomes for children who get good care and those who don't. 	1. "We have bigger problems than a handful of sick kids" -> "Ignoring the problem today will make it only bigger tomorrow"

Practical exercise

- You are at a national conference dedicated to patients' rights. It is chaired by the Minister of Health and has national policy-makers, industry and EU representatives as participants. You have an opportunity to make a short intervention or ask a question. What is the best way to use this opportunity?
- · You are being interviewed for your local TV/radio station. What will you say?
- You are riding the lift with the head of the paediatric section of the big reputable hospital. You have 30 seconds to pass on your message. What technique will you use to be remembered by her/him?

VI. Gather your allies, build your network

Partnerships and coalitions are indispensable. They can help spread your messages, provide credibility and help in accessing the communities. The larger the circle of your partners and supporters, the greater the chances of success of your advocacy campaign.

How to build coalitions?

- Find a unifying issue and stick to it. Satisfying the different demands of everyone will be impossible, so focus on what is important to everyone.
- Only enter in partnerships with the organisations whose credibility and integrity you trust. For example, if you cooperate with an organisation that has a record of tax evasion or hate speech, your reputation will be tarnished by association.
- Agree on simple rules of working together: they should include elements on transparency, exchange of information, decision-making, visibility of partners and actions to follow in case of disagreement.
- If possible and appropriate, create partnerships with less obvious stakeholders, such as the private sector.

VII. Develop an action plan

Now that you know what you want to achieve, whom you need to target in order to achieve it and with what messages, and who can support you in doing so, you need to systematically plan how you are going to achieve your objectives.

The examples of activities to be done can include:

- Writing a letter to a politician/decision-maker to present your views and ask for a meeting
- Organising a capacity-building / fundraising seminar for families
- Writing a media article and finding where to publish it
- Contributing to a public consultation

Ask the following questions before you decide to do any activity:

- Does this really serve the objectives of my advocacy strategy?
- How much time should I spend on this activity? If the possible outcome of the activity is modest, spend less time on it than if the possible outcome is great (i.e. many people will benefit from it). For example, you may be asked to speak for 10 minutes in an event on participation in the cultural life, for which you have to prepare and travel very far. Although this event is not entirely irrelevant to your objective, it is not the priority of your advocacy to work on culture right now.
- Are there resources to undertake this activity? It may be a good idea to organise a large conference, but if your organisation only has one paid part-time staff and no financial resources, it may not be realistic right now.

Do not undertake any activity unless you know how it will contribute to achieving your objectives!

VII. Engage media interest

Working with the media is closely linked with the public opinion: most media claim to represent the public opinion and also shape the framework for debates. The media have a great influence in setting the political agenda and are usually listened to by politicians when they decide on government policy. There are different forms of media.

Media could either be local, national or international. You could use each kind of media for different purposes.

- Local media could promote your cause to potential supporters and local associations. They could be very useful if your campaign is aiming for changes at the local level.o National media could give your campaign more credibility and attract the attention of the public, of other organisations or even of decision-makers at a national scale.
- Some media, like the BBC, are essentially national but have a worldwide influence. You could also target the European media (European Voice, Euractiv, EU Observer...) if you would like to defend your cause on a European scale.
- Newspapers and magazines encompass a wide range of publications: they could be daily, weekly, monthly, local, national, European, specialised or general. When approaching a newspaper, think about its audience, its editorial line, and whether it covered stories similar to yours before. For example, if you are aiming for changes in the medical sector, you might want to target a newspaper specialised in medicine.
- However, it may also be useful to target other newspapers which may indirectly be linked to your **campaign issue** in order to reach as wide an audience as possible (e.g. if you are leading a campaign on the issue of migrant workers, it may be useful to target press specialised in agriculture, as many migrant workers work in that sector). Similarly, you will not present your story under the same angle if you are approaching a tabloid or if you are approaching the financial press. You should also not limit yourself to newspapers whose editorial line is friendly to your cause; you will gain more credibility if your campaign is covered by newspapers that would not be

likely to defend your arguments at first sight. You must also pay a particular attention to timing. The coverage that your story will receive will depend on the journalists' deadlines. On the one hand, in the daily press, the best time to contact journalists is early morning; a story is less likely to be covered if it arrives in the afternoon, when the content of the next day's edition has already been decided. Moreover, you have to offer the daily press a new angle to your story every day, otherwise it will have nothing 'new' to cover. On the other hand, weekly or monthly newspapers or magazines all have different deadlines and allow for more space for features. They are often more specialised than the daily press and do not need to be provided a new angle regularly.

- The **television** needs for visual stories, for images and for filmed interviews. If you cannot provide attractive or shocking images, the television will be less likely to be interested in your campaign. For example, public demonstrations are more likely to lead to spectacular footages than reports. The television is viewed by millions and could be a great way to attract support for your cause; yet, organising events that will provide them with the necessary footage is often costly.
- The **radio** relies heavily on sound. Targeting the radio is generally cheaper than targeting the television: a good speaker with catchy phrases could be particularly effective on the radio, while the television will require a story whose potential goes beyond a simple interview. Radio has enormous potential to communicate to a wide audience, especially with the mushrooming of FM radio stations throughout the world and access to radio through the internet. Radio also has the advantage of being able to 'bring to life' development issues, events and activities, thus often transmitting messages in an interesting and effective way.
- The **online media** are also a way to reach a wide audience. Some media exist exclusively on the internet (e.g. Euractiv, EU Observer), and most news organisation have their own website on which a team of journalists often write stories that do not find their place in the usual news. Some websites can also reach a more international audience (e.g. BBC Website).

Media ready checklist¹

Organisational Assessment:

- Does your organization have a media strategy?
- Is the media plan discussed as part of the overall influencing plan?
- Do you revise the media plan on a regular basis as your influence campaign evolves?

Organisational Infrastructure:

- Do you have a staff person who is responsible for carrying out the media plan and coordinating all the media efforts in your organisation?
- · Do you have a planning calendar of key political events?
- · Has your organization identified its primary, formal spokespersons?
- · Do your spokespersons need media training and preparation?
- Have your board and staff prepared a plan for 'rapid response' to an opportunity or a crisis that presents itself with little warning?
- Is the chain of decision making for media statements clearly designated and understood by everyone within the organisation?
- Does your public policy budget have a media component?

Media Systems:

- Are your media lists up-to-date, complete with names of editors, reporters or producers for all media outlets you plan to use?
- Do you know deadlines, work hours and preferred communications modes for key people who work on your public policy issues?
- Do your lists distinguish types of coverage: news, feature, editorial, columns, calendars?
- Do you have a clipping file for all relevant media coverage and for a complete record of coverage of your organisation's work?
- Are you in regular contact with the editor and reporters you have designated as key contacts?
- Is your information media ready?
- Do you have accurate, concise, interesting information about your organisation its mission, history, programmes and services?
- Have you shaped a clear message and talking points for the policy issue you plan to raise?
- Have you held introductory meetings with members of the press who are likely to cover your organization and issues?
- Do you maintain an information base that is a valuable resource to the press, including a portfolio of data and stories, and a list of staff or others who are willing to talk to the press?

1 Source: Angelica (2001)

Tips on writing press releases

- Determine what is the main news angle you wish to communicate.
- Connect the report to a news hook.
- Check deadlines for local publications/ television/radio bulletins to ensure the media release is received in time to be published before the event.
- On average, send releases two weeks before events, except to magazines which may have a two to three month lead time for publication.
- First paragraph of no more than 25 words telling briefly who, what, where, when and why about the event, issue or project.
- Use short sentences. Each sentence should be a separate paragraph. Use active sentences ('The group have decided', not 'It has been decided'). Avoid jargon and difficult words. Keep it simple. Make numbers more meaningful by making comparisons or breaking them down into familiar units.
- If using quotes in the body of the release, quote credible spokespeople and identify them with their positions in the organisation.
- Keep information clear and unambiguous.
- Keep releases short, no longer than one page. If the media want more information, they will contact you.
- Include in the media release the date the release was written, and a contact name and phone number for someone who is easily contacted during office hours. Put the summary on your website and include the link in any press release.
- If offering interviews, make it clear whether this is an exclusive for one media outlet (could be one print, one radio and one television, as these do not see one another as competing). This can encourage coverage of your issue, whereas a general media conference may not be well attended.
- Track coverage to see how and when your information is published.
- Be sure to write and thank the journalist to develop a relationship that may encourage them to work with your organisation in tracking progress on the issue/project, and hence keep the community informed.

Tips on becoming a resource for journalists¹

- Be available. Give reporters, especially at news services where they work odd hours, home and mobiles numbers and tell them it's OK to call.
- Seek journalists at meetings etc and give them your business card.
- Be ready to be quoted. Having to call back once the quote has been cleared will reduce the chance of the quote being used.
- Know the issues. Read and comment intelligently on developments relating to your cause.
- Don't always assume journalists have received the information you have about topical events or relevant news releases.
- Avoid rhetoric and ideological arguments; most journalists have heard all this before.
- Know your facts; never pass on information unless you know it's true.
- Know where to find information or contacts fast and therefore gain a reputation as a good source.

Source: Citizen Science Toolbox

For more resources check: A Media Relations Handbook for Non-Governmental Organizations by Independent Journalism Foundation www.ijf-cij.org or Media Diversity Institute www.media-diversity.org

IX. Monitor and Evaluate

Impact is the lasting result and sustainable changes brought about a given advocacy or campaign project. Impact may occur in the lives of beneficiaries or untargeted groups. Impact can be positive or negative. In order to assess the impact of your work, you need to monitor and evaluate it.

Monitoring is the continuous process of recording steps that help you achieve success. Monitoring takes place on the basis of indicators that you have decided to you.

Evaluation is a process to determine whether or not you have achieved your objectives. Evaluation takes place at the final stage of your advocacy and serves as the basis for deciding on your next steps.

The key areas to evaluate are:

- 1. Achievement of advocacy objectives
- Completion of the action plan (on time and within the available budget)
- 3. Lessons learnt

The following checklist may be helpful in setting your monitoring and evaluation indicators:

- 1. Achievement of advocacy objectives
- · Have we achieved the objectives of the advocacy strategy?
- · Were the objectives SMART?
- · Were the outcomes as we expected?
- Are our members and end users (people with SB/H) pleased with the end result?
- How does the project contribute to our overall goal (our vision of the future)?
- 2. Action plan
- · Did we correctly identify the activities required to achieve the objectives?
- Was our time scale realistic?
- Were the human/financial resources estimated appropriate?
- Were all team members aware of their roles and responsibilities?
- Was the internal communication effective and transparent?
- · What delays and difficulties were there and how were they corrected?
- 3. Lessons learnt
- What went well and could be repeated another time?
- · What problems occurred and how could they be avoided in the future?
- What caused delays and difficulties?

Example

Objective	Target groups	Activities	Indicators of success
By 2016, three paediatricians, each in a different hospital, will be trained on multidisciplinary care for persons with SB/H.	 3 directors of hospitals 3 paediatricians Specialised media Private sectors (medical goods supplier) 	 Approach the hospitals with proposal to design training Design, in cooperation with (international) experts, the training pack Ensure funding for activities (fundraise, or obtain public funding) Invite experts Conduct trainings Present the results to the Minster of Health with the view of rolling out the programme wider 	 How many hospitals have been approached? How many have responded positively? How was the training pack designed? Did all relevant stakeholders participate in it? Did we manage to obtain funding? How much? What feedback to the training from doctors? Have there been requests for more training? How has the Minister of Health reacted to your work? Will the training be rolled out in other hospitals?



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