



Advocacy and Campaigning Course Toolkit

**Cyprus
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Introduction - About the Toolkit

This Advocacy and Campaigning Course Toolkit has been produced as part of the broader **Cypriot Civil Society Strengthening Programme** implemented by **INTRAC** (International NGO Training and Research Centre) www.intrac.org, UK, The Management Centre of the Mediterranean www.mc-med.org and NGO Support Centre, www.ngo-sc.org, Cyprus.

The course is suitable for beginners and for people with some experience of advocacy and campaigning who want to reflect on how to increase their impact or about creating advocacy and campaigning strategies. It provides a mix of theoretical inputs and practical exercises that will enable participants to build their skills and understanding.

This toolkit is intended for use by Cypriot CSOs – we hope you find these materials useful – please let us know if you have any feedback!

Overall Course Objectives

- To introduce advocacy concepts; identify the core skills required for advocacy; and learn how to develop an advocacy strategy
- To consider how advocacy could contribute to achieving the objectives of participants' organisations
- To provide a practical introduction to some key tools and methods used in advocacy including
 - Issue identification and analysis
 - Power mapping
 - Lobbying and influencing
 - Working in alliances
 - Campaigning and public outreach
- To reflect on the role and influence of the EU and identify key institutions and individuals relevant to the interests and activities of CSOs in Cyprus
- To review ways to set objectives and monitor advocacy

Overall Course Content

Session One and Two

- Welcome and introductions
 - What is advocacy
 - Participant's perceptions about advocacy
 - Definitions
 - The advocacy toolkit
- Why use advocacy
 - What can it do for our work
 - Participants' experience of advocacy or influencing work
 - Concerns and anxieties about using advocacy

Sessions Three, Four, Five and Six

- Issue analysis and identification
 - Issues being addressed by participants
 - Getting to root causes – but why exercise
 - Practical exercises using visioning, problem tree, and issue analysis star tools
 - Criteria for selecting strategic issues
- Mapping the external environment
 - Identification of key institutions and individuals in Cyprus
 - Power mapping
- Reflection on the role and influence of the EU and identification of key institutions and individuals relevant to the interests and activities of CSOs in Cyprus

Sessions Seven and Eight

- Lobbying, influencing and making your voice heard
 - Top Tips for Success
- Practical exercises
 - What makes people change their minds

Sessions Nine and Ten

- Reaching a wider audience
 - Why communicate
 - Examples of campaigns from Cypriot CSOs
 - Campaigning toolkit
 - Audiences and messages
 - Designing a campaign - practical exercises

Sessions Eleven and Twelve

- Working in alliances – including working with international NGOs
- Setting objectives for and monitoring and evaluating advocacy

Session 1.1 Handout

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Session 2.1 Handout

What is advocacy?

Advocacy describes a method or approach used to:

- change policies and practices
- reform institutions
- alter power relations
- change attitudes and behaviours
- give project work a broader impact

Some Definitions of Advocacy

"Advocacy is putting a problem on the agenda, providing a solution to that problem and building support for acting on both the problem and the solution"

(An Introduction to Advocacy: Training Guide, Ritu R Sharma, Academy for Education Development)

"The term advocacy encompasses a whole range of methods and approaches used to change those policies and practices, attitudes and behaviours that function as obstacles to development and poverty eradication. While technical support and the provision of services focus primarily on the manifestations of poverty, advocacy focuses on the causes of poverty and seeks change at this level. At its best, the process of advocacy should involve those people who are affected by the problems identified; increase cooperation between NGOs and other civil groups; and expand the space for open discussion between citizens, governments and institutions."

(ActionAid UK, internal paper for country programme staff)

"Advocacy consists of actions designed to draw a community's attention to an issue and to direct policy-makers to a solution. It consists of legal and political activities that influence the shape and practice of laws. Advocacy initiatives require organisation, strategic thinking, information, communication, outreach and mobilization"

(Human Rights Manual, Marge Schuler)

"Advocacy can be defined as action aimed at changing the policies, position and programmes of governments, institutions or organisations involving an organised, systematic influencing process on matters of public interest. In addition, advocacy can be a social change process affecting attitudes, social relationships and power relations, which strengthens civil society and opens up democratic spaces."

(Working for Change in Education - A handbook for planning advocacy, Save the Children Fund, UK)

Advocacy involves different strategies aimed at influencing decision-making at the local, provincial and national levels, specifically:

- who decides – elections, appointments, ministers, boards of advisors, judges, managing directors, etc.
- what is decided – laws, policies, national priorities, programmes, services, budgets, etc.
- how it is decided – accessibility of information, consultation and/or involvement of people in decision-making, responsiveness to citizens/stakeholders, accountability for decisions

(The Action Guide for Advocacy and Citizen Participation, Lisa Veneklasen, forthcoming)

Put simply, advocacy means fighting for our rights. Advocacy includes figuring out how bureaucracies and systems work, and fighting decisions that deny us things we are legally entitled to -- protection from discrimination, access to social assistance and health care, fair treatment by the justice system, etc. Advocacy also includes lobbying organizations, institutions, and various levels of government to change their rules and regulations that deny people the full economic, political, and legal rights set out in the United Nations' Universal Declaration of Human Rights.

(Transcend – Transgender Support and Education Society)

(Hilary Coulby for INTRAC)

Session 2.2 Handout

The advocacy toolbox

Strategy development

- research and analysis into issues – their causes and consequences
- identification of the solutions and changes needed
- power mapping
- stakeholder analysis
- setting issue and process objectives
- outlining methods, tone and approach
- laying out a timetable of activities and assigning responsibilities

Reports and briefings

Lobbying

Networking, alliance building

Conferences/seminars

Exposure visits

Campaigning

Media work

Social marketing

Running an active website

(Hilary Coulby for INTRAC)

Session 2.3 Handout

Why use advocacy?

To achieve widespread, sustainable change

to create a bigger impact than is possible with grassroots programmes alone

to try to make programme impacts more sustainable

to defend communities and programmes from adverse policy changes

To strengthen civil society and expand democratic space by:

encouraging consultation and the participation of citizens in all levels of policy-making

building and strengthening cooperation between NGOs and other civil groups

establishing through interactions with decision-makers the legitimacy and credibility of civil groups

(Hilary Coulby for INTRAC)

Session 2.4 Handout

DIFFERENT WAYS OF SEEING DEVELOPMENT

**Traditional Service
Provider Sees**

**Rights Based Approach
Worker Sees**

Basic needs

Basic rights

Symptoms

Causes

Projects

Strategies

Teaching

Two way learning

Beneficiaries
(passive recipients)

Constituents/citizens
(active participants)

Outputs

Social change

Mission

Vision for change

(Hilary Coulby for INTRAC)

Session 3.1 Handout

Problem and Issue Analysis – the “but why” technique

What are "root causes?"

Root causes are the basic reasons behind the problem or issue you are seeing. It helps you to focus on the causes instead of the symptoms of problems. Trying to work out why the problem exists is an essential part of finding the right solution and helps to guarantee the right responses.

What is the "but why?" technique?

The "But why?" technique is one method used to identify underlying reasons or root causes that affect an issue.

The "But why?" technique examines a problem by asking questions to find out what caused it. Each time an answer is given, a follow-up "But why?" is asked.

For example, if you say that people in poor communities don't have access to clean drinking water, you might ask yourself "but why?" Once you come up with an answer to that question, probe the answer with another "but why?" question, until you reach the root of the problem, the root cause.

For example, does the problem start with lack of hygiene education resulting in people not caring about clean water, or is it because they don't know how to dig safe drinking water wells? Or is it a result of government's failure to implement well digging programmes? If it is a government failure, why is this happening? Is it because of lack of money? Why is there a lack of money for drinking water wells? etc.

How does the "but why" technique work?

Example:

The immediate problem

Children are not going to school

Ask why?

They keep falling ill

Possible response: provide medicines

Ask why?

They drink bad water

Possible response: dig a well

Ask why?

The well is too far from the school

Possible response: put in a pipe

Ask why?

The local government said it would dig a new well last year but it hasn't

Possible response: dig a well or lobby local government to provide the well

Ask why?

Central government has not released the funds they promised

Possible response: dig a well/put in a pipe or lobby central government to release the funds

Ask why?

The bilateral donors haven't released the pledged aid funds

Possible response: dig a well/put in a pipe or lobby bilateral donors

Many causes and solutions may apply to your problem, so it is up to you to find the ones that seem most important and that your organization has the capacity to work with.

The "But why?" analysis by itself doesn't lead automatically to the area you should choose for your work but it does highlight the different causes of the problem and the different paths you may take to solve it.

Why should you identify root causes?

Identifying genuine solutions to a problem means knowing what the real causes of the problem are. Taking action without identifying what factors contribute to the problem can result in misdirected efforts. This wastes time and resources.

It will uncover multiple solutions for a certain problem and allow the user to see alternatives that he or she might not have seen before. It increases the chances of choosing the right solution, because many aspects of the problem are explored during the "But why?" exercise.

When should you identify root causes?

When there is support for a "solution" that does not seem to get at the real causes of the problem. For example, if there's hunger in community, let's distribute free meals.

When there is ignorance or denial of why a community problem exists.

Whenever you are planning advocacy on an issue.

Of course, the "But why?" technique is not perfect but it is an efficient way of exploring a variety of solutions to a problem. And it is a quick and inexpensive technique that can be used by anyone, at any time, anywhere.

Complementing "but why"

Once you have identified root causes, and to ensure broader involvement in your advocacy, you will need to complement your initial problem analysis with consultations with the people affected, and with desk research into policies and case studies.

(Adapted by Hilary Coulby for INTRAC from the Community Tool Box)

Session 3.2 Handout

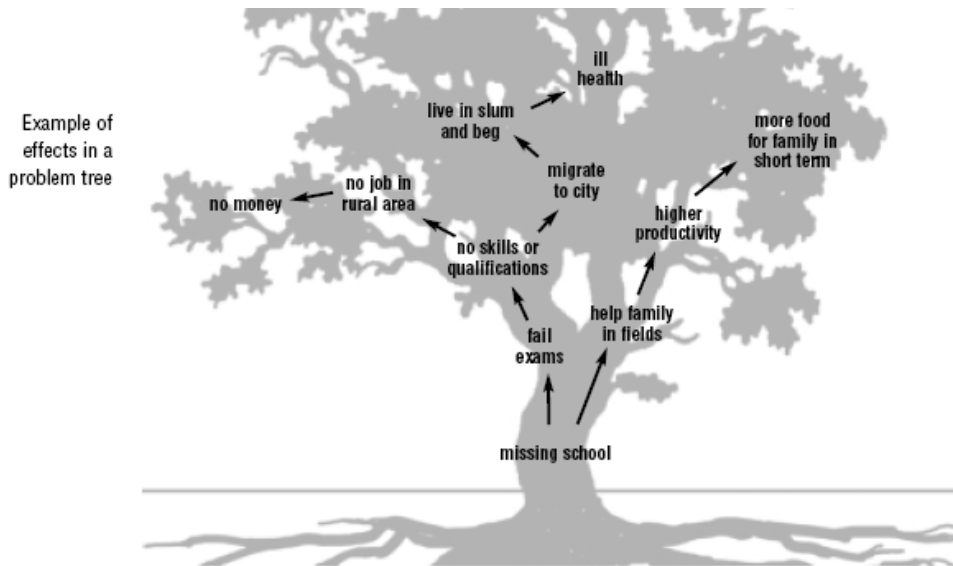
Visioning Key Issues

- What is your long term vision for your country?
- What do you want your society/country to be like?
- What specific features would act as indicators for your ideal society
- What needs to change for this to be achieved?
- What are the obstacles that stop this happening?
- What are you trying to achieve with your work?
- What contribution does this make to your overall vision?
- What else is there that you could/should do?

(Hilary Coulby for ActionAid)

Session 3.3 Handout

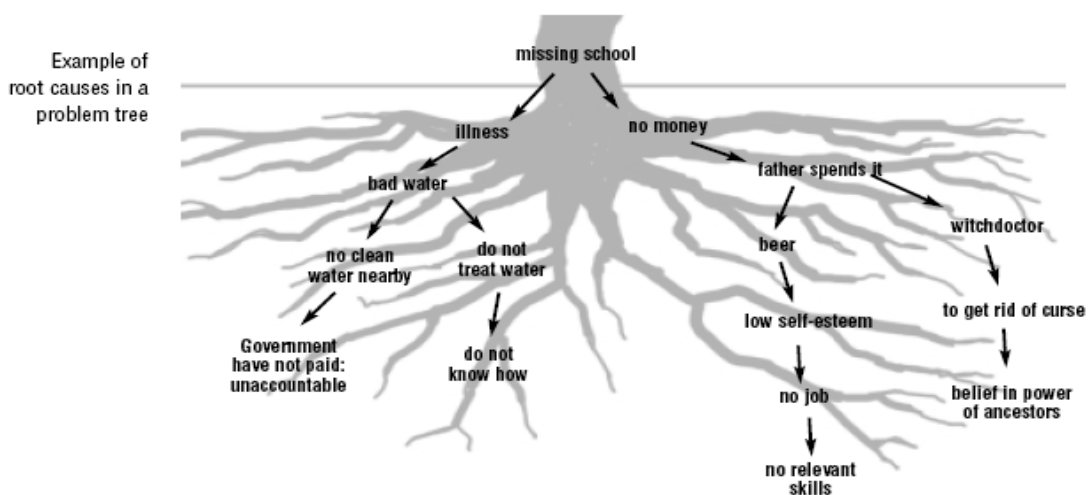
Problem Tree (from *Tearfund Advocacy Handbook 2003*)



The whole exercise of the problem tree (causes and effects) is best done on a long piece of paper on the wall – so that people can see all the causes and effects and possible interventions at the same time. The paper can be written on directly or people can stick post-it notes onto it and move them around as necessary.

STEP 2
The problem tree

At each ‘but why?’ there are a variety of answers that can be given and if the ‘why?’ exercise is repeated for the same problem a number of times, you will be able to identify many of the roots of the problem. A simple example is given below, although problem trees can sometimes become much larger!

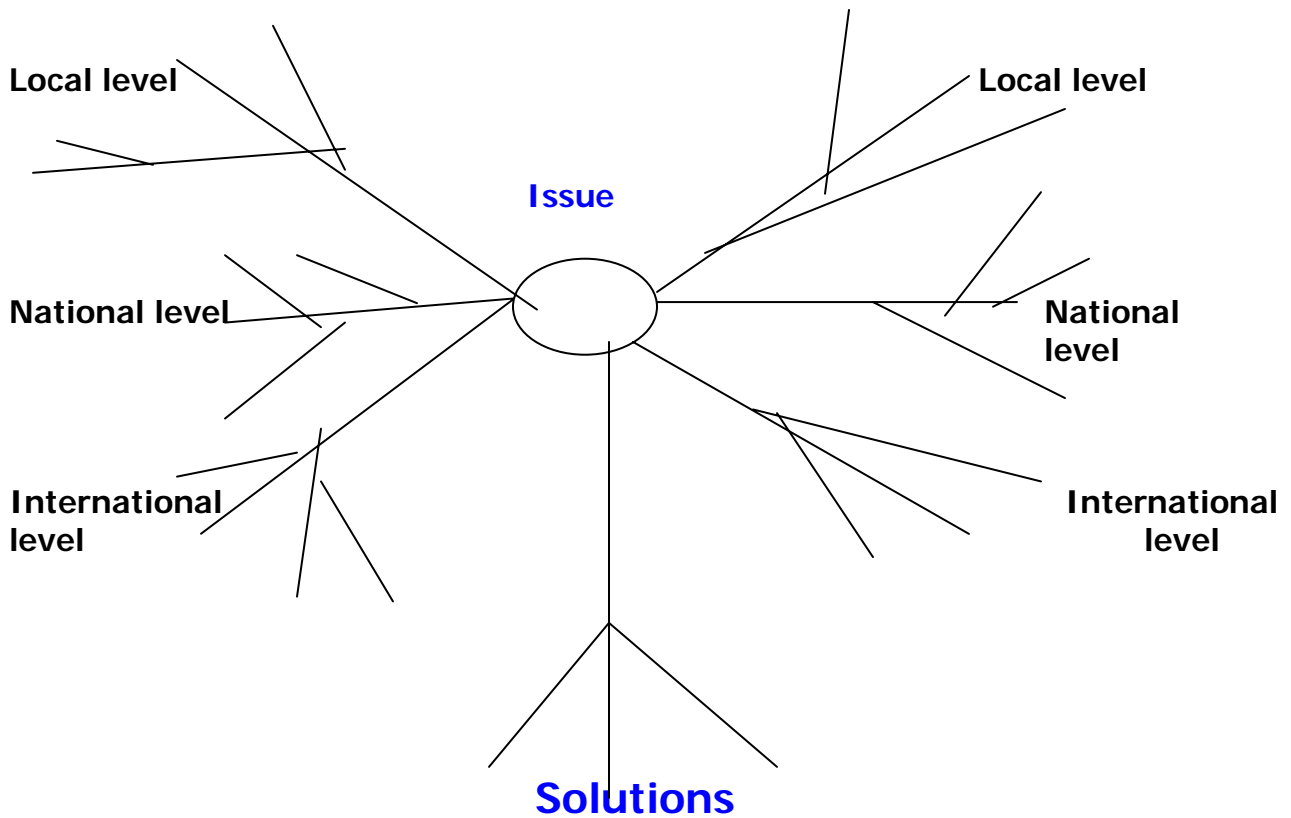


Session 3.4 Handout

ISSUE ANALYSIS STAR

ROOT CAUSES

IMPACTS/EFFECTS



(Hilary Coulby for INTRAC)

Session 3.5 Handout

Causes Consequences & Solutions

Issue: Poor primary health care services

CAUSES	CONSEQUENCES	SOLUTIONS
<p><i>Local</i> Understaffed clinics Low morale amongst health workers (low wages, some poorly trained)</p>	<p>Inadequate healthcare high infant mortality high prevalence of infectious diseases Effect on productivity (GNP)</p>	<p>Educate people about their right to healthcare Grassroots advocacy to hold district level administration accountable</p>
<p><i>National</i> Government has other priorities and poor who need healthcare most don't make demands "Brain drain" of skilled personnel to North</p>	<p>Health given low priority in Poverty Reduction Strategy Health Minister has low status within Cabinet and lacks political clout Lack of trained doctors and nurses</p>	<p>Reform national health policy to emphasise primary and preventative care Increase health budget Increase pay and qualifications of basic healthcare providers</p>
<p><i>International</i> IFI policies on user fees and privatisation</p>		<p>Persuade IFI's to change policies regarding health care delivery (use economic and social arguments)</p>

(Adapted from Veneklasen and Miller, A New Weave of Politics, People and Power, 2002)

Session 3.6 Handout

Criteria for strategic issues

- Successfully addressing the issue will result in a real improvement in people's lives
- The issue is are significant/important to your mission and stakeholders
- It is are consistent with your organisational priorities
- It is a 'root' issue that will block progress on other problems if not addressed –but dealing with it successfully will unlock possibilities for other changes
- Successfully dealing with issue will magnify the impact of your work
- The issue fits your expertise, experience or analysis
- You know what it is you want to change, why it should change, and how it should change.
- There are opportunities/possibilities to make the changes needed
- Your supporters and donors will support your work on the issue
- Your partners and constituents (beneficiaries) believe the issue is important
- The risks involved in addressing the issue are manageable
- Your organisation has a unique contribution to make on the issue and/or can bring added value to it
- Work on the issue allows you to integrate programme and advocacy work for greater impact
- Change can be achieved using methods you are comfortable with

(Hilary Coulby for Intrac with thanks to Kim Bobo, Jackie Kendall, and Steve Max: Organizing for Social Change: A Manual for Activists in the 1990)

Session 3.7 Handout

CHECKLIST FOR CHOOSING A STRATEGIC ISSUE

To compare issues and choose the best focus for your advocacy, first think through your strategic criteria and list them. Then put the name of your issue at the top of the column, then place a tick or cross in the boxes for every “yes” and “no” answers to the criteria/questions on the right. The issue with the largest number of ticks has the greatest potential for positive results.

Name of Issue	Name of Issue	Criteria
		Change will result in a real improvement in people’s lives
		There are opportunities to do something about it
		The issue is consistent with your values and vision?
		Will help to raise funds
		Successfully dealing with issue will magnify the impact of your work
		The issue fits your expertise, experience or analysis
		Be widely felt?
		Be deeply felt?
		Have clear advocacy targets?
		Link local issues to global issues and macro policy context?
		Build strong and lasting forums for discussing and resolving policy issues
		Enable people to understand their democratic rights?

Adapted by Hilary Coulby from Organizing for Social Change: A Manual for Activists in the 1990s by Kim Bobo, Jackie Kendall, and Steve Max and A New Weave of Power, People, and Politics: The Action Guide for Advocacy and Citizen Participation by Lisa VeneKlasen with Valerie Miller

Session 5.1 Handout

Some groups with power or influence

Politicians and parties (elected, appointed) in formal government

Civil servants

Faith organisations and faith leaders

Business associations and big companies

Lawyers, judges, doctors, academics, teachers and other professionals

Media - including television, radio, newspapers and magazines

Trade unions and workers associations

Consumer organisations and consumer groups

Women's groups

NGOs and civil society organisations

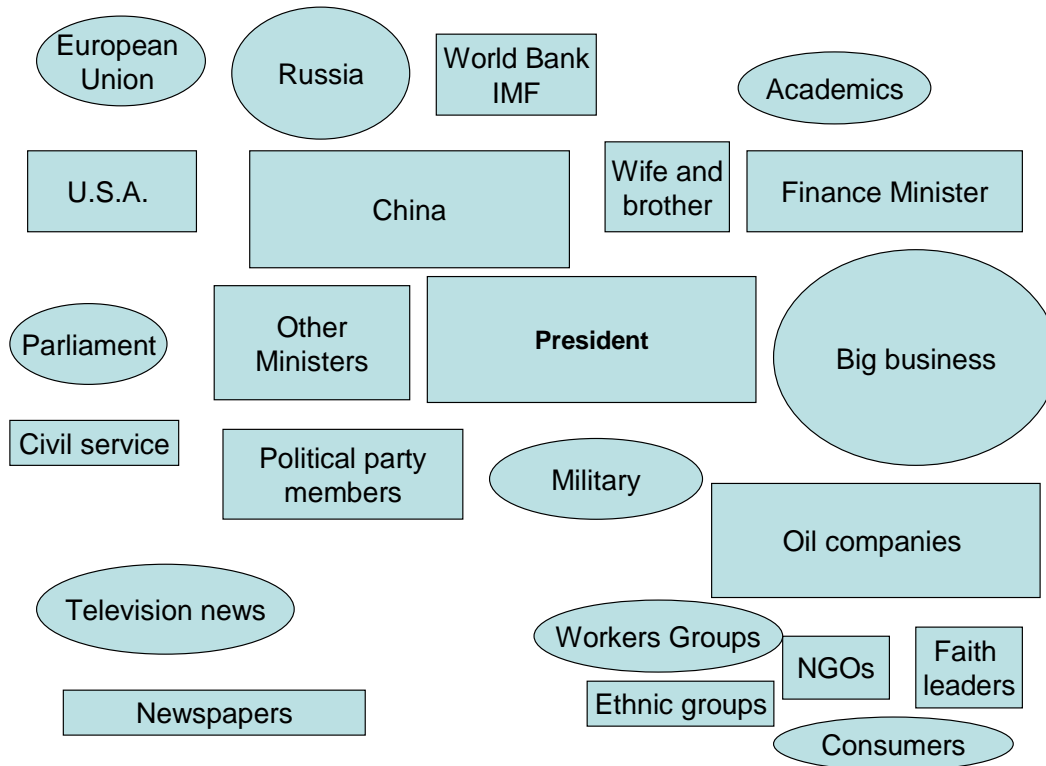
Regional institutions – EU, regional trade groups, etc.

International institutions – World Bank/IMF, World Trade Organisation, UN agencies, etc.

(Hilary Coulby for INTRAC)

Session 5.2 handout

Power Map Example



Session 5.3 Handout

Stakeholder analysis

Targets:

decision-makers; people who have the power to make the necessary changes; people with influence over decision-makers

Constituents:

the people you work with and for; those who are expected benefit from your advocacy

Allies:

those who share your aims and can help to influence or put pressure on the decision-makers

Opponents:

those who are opposed to what you want to achieve and will try to block the changes you want to see

Session 7.1: What is Lobbying?

A Lobby

A group, organization or association engaged in trying to influence legislators or other public officials in favour of a specific cause. Originally the term referred to persons frequenting the lobbies or corridors of government buildings in order to speak to lawmakers.

Lobbying

The definition of the activity of lobbying is a matter of differing interpretation. Mostly, lobbying is limited to describing **direct attempts to influence policy makers, public officials or other decision makers through personal interviews and persuasion.**

However, some people use the term inter-changeably with advocacy and for them it covers all attempts to influence directly or indirectly any policy, practice or government activity, and includes any attempt to influence legislators, their staff, civil servants, and members of regulatory agencies

Lobbyist

The person or entity that does the work of lobbying

Session 7.2 Handout

Making the first approach to lobby targets

When you begin work on a new advocacy initiative, there is always a moment when you need to arrange a lobby meeting with a person or institution that you don't know. This is not as difficult as it may seem.

Step One

Find out who is the right person in the organisation or institution by:

- searching institutional websites, or
- asking alliance or network partners, or
- speak to advocacy colleagues in other agencies, or
- asking relevant friends and relatives

Step Two

Call them or their administrator/secretary/PA and:

- say briefly who you are, what your organisation does and why you would like to arrange a meeting with the decision-maker
- the person will tell you whether you have approached the right person. If not, ask them to give you the name and contact of the person you should speak to
- use the opportunity of the phone call to check the spelling of person's name, and their job title
- be friendly and respectful whoever you are talking to – this person may be the key to getting access to higher level decision makers
- if you are given the appointment straight way congratulate yourself and prepare for the meeting.

Step Three

If you are not able to arrange an appointment on the phone – this is common because people usually want evidence that you are who you say you are write a brief letter (not an email) to the person outlining

- basic information about your organisation or alliance
- basic information about your advocacy issue and main concerns
- stating you would welcome a meeting to find out more about the decision-makers/institutions policy/thinking on the issue and discuss your concerns
- saying you would be pleased to invite them to your office, or to go to theirs

Wait two weeks. If you haven't heard anything, follow up with a phone call, politely asking whether they have received your letter and whether an appointment would be possible, or if not, if there is someone else in the institution you could speak with.

(Hillary Coulby for INTRAC)

Session 7.3 Handout

Lobbying Ethics

What ethical dilemmas does lobbying present?

Since the ethical foundation of lobbying is the vigorous public debate necessary for informed decision making, ethical dilemmas related to lobbying tend to arise when various behaviors by lobbyists and lawmakers undermine the fairness and transparency of that process and do not contribute to the common good.

Fairness

The most obviously unethical (and illegal) practice associated with lobbying is paying a policy maker to vote in a favorable way or rewarding him or her after a vote with valuable considerations. If this practice is allowed, people and organizations with money will always win the day. But even with outright gifts to lawmakers outlawed, there are subtler ways to "buy" undue influence including paying for congressional travel and lavish meals. Local officials are faced with similar temptations - tickets to games or concerts, dinners in expensive restaurants, etc.

Fairness questions also arise when some lobbyists have easier access to lawmakers than others. Frequently discussed is the problem of revolving door lobbyists - those people who once served as public officials who then go into the private sector and work to influence their former colleagues. In addition to relationships with lawmakers, they may, for example, still have access codes to offices, use lawmakers' exercise facilities, or otherwise have easier entrée to the corridors of power.

Other kinds of relationships besides may undermine fairness. Especially on the local level, policy makers are often lobbied by people they know socially. It is incumbent upon public officials to avoid influence that might arise out of their friendships. All politicians may be influenced by organizations or industries that have made significant contributions to their party or election campaign.

Transparency

One way to improve the fairness of the lobbying process is to make sure that possible sources of influence are visible to the public. This goal is behind the initiatives in a number of countries either requiring lobbyists to file reports on what they have discussed with lawmakers, or that civil servants/politicians declare any "presents" or contributions made to them, and/or any fees paid to them, and/or membership of Boards or organizations. Various proposals have been offered to strengthen these transparency provisions, but problems remain.

(Adapted by Hilary Coulby from: Judy Nadler and Miriam Schulman, Santa Clara University, USA, http://www.scu.edu/ethics/practicing/focusareas/government_ethics/introduction/lobbying.html)

Session 7.4 Handout

Top Tips for Successful lobbying

PREPARE, PREPARE, PREPARE!

- ✓ Be clear what you want
- ✓ Know the views of the people to be lobbied
- ✓ What's in it for them – why should they change their views

Develop your messages

- ✓ Be simple and explicit
- ✓ What is the issue
- ✓ What do you want them to do about it
- ✓ Use examples that will engage their interest
- ✓ Prepare a short brief – large type

Plan and rehearse

- ✓ Consider the best time and place for a meeting
- ✓ Be sure you know the venue
- ✓ Arrive on time; be prepared to leave before time
- ✓ Dress appropriately
- ✓ Be polite, acknowledge status
- ✓ Give name cards

Use negotiating techniques

- ✓ Be conscious of your body language
- ✓ Relax, keep your voice calm
- ✓ Listen actively – don't interrupt, demonstrate empathy
- ✓ Ask questions
- ✓ Keep to time – brief is best; don't get distracted, stick to your plan

Build relationships: the messenger can be as important as the message

- ✓ Consistency of personnel builds trust and transparency
- ✓ Being a credible and reliable source of information makes people listen
- ✓ Consider involving someone who is directly effected by the issue
- ✓ Be friendly, use social skills
- ✓ Keep in regular contact
- ✓ Always finish a meeting by suggesting another one would be useful

Hilary Coulby for INTRAC

Session 9.1 Handout

The Campaigning Toolkit

- Leaflets and other materials for public distribution
- Posters or advertisements
- Public meetings
- Media work – newspapers, radio or TV
- ‘Stunts’ or events to attract media attention
- Using celebrities to support your cause
- Letter writing campaigns
- Petitions
- Competitions
- Mass lobbies, demonstrations
- Mass events - fasts, cycle rides, street theatre etc.
- Running an active website

(Hilary Coulby for INTRAC)

Session 9.2 Handout

Developing a Public Campaign

- STEP ONE: Ask yourselves why you need to have a campaign
What are you concerned about? What needs to change?
Why hasn't change happened already?
How would communicating with a wider public help?
- STEP TWO: Decide on your target audience(s) for the campaign – be specific
Who is most likely to respond to the issue? Who do you want to be involved?
You must know your target audience really well.
What media do they read/watch/listen to?
What are they enthusiastic about?
What styles and approaches would they respond to?
What would alienate them?
- STEP THREE: Develop your message
Remember this is a campaign not an exercise in education. Communicate one message only. Be straightforward and simple.
Start from where your audience is, don't assume they know anything about the issue.
All issues are complex but your campaign must not be. Complexity demotivates people, makes them confused and reduces their willingness to listen to what you are saying.
A good picture is worth a thousand words.
- STEP FOUR: Design, plan, and timetable and budget for your campaign activities.
You need to have clear objectives and know exactly what you are going to do from the start.
Are there any volunteers who could help you with campaign activities? Would any businesses sponsor you by providing services?
- STEP FIVE: Before you launch your campaign, inform other NGOs and civil groups about it.
Ask them if they would like to join.
- STEP SIX: Establish a way of recording the names and addresses of campaign supporters.
If resources permit, provide them with feedback as the campaign progresses – this will maintain their enthusiasm and interest and allow you to call on them for further support in the future.

(Hilary Coulby for INTRAC)

Session 9.3 Handout

Campaigns are most successful when:

- ✓ The campaign is firmly motivational, not educational
- ✓ The objectives resonate with the public (is widely felt, arouses emotion)
- ✓ Is winnable: objectives are realistic and achievable in a timeframe that works for you
- ✓ There is a clear and simple “ask” or action that supporters can take
- ✓ Your whole organisation is involved and actively engaged in the campaign – everyone is an ambassador
- ✓ The approach taken is creative, innovative but easily understood
- ✓ Supporters have the opportunity to be actively engaged in a range of activities
- ✓ The campaign is supported by wider alliances of civil groups and NGOs
- ✓ The media are attracted by the campaigns messages and activities and provide extra publicity
- ✓ The issue allows you to speak from your experience and expertise and is consistent with your values and vision
- ✓ The issue is one where changes will result in real improvements in people’s lives

Above all, just try things – don’t be afraid of failure!

(Hilary Coulby for INTRAC)

Session 9.4 Handout

Jonathan Ellis's Tips on What Makes a Campaign Effective

To run an effective campaign it needs to pass the **TEA** test:

- Touch
- Enthuse
- Act

An effective campaign needs to **T**ouch people. It needs to make a connection with its target, strike a chord and prompt a response

But it needs to do so much more than that. It is all very well touching your target with your message, but they might decide that it is all so depressing or difficult that there is nothing that they can do.

A campaign needs to go beyond touching people to **E**nthuse them. An effective campaign convinces its target audience that there is a solution that could remedy the problem that has touched them. The campaign must contain elements that will enthuse people and deflect any defeatist or negative thoughts.

But touching and enthusing are no good for the campaign if you cannot move onto the third part of the TEA test. You need to touch and enthuse to ensure that the recipient of the campaign's message decides to **A**ct.

Campaigning is all about believing that there can be change to address a problem in the world. And it is about influencing decision makers, at whatever level, to show and then demonstrate their agreement with the campaign's ambitions.

To achieve this goal, you need a campaign message that passes the TEA test: ask yourself, do your campaign messages pass the TEA test?

In addition.....

Jonathan Ellis's Tips on What Makes a Campaign Effective, continued..

A good campaign makes use of all or some of the following:

- A clear message
- A simple solution
- Clear outrage
- Use of the media
- Political support
- Alliances
- Public Action
- Celebrity

It is important to focus on one message and remember the impact of a drip-drip effect.

(Taken from Jonathan Ellis - Campaigning for success – how to cope if you achieve your campaign goal, National Council for Voluntary Organisations, UK, 2007)

Session 9.5 Handout

What is a Message?

*“If you can’t write your idea on the back of my calling card, you don’t have a clear idea.”
(David Belasco, theatrical producer)*

A message is a concise and persuasive statement about your advocacy objective that captures:

- What you want to achieve
- Why you want to achieve it – positive or negative consequences of no action
- How you propose to achieve it
- What action you want taken by the audience

Messages should encapsulate everything you need to say – they are not the same as slogans or soundbites.

A good basic message:

- Can be tailored to fit specific audiences
- Uses clear, brief arguments that will persuade the audience
- Uses simple and unambiguous language that can be easily understood

EXAMPLE OF A GOOD MESSAGE

If you find a fire

- Raise the alarm
- Go immediately to a place of safety
- Call the fire brigade

EXAMPLE OF A BAD MESSAGE

If you find a fire

Communicate with the immediate community in your building. Advise them of the situation. Make sure elderly people are aware of what is happening.

Look for the nearest fire exit or other convenient way out of the building. Walk slowly and calmly towards it and make your way out.

Does the fire look serious? If it is bad, ring the fire brigade. Either use your mobile phone or ask someone in a neighbouring building use their landline. Make sure everyone stays a safe distance away from the fire.

(Hilary Coulby for INTRAC with thanks to Marquita Bowen)

Session 9.6 Handout

What is needed for successful communications?

Creation of a communications strategy and programme that has:

- a clear vision
- agreed key messages
- clear and realistic objectives
- evaluation criteria

A well thought through programme that:

- educates, persuades & motivates
- creates awareness, builds loyalty
- revitalises and repositions your brand/image
- creates a sense of injustice that will mobilise positive action
- gains the endorsement of the media
- cultivates new donors & ambassadors

Defining and creating a process of stimulating preferences, that is, taking action to ensure that your organisation the charity/organisation “of choice”.

Actions could include, for example:

- media inductions
- meetings between media and key stakeholders with those responsible for implementing your programmes to educate and influence the media and stakeholders - these should use real examples that demonstrate why your organisation’s work is important
- taking the media, donors, decision-makers on programme visits
- designing activities and events that will generate positive media coverage that builds profile while highlighting injustices using real issues
- networking constantly with key people in the media, supporters, your peers in similar organisations in order to promote your organisation, its work and the issues you address
- never saying no to media enquiries – if you can’t help yourself, then give the media information about who can

(Marquita Bowen for Everychild)

Session 11.1 Handout

Advantages and Disadvantages of Working in Alliances, Coalitions and Networks

Advantages:

- Can involve groups with different skills and experience
- Can reach wider variety of donors, policy-makers, media
- Coordinated activities mean less duplication
- Broad participation increases credibility and legitimacy
- More groups mean a larger 'voice'
- Participants operating in different geographical locations can create momentum and impact on public opinion
- Cooperation allows for division of labour and sharing of resources
- Any backlash from authorities will be diffused among participants

Disadvantages:

- Requires active management
- Progress towards aims may be slower
- Can be very time consuming even as participant
- May need to compromise to arrive at a common view and plan of action
- Some participants may take more than they give
- Your organisation's individual profile may be lost
- Some participants may grab public profile for themselves

***If you want to walk fast, walk alone
If you want to walk far, walk together***

West African proverb

(Hilary Coulby for INTRAC)

Session 11.2 Handout

SUSTAINING AND MAINTAINING ALLIANCES AND NETWORKS

- ✓ **Don't treat participation in an advocacy network as an `add-on'.** If advocacy is one of your responsibilities, then undertaking advocacy through a network is part of your job. Networks require the paid staff time of individual members. Make sure you negotiate this time with your manager.
- ✓ **Keep your own organisation informed of the network's activities and progress.** Encourage colleagues to contribute by asking them to comment on draft mission statements, advocacy strategies etc. That way, when difficult political decisions/processes arise in the network, you have your organisation behind you. Remember: *your organisation* is a member of the network, not you as an individual.
- ✓ **Don't wait until you have refined every aspect of the network's mission, purpose and advocacy strategy before undertaking any advocacy activities.** Once it is fairly clear what the common ground is between members, you can start to hold private, relationship-building and information-gathering meetings with policymakers (even if you're not yet ready to hold high-level, public meetings). Such meetings will help shape the network's identity, unity of purpose, advocacy strategy, and group cohesion. If you wait too long before getting out and *doing* something, there is a danger the network will turn into a `talk shop'. This may discourage individual members from actively participating
- ✓ **Engage a network coordinator** – even if only part-time (funded jointly by members). The alternative is for someone within the network to get their organisation to agree to give them specific time and responsibility for coordination within their job. Without a coordinator, individual members will find it very difficult to maintain and service the network alongside their responsibilities in their own organisations.
 - When appointing a coordinator, **look for someone who will provide leadership and group facilitation**, and not just administrative skills. A contracted coordinator should facilitate consensus-building and arbitrate when there are differing opinions – this requires special skills. Once consensus is reached, s/he needs to rally the network behind him/her - without dominating it.
 - The coordinator may also represent the network externally - think about the skills needed when recruiting or selecting the person.
 - Once you've appointed/selected the coordinator and agreed on the network's advocacy strategy, **don't just leave the Coordinator to carry out the strategy**
 - **on his/her own.** Make sure 1-2 other members of the network accompany him/her to lobbying meetings. Otherwise, policymakers may question whether your network is

SUSTAINING AND MAINTAINING ALLIANCES AND NETWORKS continued..

- really a `network'. Moreover the Coordinator can only represent the consensus position of the Network. If other issues outside this position are raised by policymakers, individual organisations may be better placed to deal with these.
- ✓ When attending lobbying meetings under the auspices of the network, **make it clear *when you are speaking on behalf of the organisation that employs you and when you are speaking on behalf of the advocacy network of which your organisation is a member.*** Speaking out on an issue on which the network has not reached a consensus could seriously compromise both the network as a whole and other member organisations that may not share your position on this issue
- ✓ **Address difficulties as they arise.** One clear indication that a network or coalition is having difficulties is a decline in coalition membership. Earlier warning signs include reduced attendance at meetings, repetitious meetings or meetings that consist primarily of announcements and become bogged down in procedures; challenges of authority and/or battles between members; lack of member enthusiasm; or an unacceptable drain on lead agency resources as a result of attempts to bolster the coalition. Coordinators/lead organisations must watch for warning signs and constantly minimize the difficulties by finding out about members' concerns and working to resolve problems. Everyone involved in the coalition will benefit from the opportunity to discuss what is and is not working
- ✓ **Renew and revitalise your network or coalition** through, for example, supporting participation between meetings in small planning groups or subcommittees; holding a retreat/all day meeting in a new venue to discuss challenging or exciting new issues; provide training for the group; arrange for external speakers to give presentations at meetings; or facilitating members' attendance at conferences. It is also important to actively acknowledge the efforts and contributions of each member and demonstrate how much these are valued. Lunch meetings between coalition sessions can bring together key participants and allow them to provide their best input while increasing their buy-in. Coalitions are not just for fun, but when members enjoy working together, the coalition can achieve more of its objectives.
- ✓ **Celebrate and share successes** to maintain morale and a sense that the coalition is playing a vital role in addressing the problem. Too often, coalitions focus on problems and next steps without pausing to appreciate their accomplishments.

(Created by Helen Collinson and adapted by Hilary Coulby)

Session 11.3 Handout

Building a Strong Alliance

FORMATION STAGE

- Establish a clear purpose or mission
- Involve individuals and organizations that share the mission
- Build a commitment to participatory process and collaboration

MAINTENANCE/GROWTH STAGE

Organization

- Define clear, specialized roles
- Establish a loose or fluid organizational structure; vertical, hierarchical structures don't build stronger networks
- Compile a skills inventory including the skills/expertise of individual members and institutional resources (fax, internet, meeting space, etc.)
- Prepare to fill expertise gaps by recruiting new members
- Establish a communication system (i.e. telephone tree)
- Create an NGO member database (name, address, organization's mission, type and focus of organization, etc.)

Leadership

- Share leadership functions (i.e., rotating coordinating committee)
- Set realistic goals and objectives
- Divide into sub-groups/task forces to take on specific tasks according to expertise
- Spread responsibilities across all members to avoid burnout
- Promote participatory planning and decision-making
- Foster trust and collaboration among members
- Keep members motivated by acknowledging their contributions

Meetings/Documentation

- Meet only when necessary
- Set a specific agenda and circulate it ahead of time
- Follow the agenda and keep meetings brief; finish meetings on time
- Rotate meetings and facilitation roles
- Keep attendance list and record meeting minutes to disseminate afterwards
- Use members' facilitation skills to help the network reach consensus and resolve conflict
- Discuss difficult issues openly during meetings
- Maintain a network notebook to document network activities, decisions, etc.

Adapted from Networking for Policy Change: An Advocacy Training Manual, The Policy Project/USAID

Session 12.1 Handout

Setting the Scene for Advocacy

- ✓ Analyse the problem. Break down the issue into component parts and select the most strategic issue by exploring how the issue effects the people you are working with – what changes do they want or need?
- ✓ Clearly define what it is you want to see change. What solutions are being proposed by you and others?
- ✓ Understand policy making processes. How do issues get onto the policy making agenda. At what stages can effective interventions be made?
- ✓ Analyse the decision-making space. Which institutions can make decisions regarding the issue? Who decides and when? Identify primary and secondary 'targets' for advocacy and policy influencing – those who can make the decision and those who can influence these decision makers
- ✓ Think about the opportunities that exist to influence the issue?
- ✓ Who are your potential allies for this work? Prioritise amongst allies and begin networking
- ✓ Who are your potential opponents? What arguments will they make, how can these arguments be dealt with?
- ✓ Analyse your institutional capacity to undertake the advocacy, alongside the capacity of allies. Who will do what? When will human and financial resources be needed? Brainstorm solutions to address any weaknesses.
- ✓ Develop a strategy for influencing the primary and secondary targets, using components from the advocacy toolbox – lobby meetings, seminars and conferences, policy briefings and research documentation, exposure visits, media coverage, campaigning, etc.
- ✓ Estimate the costs involved and make a budget
- ✓ Plan and implement all specific activities and individual responsibilities
- ✓ Periodically stop to reflect on any changes in the local context, successes or failures of specific initiatives and overall advocacy strategy and make adjustments as necessary
- ✓ And think about.....When will your advocacy strategy be over? What happens if you have a success in changing policy? Will you engage in developing and implementing the policy with government or stay away in case you are coopted? What will be the impact on Southern partners think if you stop work on the issue?

(Created by Hilary Coulby –with inputs from Civicus and the Central American Advocacy Training Project of WOLA

Session 12.2 Handout

Example of a Roadmap for Advocacy

YEAR ONE: Assessment of the issue carried out > advocacy strategy developed (stakeholder analysis, policy analysis, etc.) > advocacy aims and objectives established > plan of action developed > further research and analysis > alliances built

YEAR TWO: > dialogue with decision-makers and other key stakeholders begins > relationships built with key stakeholders > publications, media work, seminars to raise awareness > issue is part of public agenda for debate > more communications work and campaigning to highlight the issue > more research to provide evidence policy makers require > lobbying of key influencers > lobbying of decision-makers

YEAR THREE: > lobbying continues > major stakeholder seminar convened > decision makers begin to change their opinions > more research carried out regarding the issue and potential solutions > draft policies produced

YEAR FOUR: > new policies agreed > new policies resourced and implemented > positive change in people's lives

(Hilary Coulby for Oxfam Hong Kong)

Session 12.3 Handout

Setting Objectives for Advocacy

Primary Objectives for Advocacy

Changes in laws and policies

Implementation of laws and policies

Reform of institutions

Changes in attitudes and behaviours

Increasing democratic space – legitimacy of civil groups, freedom of information and space to speak out

Civil society gains – increased cooperation, solidarity,

South – North partnership gains – reduced dependence

Secondary Objectives for Advocacy

Getting the issue on the agenda for public debate

Increasing support and active membership

Fundraising

Developing the profile and reputation of your organisation

(Hilary Coulby for Oxfam Hong Kong)

Session 12.4 Handout
THINKING ABOUT WHAT YOU WANT TO ACHIEVE

Aim	The overall purpose of the advocacy initiative: <i>To improve poor people's health by increasing access to medicines</i>
Objectives	Specific things to be achieved in the short and medium term on the way to achieving the aim: <i>To increase the budget for primary health care centres; generic drugs policy introduced</i>
Activities	What will be done: <i>research into the issue; lobbying decision-makers; running a public campaign; organising a seminar, etc.</i>
Outputs	What will be produced and happen as a result of activities: <i>2 briefing papers – published and distributed; 7 meetings with decision makers; 1 mass cycle ride and 2 public meetings; seminar attended by 70 people</i>
Outcomes	What you believe will happen as a result of your advocacy. It is useful to divide these into: SHORT TERM: <i>The issue has become part of national debate and politicians are asking for an increase in next year's budget.</i> MEDIUM TERM: <i>Increase in the budget is agreed; generic health policy in place</i> LONG TERM: <i>More medicines available in rural health clinics; child mortality decreased; loss of income through illness decreased</i>

(Hilary Coulby for Oxfam Hong Kong)

Session 12.5 Handout

FOCUSING ON OUTCOMES

In addition to setting advocacy objectives, it is important to focus right from the start on *what outcomes you want to see*, for the following reasons:

- Outcomes reduce the danger of being too activity-focused, ie objectives can sometimes become a list of 'things we intend to do'. This can lead to an M+E process that only looks at 'whether we did the things we said we'd do'.
- If you are 'outcome-focused' you are much more likely to look at the *impact* of the activities, rather than the activities themselves.

It is useful to compare actual outcomes against the anticipated outcomes – changes are not always predictable.

Focus on more than *policy* outcomes or other main change aim of your initiative. Since large scale change is rarely immediate and very difficult to achieve, you need to identify significant shorter term achievements. Important outcomes that can be monitored include, for example, the extent to which an advocacy initiative *has built the capacity of the organisations involved*. Strong civil society organisations will be needed to monitor any policy gains and to hold governments accountable for policy implementation. Capacity built today could mean policy gains tomorrow.

Outcomes: some factors to measure:

- Policy gains: Specific changes in policy, practice and/or institutional reforms
- Implementational gains: the extent to which stated policies are implemented and how these have changed and what impact (or lack of impact) the change has had on the people and communities expected to benefit
- Political and democratic gains: civil groups gain increasing recognition as legitimate actors, the democratic space within which NGOs and other civil groups can work increases, access to governments and other institutions improves, increased respect for human rights including the rights of women, disabled, children, etc., greater freedom of information
- Civil Society gains: the degree to which the capacity of CSOs/NGOs is strengthened; improved cooperation between civil groups; CSOs/NGOs can manage constructively the existence of different perspectives and positions amongst civil groups; CSOs/NGOs have the skills needed to successfully hold governments and international organisations to account
- Partnership gains: advocacy leads to the formation of regional and international networks that can effectively address international institutions and issues of globalization; strong relationships built between groups in the global South and North that erode traditional inequalities and dependencies and form the basis for long term cooperative action
- Organisational gains: increased profile, respect as a credible source of information, increased funding

(Hilary Coulby with thanks to Helen Collinson, Jane Covey, IDR and CIIR)