PLANNING YOUR ADVOCACY CAMPAIGN WITH APF



CORE STRATEGIC FOCUS OF YOUR CAMPAIGN

Try not to get stuck on these questions the first time you discuss them or think them over. The detailed mapping process that follows will help you to go much deeper into answering these questions. But keep them in mind and come back to them throughout the process.

KEY QUESTIONS	EXPLANATIONS AND ILLUSTRATIONS

1. MAP THE CURRENT OBSTACLES /CHALLENGES

• What's stopping the policymaking process from moving in the direction you wish? • What obstacles or challenges exist to having your proposals accepted and acted upon?	Understanding the obstacles to the change you are proposing or trying to prevent will inform all aspects of the campaign from setting a feasible objective to developing your messages, activities and communication tools. Obstacles in the process can be varied and include strong opponents, value conflicts, lack of support, or the lack of access to the policymaking process. Overall, try to identify what combination of these various elements is blocking the process and see if there is a core tipping point that would change this.

NOTES

2. ASSESS YOUR LEVERAGE

• What can you bring to the policymaking process to address identified obstacles and create the momentum to push the process in the direction you want? • What combination of new striking insights or evidence, supporters, and opportunities can you use to move the process?	The key is to identify what you have got to catalyze the change you want. This could be one piece or a combination of new evidence, analysis, or research data; a new problem definition; or solutions/policy options; support from opinion leaders, stakeholders, or experts; credibility; money; votes; and/or an open policy window or opportunity in the decision-making process.

NOTES

3. SET A FEASIBLE ADVOCACY OBJECTIVE

- What is a feasible objective for your advocacy initiative that you think is realistic to achieve?
- Given the leverage you've got and obstacles outlined, how far can you realistically expect to move the process?

Setting feasible objectives will give you a realistic chance of making or preventing change. Examples of objectives are

- to stop or start a particular policy initiative by the government,
- to have your recommendations accepted by the government,
- to change the nature of a public debate around a certain issue,
- to get an issue on the agenda of the government.

Try to avoid just writing down a wish list; being realistic will show you that influence is possible. Also remember that the objective is not the policy outcome you want (for example, decentralized education funding) but the process change you are targeting (for example, getting this option on the agenda of the ministerial working group).

NOTES

DETAILED MAPPING AND PLANNING



WAY INTO THE PROCESS

Map the various dimensions of the target decision-making process listed below to try to find the most suitable and effective way of bringing your advocacy messages and campaign into that process.

KEY QUESTIONS	EXPLANATIONS AND ILLUSTRATIONS

1. GAUGE THE LEVEL OF DEMAND

• Is your issue already on the government agenda? If not, is there another group of people talking about it or advocating for it? • Does interest and momentum already exist around the issue or do you have to create it?	It is generally easier to influence policy if there is already some level of demand for your ideas and proposals. The best case is if the government has chosen to act on the problem you are also focusing on. If not, see if there are other researchers, NGOs, government agencies, or stakeholders discussing it. It is better to feed into an ongoing discussion than to have to create one.

NOTES

2. MAP THE ACTORS, NETWORKS, AND POWER CENTERS

• Who are the main stakeholders in the target policy issue? • Who are the key decision makers and opinion leaders you need to influence? • Where does the real power lie? Who actually makes the decision? And who influences that person(s)? • How are key actors connected in the network?	Understanding who the key players are and how they are connected is pivotal. You are looking for the real decision makers and the circles of people around them, that is, the centers of influence or power in the network. Map out the sectors and their connections, such as government agencies, NGOs, media, and academics. Informal or personal connections can be just as important as the more formal.

NOTES

3. UNDERSTAND THE DECISION-MAKING PRACTICE

• How are decisions really made in practice for your policy issue? • Where does decision making really happen? Does influence exist in formal or informal processes?	Decisions are often made through a process of formal and informal fora. There can be public discussions, hearings, and consultancy, ministerial and parliamentary working groups and debates, but maybe the real deal is struck in one informal meeting. Knowing where and how real influence happens is essential.

NOTES

4. GET THE TIMING RIGHT

- When is the best time to make your move in launching your advocacy campaign?
- Can you identify an opening/window of opportunity to take advantage of? How long will this opportunity last?
- Will you be ready with your research and analysis to take advantage of the identified opening?

Being ready and getting your proposals and analysis into the decision-making process at the right time is vital to having influence. Looking at the people and decision-making practice, you should try to predict the best opportunity or window to make your move. Policy windows often open around elections, with new administrations or leadership, when new solutions emerge or around focusing events, for example, a financial crisis.

NOTES

5. UNDERSTAND CURRENT THINKING IN THE NETWORK

- How do key stakeholders think about and discuss your issue and the potential solutions (policy narrative)?
- How do main stakeholders see or frame the policy issue?

To make your proposals and analysis relevant to stakeholders, you have to be able to connect and contrast your thinking to their ongoing debates on the issue. Before you can do that, you have to understand how they discuss, define, and support their current understandings of the policy problem and potential solutions. Their framing of the problem is very important. For example, in the delivery of social services in minority languages, do they talk about it as an issue of efficiency, human rights, or a threat to national security.

NOTES

6. MAP THE CURRENT POSITIONS OF KEY STAKEHOLDERS

- What is the current position of the key actors on your issue?
- To what extent is there broad consensus or conflict among key players on the issue?

This entails a detailed mapping of where different actors stand on the issue in the debate and understanding the reasons they do, that is, the interests and values informing their position. Remember that even if people are on the same side of the debate, they may be there for very different reasons. This insight will help you really get to an understanding of the nature of the challenge you face in trying to shift key stakeholders' positions. Actors in conflictual policy debates tend to be harder to move.

NOTES

Before moving on to the next section on the messenger, go back to the core strategic focus questions and reconsider your notes in light of your discussion in completing your detailed planning on the "way into the process."

DETAILED MAPPING AND PLANNING

THE MESSENGER

Finding the face for the campaign and assessing the support from others needed. In advocacy, the messenger is often as important (if not more) than the message.

KEY QUESTIONS	EXPLANATIONS AND ILLUSTRATIONS

1. CHOOSE THE FACE OF YOUR CAMPAIGN

• Will you or your organization be the face or spokesperson for your campaign? Do you have the right balance of reputation, credibility, visibility, support, and skills to play this role?	Having the right person or organization that is credible is key to opening doors, getting the right meetings, and being taken seriously. The messenger does not have to be one person—it can be an organization or coalition.
• Or should someone else take the lead in the campaign? Or maybe you just need someone else to play a specific role at a particular time in the campaign?	Often you need the support or approval of a high visibility individual to make a campaign happen. For example, close advisors to ministers or MPs or prominent NGO figures often take on this role. These people could lead the campaign or play a more specific role, such as providing a bridge to a particular objective or getting past an identified obstacle. These people are often referred to as policy brokers or champions.

NOTES

2. MOBILIZE OTHER SUPPORT

• What type and level of support from others do you need to achieve your objectives? Who are the key people to try to get on your side?	You have to find friends in the process, and hence you need to get the support of others to strengthen your credibility and position. These people can range across the sectors from government to NGOs, stakeholders, and media. You may also need practical support like money, resources, or capacity, so try to match support to the needs and gaps identified, and not just because they are your friends or allies.

NOTES

Before moving on to the next section on the message, go back to the core strategic focus questions and reconsider your notes in light of your discussion in completing your detailed planning on the "messenger."

DETAILED MAPPING AND PLANNING



MESSAGE AND ACTIVITIES

Deciding on the focus for your advocacy message(s) and the set of activities and tools you will use to deliver them in order to engage and persuade the most important target audiences.

KEY QUESTIONS	EXPLANATIONS AND ILLUSTRATIONS

1. DEVELOP AN IN-DEPTH AUDIENCE PROFILE

- Who are the specific audiences you are targeting in the first or next wave of your advocacy campaign?
- How far do the chosen audiences have to move to get on board with your ideas and proposals?
- What interests are they protecting in their current position? Is there also some type of emotional or personal attachment they have to their position?

In the "way into the process," you identified the main stakeholders. Now you must choose the specific people or groups you will engage in your campaign. These audiences may include pivotal decision makers and opinion leaders or, maybe initially, others whose support you need as a stepping-stone before you directly engage decision makers.

You next need to be clear about the current positions of the target audience(s) and the distance they would need to move to agree with your proposals. Reflect on the feasibility of your objective at this point.

You should try to get behind the positions held by your chosen target audiences. Often there is a monetary element to the protection of a certain position and/or there may also be a historical, national, regional, or ethnic attachment to it. This will help you to really focus and sharpen your messages.

NOTES

2. SHAPE THE MESSAGE FOR YOUR AUDIENCE

- What message(s) will you send to your chosen audience(s) to get them to question their own position and engage with your proposals?
- Is the message accessible and relevant to the current discussion and focusing on practical solutions?
- How will you present the message so that it is memorable and portable, that is, that audiences can easily retell it to others?

Start from the target audience perspective and think how you can engage and convince them, that is, how, seen from their perspective, does it make sense to adopt your thinking. Use their language and support the message with striking or unexpected findings.

Audiences will often write off suggestions and proposals that are unfeasible or do not obviously feed into the debate they are having on the policy issue. Making the message difficult to comprehend is also a barrier.

Thinking of what audiences will easily remember and be able to retell from your messages is important. Planning titles, stories, and graphics that stick is important.

NOTES

3. SELECT ADVOCACY ACTIVITIES AND COMMUNICATION TOOLS

- What are you trying to achieve in the next wave of your campaign?
- What combination of activities will you need to provide enough engagement and interaction with your target audiences to reach your goal?
- What combination of communication tools do you need to develop to support your chosen activities?

Think about breaking down your objective into short- to medium-term steps or waves. Maybe as a starting point, for example, you want to engage key opinion leaders to build support. This is a step towards your overall objective.

Reaching your goal may only require publication and a meeting, but often a combination of publications, ICTs, conference presentations, meetings, lobbying, and media are needed. Through the set of activities, you are also building a foundation to the next step of your campaign.

Make sure you choose the right tools to reach the right audiences, that is, for experts, informed nonexperts, or the public. Based on the activities you choose and the audiences, you will need some combination of communication tools such as policy papers, presentations, videos, internet pages, or media articles.

NOTES

4. ASSESS THE STRATEGIC RISK OF THE CAMPAIGN

• What is the strategic risk for you or your organization in proceeding with your advocacy campaign?	Advocacy means taking a stance and often involves being publicly critical of powerful people. You should think through the risks to you and your organization in conducting your campaign. These risks can involve sustainability questions and, in some instances, even personal safety issues.

NOTES

5. PLAN FOR CHALLENGES AND RESPONSES

• Are you ready to defend the credibility of the research? • How can you prepare to defend the ideas and proposals you're putting forward?	The first response to research-based advocacy is often a challenge on the basis of methods used, sample size, case selection, type of evidence, and so on. In essence, you need to be able to defend the claims you make based on the data collected and evidence generated. Also prepare to defend the relevance and practical utility of the research. Think of the first four or five audiences you will present to: how are they likely to respond to your message? Think about case testing the content and focus of your message before going public. In any case, you can expect to be challenged on your proposals and it's only natural that some people won't like them.

NOTES

One last time, go back to the core strategic focus questions and reconsider your notes in light of your discussion in completing your detailed planning on the "message and activities."