

Advocacy plan

Template

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Why develop an advocacy plan?

Understand:

- Situation
- Stakeholders
- How change happens

Identify:

- Target audiences
- Right messages
- Right messenger
- Process
- Opportunities
- Entry points

Recognize capacity and gaps

Set goals

Develop an action plan

Monitor and evaluate results

Complete your advocacy plan before you start advocating as it will help you to clearly define the issue and possible solutions to tackle it, find out ahead of time which are the people needed to get involved and raise the money and other resources required.

General structure of an advocacy plan

- Problem
- Goals (or objectives)
- Target audiences
- Messages and messengers
- Resources and assets
- Strategy and tactics
- Evaluation

Keep in mind



Planning is best done as a group activity.

Before you start developing the advocacy plan, establish who your advocacy group is.

- Who is the lead?
- Who is the core team?

(Think who will be the people working closely on planning and deliver the strategy)

- Who are the satellites?

(Think who will be the people acting as reference points/have occasional involvement)

Problem

- What is the problem?

(Under this section you have to uncover the problem that needs to be addressed. Give a brief description of the problem that you want to solve:

- Who are those affected?
- Why is there a problem?
- What are the problem main causes?
- What is the impact of the problem and future consequences?
- In what ways can the problem be solved?
- What evidence can support your definition of the problem?

Make a clear statement of the implications of the problem. Use evidence from literature and other reliable sources to support your assertions. Conduct an extensive research on the issue you plan to advocate for. Try to give some examples and create a solid evidence base for your assertions)

Goals (or objectives)

Under this section you have to plan your goals or objectives:

- What is the goal of your advocacy campaign? What do you want?



Keep in mind

Goal/objective planning has to be SMART.

(At the end of your advocacy, what is the overall goal you want to achieve? State here your vision of change. In order to be more specific, split your goals into specific steps according to your time-frame)

- What are your long-term goals?

(Decide where you want to be, by the end of your advocacy campaign)

- What are your intermediate goals?

(Intermediate goals represent concrete steps toward achieving the ultimate goals. You can use these objectives to measure your work progress. When writing the intermediate goals, keep your focus community and system changes – programs, policies, and practices)

- What are your short-term goals?

(Short-term goals help to keep you motivated and measure the progress step by step. Provide immediate targets in the form of small action steps)

- What are your content outcomes? What are your process outcomes?

(Define clearly what you need to achieve through the advocacy campaign in order to be able to makes the goals happen, like for e.g. policy change/building community and trust among participants)

Make sure that your objectives are SMART:

Specific: *What is your focus?*

Measurable: *Who? What? Where? When? How?*

Achievable: *Is your goal realistic? It can be actually achieved?*

Relevant: *What is the relevance to your mission? The goal successfully accomplish its mission?*

Timed: *What is the time frame?*

Target audiences

Be very clear and specific on how your target group is!

- Who are those that you need in order to move on?

(Under this section you will have to identify who are the decision-makers that have the power to change the status of the problem. Consider to conduct a stakeholder analysis, to identify audiences as well your supporters and opponents)

1. Stakeholder analysis

(Stakeholders analysis will help you to understand who are those individuals and institutions that will be more likely to support you and increase the level of discussion and debate surrounding your problem. Identify the stakeholders, assess their interest, whether they support or opposite you, their influence and importance)

When conducting the stakeholder analysis, consider to include the following information:

Identification of stakeholders

(Include main individuals, groups and institutions)

- Who is more likely to benefits from the proposed change?
- Who is more likely to be adversely influence by the proposed change?
- Who has the power and resources to make changes happen?
- Who complains about the issue?
- Who are those that may be affected by the project?

(Identify who are the main stakeholders and who are secondary stakeholders, as well the relationships that exists between the stakeholders listed: individuals, groups and institutions)

Assessment of stakeholders' interests

(Understanding stakeholders' interest will guide in how to approach them)

- What expectations the stakeholders may have?
- What are the project's benefits for stakeholders?
- What resources might they be able and willing to invest?
- Is there any conflict of interest between stakeholders and project goals?

Assessment of stakeholder support or opposition to the issue

(Assess whether stakeholders are you allies or they will fight against you)

- Does the stakeholders support or oppose your issue publicly?
- The stakeholder public support or opposition is different from private support or opposition?

- What has the stakeholder’s position been on previous similar issues? How it changed that over time?

Assessment of stakeholder influence

(Assess whether the stakeholder has the capacity and power to promote a change on the issue)

- What level of influence does the stakeholder have?
- What political, social and economic power the stakeholder has?
- Is he having any control over strategic resources?

Assessment of the stakeholder importance

(Decide how much the stakeholder engagement will help you to achieve a sustainable change)

- How necessarily is to engage the stakeholder in order to address the underlying causes of the problem?

2. Primary & secondary audience

(After you decide who the stakeholders are, identify the main target audience. Identify the individuals, groups or institutions that have the power and ability to influence the problem)

- Who are the individuals, groups or institutions in the primary audience?

(Primary audience includes decision makers that have the authority to directly influence your advocacy outcome)

- Who are the individuals, groups or institutions in the secondary audience?

(Secondary group audience includes individuals, groups and/or institutions that can influence the decision makers)

- What is their decision making role and area of influence?

3. Supporters & opponents

(Identify potential allies and opponents that have the power to make changes happen. You may choose the top five individuals, institutions or groups that will support/opposite you in your advocacy work)

- What is their level of influence? High, medium, low?
- What is their position on issue?
- What you can to in order to successfully collaborate with each supporter/opponent?

You may consider to use the following tool to describe your supporters/opponents.

Supporters	Level of influence	Strategies for engagement
<i>Share the same position and are willing to actively support you</i>	1.	
	etc.	
<i>Share the same position but not sure if actively support you</i>	1.	
	etc.	
Opponents		
<i>Disagree with you and actively oppose your issue</i>	1.	
	etc.	
<i>Disagree with you but not sure if actively oppose your issue</i>	1.	
	etc.	

Messages and messengers

In order to reach your audience, you will need to develop tailored messages depending on what different groups need to hear. Advocacy messages have to include two main components: “an appeal to what is right, and an appeal to the audience’s self-interest” (Jim Schultz: Strategy Development: Key Questions for Developing an Advocacy Strategy). However, try to be consistent with your message.

1. Developing the message

- What is your principal (primary) message? Include: What do you want to achieve, why, and how?

(Try to be clear, concise and compelling. Simple and direct messages have a greater potential to attract attention of your audience.)

Primary message – evidence based key message

(The primary message has to be designed for all audiences. It’s a universally compelling statement like for example “Injuries can be prevented”.)

- What is your statement?

(Include in your primary message the central idea of your message – statement. Highlight why the change in the issue is so important)

- What supports your main message?

(Base your primary message on evidence. Be sure that your statements are evidence-based at all the times)

- What is the most relevant example that supports your message?
- What is your goal?

(Highlight also here what you want to achieve)

- What is the solution for the problem?

(Highlight what you want to do in order to reach the established goals/objectives)

Secondary message

(The secondary message has to be designed for a specific audience that needs further explanation. According to your audience, you may need to develop several secondary me)

- What does a specific audience needs to know? What piece of information will be most relevant?
- What you have to argue in order to convince this audience?
- What specific action do you want this audience to take?



Keep in mind

Be consistent with your message at all times.

(In order to capture the audience’s attention, your message has to use an audience-appropriate language and have a balanced level of rational and emotional approach. This will motivate the audience to take action)

How to develop a good advocacy message?

Your message has to be:

- CLEAR:** How focused is your message on the main point of the issue?
 - CONCISE:** Is your message expressed in a short paragraph?
 - CREDIBLE:** Can your message be accomplished?
 - COMPELLING:** Is your message addressed to the target audience, to their values and concerns?
 - CONTRASTING:** Is your message highlighting the difference between you and the others advocating for the same thing?
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After you developed your primary message, you may consider using the following tool to outline the key messages for your specific audiences, including the format and channels best fitted for each group.

Audience	Messages	Channel	Format
<ul style="list-style-type: none"> • What is the specific target audience? <p><i>(Consider to include stakeholders, supporters and opponents, the general public etc.)</i></p>	<ul style="list-style-type: none"> • What is your message for that specific audience? <p><i>(Choose the message that best fits the specific audience' interests and concerns)</i></p>	<ul style="list-style-type: none"> • What is the channel most trusted by the specific audience? <p><i>(Consider which of the specific media outlets is best fitted for that audience; or is there and individual with power to influence that audience?)</i></p>	<ul style="list-style-type: none"> • How is your audience most likely to be reached? <p><i>(Decide what the most appropriate format is for your audience – for e.g. policy brief, report, face-to-face discussions, short movie etc.)</i></p>

2. Media strategies

(In order to draw attention on your issue you will need to have media exposure. Using media is one of the best strategies to make your message heard by policy makers and influential stakeholders. Media exposure will help you also to increase public awareness and generate pressure on policy makers to move forward the efforts on solving the problem)

You may consider to use the following tool to for preparing a press release.

Ask yourself:

- WHO is the target group of the press release?
- WHAT is happening? What do you want to do?
- WHERE all your activity is going to take place?
- WHEN does all happen?
- WHY is important for the audience?
- HOW are you involved? What is your role?

**Adapted from Sharon D'Onofrio, Steps in Advocacy Planning: A Workbook for Microfinance Associations. The SEEP Network*

3. Messengers

Consider that the same message can be differently perceived depending on who is delivering it, so specific audiences may need different individuals and institutions communicating the message.

- Who are the most credible messengers for specific audiences?

(You have wisely chosen those who have the power to influence the audience and initiate the desired change. Your messenger has to support the issue, to be credible and clear in his arguments)

Choosing the right messenger

- What is the messenger position regarding the issue?
- What is the messenger level of influence on the specific audiences?
- How aware is the messenger on the issue? How much information does the messenger has regarding the issue?
- How credible is the messenger in the eye of the specific audience?
- How easily is for you to access/interact with the messenger?
- How and when does the messenger interact with the specific audience?
- What are the risks of engaging this messenger?
- How the messenger will deliver the message? Can the messenger deliver the message with clarity and with empathy?

**Adapted from Advocacy Toolkit. A guide to influencing decisions that improve children's live, United Nations Children's Fund (UNICEF), New York, 2010*

Resources and assets

- **Do you have the resources to reach your goals?**

(At this point it is recommended to make an inventory of all available and needed resources. Consider to include both the resources that are already available to be built on as well as what you need that is not there yet)

- What do you have?

(Think at any other advocacy activities conducted in the past, already built alliances and partnerships in the field, the capacity of your team and other partners, and any other information and resources available)

- What do you need?

(Consider to include all the resources needed in order to reach your objectives – partnerships and alliances that need to be developed, capacities, research to support your assertions, media support etc.)

According to the nature and goal of your advocacy plan, the list of available and necessary resources will vary, but you should consider to include three main categories of resources – financial, human and infrastructure. They may include, but are not necessarily limited to:

Resources	Status
Financial	<ul style="list-style-type: none"> • What funds are available to support your advocacy campaign? • What are the expenses involved by this activity? <p><i>(Include here also in-kind contributions)</i></p>
Human	<ul style="list-style-type: none"> • Who are the people available to help and support you with the plan? • What are their skills? • Who are the people needed? • What are the useful contacts from community? <p><i>(Include here both staff available and needed as well the volunteers if applicable and consider any previous contacts with media resources)</i></p>
Infrastructure	<ul style="list-style-type: none"> • What are the facilities already available and what you need? • What access do you have to information? <p><i>(Include here all the infrastructure available, if any: meeting rooms, offices, internet access, laptops and computers, software etc., transportation, access to libraries, archives etc.)</i></p>

Strategy and tactics

All the information gathered in the previous steps will be reflected in your strategy and tactics. You will have to decide how to reach your goal – you may choose to use friendly persuasion or you may choose to be a bit more conflictual. Based on what you’ll already develop, choose what you consider is best fitted for your case.

Strategy

“A strategy is a plan of action devised to achieve a goal through specific tactics” – Public Health Policy Agenda & Action Guide. The Chicago Partnership for Public Health, 2002)



Keep in mind

When choosing and developing the strategy keep your focus on what is current status of the issue related to the policy area, what you want to change and how you will facilitate the change.

Before writing down your strategy, consider to ask the following questions:

- What are the supporters and opponents that can influence the outcome?
- Who are the advisors to policy makers?
- How can you reduce the influence of your opponents?
- What are the most effective tactics for each target audience/stakeholder?
- What is the most effective timing for tactics?
- What are your tactics?

**Adapted from Public Health Policy Agenda & Action Guide. The Chicago Partnership for Public Health, 2002.*

Tactics

“Tactics are the activities employed to implement a strategy” – Public Health Policy Agenda & Action Guide. The Chicago Partnership for Public Health, 2002)

At this point you will have to take concrete measures to reach your target audiences and motivate them to get actively involved. You may plan your action steps for each major objective or to go into more details including resources and support needed for each action step in part, but either way you may consider to ask to the following questions:

- What is the scope of each specific action? What is your target – legislation, administrative regulations etc.?
- Who is your target audience and why?
- How the policy making process is working in the targeted area and where you should fit your intervention?
- Who will care out each specific action/step, when and for how long?
- Do you have all the necessary resources to take that action?
- Who might be the supporters and opponents?

Evaluation

Monitoring and evaluation is an important step in advocacy, as it helps to check the progress of your work.

- Was your advocacy plan properly implemented?
- Does your advocacy plan achieved its intended purpose?

In order to monitor and evaluate your work, you will have to develop two type of indicators: 1) indicators of process and 2) indicators of impact. You may consider to use the following tool to monitor and evaluate your advocacy work.

Monitoring and Evaluation		
Objectives and activities	Indicators of process	Indicators of impact
<i>Objective 1</i> <i>Activities</i>	<i>(The indicators of process represent the achievement of the small steps undertaken in order to achieve your goal)</i> <ul style="list-style-type: none"> • What indicators you will use to monitor your progress? <i>(These indicators have to reflect the main deadlines and activities previously assumed in the advocacy plan)</i>	<i>(The indicators of impact represent the evidence that your advocacy activity positively influenced/changed the issue. Consider to measure the impact bot at the level of policy and practice)</i> <ul style="list-style-type: none"> • What indicators you will use to assess the impact of your advocacy plan? • How the policy was changed as a result of your work?
<i>Objective etc.</i> <i>Activities etc.</i>		

This advocacy plan template contains text or questions adapted from Jim Schultz: *Strategy Development: Key Questions for Developing an Advocacy Strategy*. Democracy Center, San Francisco and *Advocacy Toolkit. A guide to influencing decisions that improve children's lives*, United Nations Children's Fund (UNICEF), New York, 2010.

Other resources used to develop the advocacy plan template:

Developing a Plan for Advocacy, Retrieved September 20, 2014, from <http://ctb.ku.edu/en/table-of-contents/advocacy/advocacy-principles/advocacy-plan/main>.

D'Onofrio Sharon, *Steps in Advocacy Planning: A Workbook for Microfinance Associations*. The SEEP Network. Washington, 2010.

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UN Women, *Planning for Advocacy. Advocacy Toolkit for Women in Politics*. Retrieved September 18, 2014, from <http://www.ipsnews.net/publications/Planning%20for%20Advocacy.pdf>.