

Introduction to Advocacy Planning

This section will cover:

An introduction to advocacy planning by looking at definitions, reasons for planning, characteristics of good and bad advocacy planning, and an introduction to the advocacy planning cycle.

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This section links closely to sections four and five, which look in more detail at the advocacy planning cycle.

1. WHAT IS GOOD ADVOCACY?

There are many kinds of advocacy. In some countries, advocacy has traditionally been viewed as a way for those with legal backgrounds to call for changes in the law or to use the law as a means to demand justice. Alternatively, groups of workers have come together as trade unions to win concessions from their employers. In other communities, local groups of people affected by a particular issue have used direct action, such as sit-ins, to bring attention to their issues. Civil Society Organisations (CSOs) have organised citizens to meet with government officials or parliamentarians to put forward their case. All these activities are valid forms of advocacy.

Effective advocacy:

- ✓ Clearly articulates the problem
- ✓ Offers positive and credible alternatives
- ✓ Is directed at those with the power to make changes
- ✓ Has clear goals and measurable objectives
- ✓ Is a long term process, not a one off event or output
- ✓ Is a means to achieve a goal, not an end in itself
- ✓ Follows through to ensure policy changes lead to improvements in practice
- ✓ Is based on a belief that change is possible – and inspires others to feel the same

Good advocacy achieves the change you were aiming for!

Advocacy on women's rights usually also:

- Opens political space for others
- Reflects the values it seeks to promote
- Challenges imbalances in power or structures which prevent women from accessing their rights

2. WHY ADVOCACY PLANNING IS IMPORTANT

Any project benefits from planning, but it is particularly important for advocacy. There will always be people opposed to what you are trying to do; if it wasn't controversial you would not need to do advocacy. Use your resources wisely and think carefully about what strategy you will use before you start. Then be prepared to adapt to changing circumstances!

Planning is important because it helps you to:

- Head in the right direction
- Break down your goals into manageable pieces or stepping stones
- Use the right tools
- Use scarce resources wisely by making strategic choices
- Make sure activities reinforce rather than undermine each other
- Get the timing right and start preparing early enough
- Be prepared to counter opposition

Commons problems with advocacy include:

- Unclear aims and objectives
- Undertaking activities without working out a strategy or plan
- Asking decision makers to do something which is not in their power
- Not having a clearly defined 'ask'
- Getting the timing wrong and trying to influence a process when key decisions have already been made
- Using poor messages which are confusing, don't motivate or fail to include a call to action

Advocacy also relies on changing plans and capitalising on new opportunities – this makes planning all the more important. You may have to make a decision quickly and the more consensus thinking you have already done the easier this will be.

Advocacy can also be messy. Tempers fray when people work under pressure and arguments can occur if people disagree on tactics. Good planning will not prevent this entirely but it may minimise disagreements and make them easier to resolve.

3. THE RISKS OF ADVOCACY

Advocacy does come with some risks, and it's important to venture into advocacy aware of these. Good advocacy planning will consider risks such as:

- Personal safety – at its most extreme advocacy can put individual staff at risk. Knowing the legal and political context is crucial
- Programme protection – in another extreme case, speaking out against decision makers could also cause your programme work to be shut down or your funding cut
- Reputation risk – donors and decision makers may question your seriousness as service providers if they feel your advocacy is misplaced
- Relationship maintenance – similarly those supporting your programme work may question your involvement in advocacy and be less likely to support you

- Financial costs – advocacy costs money which could be being spent on programmes, and if your efforts fail you won't have achieved anything. However, there is evidence that campaigning can increase funding for some organisations both by raising profile and motivation

To assist you with your risk analysis see the risk matrix in **section five, 2.4.**

4. THE ADVOCACY PLANNING CYCLE

Planning advocacy is like planning any project; you identify your objectives and then work out how to get there. However, what makes advocacy a bit more complicated is that you have to work with many external actors, and you usually have very little power or control over what they do.

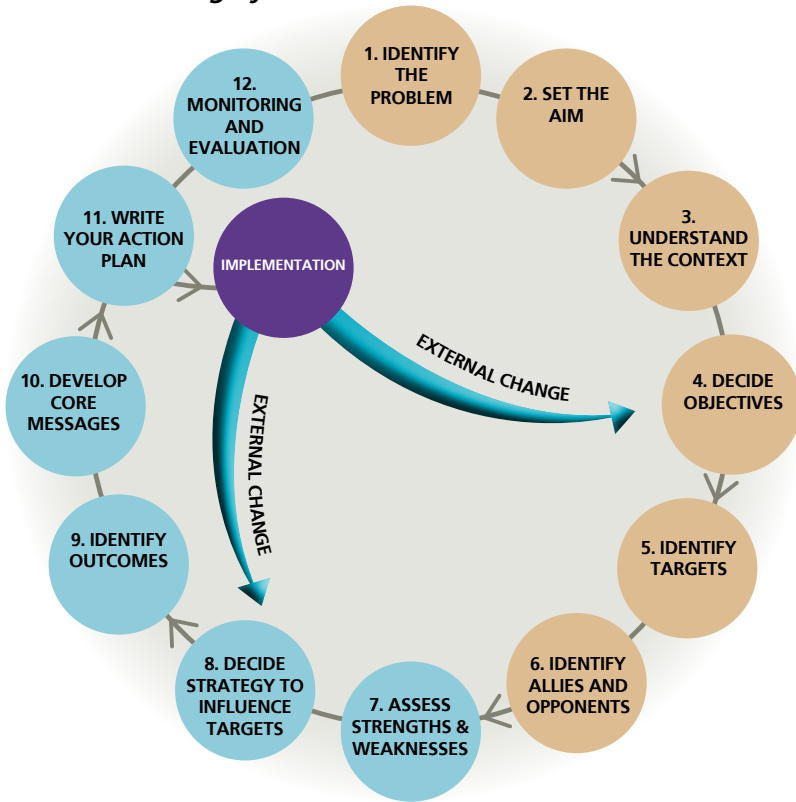
Who you speak to and consult during the planning process will depend on your project. In stages 5 and 6 of the advocacy planning cycle, outlined on the next page, you will need to identify both your targets and your allies and opponents. This should include discussions with relevant staff within your organisation and sister organisations, in order to find out what they may also be planning, how you can work together and whether they support your plan. It could also include discussions with key civil servants (particularly allies who may advise you on the most effective strategies for influencing key decision makers), other civil society actors and where possible the key opponents and targets for your advocacy in order to seek greater understanding of their position, motivation and the factors most likely to influence them.

The planning process rarely happens in a straight line. You may have to go back and adjust your strategy as things change or as you learn more. This is why advocacy planning is often presented as a cycle. Being flexible and adjusting your planning to changing circumstances is necessary and effective. A neat planning process is likely to be a superficial one.



TIP Remember the planning process is designed to help you organise your activities so that you maximise your impact in order to achieve your aim. If it is not helping to do this, step back and try a different approach. Make sure you don't get so bogged down in planning that you forget to act.

Phases of the Planning Cycle



During the implementation phase **external events** may mean you need to take a few steps back. For example, a new government Minister might require that you go back and review your strategy. A newly elected government may even mean reviewing your objectives. (See diagram above)

5. EXPLAINING THE PLANNING CYCLE

In this toolkit we have broken down advocacy planning into two phases:

- 1 What needs to be done (phase 1 steps 1-6 in the diagram above) which you will find in section **four**
 - 2 Our role in achieving it (phase 2 steps 7-12 in the diagram above) which you will find in section **five**
- How to take action is covered in section **six**.

The stages of the planning cycle are essentially a series of questions addressing what needs to be changed, and how to change it. These are set out in the diagram on the next page. We know time is often tight so we have indicated which steps to prioritise.

Key questions for the planning cycle



If time is tight...

WHAT IS WRONG?

Identify what problem you want to tackle and therefore what issue you want to work on

If this is an issue on which you already work, this stage can be quick – but it's still worth checking your assumptions if you have time. A new issue will need a more substantial amount of work.

WHAT IS THE ALTERNATIVE?

The positive alternative to this problem will become the **aim** or goal of your advocacy work. This can be general and long term

The aim must be worded correctly – if you already know your issue it shouldn't take long. Do challenge your ideas to check they are right. (ESSENTIAL)

WHAT IS HAPPENING NOW?

Now research and analyse the context to understand what is preventing things from changing and what the opportunities are

Your advocacy will be better for time spent on this – but you can do it quickly if you don't have much time. The toolkit provides lots of ideas but you don't have to use them all.

WHAT MUST CHANGE TO MAKE THINGS BETTER?

Break down the aim into manageable stepping stones. These are the **objectives** of your advocacy work. You will need to research and analyse your problem before deciding on the objectives

This is the stage you will need to give time to – however limited your resources! (ESSENTIAL)

WHO HAS THE POWER TO ACHIEVE CHANGE?

Once you have your objectives, find out who has the power to make things happen. These are your **targets**

This is essential – but if you are short on time don't map all your possible targets just focus in on the main one or two targets you already know are important. Working with allies could save you resources in the future – don't do an unfocussed brainstorm. If time is short, go with what you already know (ESSENTIAL)

WHO WILL HELP OR HINDER THIS PROCESS?

Identifying your **allies** and **opponents** will inform the strategy you use

This is essential – but if you are short on time don't map all your possible allies and opponents, just focus in on the main ones you already know are important

WHAT RESOURCES, INFLUENCE AND POWER DO YOU HAVE TO MAKE THE CHANGES?

This honest stock take of your strengths, weaknesses and resources (money and time) will inform your strategy



If time is tight...

This can be done quickly

HOW CAN YOUR TARGETS BE INFLUENCED TO CARRY OUT THE OBJECTIVES?

Once you've understood the external environment, learnt about your targets and allies, and assessed your own resources, pull this all together to work out what your particular role will be in influencing your targets to meet your objectives. This will give you your **strategy** outline

Don't skip this stage – if necessary keep it short by focusing on the things you could do. It is important to reflect on whether you / your organisation are best placed to advocate for change on this issue. Are other individuals / organisations already working on this, are others in a stronger position to effect change? Ask yourself 'Why Us?'" (ESSENTIAL)

WHAT MUST YOUR ORGANISATION ACHIEVE IF THE OBJECTIVES ARE TO BE REACHED?

From this you can list the things that you need to achieve – these are your desired **outcomes**

Be realistic from the start about your capacity and you'll reduce time spent on this.

WHAT WILL YOU ASK FOR?

You need a set of core **messages** which you will use again and again and will encompass what you are asking for, tailored to your target audience

This can save time later – get the right person to work on it, and it shouldn't take too long.

WHO SHOULD DO WHAT, WHEN?

Now you get practical. You can list the activities or tools you will use to achieve your outcomes and turn them into an **action plan** with a timeline and a budget

Be realistic and you'll save time. Agree top lines as a team then do more detailed planning separately.

HOW WILL YOU KNOW IF YOU ARE GETTING IT RIGHT?

Monitoring and evaluation of your work will need to be built in from the start

Building on your organisation's existing methods can cut time here

HOW THE STEPPING STONES MAKE AN ADVOCACY PATH

Aim

Is achieved by meeting

Objectives

Are achieved by completing

Outcomes

Are achieved by undertaking

Activities

The difference between aims/objectives/outcomes and activities:

Aim Your long term goal based on your vision of a better society. This is an outcome or condition and can be quite general.

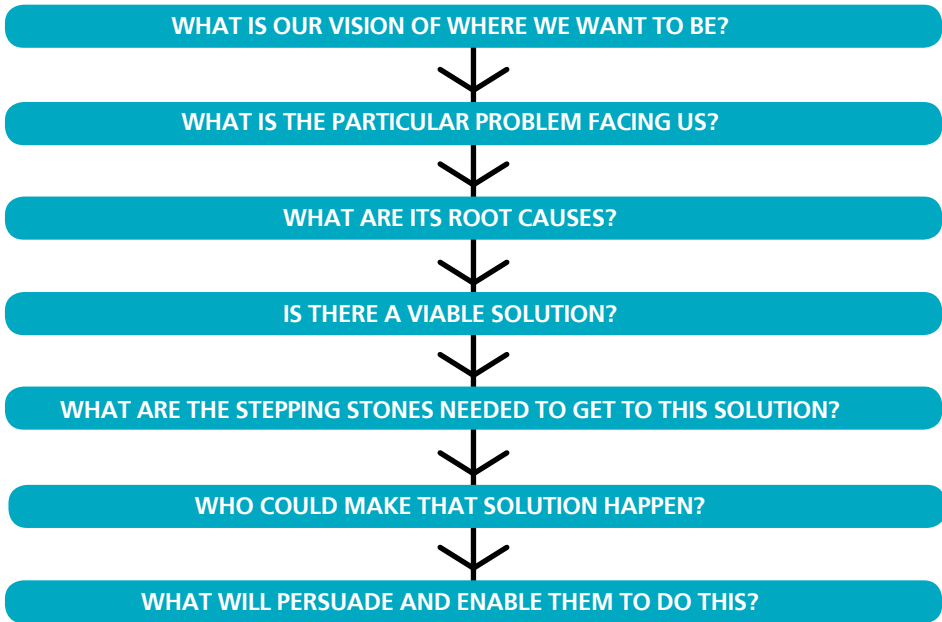
Objective Specific action to be taken by an individual, group or institution that will contribute towards achieving your goal. It must define what should happen, when, where and who will do it. This is what you want to persuade others to do, not what you will do yourselves. (For each aim you should usually have 2-3 advocacy objectives and work within a 1-3 year timeframe).

Outcome (or organisational objective) What *you* need to achieve in order to make the objectives happen.

Method or Activity The way in which you will achieve your outcome.

The importance of questions

In planning a piece of advocacy you are essentially asking yourself a series of logical questions. In all the detail of how to develop an advocacy planning cycle don't lose sight of these basic questions:



In summary

Who do you want to do what, by when, and how can you persuade them?

What are we trying to achieve, what is stopping us, how can we change this?