

Module 2

How to design Effective Advocacy

Devised & presented for the
Thematic Forum, Denmark
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Common Weaknesses

(or the Seven Deadly Sins of Advocacy & Campaigning)

1. **Unclear aims and objectives**
 - "If you don't know where you are going, any road will take you there"
2. **Activity planning happening before (or without) developing an influencing strategy**
 - Leading to untargeted actions, wasted effort and ultimately reduced impact
3. **Action plans that run to an internal timetable**
 - Rather than being determined by external events and opportunities
4. **Lack of innovation**
 - In developing strategies and actions, relying on whatever was done last time
5. **Messages that don't get noticed and move people**
 - Because they are vague, unfocussed, bland, technical or untargeted
6. **Poor monitoring & evaluation**
 - Leading to lack of flexibility, no real accountability and limited learning
7. **Failing to focus**
 - Trying to tackle more issues, adopt more objectives or target more audiences than resources allow

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Planning Process

Compared with other project & programme planning, advocacy planning has some particular challenges, including:

- Dealing with complexity
- Dealing with uncertainty
- Dealing with ownership

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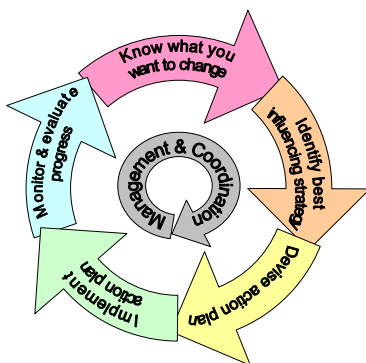
Planning Process

Effective advocacy planning is:

- a) Systematic
- b) Evidence Based
- c) Participatory
- d) Decisive

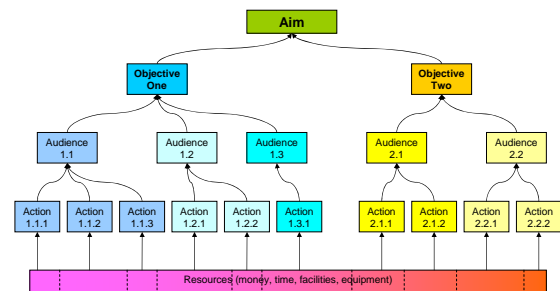
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The Advocacy & Campaigning Cycle



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Advocacy Strategy Map



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Advocacy Strategy Paper

Advocacy Strategy Purpose

Why do we write strategy papers?

- To solidify plans, relating activities to aims
- To gain approval and release of resources
- To communicate plans to other stakeholders and win their participation
- To be a reference point for evaluation
- To be your road map for the campaign

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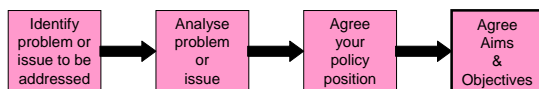
Advocacy Strategy Paper

Advocacy Strategy Contents

1. Aims (*how will beneficiaries be affected*)
2. Objectives (*specific changes to be made*)
3. Target audiences & key influencing strategies
4. Proposition/Core Message
5. Action plans & timetable for each audience/strategy
6. Resources & budgets
7. Risks & Assumptions
8. Monitoring & Evaluation plan

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Phase 1: Know what you want to change



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Identify the Issue

This is a two stage process:

- a) Recognise potential campaign issues
- b) Select actual campaign issue

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a) Recognise potential issues

Potential advocacy issues arise from:

- Views of beneficiaries and partner organisations
- Own programme experience
- Opportunities in the external policy and media environment
- Views of staff, volunteers & supporters
- Priorities of funders

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a) Recognise potential issues

They can be identified through:

- One-off processes (eg, when doing strategic planning)
- Continual processes of monitoring

Both require pro-active implementation of effective information and communication systems (knowledge management) and research

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b) Select actual advocacy issue

- Potential issues need to be assessed through a set of previously agreed criteria. Each organisation should develop its own criteria so that they relate to the overall organisational strategy.
- This assessment process can be supplemented through research and consultation with internal and external stakeholders.
- There needs to be a clear decision making process.

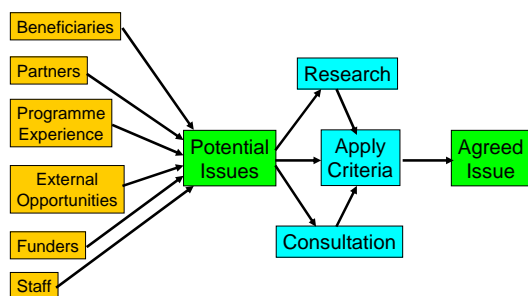
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Potential criteria for problem selection Is the issue RIPE?

- **Relevant**
 - To the organisation's mission and strategy (including its positioning strategy where appropriate)
 - To the organisation's programme experience
- **Important**
 - Numbers affected
 - Severity of impact
- **Potential for change**
 - Viable solutions exist
 - Levers of change exist in area for advocacy
 - Existence of allies
 - Issue is already on the policy or media agenda (unless highly important?)
- **Empowering**
 - Will help empower and/or build capacity of beneficiaries and partners
 - Will help build experience and advocacy capacity of the organisation

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1. Identify the Issue



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Analyse the Problem

- Research
 - Primary
 - Secondary
- Using PRA and other participatory and consultative processes
- Using analysis tools, for example:
 - Force-Field analysis
 - Problem Trees and Solution Trees

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Research

Why do we need to do research for advocacy?

1. To help us **understand** the situation more fully, leading to a better analysis and more effective strategy
2. To provide **evidence** to help convince others of the validity of our analysis

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Agree your position

Position Paper
(also known as
a Policy Paper
or Policy Brief)

1 or 2 pages
(max 4 sides)

You should produce and agree a short Position Paper that sets out your understanding of the problem and your recommendations for its solution

- Use internally to obtain agreement and common understanding and ensure the consistency and coherence of external messages
- Use with potential alliance partners to get agreement around a common position
- Use with targets as a back up document to summarise your position

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Aims & Objectives

for advocacy and campaigning

- **Aims** relate to the ultimate impact you hope to contribute to, usually expressed as changes in people's or animals' lives
- **Recommendations** are what you would like others to do to make that impact happen
- **Objectives** are those recommendations that you have selected on which you will focus significant time and resources to make them happen
- **Objectives for Institutions** are either Policy Change or **Practice Change**
- **Objectives for Individuals** relate to their Knowledge, Skills, Attitudes or **Behaviours**

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Selecting Objectives

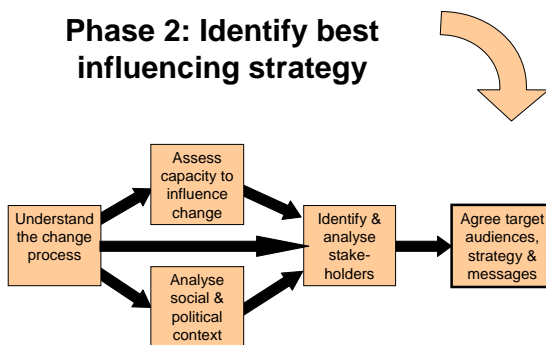
When selecting objectives from your list of recommendations, you want to choose:

- The most important one
- The easiest one (low hanging fruit)
- The one that needs to happen first to enable the others to happen
- The one that is easiest to explain
- The one that is most emotive

or any other criteria that fits your organisational advocacy/campaign strategy

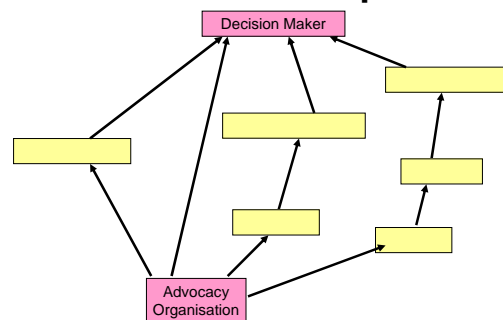
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Phase 2: Identify best influencing strategy



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Influence Map



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Advocacy Approaches

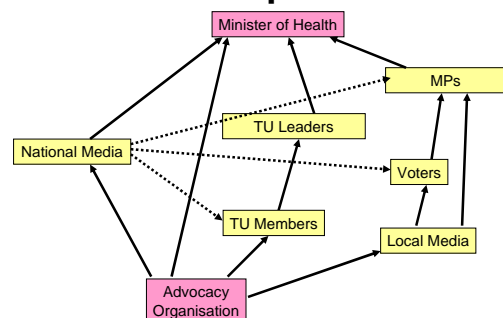
- **Insider or Outsider**
 - According to how you see your relationship with the target and your influence over them

In contrast to:

- **Reformist or Radical**
 - According to how you see the issue and the change that is required

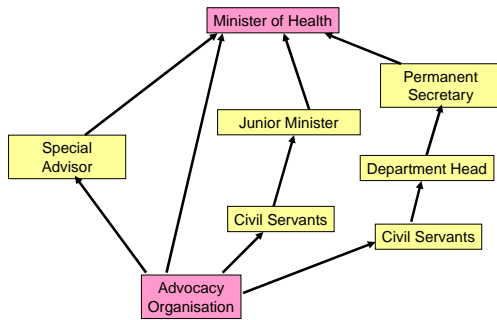
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Influence Map - Outsider



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Influence Map - Insider



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Insiders & Outsiders

- Insiders see their main influence being through developing close relationships with decision makers and their advisers and engaging in direct persuasion.
- Outsiders see their main opportunity to influence being through generating outside pressure on the decision maker. Outsiders are usually critical of the decision maker and their institution.
- Maintaining an effective insider relationship is hard if you are also generating outside pressure. Trying to do both often results in doing neither effectively.

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Insider & Outsider approaches

Insider approaches:

- ⊗ Access to inside information about policy processes and target's positions
- ⊗ Build relationships & mutual trust
- ⊗ More direct
- but
- ⊗ May have to compromise your position
- ⊗ May be co-opted to target's agenda
- ⊗ Gives legitimacy to target and/or process
- ⊗ May be misrepresented
- ⊗ Excludes involvement of stakeholders & supporters
- ⊗ Vulnerable to change in government or personnel

Outsider approaches:

- ⊗ More involving of different stakeholders
- ⊗ More freedom of action
- ⊗ Higher profile
- ⊗ Can be more innovative, fun
- but
- ⊗ May be stereotyped as radical, extreme or irrelevant
- ⊗ May be marginalised
- ⊗ May drive opponents into a corner
- ⊗ Risk of loss of institutional funding
- ⊗ May damage future relationships

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Public Campaigning

Before we take a brief look at public campaigning, here are a couple of "health warnings":

1. Mobilising support from "the public" is only one possible approach of many.
2. For campaigners, there is no such thing as "the general public" – there are many different public audiences (segments).

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Public Concern

Public concern describes an attitude that change is needed (or that a proposed change should not take place)

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Public Pressure

For public concern to influence a decision maker, it needs to satisfy a number of requirements:

- It must be widespread
- It must be deeply held
- It must be detectable, and more usefully
- It must be demonstrated to the decision maker

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Demonstrable Public Concern

Demonstrable Public Concern (DPC) is an attitude to an issue that is expressed in certain behaviours. For example:

- As a **citizen**: writing to elected representatives and government, changing voting intentions, etc.
- As a **consumer**: buying fair-trade coffee or boycotting Esso, etc.
- As a **community member**: writing to the media, wearing badges, talking to friends,

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People play multiple roles

When designing campaign actions for people to take, or planning ways you can engage with them, you should consider the different roles that people play:



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Understand change process

- Who makes the decision?
- How is the decision made?
- When is the decision made?
- What influences the decision?

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Understand change process

Tools for understanding institutional policy & practice change:

- Target mapping
 - Organigrams, systems maps, power maps
 - Decision Makers model
- Decision flow charts
- Force-Field analysis

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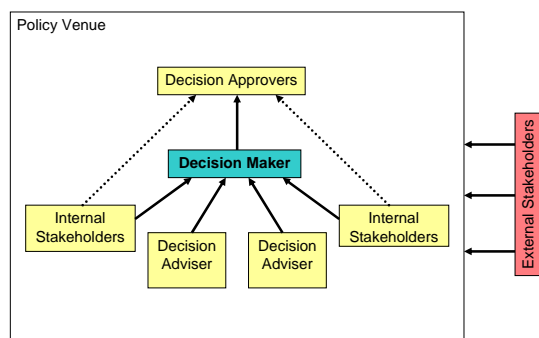
Who is your target?

For every policy change objective, there is be an associated “Decision Maker”.

He or she may not have sole authority, but they are responsible for that policy and will be the gate-keeper for any changes.

“Decision Makers” should be distinguished from “Decision Approvers” and “Decision Advisers”

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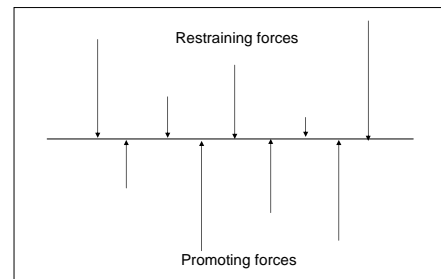
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Influencing your target

- Can you get direct access to your target?
If not, who can?
- Will your target be persuaded by your argument alone?
If not, what else is needed?
- Is your target under pressure from anyone else?

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Force-Field Analysis



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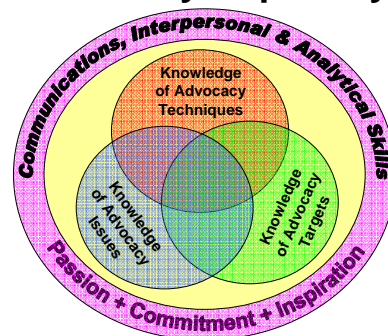
Assess your capacity to influence change

Possible tools and activities for an internal situation analysis include:

- Resources audit
- Skills audit
- Mapping alternate activities & timelines
- Power analysis
- SWOT analysis
- etc

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Advocacy Capability



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Sources of Power

There are two main types of power

- **Internal power** – power that you bring with you, such as your confidence and capacity
- **External power** – power that others give you according to how they perceive you

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External Power

External Power can be seen as coming from six sources as perceived by the target:

- Expert
- Legitimate
- Representation
- Reference
- Resource/Trade
- Reward & Punishment

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Analyse social & political context

Understand the advocacy environment:

- SWOT
- PESTLE
- Event Timelines
- Market Research/Attitude Surveys

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SWOT Analysis

| | | |
|---------------------------------|------------------------------|------------------------------|
| Strengths 1. 2. 3. | Weaknesses 1. 2. 3. | Internal to the organisation |
| Opportunities 1. 2. 3. | Threats 1. 2. 3. | |
| Positive factors | | Negative factors |

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PESTLE Analysis

- Political
- Economic
- Sociological
- Technological
- Legal
- Environmental

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Event Timelines

2003 2004 2005 2006 2007 2008 2009 2010



National:

International:

Internal:

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Market Research

Market research can help us to:

- Segment the public into distinct target audiences
- Understand our target audiences

Successful communications demands that we:

- **Start where the audience is at, not where we want them to be**

Market research can also be used to create awareness among those surveyed, gain media attention and influence decision makers.

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Audience Segmentation

The public can be segmented and categorised in a variety of different ways:

- **Socio-economic** factors (such as income, social class, occupation, etc)
- **Demographic** factors (such as age, gender, marital status, etc)
- **Geographical** factors (such as country, region, urban/rural, etc)
- **Psychological** factors (such as attitudes, needs, beliefs, etc)
- **Life-style** factors (such as "young upwardly mobile", "well-off retired couples", etc)
- **Loyalty** factors (such as donation or purchasing habits)

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Social Class

A standard classification system for segmenting the public, widely used by social scientists in Europe and North America, is by "social class":

- A = Higher managerial, administrative or professional
- B = Middle management, administrative or professional
- C1 = Supervisory, clerical, junior administrative or professional
- C2 = Skilled manual workers
- D = Semi-skilled and unskilled workers
- E = State pensioners with no other income, widows, casual and lowest grade earners

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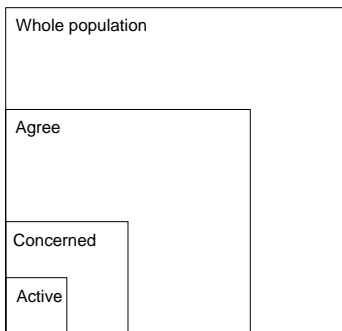
Behaviour

Classification according to behaviour, especially purchasing behaviour, is common.

Campaigners often use newspaper readership as an easy way to segment audiences and target messages to them.

However, segmentation according to newspaper readership can become an excuse to target small segments who already support you (eg, Guardian readers in the UK) and ignore the majority who may be more strategically important

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Options

1. Persuade/enable those who are already active to be even more active
2. Persuade more of those who are already concerned to be active
3. Persuade more of those who already agree with your position to be more concerned
4. Persuade more people to agree with your position

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Who are Stakeholders?

Stakeholders can be individuals, types of people or organisations who:

- Are affected by the issue
- Can influence the issue

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Why are they important?

- Some are natural or potential allies
- Some are natural or potential opponents
- Some are undecided
- All can be subject to influence

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Stakeholder Analysis

Helps us to:

- Identify our allies & opponents
- Prioritise who we should target to achieve maximum influence
- Determine the influencing strategy for each priority audience

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Stage 1

Brainstorm all stakeholders

Aim for a long and comprehensive list

- Be creative
- Don't judge or censor as you brainstorm
- Sub-divide groups as appropriate so that each named group can be seen to have a broadly common position and interest

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Stage 2

Analyse the Stakeholders

We need to identify the most important stakeholders for our campaign

- We want to put our attention and resources where it will have most effect
- We don't want to spread ourselves too thin

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What do we need to know?

1. How much influence do they have over the issue?
2. How much do they agree or disagree with us?
3. How important do they think the issue is?

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Question 1

- What degree of influence can they have over the decision maker (compared with the other stakeholders)?
 - High Influence
 - Medium Influence
 - Low Influence

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Question 2

- How much do they agree or disagree with our objective?
 - Strongly in favour (*pp* – *very pro*)
 - In favour (*p* – *pro*)
 - Neutral (*n*)
 - Against (*a* – *anti*)
 - Strongly against (*aa* – *very anti*)

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Question 3

- How important is this issue to them (compared with the other issues that they face)?
 - High Importance
 - Medium Importance
 - Low Importance

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Can't agree/don't know?

- Sub-divide the category and/or
- Investigate further and/or
- Make an educated guess

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Stakeholder Analysis

| Stakeholder | Influence | Attitude | Importance |
|-------------|-----------|-------------|------------|
| | L M H | AA A N P PP | L M H |
| | L M H | AA A N P PP | L M H |
| | L M H | AA A N P PP | L M H |
| | L M H | AA A N P PP | L M H |
| | L M H | AA A N P PP | L M H |
| | L M H | AA A N P PP | L M H |

AA = Very Anti; A = Anti; N = Neutral; P = Pro; PP = Very Pro
L = Low; M = Medium; H = High

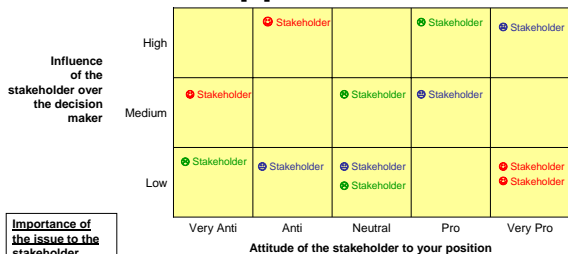
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Stage 3 Sort the results

To make the results stand out, you should transfer the results onto the "Allies & Opponents Matrix"

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Allies & Opponents Matrix



Importance of the issue to the stakeholder
 ● High
 ● Medium
 ● Low

The three dimensions can be represented on one matrix, with the axes representing the influence and attitude of the stakeholder, and coding the importance of the issue to the stakeholder by using symbols or colours.

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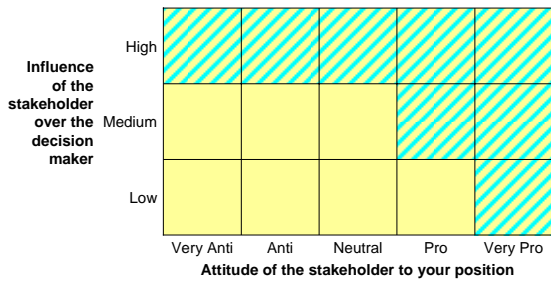
Stage 4 Interpret the results

You now have to interpret the results and determine your influencing strategy:

- Who are the priority stakeholders?
- Who are your most important allies and opponents, and who are the neutrals?
- What options do you have for shifting the balance of power and ideas?

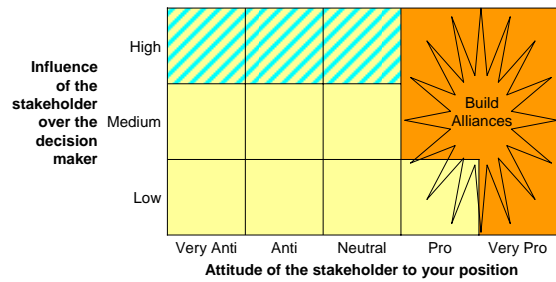
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Influencing Options



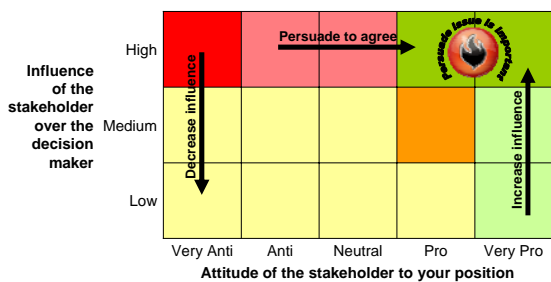
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Influencing Options



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Influencing Options



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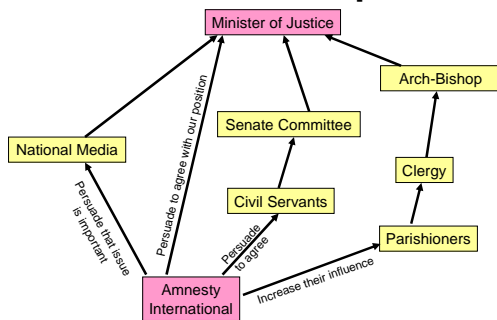
Influencing Options

For the audiences you select to target, you have five influencing options:

- **Persuade them to agree with your position** – with influential neutrals and soft opponents
- **Persuade them that the issue is important** – with disinterested allies
- **Build alliances with them** - with influential and interested allies
- **Increase their influence** – with allies of low influence
- **Decrease their influence** – with opponents of high influence

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Influence Map



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Decision makers & opinion formers:
Powerful as individuals

Have knowledge:
Need detailed messages, using rational arguments

Members & supporters:
Powerful as catalysts

Some knowledge:
Need more detailed but emotive messages

The Public:
Powerful together

Little knowledge:
Need simple messages, using emotive arguments

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Messages

- Although you need to “package” your communications differently for each audience, messages should be consistent and coherent
 - This gives synergy between different channels of influence and safeguards your credibility
- You also need to ensure that your communications are clear and focussed
 - This will help you be more effective and give you more impact
- To do this, you can identify your core message or “proposition”.

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Proposition

- A **Proposition** is the specific single message that defines what all the communication activities in the advocacy campaign should promote.
- It is a short phrase (no more than ten words) that specifies the key message that you want audiences to remember.
- It is not a slogan or sound-bite (although these will be derived from your proposition), and the actual words might not be used in public.
- It can also be called a **Communications Proposition** or a **Message Proposition**

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Developing a proposition

- Avoid the tendency to write slogans
- Start where your audiences are at, not where you want them to be
- Consider the dominant “frames” – either work within the dominant frame or try to establish a new frame
- Test different options before making a final selection

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Communicating your proposition

- Actions speak louder than words
- A picture is worth a thousand words
- You govern in prose but campaign in poetry

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Similes, Metaphors, Allegories and Parables

Simile:

- “A woman without a man is like a fish without a bicycle”

Metaphor:

- “All the world’s a stage, and all the men and women merely players; they have their exits and entrances”

Epic metaphor:

“This is a crisis. A large crisis. In fact, if you’ve got a moment, it’s a twelve-story

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Slogans, Strap lines & Sound bites

- A **slogan** is a short memorable phrase that communicates the message proposition. It will be repeated at every opportunity so that audiences remember it.
- A slogan that is incorporated in a campaign logo is called a **strap line**.
- A **sound bite** is a short, memorable phrase, quote or statistic that illustrates the message proposition. Usually used only once before it loses its impact.

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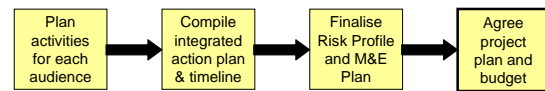
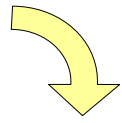
Group Exercise

Your task is to devise a suitable Message Proposition (maximum 10 words) for the launch of your advocacy campaign.

1. Brainstorm a number of options
2. If possible, select your preferred option
3. If you have time, identify ways of communicating the proposition through pictures, actions, slogans, sound-bites, etc.

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Phase 3: Devise action plan



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Engaging with audiences

- All your communications activities – the materials you produce, the meetings you hold and the events you organise – should be targeted at a specific audience and be designed to achieve a specific outcome from that audience.

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Change Communications

One established model for change communications is called AIDA:

- A** Attention or Awareness
- I** Interest
- D** Desire
- A** Action

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Influencing Styles

- **Factual:** influences by a presentation of the facts; there is an emphasis on detail and documentation.
- **Intuitive:** influences by stressing the benefits of a solution; the emphasis is on the a creative approach to new possibilities.
- **Normative:** influences by an appeal to a common set of beliefs; emphasis on a fair solution; behaviours tend to be based on emotions.
- **Analytical:** influences by showing causal relationships between parts and then synthesising them.

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Influencing Styles

- You have these unconscious preferences, and you need to be aware of them.
- Your advocacy targets will also have their own unconscious preferences, and you need to recognise them.
- You need to be able to “speak the same language”.

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Materials & Activities

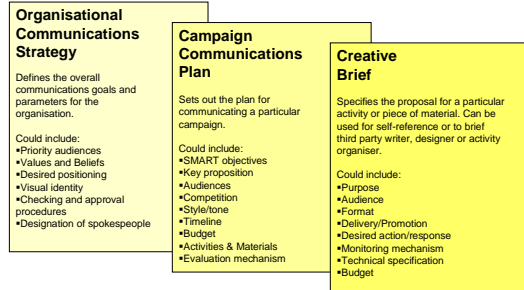
Each communication activity you organise or piece of communication material that you produce should be designed:

- For a particular target audience
- For a particular purpose

To help you do this, you can use a checklist or a form (creative brief)

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Communications Framework



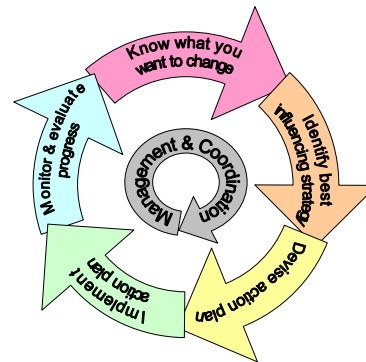
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Creative Brief / Checklist

- **Audience** – Who is this for?
- **Purpose** – What is this to achieve?
- **Format** – What is it?
- **Delivery** – How is this to be distributed or promoted?
- **Proposition** – What is the core message?
- **Action** – What do you want the audience to do? Why should they?
- **Response** – How can the audience get more information or get involved?
- **Accompanying materials** – What goes with this?
- **Evaluation** – how is this to be evaluated?
- Budget/Technical Specifications/Numbers/Deadline

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The Advocacy & Campaigning Cycle



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Individual Task

Write for yourself a Personal Action Plan that sets out what you will do in the next few months to:

- Share your learning
- Extend your learning
- Put your learning into practice (you will not be asked to share this plan)

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