



Taking into consideration implementers' limited time and resources, the tools in Pathfinder International's *Straight to the Point* Series provide clear, concise guidance on a variety of issues related to program design, implementation, and evaluation.

## ADVOCACY TOOLS

The *Straight to the Point* advocacy tools are intended for organizations that want to include in-country advocacy and public policy work among their programmatic strategies. The tools will lead you through the three essential steps to developing an advocacy initiative.

**1 Setting Advocacy Priorities** will help you take the first step in developing an advocacy initiative—selecting an issue for advocacy.

**2 Assessing the Political Environment for Advocacy** will help you understand the environment you are working in and the key factors you need to consider as you develop your initiative.

➤ **3 Mapping an Advocacy Strategy** (*this tool*) will help you plan a concrete strategy for achieving your goal, including determining your specific activities.

After completing the three tools you will be ready to launch your advocacy initiative.

In this tool you will take the information you gathered in the previous tools (e.g., potential partners and opponents, key people of influence inside and outside the government, public opinion) and use it to map out the specific steps you will take to accomplish your goal.

**To develop your advocacy strategy, you need to answer questions including:**

- What is your advocacy goal?
- What are your specific objectives that will contribute to the achievement of your overall goal?

- Who do you want to partner or collaborate with? What are their contributions to your initiative?
- Who are the targets (policymakers, government agencies, etc.) you need to influence to achieve your goal?
- What are the key upcoming events that may provide opportunities for mobilization and advocacy?
- What is your approach to advocacy (e.g., direct or indirect)?
- What are the specific activities you will carry out? When? How?

### How to use this tool:

The *Straight to the Point* advocacy tools might look difficult to complete, but they are actually the fastest and easiest way to develop an advocacy initiative. If you complete all three tools during one or two workshops, you will be well prepared to launch your initiative—a process that might take months otherwise. Although there are numerous questions to answer and tables to fill in, be aware that you do not need to write very much—you can just make notes on the essential information.

The *Mapping an Advocacy Strategy* tool can be completed by an individual. However, *ideally it should be completed by a small group of core leaders* from your organization or coalition (if you are part of one) in a team exercise or workshop setting. After a core group comes together to lead the initiative, the strategy should be continuously adapted and adjusted through a process of open, participative discussion with all relevant actors.

As you use this tool, it is important to remember that developing an advocacy strategy is not necessarily a linear/direct process. You need to be flexible and sometimes you will have to jump ahead or go back and repeat steps you have already taken. Additional sheets of paper, a flipchart, or a computer may be helpful for making notes and recording your answers.

**Note:** Changes in the political environment (e.g., new risks and opportunities and reactions from the individuals and institutions you are targeting) can affect your advocacy strategy and the range of activities you will conduct. Therefore, you should revisit the *Assessing the Political Environment for Advocacy* and *Mapping an Advocacy Strategy* tools periodically.

**Before planning your advocacy strategy, you should be familiar with the following terms and common definitions:**

### **ADVOCACY**

Advocacy is a strategy to influence policymakers to make a policy change (e.g., create supportive policies, reform or remove harmful policies, ensure the funding and implementation of supportive policies).

When we talk about advocacy, we do *not* mean information, education, and communication (IEC) activities. Advocacy is not about changing specific practices or even building community awareness or support for an issue or practice. Rather, advocacy is intended to change opinion about a *policy*—specifically, policymakers’ opinions—and achieve a particular policy change. It is often necessary to conduct opinion change activities with the media, community members, religious leaders, and health care providers before conducting advocacy activities. However, these efforts are only considered advocacy activities if the target groups then put pressure on the policymaking process. Additionally, efforts to persuade government offices/ministries/etc. to give funding to your organization’s programs are *not* advocacy.

### **POLICY**

A policy can be a plan, strategy, or agenda; program or course of action; human rights instrument; budget decision; piece of legislation; or regulations or protocols/guidance issued by a government, multinational entity, or institution.

### **POLICYMAKERS**

Policymakers are typically government officials or people with formal political power (e.g., parliamentarians, ministers or agency officials, and their staff).

### **LOBBYING**

Generally, lobbying is defined as the work of influencing a specific piece of legislation. So, while lobbying can be part of an advocacy strategy, advocacy work does not necessarily involve lobbying. For example, holding a meeting with a policymaker explaining the benefits of permitting community health workers to distribute injectable contraceptives is *not* lobbying. Encouraging that same policymaker to sign a piece of legislation permitting this *is* lobbying. Often, limitations are placed on NGOs’ lobbying activities. Before considering lobbying as part of your advocacy strategy, review your country’s laws and policies governing NGO lobbying and advocacy.

# Issue, Goal, & Objectives

## ISSUE

Your advocacy issue should be specific and concrete. It should clearly reflect the policy change you want to achieve (i.e., the issue should be directly linked to your goal). The *Setting Advocacy Priorities* tool can assist you in identifying your issue.

**Strong example issue:** Community health workers (CHWs) are permitted to distribute injectable contraceptives.

**Weak example issue:** Family planning

**What is your issue?**

## GOAL

Your advocacy goal builds on your advocacy issue by adding *who* (e.g., person, institution, office) will make the policy change, *how* the policy change will be made (e.g., through a specific bill, guidance, regulation), and *when* it will be achieved. Set an attainable goal with a realistic timeframe.

**Strong example goal:** The Ministry of Health will issue new protocols/guidelines for the distribution of injectable contraceptives by CHWs by December 2013.

**Weak example goal:** The government will enable CHWs to distribute injectable contraceptives.

**What is your goal?**

## OBJECTIVES

Your goal should be broken down into a few short-term objectives that will *directly* contribute to achieving your goal. Objectives are the smaller steps you must complete in order to reach your overall goal. They should be clear and focused, and should include: the *change* you want to see, *who* (e.g., person, institution, office) will make the change, and *when* it will be achieved. They should be limited in number (no more than 3). **Note:** *If your objective is likely to take longer to achieve than your goal, it is not a good objective.*

**Strong example objective:** Five high-level champions in the Ministry of Health's Reproductive Health Division will make public statements in support of CHWs distributing injectable contraceptives by June 2012.

**Weak example objective:** Build ministry support for CHWs to distribute injectable contraceptives.

**What are your objectives?**

Objective 1	
Objective 2	
Objective 3	

## Partners & Alliances

Forming strong partnerships with other groups/organizations is essential to a successful advocacy strategy. You need to identify partners who will bring helpful, unique skills and contributions to your effort. Make sure you and your potential partners are in agreement about the issue and its potential solutions. A stakeholder forum may be necessary to build consensus.

Identify 5–10 potential partners and what they can contribute to your advocacy initiative. Include your own organization and its resources in the list.

<b>POTENTIAL PARTNER</b>	<b>CONTRIBUTIONS</b> (human resources; funding; political and media connections; advocacy, communications, and technical expertise, etc.)

**What resources are still needed?**

# Targets

Your primary targets are the policymakers/offices/etc. that have the power to make the change you are advocating for. When you cannot influence your primary targets, choose secondary targets. A secondary target is the person/group/etc. you *can* influence who can then, in turn, influence your primary target. The targets must be *specific* (e.g., a person, newspaper, department, committee) —“the public” or “the government” are too general and, therefore, are not good targets.

Identify 5 primary targets for each objective. Then fill in the target’s position on your issue based on 2 criteria: supportive/neutral/opposed, and informed/uninformed. Next, note who in your organization/partners has the connections needed to influence each primary target. If you do not have the connections you need to influence the primary target, choose a secondary target (who can influence the primary) and fill in the information in the Secondary Target table on the next page.

## OBJECTIVE 1

PRIMARY TARGET NAME	POSITION ON YOUR ISSUE	PARTNER WITH CONNECTIONS TO INFLUENCE TARGET

## OBJECTIVE 2

PRIMARY TARGET NAME	POSITION ON YOUR ISSUE	PARTNER WITH CONNECTIONS TO INFLUENCE TARGET

## Targets *(continued)*

### OBJECTIVE 3

PRIMARY TARGET NAME	POSITION ON YOUR ISSUE	PARTNER WITH CONNECTIONS TO INFLUENCE TARGET

### SECONDARY TARGETS

OBJECTIVE #	NAME	PRIMARY TARGET IT CAN INFLUENCE	POSITION ON YOUR ISSUE	PARTNER WITH CONNECTIONS TO INFLUENCE TARGET

## Timing

Advocacy activities should be timed to occur just before key decisions are made or before an important event.

**What upcoming events, significant dates, or government decisions might be important mobilization and communication opportunities?**

# Approaches & Activities

## APPROACHES

There are different ways of approaching advocacy. One way is a *public* approach, which generally means mobilizing broad support from the government and/or the public through highly visible activities. Compare this to a *private* approach, which involves working quietly with a few key partners to make changes behind the scenes.

You might also want to consider *direct* versus *indirect* approaches. Direct approaches involve directly asking policymakers to take action. Indirect approaches involve influencing opinion through a third party such as the media, public, or other actors.

### Which approach(es) do you want to take?

- Public
- Private
- Direct
- Indirect

When selecting your advocacy approach(es) think about the best way to exert influence, given the information you gathered in the *Assessing the Political Environment for Advocacy* tool. The approach(es) you choose will inform your activities.

## ACTIVITIES

Your advocacy activities should be designed to help you achieve your individual objectives, moving you toward your goal.

Below is a list of common advocacy activities. You should consider pursuing a combination of them for each objective. Do not be afraid to use your imagination as well, but be selective. You cannot and should not do everything. Think about your expertise, capacity, what will have the greatest impact on your target, and your funds.

### Examples of activities:

- Arrange site visits or study tours
- Hold educational briefings & events
- Conduct advocacy trainings
- Launch public awareness campaigns
- Hold policy dialogues & forums among key stakeholders
- Document problems for policymakers (e.g., commission a report)
- Engage the media to cover your issue
- Hold face-to-face meetings with policymakers
- Mobilize groups (community members, public interest groups, etc.) in support of policy change
- Provide technical information and recommendations to policymakers
- Utilize email, phone calls, letters, petitions, and social media to mobilize constituents to contact policymakers

## Approaches & Activities *(continued)*

Fill out the chart below to help you decide which activities you will conduct to meet your objectives. For each activity, determine the approximate timing. Timing will depend on each activity's priority. *Do not try to do everything at the same time.* Identify the cost of the activity and the person/organization primarily responsible for leading it, along with partners who will support them. Be as detailed as possible regarding your specific plans and tactics, including how they will reach your targets. For example, do not just write "public awareness campaign"—include the topic of the campaign, who you will target, what forms of media you will use, etc. Decide on 5 activities for each objective.

### OBJECTIVE 1

ACTIVITY	LEAD PERSON/ORGANIZATION	PARTNER(S)	TIMING	COST

### OBJECTIVE 2

ACTIVITY	LEAD PERSON/ORGANIZATION	PARTNER(S)	TIMING	COST

## Approaches & Activities *(continued)*

### OBJECTIVE 3

ACTIVITY	LEAD PERSON/ORGANIZATION	PARTNER(S)	TIMING	COST