

Advocacy

A toolkit for small NGOs



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This toolkit is part of a series of five for small charities released as part of the INTRAC programme "Strengthening Small Organisations with Big Ambitions".

Here you can access all of the toolkits including more accessible mobile-friendly versions.

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01. Introducing advocacy

1.1 What is advocacy?

Advocacy means actions intended to influence selected people, governments, private companies or other institutions in order to achieve a desired policy, practice, social, or political change that will benefit particular groups.

Advocacy can seek to reform policies and institutions or get good policies implemented or alter power relations and bring about fundamental changes or protect or defend particular groups from adverse changes.

1.2 Why do advocacy?

- To defend communities and programmes from adverse changes
- To achieve more widespread, longer term and sustainable changes than is usually possible through community-based programmes alone
- To address the causes of poverty and not just the symptoms
- To ensure the responsibilities of governments to citizens are met and rights are respected
- To strengthen democracy by encouraging the engagement of citizens and civil society organisations in the policy-making process
- To increase the profile of your organization among policymakers

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- 1.1 What is advocacy?
- 1.2 Why do advocacy?
- 1.3 Challenges of doing advocacy
- 1.4 What's in the advocacy toolbox? (ie range of activities)



We are all advocates!

You don't need to have had 'advocacy' in your job title to have had experience of advocacy. In our daily lives, most of us are constantly trying to influence others to take a certain course of action. Remember to draw on these experiences when advocating for the changes you seek.

1.3 Challenges of doing advocacy

- **Advocacy is about influence rather than control.** You may succeed in influencing and persuading powerful actors to take action and make change happen – or you may not. You cannot totally control what they do.
- **Changing policies or laws can take a long time** and the process may be very unpredictable (though not all advocacy initiatives seek policy or legal changes)
- **Advocacy strategies are very context-specific and time-specific:** what worked in one particular time or place may not work in any other time or place
- **Advocacy may require you and your organisation to engage with politicians and political processes.** Some of your supporters and those you seek to influence may regard your organisation as too 'political'. This may affect your reputation and your funding
- **In some contexts, engaging in advocacy may expose your organisation and staff to harassment** because those you seek to influence regard you as a threat to their power and their interests
- **Multiple actors and factors may have been involved** in securing the change you seek. This makes it hard to attribute change to your advocacy

"You may never know what results come of your actions, but if you do nothing, there will be no results."

Mahatma Gandhi

1.4 What's in the advocacy toolbox?

Advocacy is an umbrella term covering a wide range of activities., such as:

- Direct engagement with powerful actors whom you are seeking to influence. Includes face-to-face or zoom/online meetings. The direct engagement is often with policymakers (ie politicians or civil servants in local or national government or in parliament), but the engagement could also be with community or religious leaders. Short briefings or policy reports aimed at these powerful actors may enhance this direct engagement.
- Public campaigning. Includes mobilising citizens to put pressure on powerful actors through, for example, signing petitions or participating in marches or vigils
- Using the media and social media to influence powerful actors – eg by persuading journalists to report on the issue or writing letters to a newspaper, or posting messages and content about the issue on social media
- Litigation. When policymakers are not complying with their own laws, one option is take them to court and require them to comply through legal action

Core activities recommended for effective advocacy:

- Working in coalitions and alliances with others to achieve greater impact
- Research and analysis of the problem you are addressing and the solutions – to support your case for change
- Constant monitoring of your issue to understand how it is being addressed in political fora such as parliaments and by governments and in the media

There is no blueprint for how you do advocacy!

Your advocacy activities will depend on your analysis of:

- Who is involved in the advocacy – eg. your organisation, coalition, communities
- The context in which you will advocate and who you are seeking to influence

02. How to develop an advocacy strategy - an overview

2.1 Why develop an advocacy strategy?

The pathway to securing change through advocacy may not be very clear - mainly because you don't have control over those you are seeking to influence or the political processes through which they operate. So it's good to develop a strategy that can act as a kind of 'road map'. The development of a strategy will also help ensure that members of your coalition or organisation and those affected by the issue are following the same map!

Sometimes advocates waste time reacting to political events that may be only tangentially connected to the change they are trying to secure. The development of a strategy will help ensure that those involved are proactive and strategic, rather than just reactive.

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- 2.1 Why develop an advocacy strategy?
- 2.2 Who to involve in the strategy
- 2.3 Key steps in developing an advocacy strategy



This handout describes ten steps to developing an advocacy strategy.

The process of developing an advocacy strategy can also help you to:

- Build a broader base of support by engaging a range of stakeholders in developing the strategy – including those directly affected
- Systematically analyse the context in which you will be advocating. In turn, this analysis will help you identify who you need to influence and the most effective tactics and activities for influencing them
- Monitor your advocacy. Developing a strategy will help you identify a) the short-term, medium-term and longer outcomes you will seek to secure (as the ultimate change you seek may take a long time); and b) the indicators – ie the evidence you will collect to demonstrate progress in securing the outcomes you seek

2.2 Who to involve in the development of the strategy

Advocacy can be carried out by:

- The people affected by an issue or problem
- Other people representing them
- Both groups together

Advocacy is more powerful if those affected by the issue are involved in some way. If possible, make sure they are involved in defining the problem and the solutions and developing the strategy. If you are advocating on behalf of those affected by a given issue, you must ensure you represent their opinions and interests fairly. This means having a close relationship with them and permission from them to advocate on their behalf.

Why it is important to involve those directly affected by the advocacy issue, from early on in the planning process:

- They will have expert knowledge of the issue or problem
- They can suggest workable solutions based on direct experience of the problem
- They are often highly motivated, because they are directly affected by the issue
- Affected individuals and groups will gain more skills and confidence – so the process of developing an advocacy strategy and then doing advocacy can be a way of starting to shift power to these groups that have been disempowered.



2.3 Ten steps in the development of an advocacy strategy

1. **Analyse and research** the problem you want to address so that you are clear about the root causes of the problem and the blockages to change
2. Have a vision of the long-term change you want to see - **the long-term goal**. It is not something which your advocacy alone will achieve. But it is the ultimate reason for why you are doing the advocacy
3. Analyse all of the changes needed to secure the long-term goal and linkages between these changes
4. Select which of these change(s) you will seek to secure through advocacy. This is your **advocacy goal**
5. Analyse the **external context** in which you will advocate – ie people, power, policies, politics. Analyse upcoming opportunities and threats too
6. Analyse the **internal context** within your organisation or coalition – eg. advocacy capacity, expertise on the issue etc.
7. Identify your **overall approach and tactics** (based on your analysis of the internal and external context)
8. Identify the sequence of actions and outcomes you will seek on the way to achieving the advocacy goal(s) – essentially your **advocacy roadmap**. Set **indicators** to help you measure your progress in securing the outcomes
9. Develop your **key advocacy messages and your `asks`** of those you are seeking to influence – eg. policy recommendations
10. **Monitor** (regularly) your advocacy strategy. You may need to amend the strategy as the context (inevitably) changes and depending on the outcomes you are observing. Remember advocacy is about influence – not control! For reasons beyond your control, your strategy will probably have to adapted.

03 Identifying your advocacy goal

3.1 What is the long-term goal which your advocacy will contribute to?

Your long-term goal is your vision of the long-term change you want to see. It is what gives your advocacy its real sense of purpose and legitimacy. It is what motivates you to keep going, even when progress is very slow or when things feel like they are going in the wrong direction.

Examples of long-term goals:

- Climate change: Global temperature rises kept below 1.5 degrees
- Education: All children have access to education from 5 – 18 years old
- Agriculture: Rural communities have secure livelihoods
- Gender equality: Women and men have equal employment opportunities, conditions and pay

It is important to keep the long-term goal in your vision. But it is unlikely that your advocacy strategy alone will secure this goal. Multiple changes may need to happen in order for the long-term goal to be realized, and your organisation or coalition can't advocate for all of them. So you need to decide which change your advocacy will focus on as a contribution to the long-term goal – your advocacy goal, in other words. This module will help you identify your advocacy goal.

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- 3.1 Your long-term goal
- 3.2 How to identify your advocacy goal, using a 'systems thinking' tool
- 3.3 Typical factors to help you decide on your advocacy goal
- 3.4 Examples of advocacy goals

3.2 'Systems thinking' tool to help identify the advocacy goal

Write your long-term goal in the middle of a page /virtual canvas. Around the long-term goal, write down all the changes that need to happen for the long-term goal to be realized. Start with the bigger changes and then work outwards to the smaller changes.

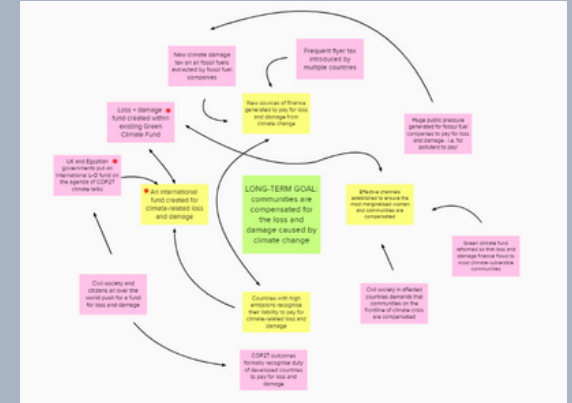
Then, insert arrows to indicate any connections between the changes. This may help you identify the really critical changes that will unlock lots of other changes. You have now produced what is known as a 'systems thinking' map – showing the whole system of changes needed and the connections between them (see example on the right hand side column (also in the downloadable activity guide)).

Discuss with your colleagues, partners (and ideally those directly affected by the issue) which change your advocacy will focus on. This will depend on a range of factors (see 3.3 below for common factors influencing your decision).

Insert a star or asterisk in your map next to the change which your organisation/coalition will seek to secure through advocacy.

Articulate your advocacy goal as though the change you seek has been secured. One way of doing this is to imagine what the newspaper headline would read if your advocacy goal had been achieved

NB. You may decide to select more than one advocacy goal – for example, when several changes you seek are connected in some way. But more than 3 advocacy goals is not recommended. The more focused your advocacy strategy, the more successful it is likely to be.



Here you can find an activity guide
to draw your own systems thinking
map.

3.3 Common factors to consider when deciding which change to try to secure through advocacy

Relative importance of the change - choose an advocacy goal which:

- Is a 'root' change which will unlock other changes (or block other changes if not pursued)
- Is important to those affected by the issue and to your organisation's mission and stakeholders

External context - choose an advocacy goal on which:

- There are upcoming opportunities to achieve this goal
- The risks involved in seeking this goal are manageable
- Your advocacy will either complement or strengthen the advocacy of others

Capacity and expertise – choose an advocacy goal which:

- Fits your expertise, experience or analysis
- You know quite a lot about: what it is you want to change, why it should change, and how it should change.
- Allows you to integrate advocacy work with other work done by your organisation (eg. work on the ground with communities).



3.4 Examples of advocacy goals

Long-term goals	Advocacy goals
Climate change: Global temperature rises kept below 1.5 degrees	X big banks stop financing coal, oil and gas
Education: All children have access to education from 5 – 18 years old	The government removes all school fees
Agriculture: Rural communities have secure livelihoods	Farmers secure access to interest-free loans
Gender equality: Women and men have equal employment opportunities, conditions and pay	Women secure the statutory right to paid maternity leave

04 Analysing the context: people, power, policies, politics

4.1 Analysing the external context for your advocacy

An analysis of the external context will help you identify:

- **The external opportunities and threats** in relation to your advocacy issue – especially in the political sphere
- **Targets** of your advocacy - ie those with the power to bring about the change you are seeking - those you will seek to influence
- Potential **allies** who may help you bring about the change you are seeking
- Potential **opponents** who you may need to confront, neutralise or convert to your cause if you are to succeed
- The relevant **policy channels and processes** you will need to influence
- **What advocacy tools** are most likely to influence those with the power to bring about the change you seek (ie private lobbying? Or public campaigning and media work? Or a combination of these?)
- Features of the **political culture** which may affect your tactics (eg. laws governing what NGOs can and can't do or the right to protest; politicians' attitudes to NGOs etc) and the level of **political will** to effect the change you seek

For your advocacy to be successful, you will need to constantly monitor and analyse the external context and the impact of your advocacy activities within that context – not just when first drawing up your strategy. This is because advocacy hinges on influencing powerful actors outside your organisation to take action.

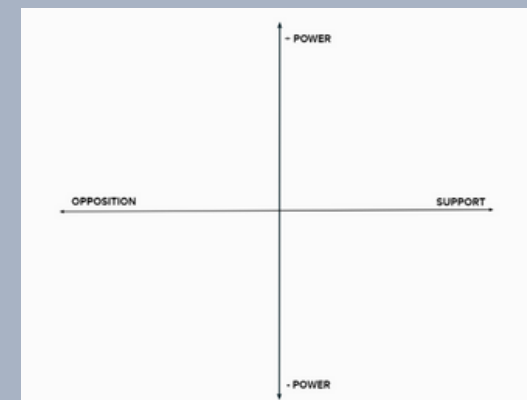
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- 4.1 Analysing the external context for your advocacy
- 4.2 Power & stakeholder mapping
- 4.3 Political triangle tool – for analysing relevant policies and politics
- 4.4 Analysing the internal context for your advocacy

4.2 Power & stakeholder mapping

Brainstorm all of the different actors that have some kind of power or stake/interest in your advocacy goal (either positively or negatively). Write their names on sticky notes, then position the notes on the chart, based on their relative power (vertical axis) and support/opposition of the actor with regard to the advocacy goal (horizontal axis).

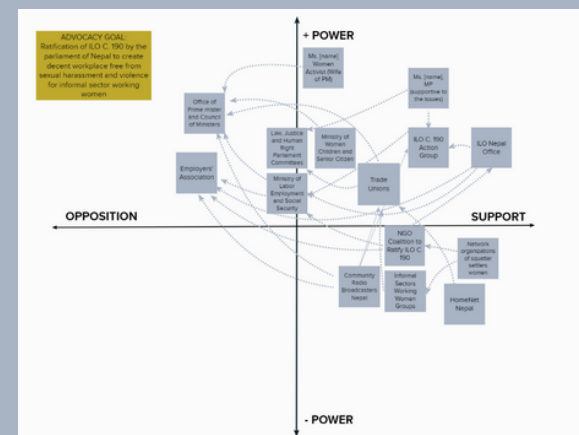
Now, draw arrows between the different notes to indicate the chains of influence – i.e. who influences who (as you may not get direct access to the most powerful actor and may have to resort to influencing those who influence him/her). Your final map may look like the one on the bottom right (courtesy of Anup Raj Pokhrel, CARE Nepal, former participant on an INTRAC Advocacy Strategy and Influencing Skills training course).



[An activity guide with larger images is available for download here](#)

4.2.1 Questions to address when analysing your power & stakeholder map

- Who do you think your advocacy strategy should particularly seek to influence? I.e. who will be your prime targets?
- What will be your strategy towards your opponents? Will you seek to influence them? Or seek to isolate them? Or ignore them?
- Which actors do you need to build alliances with and why?
- How could you increase the power of allies who don't have much power?

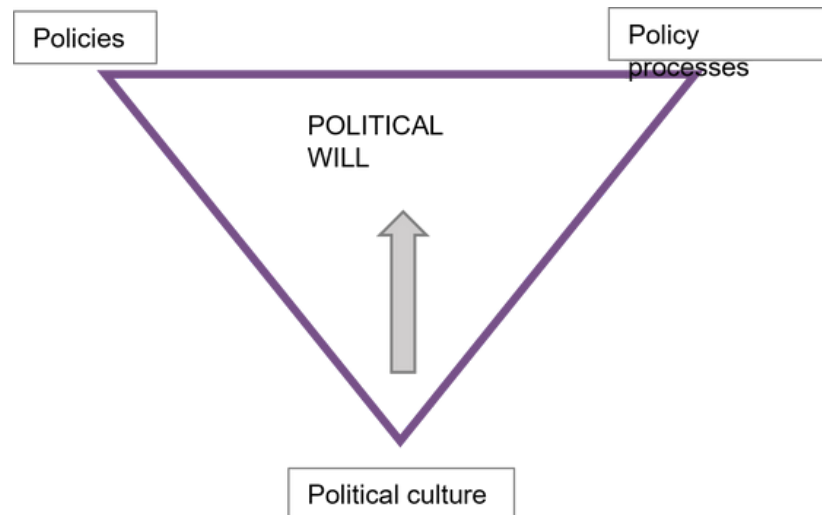


What your power and stakeholder analysis might mean for your strategy

Position on the map	Description of the actor	What to do
In between the two upper quadrants	Influential actors who are neutral on the issue	Persuade them to agree with you
Around the centre of the diagram	Potential allies who have a marginal interest in the issue	Persuade them that the issue is important
Upper right quadrant	Influential allies	Build alliances with them
Bottom right quadrant	Strong allies with low influence	Build their influence
Upper left quadrant	Opponents with high influence	Seek to influence them or decrease their influence
Bottom left quadrant	Opponents with low influence	Ignore and seek to isolate them

4.4 Political triangle – to help you analyse politics and policies relevant to your advocacy goal

Use the three 'points' of the triangle as a framework or checklist for analysing a) the policies, b) the policy processes relevant to your issue, and c) the underlying political culture:



Political culture and political will: You need to understand the policies that are relevant to your issue and the processes for changing them. But policies usually only change when enough political will has been generated to change them, as this triangle indicates. Start by analysing how much political will already exists. This includes analysing the political culture – i.e. policymakers' attitudes, interests, behaviours and values. Then tailor your advocacy message to address these interests and attitudes in order to generate political will for the change you seek.

We have the means and the capacity to deal with our problems, if only we can find the political will.

Kofi Annan, former UN Secretary-General

4.5 Analysing the internal context for your advocacy

Advocacy seeks change in the external context - well beyond the changes resulting from the services that an NGO might provide in a single community, for example. So advocacy tends to be more externally focused than other activities. But the internal context inside your organisation will also affect your advocacy strategy and therefore needs analysing. Questions to address when developing an advocacy strategy:

- Do the communities we work with support our proposals to undertake advocacy on this issue?
- Does senior management support our intention to undertake advocacy on this issue? Do they understand the purpose and objectives of it? Are senior managers aware of the potential risks involved?
- What skills, expertise and experience do a) our staff; b) our partners; and c) the communities we work with, currently have to engage in advocacy on this issue? Do we need to build their capacity?
- Do we have sufficient human capacity and financial resources to undertake advocacy on this issue? Will the advocacy need to be combined with other work and responsibilities? And if so, how?
- Are there particular methodologies and approaches promoted by my organisation that will affect our approach to advocacy? (eg. emphasis on participatory approaches involving children; emphasis on partnership)
- Does my organisation's mission, mandate and organisational culture limit the kinds of advocacy activities we can engage in?

05 Identifying tactics and approaches

5.1 Identifying your overall tactics and approach

- You have clarified your advocacy goal.
- You have analysed the external context for your advocacy: the threats and opportunities in relation to your advocacy goal, the policy and political context, who has the power to bring about the change you are seeking, and who has a stake or interest in this change.
- You have reflected on the internal context within your own organisation (expertise, experience, mission etc).

Now you need to think about tactics – and the approach you will take – based on all of the above analysis. What is your theory of change? In other words, what is your theory for how the advocacy goal can be achieved and for how your organisation can contribute to its achievement?

‘Strategy requires thought, tactics require observation.’

Max Euwe (chess champion)

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5.1 Identifying your overall tactics and approach

5.2 ‘Insider’ and ‘outsider’ approaches

5.3 Benefits and risks of ‘insider’ and ‘outsider’ approaches

5.4 Advocacy approaches to consider in restrictive contexts

The approach you take will depend on:

- The external context: how political change comes about in your context, what approaches are likely to have the most impact on those you are seeking to influence.
- The internal context: your organisation's capacity, expertise, and mission, plus the expectations of your stakeholders and the kind of approaches they feel comfortable with.
- The type of change you are seeking: radical change may require tactics such as public campaigning whereas small incremental changes may be secured through more discreet direct engagement with those who have the power to make these changes.

5.2 `Insider' and `outsider' approaches

`Insider' Approach

This refers to private influencing work and direct engagement with powerful actors behind closed doors. The engagement is often with policymakers but may also be with community leaders or religious leaders. It tends to involve constructive dialogue and relationship-building. With this approach, the emphasis is on research and analysis which is shared with the powerful actors to influence them directly and build your credibility. It usually involves gentle persuasion. It is more of a collaborative approach in contrast to the more adversarial `outsider' approach. Sometimes, the `insider' approach involves working with allies inside the system and supporting them to better influence their superiors.

`Outsider' Approach

Advocacy conducted outside the corridors of power - for example a protest that is physically outside a government building, not a meeting with government inside the building. It is an outside approach in a metaphorical sense too because the advocacy is being undertaken in public, not through private engagement.

This approach tends to involve public campaigning and mobilisation of citizens, protests, stunts, or media work. It will often be distinguished by a simple and direct message (eg. `Bring back our girls' or `drop the debt'). It may harness people's anger and passion by shaming policymakers and exposing wrongs - but it doesn't have to be confrontational. Sometimes a public campaign can have quite a soft message to attract a diverse range of supporters (eg. `Peace Now', `Poverty Over' etc).

The approach you take may depend on the kind of change you are seeking to secure through advocacy. The `insider' approach may be sufficient to secure smaller, incremental reforms whereas an `outsider' approach may be required for bigger, more radical changes which may not be achieved without public pressure.

Further resources: Case-studies of successful advocacy strategies

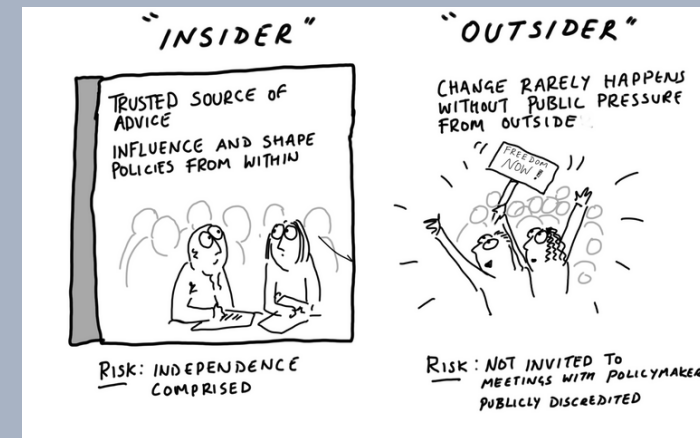


1. [Ban Landmines campaign](#) - example of a successful advocacy initiative that combined `insider' advocacy with `outsider' tactics.

2. [How Big is Yours campaign](#) to stop under-sized fishing in Turkey - example of a successful `outsider' campaign

5.3 Benefits and risks of 'insider' and 'outsider' approaches

Approach	Benefits	Risks
"Insider"	You can become a trusted source of advice and can access important information about policy processes. You may be able to influence and shape policies directly.	Possibility of being co-opted by those you are seeking to influence. You may find your independence is compromised
"Outsider"	Change rarely happens without public pressure from outside.	You may not be invited to meetings with policymakers and you may find you are publicly discredited by them.



A combination of the two approaches can be very effective – with different organisations within the same coalition taking on different roles, for example. Alternatively you could start with the insider approach and then switch to a more public 'outsider' approach if the insider approach isn't working.

Just make sure you discuss with your colleagues and partners what overall approach you will take before you start planning your advocacy activities.

5.4 Advocacy approaches to consider in restrictive contexts

In a growing number of countries, governments have become suspicious of NGOs' advocacy and have tried to restrict it. In spite of this, it is nearly always possible to do something to try to secure the change you seek – however restricted the context. In these contexts, make sure you:

- Assess your risk and regularly review risks relating to specific activities as the context changes
- Identify approaches which are appropriate to the context. This could include:
 - Adapting the language you use. If the word 'advocacy' is perceived negatively, use other terms such as 'constructive dialogue' or 'engagement'
 - Using existing partnerships with government on, say, the delivery of health or education services as a gentle influencing opportunity
- Develop alliances and work with others – i.e. safety in numbers
- Ensure partners or communities you are working with feel able to raise concerns with you about risks – including the risks of advocacy activities
- Develop policies and procedures to protect staff and offices from the risk of harassment or attacks in response to your advocacy activities, i.e.
 - Office security drills
 - Ensure staff know who to contact in the event of harassment, and how
- Be careful about what you communicate, to whom, and how



**Further resource / case study:
advocacy undertaken in
restrictive contexts:**

- [Kubatana's yellow banana poster campaign](#) (Beautiful Trouble)
- See also: [Campaigning in high-risk environments](#) (Mobilisation Lab)

o6 Developing your advocacy roadmap

6.1 Developing your advocacy roadmap

- You have identified your advocacy goal.
- You have decided on your overall approach based on your analysis of the issue, the political and social context you are working in and the context within your organisation.

Now you need to think about the sequence of activities and the outcomes of these activities that will move things from where you are now (current situation) to where you want to be (advocacy goal achieved). This is your advocacy 'road map'.



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- 6.1 Developing your advocacy roadmap
- 6.2 Tool: 'so that' tool for developing your advocacy roadmap
- 6.3 Planning for potential 'detours' in the roadmap
- 6.4 Identifying the interim 'milestones' in the roadmap

6.2 `So that' tool for developing your advocacy roadmap

Try developing your advocacy roadmap with a simple device: `so that' (`in order to...'). By using the `so that' technique, you can think through the chain of actions and outcomes that could lead to the achievement of your advocacy goal.



[Download a template of an advocacy roadmap here.](#)

1. Take a large sheet of flip-chart paper and some post-it notes
2. Write your advocacy goal at the bottom of the paper
3. Write down the first action you plan to take on a post-it note and place it at the top of the paper
4. Write `so that' underneath
5. On another post-it note, write down the outcome of this action and stick it underneath the words `so that'.
6. Repeat the exercise until you have reached your goal at the bottom of the paper
7. The `so that' technique will help ensure there is a clear connection between your actions and the anticipated outcomes of these actions. This is important, given how unclear and undefined the road to change can be in advocacy.



Work backwards?

Some people prefer to start from their advocacy goal and work backwards to where they are now, by using the connector `if'. Example: `the law will be changed if we can persuade enough parliamentarians to support our amendment' – and so on.

6.3 Planning for potential 'detours' in the roadmap

Your roadmap probably won't go exactly to plan.

This is because advocacy is all about influencing powerful actors (e.g. parliamentarians, government ministers, ordinary citizens, journalists etc) over whose actions you have little control. Moreover other developments and events in the external context over which you have no control may send the whole roadmap into disarray (e.g. snap general election, reshuffle of key government minister etc).

So, be prepared for dead-ends and for certain things to go into reverse – requiring a 'detour' and alternative actions at certain points in the road.

The key to effective advocacy is flexibility!

'Political chess' tool to help you anticipate alternative scenarios:

1. Try to anticipate what you would do if the opposite happens to the outcome you had anticipated as a result of each of your actions (alternatively ask your colleagues to do this)
2. Now try to think what action you would undertake in response, if the opposite to what you were expecting were to happen.

Do not judge me by my successes. Judge me by how many times I fell down and got back up again.

Nelson Mandela

6.4 Identifying the interim 'milestones' in the roadmap

The 'so that' roadmap tool will help you identify the interim outcomes or 'milestones' you should try to secure on the way to achieving your advocacy goal. This is important because your advocacy goal may take a long time to secure – especially if it involves a major new policy or a change in the law. Having a sense of the short-term and medium-term outcomes to be secured will enable you to measure progress (and demonstrate this to others, including donors) - even if the advocacy goal at the end of the road remains elusive.

Possible outcomes to seek – on the road to securing the advocacy goal

- **Civil Society outcomes:** the capacity of local NGOs to advocate is strengthened; improved cooperation between civil groups; a coalition established to advocate for change on this issue
- **Partnership outcomes:** the formation of regional or international networks on the issue; constructive relationships established with government officials
- **Political and democratic outcomes:** civil groups gain recognition as legitimate actors; increase in the space in which NGOs can advocate; NGOs' access to governments and other institutions improves; greater freedom of information.
- **Organisational outcomes:** increased profile of your organisation; respect as a credible source of information; increased funding

Divide up the outcomes you will seek into:

- Short-term outcomes (eg. to be secured in 6 months);
- Medium-term outcomes (eg. in 1 year);
- Longer-term outcomes (eg. in 2 years)

Then insert the activities you will undertake to secure each outcome

07 Monitoring and evaluating your advocacy strategy

7.1 Why monitor and evaluate advocacy?

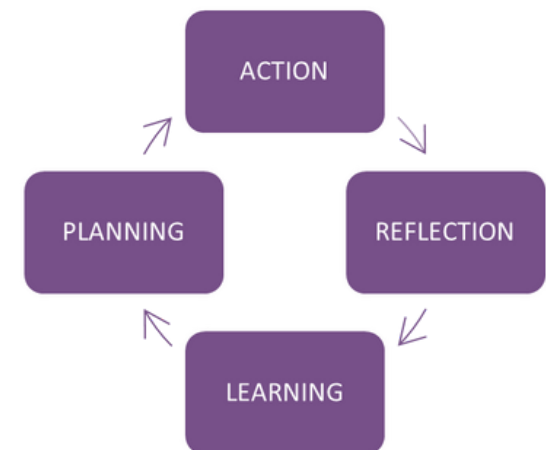
Monitoring and evaluation is an essential part of your accountability to your donors, managers and your other stakeholders, enabling you to demonstrate that your advocacy is making progress. But ongoing monitoring of your advocacy is also an essential advocacy activity in itself. It will help you identify whether:

- The approach being taken is working in the current context
- You need to change tack – especially if the political context has changed since you first drew up your strategy.

When providing a direct service like running a school or building a health clinic, your activities will generally result in the outcomes you envisaged. But with advocacy, your activities revolve around your interaction with external political actors over whom you have very little control. A slight change in the attitudes or actions of the key actors involved and the political context in which they are operating can mean that your advocacy strategy needs to change too. That's why ongoing monitoring is so critical to your progress. Think of your advocacy as a constant cycle – even on a daily basis. You meet a politician – you reflect on what he/she said and what you learnt – you identify what all this means for your future actions – and then you plan your next moves.

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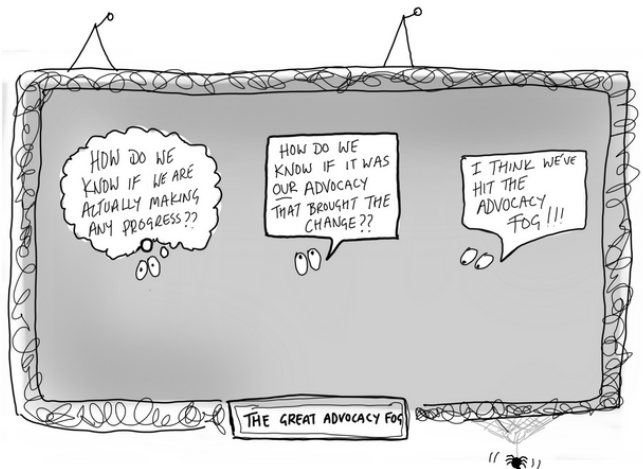
- 7.1 Why monitor and evaluate advocacy
- 7.2 The particular challenges of monitoring and evaluating advocacy
- 7.3 Top tips for dealing with the top challenges



7.2 The particular challenges of monitoring and evaluating advocacy

1. Policy change can take a long time to achieve. How can we demonstrate that we're making progress even if we haven't got the policy change yet?
2. It's hard to measure progress in advocacy because most of the outcomes are not very tangible (apart from policy change or a change in the law which may take a long time).
3. We can't prove that any positive change that happens is the result of our advocacy because so many other factors and actors may have played a part
4. It's hard to monitor the progress of our strategy when we've had to change it so many times and the situation is so complex.

Below we suggest some top tips for dealing with these four challenges.



Challenge 1: How can we demonstrate that we're making progress, even if we haven't secured the policy change yet?

Top tip: Don't just monitor policy outcomes

Point to the progress in achieving the *interim* outcomes you set in your advocacy strategy, such as:

- Increase in public support for the change we seek
- A shift in public opinion
- Increase in support for the change amongst politicians
- Greater recognition of civil society's role
- National media coverage of the issue
- Creation of a new coalition to advocate for the change
- Increase in the capacity of civil society organisations to advocate on this issue
- A change in behaviour within the target group
- A shift in power

Challenge 2: It's hard to measure progress in advocacy because the outcomes are not very tangible

Top tip: Evidence can always be found to demonstrate important advocacy outcomes – even if they don't seem very tangible. Here are some examples:

Typical advocacy outcomes you might seek	Evidence – ie.. indicators – of these outcomes
A shift in public opinion	<ul style="list-style-type: none">• Positive articles in mainstream media• Mentions of the issue on social media• Opinion polls
Stronger relationships with policymakers	<ul style="list-style-type: none">• Invitations to share platforms with policymakers• Policymakers agree to meet with us• Requests for our information from policymakers
The issue is on the political agenda	<ul style="list-style-type: none">• Government invites consultation on the issue (eg. through a green or white paper)• Increase in parliamentary discussions/questions• Launch of inquiry on the issue by a parliamentary committee
Stronger civil society	<ul style="list-style-type: none">• Increase in funding for civil society orgs (CSOs)• Increase in number of active CSOs and coalitions• CSOs regularly quoted in media and social media
Civil society space has been strengthened	<ul style="list-style-type: none">• CSOs invited to meetings with government• Less arrests or other interventions against freedom of speech• CSOs can speak out about the government's failings without fear of reprisal

Challenge 3: We can't prove that any positive change is the result of our advocacy

Top tip: Assess your *contribution* - don't worry about attribution

You may never know whether an outcome was the result of your advocacy when so many other factors might have played a part (eg. policymakers' own experience, a change in government, exposés by journalists, advocacy by other NGOs etc). It's even harder to attribute change to your advocacy when so much policymaking happens behind closed doors.

Rather than trying to prove a direct causal link between your advocacy and the actions of powerful actors you sought to influence, think more about the contribution that your advocacy has made to a certain outcome – recognizing that other factors and actors may have played a role too.

- Make a critical assessment of why and how far you feel you have contributed - based on the evidence you have collected and your monitoring. This will allow others to discuss, support or reject your findings as appropriate.
- 'Triangulate' your own assessment by asking the same set of questions about your contribution to different stakeholders – officials, politicians, journalists, NGO allies, affected communities. Then look for an overlap in their views.
- Retain and record all letters and statements from policymakers that acknowledge the difference your advocacy made.
- Set up Google Alerts for online mentions of your organisation, your report, the main figure quoted in your research, etc

Challenge 4: It's hard to monitor the progress of our strategy when we've had to change it so many times and when the situation is so complex

Top tips:

- Constantly monitor the context and the outcomes of your advocacy
- Record any major changes you need to make to the outcomes you are seeking or your approach and activities – as a result of your monitoring
- Be flexible and adapt to a changing context!
- Build data collection systems into your team and daily routines, eg. template forms to fill in after every meeting with a policymaker or other powerful actor to track what happened in the meeting; internal system for recording all engagement with the individual powerful actors you seek to influence
- Discuss the evidence you collect in your regular team or coalition meetings
- Create an internal folder in your system in which you and your team upload any positive quotes or feedback from policymakers about your contribution
- Conduct short After-Activity reviews with your team or coalition straight after a major advocacy event (eg. roundtable with policymakers or religious leaders, launch of a new report, public campaign stunt etc) while things are still fresh in people's minds, to help unpick the complexities – including all the factors and actors behind the outcomes (both positive and negative) and your contribution to these

o8 Communicating your advocacy message

8.1 What should an advocacy message contain?

An advocacy message is a concise and persuasive statement about your advocacy initiative that captures:

- The problem
- The solution(s)
- The action you want your target audience to take

Every good advocacy message should pass the **TEA** test.

- **Touch** the person you are trying to influence: Why should they care about this?
- **Enthuse** the person that something can be done about it
- **Act** – tell the person what you want them to do



Short film by Jonathan Ellis, "[The TEA Test in Action](#)"

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- 8.1 What should an advocacy message contain?
- 8.2 Establishing your power and legitimacy when delivering your message
- 8.3 Tailoring your advocacy message to your target audience
- 8.4 Elevator exercise – to practice communicating your advocacy message



8.2 Establishing your own power and legitimacy

Sometimes we can be so busy identifying who has power on a given issue that we lose sight of our own power as advocates. Make sure you establish your own power when you first engage with those you seek to influence – ie in the first 20 seconds of meeting them. *Why should they listen to you?*

Your power comes from the legitimacy you hold in the eyes of the person you are trying to influence. NGOs' legitimacy can come from a range of sources:

Expertise and knowledge-based legitimacy: Developed through your programme work on a given issue and/or the research you have published

People-based legitimacy: Gained through working with the people affected by a given issue; or it could be drawn from the number of organisations or individuals you represent (if you are speaking on behalf of a large coalition, for example, or a large member-based organisation with thousands of members)

Cause- or faith-based legitimacy: faith-based organisations may enjoy instant moral authority in the eyes of some target audiences; alternatively your organisation's legitimacy may come from a cause or mission which is universally revered – eg. the defense of child rights or the elimination of poverty

Tool to help you establish your legitimacy

Prior to an advocacy meeting with someone you are seeking to influence, practice introducing yourself in 20 seconds in a way that establishes your power and legitimacy. Practice answering the question:
Who are you and why should I listen to you?

8.3 Tailoring your advocacy message to your target audience

How you touch and enthuse those you are seeking to influence and what action you ask them to take will depend on the person or institution you are trying to influence. The language and the amount of detail you use will likewise depend on who you are communicating your advocacy message to. If you are communicating it in public to ordinary citizens or in the media, you will need to keep the message short and snappy. If you are communicating the message to a civil servant in a private meeting, you can go into more detail.

Knowing your target audience (i.e. those you are trying to influence) and seeing an issue from their perspective are key to successful advocacy. Try to put yourself in their shoes, even if you don't support or agree with all of their views. That way, you can tailor your message and your engagement with them to where they are at and refer to things you know they care about. Try to focus on common interests and values you share with them: 'Minister, I'm sure you'd agree with me that child poverty is a scourge on our society...'

Before you communicate with those you hope to influence, try to find out:

- What are their current interests and priorities?
- How well informed are they on the issue(s) addressed by your proposal?
- Where do they stand on the issue/problem and on the solutions you are proposing?
- What aspects of your proposal are they likely to question?
- What will motivate them to support your proposal?
- How could they benefit from your proposal?
- Will they incur any risks by supporting your proposal?

8.4 Elevator exercise – to practice communicating your advocacy message

Imagine... you step into the elevator on the ground floor of a skyscraper office block. You are visiting an organisation on the top floor. As luck would have it, the person you most want to influence steps into the elevator at the same time as you. He/she is also travelling to the top floor and the journey to this floor takes two minutes. **You have two minutes to communicate your advocacy message to this person.**

Remember to...

- Be polite, to greet him/her, to tell him/her who you are and establish your legitimacy in the first 20 seconds. Successful influencing hinges on strong interpersonal skills and relationships. Treat him/her like a real person!
- Put yourself in the shoes of the person you are seeking to influence. What is on his/her agenda? What will make him/her listen to you?
- Keep your language clear and simple
- Touch, Enthuse and ask the person to Act – ie to do something
- Think about how to continue the relationship and the conversation:
 - 'Here's my business card in case you'd like further information on this issue.'
 - 'I wonder if I could arrange a meeting with your secretary to discuss this in more detail?'
 - 'It was good to meet you at last. Do you have a business card so I can send you further information?'



"When the whole world is silent, even one voice becomes powerful."

Malala Yousafzai



All the toolkits produced for the "Strengthening Small Organisations With Big Ambitions" programme are [available here](#).



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