

Advocacy Planning Cycle

The following is a guide to working through your advocacy plan and is often thought of as a cycle since you may need to return to different steps in order to adapt to the changing circumstances and times.

1. Identify and understand the **Issue** by gathering information and doing comprehensive analysis

This initial step may overlap with the Insertion Experience aspect of the Pastoral Circle. Ask whom does this issue affect? What is the scale of this issue? What is the history of this issue, its causes and effects?

In your analysis, do you find...?

- Problems with existing policies
- Lack of implementation or enforcement of a policy
- Situation where political leaders need to take action and are not doing so
- Problem due to a lack of civil society's involvement with the decision-making process

If any of these is found to be applicable to the current situation surrounding the issue, then there is opportunity for advocacy to make a significant positive impact on the affected people's lives.

2. Name specific **Problems** and assess them; Choose one or two on which to focus (your priorities)

Both this step and the previous one can overlap with the Social Analysis piece of the Pastoral Circle, where we consider the economic, political, cultural, legal and environmental structures at work. Please use the Pastoral Circle tool's questions to aid in the analysis of both the problem and the environment in which it is embedded.

Once a decision has been made to focus on a specific problem, it can be helpful to use a tool like a Problem Tree to see the problem (trunk) and both its causes and consequences (roots), which can later be utilized to envision what a changed reality would look like and what needs to happen to get there (Objectives Tree). This analysis process helps to form a greater understanding of both direct and indirect causes and those that interconnected or even contradictory.ⁱ Assessing the context of the problem helps to decide on which causes or consequences to focus your advocacy efforts. Are there strategic opportunities for having significant influence?

3. Define broad advocacy **Goal(s)** and specific **Objectives**

What is the **goal** (aim)?

Statement of how a specific group of people's lives will be changed if our advocacy efforts are successful. It is the long-term result of the advocacy campaign.ⁱⁱ



Four Questions to Ask when setting a Goal. Is it...?

1. *Important*: How important is this goal to the people affected by the issue? Have they recognized it as a priority?
2. *Achievable*: Is there a feasible solution to the goal that has been set? Is this the right time?
3. *Sellable*: Can we communicate this issue and do we have evidence to support it? Are there any influential people who are interested in it?
4. *Added Value*: Are other groups working on this issue and do we have something to add? Would we be able to make an impact on this issue if we work alone? ⁱⁱⁱ

What are **objectives**?

Specific actions to be taken (externally, not by you) that will aid in reaching your goal. They are what you want to convince others to do; should explain *what* should happen (i.e. can be policy action or decision), *when* (timeline), *where* and *who* will get it done (i.e. policy actor/decision maker).^{iv} One tool that can be used is the Objectives Tree, where you rephrase each of the causes and consequences in positive desirable outcomes imagining the problem has been solved (write the goal in the trunk of the tree and the outcomes you want to achieve are written in the branches – becoming your objectives).^v A tip - when writing objectives, state the outcome and not the activity: instead of “To lobby the government to update the minimum wage”, write, “The government to update the minimum wage”.^{vi}

Objectives should be SMART:

- Specific
- Measurable
- Achievable
- Realistic/Relevant
- Time-bound

4. Identify who can make the needed changes (**Primary Decision Makers**) and who can influence them (**Stakeholders**)

Name the people with the direct power to make the decision that you would like to be made. This person can be seen as the gatekeeper for any changes or funding you seek. For example, these could be policymakers, elite leaders or people with power. Note that the primary decision makers are distinct from the people who advise them and those that approve of the decision.^{vii} No matter how different our opinions may be from the decision makers, our faith roots us in the belief that they are people, children of God whose Spirit is at work continually calling them to follow God’s will as is the case with any of us.

Follow-up questions once you have named these primary decision makers:

- Can we obtain direct access to this person? If not, who can?
- How can we contact this person?
- How does this person feel about the issue or problem?



- Will this person be convinced solely by our argument? If not, what else is needed?
- Is this person under pressure from anyone else and who are they?
- How does this person generally make decisions?

Analyze who are the **stakeholders**—individuals, groups of people or organizations who are either *affected by* the problem or *can influence* the issue. While some stakeholders are existing or potential allies, other existing or potential opponents and others are unsure, all of them are able to be influenced.^{viii} When mapping out the stakeholders, it's helpful to rate how significant is each one's interest level in the issue and their level of influence. After identifying those people with both high interest and influence, analyze your ability to influence them and whether they might agree or disagree with the change you want to be made.^{ix} Identifying these primary stakeholders enables you to focus your attention and resources where it will have the most likelihood of making a difference in combination with avoiding trying to do more than you're capable of.

5. Assess your **Resources** and **Capacity** (strengths, weaknesses, opportunities and threats). Determine how to address the **Gaps**.

To make a well-informed plan, you will need to know what you are working with and where there are gaps to fill. When taking inventory of your resources, include:

- Human resources – people with skills, knowledge and/or commitment
- Financial resources
- Physical resources, Equipment, Access to physical spaces
- Technological resources, including communications technology
- Relationships and connections
- Partnerships
- Reputation
- Spiritual Resources – songs, faith communities, traditions, prayers, values and principles
- Time

Name your groups' strengths and weaknesses (internal) and the external opportunities and threats, which allows you to have a clearer and broader vision of the realm of possibilities.

Part of creating a stronger voice and increasing both the legitimacy and effectiveness of your efforts is collaborating with partners. "The realization of God's dreams will take more than just the church"^x and it's important to be open to collaborating with a variety of other groups, who are also called to do their part. Some of the positive aspects of working in partnership include: sharing resources, experiences and skills; creating new opportunities for reaching key stakeholders; activities that are coordinated reduce duplication; credibility is increased because of a unified voice in the eyes of stakeholders and decision-makers; can widen your presence regionally or nationally. Some of the potential negative factors of partnerships include: slower progress due to time needed to convince each other when making decisions; the strategy may be limited to the lowest common denominator consensus so that agreement



can be reached; individual organizational profile may get lost and some partners could use the shared profile to boost themselves; if partners were to leave, the strategy might divide.^{xi}

When assessing who to form partnerships with, take into consideration the following questions:

- Are they able to influence any of our intended audiences?
- Do we have common interests and objectives?
- Could they increase the legitimacy, credibility and effectiveness of our strategy?
- Do they offer helpful evidence or knowledge?
- Do they bring any other resources to our advocacy effort?
- Are their strengths and skills complementary to ours?^{xii}

After reviewing your resources and capacity, you will better be able to see where there may be gaps and then come up with ideas for how to address the most significant gaps. For example, maybe a group you could form a partnership with has one of the resources that you lack and need.

6. Develop key **Messages** and policy asks

Any communication activity that you carry out should include these three goals:

- 1) Inform
- 2) Persuade
- 3) Move to action^{xiii}

To develop a core message, the process of answering these questions is helpful for assuring you touch on all the key points.

Problem:

- What is the problem?
- How does it affect people?
- Evidence of the problem?
- Summarize an example
- Who is responsible?

Solution:

- What is the solution?
- How will it benefit people?
- Evidence for the solution?
- Who or what needs to change?
- What action needs to be taken? By whom?

After having worked out your core message, you can frame it differently based on each audience (include primary decision makers and stakeholders), depending on:

- What are the most important things you want others to know?
- Why is your issue/problem important to your audience?
- What action do you want them to take?
- What idea or argument will resonate most with this audience?
- What are the best language, style and format to use with them?
- Who are the most appropriate messengers to this audience?^{xiv}

When drafting your key messages, think of your audience and what you want them to think, feel and/or do? Remember that our feelings are what move us to act in the end and one of the points in delivering



your message is to spark a feeling. Different audiences require different presentations of your key message. For example, in order to get media attention, a message needs to be catchy, more dramatic, short and sweet whereas government officials would require specific details and well-documented evidence.^{xv} Remember to consider calling upon your faith and Franciscan values where it fits into the messaging. You are welcome to contact FAN staff for further support.

Suggestion: Pick three talking points, stories or examples that support your key message and develop those. Story-telling skills are very effective here, such as —using a specific local example that is appropriate, be brief and yet personal, have a beginning, middle and end, have a “punch line”, and paint a picture for the audience what doing X will mean for those people affected.^{xvi}

Of the messaging that you create, also come up with a 1-Minute-Message that includes four parts:

- 1) Statement
- 2) Evidence
- 3) Example
- 4) Call to action^{xvii}

Because the core of your key messages need to be consistent across platforms and audiences, test them for clarity before continuing to make plans on how to get out the message.

- Accessible Language – is the language understandable and avoids technical terms?
- Clear Request for Action –will the audience know what to do if they agree with you?^{xviii}

7. Effective **Communication** Planning: Assess what kind of approach is best for influencing different targets (cooperative, confrontational, persuasive), opportunities and ways to get message out, who will deliver message, when and where?

Constructing communication takes into account the factors that make people change:

- **Interest** – one’s personal self-interest or a social/professional/religious obligation to change
- **Evidence** – clear evidence that change is beneficial in relation to the interests
- **Relationship** – one can be persuaded by someone they respect or care about
- **Solution** –one knows what change is desirable and knows how to do it^{xix}

Knowing who the primary decision makers and stakeholders are, consider what type of approach would be most likely to work—cooperative, confrontational or persuasive – with each one.

The *Cooperative advocacy approach* involves developing relationships with the decision makers or stakeholders and gaining their trust. The advantages include understanding their position and processes that they’re involved with more up close. The disadvantages could involve having to compromise your values, exclude some stakeholders or risk being misrepresented by the decision maker.



The *Confrontational advocacy approach* describes trying to force your issue onto the agenda, coming in as an outsider. The advantages include having increased freedom to act and having a higher profile. The possible disadvantages are damaging the relationship with the decision maker if they feel under attack, being marginalized and seen as more radical.

The *Persuasive advocacy approach* places you as a critical insider who presents evidence with the idea of persuading the primary decision makers to see your argument's merits and come to support it. The advantages include providing more opportunities to collaborate with others and this approach is seen as less aggressive. The possible disadvantage is being perceived in your more neutral position as not taking a clear stance.^{xx}

The primary decision makers hardly ever respond to only one form of pressure, which is why we need more than one tactic.^{xxi} When coming up with ways to spread your message, consider these:

- Traditional promotion materials like banners, flyers, factsheets, brochures, mailings,
- Position Paper (described below)
- Internet/Digital promotion material—to be used in emails and social media
- Text messages
- Letter to the Editor
- Op-Ed pieces (can be advantageous to have a well-known person write it or tie it into a major issue facing the region)
- Writing letters to political, industry or other leaders in society
- In-person meetings or phone calls
- Create an ad for your local paper
- Press conference
- Radio – in addition to seeking air time in an interview, you can ask them to create a public service announcement as a contribution or at a discounted price
- TV – find local TV station open to interviewing you
- Newsletter
- Postcard campaign^{xxii}
- Public event – concert, prayer vigil, march, demonstration, public debate etc.
- Have a table or speak at a conference or workshop on related topic
- Take advantage of international awareness days
- Participate in town halls

A *position paper* gives a summary with critical facts, aiming to lay out the agreed-upon analysis of the problem, the evidence, proposed solutions and actions you seek. Try to keep it between 1-2 pages and it can be signed off by your allies.^{xxiii}

Personal contact is extremely effective as a way of influencing people and for that reason it's wise to list the opportunities in the community to get face time with different audiences, whether it's being a guest speaker, presenting before a committee, speaking before the press, etc.^{xxiv}



Focus your efforts on the advocacy opportunities that:

- Happen at the right time in the decision-making process
- Those making the big decisions have a vested interest in the outcome
- Higher chances to meet influential people and network
- Greater opportunity for media attention to reach the public
- Greater opportunity for the population affected to present their view
- Have an agenda that still has space and your issue wouldn't get lost^{xxv}

Who will be the messenger? When considering what the message is, how, when and where it will be communicated, we cannot forget to intentionally decide **who** would be the people to most effectively deliver each message. Sometimes a more “technical, expert” voice is the most credible messenger and sometimes a more “authentic” voice is best. Being that our motivation for being involved in seeking changes is rooted in our faith and responding to the Gospel call to love God and neighbor, we strive *not* to be the voice of the supposed “voiceless”, rather to support the affected population (of which we ourselves may be a part) in having their voice and concerns be heard by the primary decision makers and public. Different circumstances call for different approaches and potentially different messengers.

8. **Action Plan and Implementation:** what activities will be done for each objective/audience, by whom, by when, where, using what resources?

What are the **activities/steps/methods** we will implement in order to meet our objectives (which were identified in step 3)?

Brainstorm the actions you will take, by whom, by when and using what resources. Consider your plan a living document that will need to be flexible as changes arise. Revisiting and adjusting your plan regularly is encouraged.^{xxvi} Choose whatever method makes the most sense for documenting this; the important part is documenting it all so that you can come back to it again and again.

Some advocacy tactics to consider, in addition to the communication opportunities named above are:

- Analysis and research that show evidence
- Communicating with decision makers
- Public campaigns to help create political will and put pressure on decision makers
- Build capacity and empowering other people to join in taking action
- Media – mass media, social media

Some groups find it helpful to divide into committees or task forces to help the process of carrying out the plan and working towards your objectives. One example could be a committee on coordination, publications & design, media, presentations and finance.^{xxvii} Parallel to planning the activities and steps you will take, it's important to keep track of what monetary costs could be involved. Prepare your budget and as a group analyze the possibilities for covering these costs or finding (in-kind) donations. It may be necessary to get very creative and possibly revisit your plans to adjust for the circumstances.



If it is beneficial to summarize the advocacy effort process, you can bring it all together in an *Advocacy Strategy Paper*, which would include:

- a) Goal
- b) Objectives
- c) Key strategies to influence primary decision makers and other stakeholders
- d) Key Message(s)
- e) Action plans for each objective and corresponding audience
- f) Plan for monitoring and evaluating^{xxviii}

9. Monitoring and regular Evaluation

Identify indicators (evidence that can be used to measure progress) and how outcomes will be measured to help guide you in analyzing ways that plans may need to be modified, to learn from the experiences for the future and to be accountable. Assessing the progress you've made at regular intervals shows whether the goals are being accomplished and it better equips you to identify and respond quickly to changes. Consider using both quantitative and qualitative methods of evaluation.^{xxix}

Evaluate both the *progress*—by tracking your objectives—and the *process*—by tracking your activities and outcomes. Outcomes are usually the changes in your audience's understanding, awareness or opinion, particularly of the primary decision makers and other stakeholders.^{xxx} Both the expected and unexpected outcomes will need to be noted and analyzed.

When preparing short, mid and long term evaluation indicators with corresponding time frames, you can ask yourselves a series of questions:

- Use your analysis from the beginning of the cycle to imagine what success (reaching the goal) will look like?
- How will we be able to tell if our strategy was successful?
- What will the effects of achieving our objectives be?
- How has the advocacy effort affected relationships with: the primary decision makers; stakeholders; the public?
- Has the broader perception of the issue changed? If so, how?
- How do we demonstrate the results and impact of our efforts to stakeholders and the public?^{xxxi}

Depending on your objectives, these may be possible indicators of the desired impact:

- Change in lives of the affected population
- Change in a policy and practice towards the affected population
- Change in affected population's participation in civic life
- Change in equity and non-discrimination of the affected population
- Change in the community's attitudes towards the affected population's rights^{xxxii}

Remember: advocacy efforts that achieve lasting change take *time*. Even if the change you seek isn't reached right away, you will have made progress in informing decision makers and the public about the issue. No matter the outcome, always thank supporters for their commitment. If/when the change is



achieved; consider that a possible next step could be following up on the implementation of the decision or policy change that was made.^{xxxiii} “One of the beautiful paradoxes of our faith is that acceptance of what is does not erase hope for what can be.”^{xxxiv}

ⁱ *CARE International Advocacy Handbook* (Geneva: CARE International, 2014), <https://www.care-international.org/files/files/Care%20International%20Advocacy%20Handbook.pdf>

ⁱⁱ James Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild, April 15, 2009, <https://www.slideshare.net/Bloggs74/advocacy-workshop-final>

ⁱⁱⁱ *CARE International Advocacy Handbook*, CARE International

^{iv} “Section 3: Introduction to Advocacy Planning”, Womankind, <https://www.womankind.org.uk/docs/default-source/resources/briefings/section3.pdf?sfvrsn=6>

^v *CARE International Advocacy Handbook*, CARE International

^{vi} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{vii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{viii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{ix} *CARE International Advocacy Handbook*, CARE International

^x Salvatierra and Heltzel, *Faith-Rooted Organizing*, 88

^{xi} Advocacy Toolkit Mini-Site, Sustainable Development 2015, <https://www.sustainabledevelopment2015.org/AdvocacyToolkit/index.php/post-2015-what-it-is-and-how-you-engage-2/steps-to-develop-your-advocacy-strategy>

^{xii} “Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children’s Lives”, UNICEF (2010)

^{xiii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xiv} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xv} *CARE International Advocacy Handbook*, CARE International

^{xvi} *The Advocacy Action Plan Workbook*, ALA Advocacy Institute, (Chicago: American Library Association, 2009), <http://www.ala.org/advocacy/sites/ala.org.advocacy/files/content/advleg/advocacyinstitute/Advocacy%20Action%20Plan%20-%20revised%2001-09.pdf>

^{xvii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xviii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xix} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xx} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxi} Advocacy Toolkit Mini-Site, Sustainable Development 2015

^{xxii} *The Advocacy Action Plan Workbook*, ALA Advocacy Institute, American Library Association

^{xxiii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxiv} *The Advocacy Action Plan Workbook*, ALA Advocacy Institute, American Library Association

^{xxv} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxvi} *Advocacy Action Guide, A Toolkit for Strategic Policy Advocacy Campaigns*, Bloomberg Advocacy Incubator (BAI) at Campaign for Tobacco-Free Kids and Consumers International, https://www.tobaccofreekids.org/assets/global/pdfs/en/BAI_Advocacy_Toolkit.pdf

^{xxvii} *The Advocacy Action Plan Workbook*, ALA Advocacy Institute, American Library Association

^{xxviii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxix} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxx} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxxi} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxxii} Georgalakis, “Advocacy Strategy Planning Workshop”, EveryChild

^{xxxiii} *Advocacy Action Guide, A Toolkit for Strategic Policy Advocacy Campaigns*, Campaign for Tobacco-Free Kids and Consumers International

^{xxxiv} Salvatierra and Heltzel, *Faith-Rooted Organizing*, 172

