

# Advocacy: Campaign Planning\*

Advocacy campaigns share a cycle of activity: Identifying the problem, researching the issues surrounding the problem, planning a set of activities, acting on the plan, and evaluating the results of our efforts. Activists and those who care about public policy all over the world use this model—or something very similar—to help design more effective advocacy campaigns.

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## 1) IDENTIFY

Problems created by government policies or social practices cannot usually be solved by one individual. Affected communities need advocates to help them address their problems and offer solutions. The first step in preparing for our advocacy campaign is to identify these problems and educate ourselves about their causes and effects.

Problems often resemble the structure of a tree. If we imagine that the most important problem is the trunk of the tree, we can then see all of the related effects growing out like branches. Our problem tree will most certainly have deep, root causes which feed the trunk and branches.

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**CREATE YOUR PROBLEM TREE**

**Leaves = Effects      Trunk = The Problem      Roots = The Causes**

**STEP A (Trunk):** What is the issue—problem—that concerns you?

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**STEP B (Leaves):** What are the effects of this problem on people, communities, businesses, etc?

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**STEP C (Roots):** What are the root causes of this problem? What is the “Why Behind the Why?”

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**STEP D (Our Issue):** What is the primary issue that our campaign will address?

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## 2) RESEARCH

Research is an important step in preparing for our advocacy campaign. Careful, objective research will educate us and our supporters about the causes and effects of the problem. Many campaigns make the mistake of implementing advocacy activities without first researching the problem. We must be fully informed about the problem if we expect to persuade people and institutions to change policies for the better. **Remember, information is a type of power and research provides useful data, information and evidence.**

Method	Definition	Advantages	Challenges
<b>Questionnaires and Surveys</b>	Forms containing questions, given to a statistically significant number of people—especially your members—as a way of gathering valuable information	Easy to administer to many people	Impersonal
<b>Informal Interviews</b>	A conversation in which facts or statements are discussed and noted; and anecdotal stories are collected	Flexible and intimate	Time intensive and difficult to objectively analyze
<b>Documentation Review</b>	Review literature about the problem and examine international best practices	Comprehensive	Time intensive and inflexible
<b>Observation</b>	The process of gathering information about how a problem looks in a community	View operations as they occur, adaptable	Subjective and complex
<b>Focus Groups</b>	Assemble small groups of people to discuss the problem and explore potential solutions	In-depth examination of a problem	Difficult to draw conclusions

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**STEP A:** Given the nature of the advocacy issue your campaign will address, what kind of research do you need to do in order to prepare? What evidence do you need? What do your members think? On the next page, please describe in as much detail as possible, the information that you need to design an effective campaign. What specifically do you need to know? Who has the answers? How will you get the information from them? Is there data about your issue? Media reports? Is the public involved? Do you need to know how they feel or what they think?

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Required Information	Who or Where	Method	Priority & Deadline

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### 3) PLAN

Effective advocacy campaigns begin with solid goals and objectives. Carefully defining your goals and objectives at the beginning can make your work easier in the long run and lead to more effective advocacy.

**GOALS**—A goal refers to the overall change expected as a result of your advocacy efforts. Goals describe the overriding purpose of a campaign and are written as concise, general statements, not immediately measurable. Think about these as defining the “Big Picture.”

**OBJECTIVES**—Objectives are the intermediate steps or milestones that need to be achieved in order to meet your goal(s). Objectives are written as specific intended outcomes; they are what you hope your target audience will know, feel, or be able to do at the conclusion of your campaign.

**Elements of an Objective**—Key elements of an objective can best be identified by answering the following question: "Who will do how much of what by when?"

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**WHO:** Who is your target population?

**HOW MUCH:** How much change do you hope to see?

**WHAT:** What is your intended outcome?

**BY WHEN:** By when will your objective be met or measured?

Another rule of thumb for writing good objectives is to see if they are SMART. Once you draft an objective, check it against the following criteria to see how it stands up.

**S = Specific.** Objectives should be specific and use only one action verb. Objectives with more than one verb are difficult to measure. Also, avoid verbs that may have vague meanings to describe intended outcomes (e.g., “understand” or “know”) because they are too hard to measure. Instead, use verbs that allow you to document action (e.g., “At the end of the session, the students will list three concerns...”). The greater the specificity, the greater the measurability.

**M = Measurable.** It is impossible to determine whether or not you met your objectives unless you can measure them. A benchmark from which to measure change can help.

**A = Appropriate.** Your objective must be appropriate (e.g., culturally, developmentally, socially, linguistically) for your target population. To insure appropriateness, objectives should originate from the needs of your target audience and not from a preconceived agenda of program planners. Conducting a solid needs assessment (e.g., holding in-depth interviews with members of the target population) helps to ensure that your objectives will be appropriate.

**R = Realistic.** Objectives must be realistic. Countless factors influence human behavior. If program planners set their sights too high on achieving changes in knowledge, attitudes, skills or behavior, they will likely fall short of reaching their objectives. While a program may have been very successful, it may not appear that way on the surface because the objectives were too ambitious.

**T = Time Specific.** It is important to provide a time frame indicating when the objective will be measured or a time by which the objective will be met. Including a time frame in your objectives helps in both the planning and the evaluation of a program.

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**STEP A:** Keeping in mind the guidelines above, develop two campaign goals with at least three SMART objectives for each. Think about what you are ultimately trying to change.

<b>PRIMARY Goal</b> <hr/> <hr/> <hr/>
<b>SMART Objective 1</b> <hr/> <hr/> <hr/>
<b>SMART Objective 2</b> <hr/> <hr/> <hr/>
<b>SMART Objective 3</b> <hr/> <hr/> <hr/>
<b>SECONDARY Goal</b> <hr/> <hr/> <hr/>
<b>SMART Objective 1</b> <hr/> <hr/> <hr/>
<b>SMART Objective 2</b> <hr/> <hr/> <hr/>
<b>SMART Objective 3</b> <hr/> <hr/> <hr/>

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## INDICATORS

Indicators are signs that let us know that we are making progress toward our objectives. All good indicators should be direct, distinct, practical and reliable.

**DIRECT**—A direct indicator measures only one thing at a time. Suppose, for example, that we are trying to study income levels for a specific population. We could collect a direct indicator like household income over a specific period of time. Occasionally, however, a direct indicator is not available. For example, in rural areas it might be difficult to find statistics on income levels. Instead, we could look at the percentage of village households with radios or bicycles as a substitute indicator of wealth. These substitute indicators are called proxy indicators.

**DISTINCT**—Sometimes we may need to separate information about our activities into categories. These categories, divided by gender, age, location or some other characteristic, are called distinct indicators. Distinct indicators show us exactly who is benefiting and participating in our advocacy activities.

**PRACTICAL**—An indicator is practical if data can be obtained easily and at a reasonable cost. Both cheap and readily available, the number of newspaper stories published about our advocacy campaign is a good example of a practical indicator.

**RELIABLE**—A reliable indicator provides dependable information for confident decision-making.

Many indicators are based on numbers, like those household income figures, which means they are easy to understand and evaluate. There are many other indicators, however, that are based on peoples' personal experiences or opinions and are therefore less clear and sometimes less reliable. For example, if we ask our affected group how they feel about a problem we may hear many different opinions and ideas. If there is no consensus within the group it can be very difficult to find an indicator that represents the progress we are making toward our objectives.

It is not always possible to find indicators, both based on numbers and on experiences, that fit all four characteristics, though we should search for as many of these characteristics as possible.

**STEP A:** How will you know if the campaign is effecting progress toward achieving your goals? In the space that follows, identify at least five indicators of your progress.

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_

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## TARGETS

ALLIES	NEUTRALS	OPPONENTS
<p><b>Allies are people and organizations that support our advocacy campaign. Typically they are individuals and institutions sympathetic to our cause such as opinion leaders, present and former politicians, media personalities, NGOs, community groups, professors, and, of course, the members of the affected group. They will contribute time, technical expertise, financial and material resources and influence to our advocacy campaign.</b></p>	<p><b>Neutral stakeholders are people and organizations who have not yet formed a strong opinion on an issue. Neutrals are important to our advocacy campaign because they can often quickly become allies or opponents.</b></p>	<p><b>Opponents are people and organizations who oppose our advocacy campaign. Advocacy often challenges existing imbalances of power in a society and such a challenge often provokes a negative reaction from those currently in power or people with different values. Our opponents can range from people who disagree but do not take action to aggressive or violent enemies.</b></p>

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When identifying allies and opponents, you should consider the degree of influence each stakeholder has over the problem. The people affected by the focus of our advocacy campaign are certainly stakeholders, but they often have little ability to directly change policy. Any stakeholder listed with high influence over the problem, regardless of their level of agreement with our position, is a target.

### PRIMARY Target

A person with the most power to directly address our problem. However, we may not have access to this person or there may be too great a political risk for them to openly support us.

### SECONDARY Target

A person who cannot solve the problem directly but has the ability to influence the primary target. If we can influence this person, they can influence the primary target. Remember that there are multiple sides to every problem and some of our targets may also be our opponents. We will need to educate ourselves about their opinions and ideas so we will be better prepared to find common ground or counter their arguments. Our factual research (our evidence), ability to understand their interests, and persuasion skills will ideally provide them with the motivation to change their position. Creating a chart is an easy way to identify primary and secondary targets.

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**STEP A:** Who are our targets in this campaign? Make a list of all of the people and groups who have a stake in this issue, regardless of whether they are your allies, your opponents, or haven't taken a position.

**STEP B:** Rank your targets in terms of the amount of influence they have regarding your issue.

LEVEL OF INFLUENCE OVER THE PROBLEM	ALLIES	NEUTRALS	OPPONENTS
HIGH	1)	1)	1)
	2)	2)	2)
	3)	3)	3)
MEDIUM	4)	4)	4)
	5)	5)	5)
	6)	6)	6)
LOW	7)	7)	7)
	8)	8)	8)
	9)	9)	9)

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**STEP C:** Based on all of the work you've done thus far, choose your primary targets and add in the additional information you know about them below. Remember, information is power.

Target Name	Contact Person	What Do They Know About the problem?	What Is Their Attitude About the Problem?	Who Has Influence Over Them?	What Is Important to These People?
Primary Targets			Secondary Targets		
				[Shaded]	[Shaded]
				[Shaded]	[Shaded]
				[Shaded]	[Shaded]
				[Shaded]	[Shaded]
				[Shaded]	[Shaded]
				[Shaded]	[Shaded]

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## SELECTING CAMPAIGN ACTIVITIES

Once you have clarified your goals, objectives, and indicators, and identified your targets, the next step in the advocacy campaign cycle involves focusing on the problem to be solved and developing the activities you'll engage in to get your point across

A brainstorming session can often help to identify several ways to address a given problem. In a brainstorming session, those who are participating may be able to develop options for addressing several different problems. The brainstorming process should not attempt to assign a value to options, at least initially. Simply generating a list of particular activities is a good starting point for further discussion.

Keep in mind that the activities you choose will depend largely on your resources and your relationship with the targets. The most expensive option might not be the most effective in reaching your targets. The best methods are participatory, cost-effective, and reach as many people as possible, particularly the poorest or most disenfranchised.

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**STEP A:** Hang some flip chart paper on the wall and brainstorm as many possible activities as you can. When you're finished, see if a few priorities emerge and highlight those.

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_
- 8) \_\_\_\_\_
- 9) \_\_\_\_\_

### PRIORITIES

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

## TELLING YOUR STORY

So much of the success of a particular campaign comes down to your messaging. Now that you've identified your issues, done your homework, selected your targets, clarified your goals and objectives, and planned your activities, can you define your campaign in just a few sentences? Can you describe easily what success will look like?

As you plan to deliver your presentation today, please begin with a very brief overview of your campaign. Describe it for us in 150 words or less.

It may help to outline 3-5 key **Talking Points** first:

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_

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### An Overview of our Campaign (150 Words or Less):

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