



“Nine Questions”

A Strategy Planning Tool for Advocacy Campaigns

Adapted From Jim Shultz of the Democracy Center

1. What do we want? (GOALS)

Any advocacy effort must begin with a sense of its goals. Among these goals some distinctions are important. What are the long-term goals and what are the short-term goals? What are the content goals (e.g. policy change) and what are the process goals (e.g. building community among participants)? These goals need to be defined at the start, in a way that can launch an effort, draw people to it, and sustain it over time.

2. Who can give it to us? (AUDIENCES, KEY PLAYERS, or POWER-HOLDERS)

Who are the people and institutions you need to move? This includes those who have the actual formal authority to deliver the goods (i.e., legislators). This also includes those who have the capacity to influence those with formal authority (i.e., the media and key constituencies, both allied and opposed). In both cases, an effective advocacy effort requires a clear sense of who these audiences are and what access or pressure points are available to move them.

3. What do they need to hear? (MESSAGES)

Reaching these different audiences requires crafting and framing a set of messages that will be persuasive. Although these messages must always be rooted in the same basic truth, they also need to be tailored differently to different audiences depending on what they are ready to hear. In most cases, advocacy messages will have two basic components: an appeal to what is right and an appeal to the audience’s self-interest.

4. Who do they need to hear it from? (MESSENGERS)

The same message has a very different impact depending on who communicates it. Who are the most credible messengers for different audiences? In some cases, these messengers are “experts” whose credibility is largely technical. In other cases, we need to engage the “authentic voices,” those who can speak from personal experience. What do we need to do to equip these messengers, both in terms of information and to increase their comfort level as advocates?

5. How can we get them to hear it? (DELIVERY)

There are many ways to deliver an advocacy message. These range from the genteel (e.g. lobbying) to the in-your-face (e.g. direct action). The most effective means vary from situation to situation. The key is to evaluate them and apply them appropriately, weaving them together in a winning mix.

6. What do we have? (RESOURCES)

An effective advocacy effort takes careful stock of the advocacy resources that are already there to be built on. This includes past advocacy work that is related, alliances already in place, staff and other people's capacity, information and political intelligence. In short, you don't start from scratch, you start by building on what you've got.

7. What do we need to develop? (GAPS)

After taking stock of the advocacy resources you have, the next step is to identify the advocacy resources you need that aren't there yet. This means looking at alliances that need to be built, and capacities such as outreach, media, and research, which are crucial to any effort.

8. How do we begin? (FIRST STEPS)

What would be an effective way to begin to move the strategy forward? What are some potential short-term goals or projects that would bring the right people together, symbolize the larger work ahead and create something achievable that lays the groundwork for the next step?

9. How do we tell if it's working? (EVALUATION)

As with any long journey, the course needs to be checked along the way. Strategy needs to be evaluated by revisiting each of the questions above (i.e., are we aiming at the right audiences; are we reaching them, etc.) It is important to be able to make mid-course corrections and to discard those elements of a strategy that don't work once they are actually put into practice.

Note: A common confusion in the development of advocacy strategy is the difference between "strategy" and "tactics." **Tactics** are specific actions – circulating petitions, writing letters, staging a protest—that are the building blocks of advocacy. **Strategy** is something larger, an overall map that guides the use of these tools toward clear goals. Strategy is a hard-nosed assessment of where you are, where you want to go, and how you can get there.