

# Advocacy Action Guide

## A ToolKit for Strategic Policy Advocacy Campaigns



## Contents

### **NOTE:**

Click on any subject to the right to be instantly taken to that page. To return to the Contents from anywhere in the document, click on the bar of slanted lines found at the top of each page.

### **Introduction**

#### **Section 1**

Elements of a Policy Advocacy Campaign

#### **Section 2**

Setting Policy Priorities: A 3-Step Process

#### **Section 3**

Strong Partnership Coordination: A 5-Step Process

#### **Section 4**

Political Mapping: How-to Guide

#### **Section 5**

Strategic Planning: How-to Guide

#### **Section 6**

Messaging

#### **Section 7**

Talking with Policy-Makers

#### **Section 8**

Managing Risks and Crises: Planning Guide

#### **Section 9**

Evaluation

#### **Section 10**

Concluding Your Campaign: A Checklist

Policy Advocacy: Capacity Assessment Tool

Country Reconnaissance (Recon) Visit Guide



---

### About the Guide

Changing public health policy is one of the most effective ways to improve public health on a population-wide scale. Moving a public health issue onto the policy agenda and through the policy making process requires a well-planned strategic advocacy campaign. The components of an advocacy campaign are the same regardless of the advocacy goals. This guide is designed to help civil society organizations plan and conduct effective advocacy campaigns that will result in the adoption and implementation of strong effective public health policies.

---

### How to Use the Guide

The guide covers a broad range of topics – from identifying clear policies objectives to concluding a campaign. It has been designed to provide both an overview of a policy advocacy campaign, as well as more specific information and tools on key elements. Depending on your needs and resources, you may walk through the overview and each tool, or only use specific tools at certain points in the advocacy campaign.

Whether you are just beginning to plan an advocacy campaign or are already conducting one, we recommend you start by reading the Campaign Guidelines. The overview provides a snapshot of all the elements of an advocacy campaign; it can also serve as a checklist and provide insights into gaps or areas that need focus in your campaign. Corresponding tools provide additional information and resources on each key element of a campaign.

We hope this guide will provide you and your partners a roadmap to achieving your policy objectives.

---

### Brief Description of Authoring Organizations

#### **Bloomberg Advocacy Incubator (BAI) at Campaign for Tobacco-Free Kids:**

The BAI at Campaign for Tobacco-Free Kids draws on lessons learned from tobacco advocacy to provide training and assistance to other public health advocacy initiatives funded by Bloomberg Philanthropies. The Campaign for Tobacco-Free Kids is a non-profit, public health advocacy organization that works to reduce the toll of tobacco use on global health by promoting policies that prevent kids from smoking, help smokers quit, and protect everyone from secondhand smoke

#### **BAI at Consumers International:**

Consumers International (CI) is the world federation of consumer groups that, working together with its Members, serves as the only independent and authoritative global voice for consumers. Its mission is to support, develop and work directly with constituent member organizations to protect, inform, give a voice to and secure rights for consumers worldwide.

---

### Acknowledgement

The Campaign for Tobacco-Free Kids and Consumers International acknowledge the financial contributions from Bloomberg Philanthropies and for making the preparation and publication of this guide possible.



## Elements of a Policy Advocacy Campaign: At a Glance

To move a public health issue onto the policy agenda and through the policy-making process you will need to develop and implement a strategic advocacy campaign. This is your quick guide to developing an effective advocacy campaign to achieve public health policy change.

1

### Gather background information

Before you begin an advocacy campaign, do your research. You need to be certain that policy change is the best way to solve the problem. You'll also need to know the latest science and evidence in support of your public health issue, the current laws and regulations, and what gaps may exist. Research any past advocacy efforts on the same issue, so you know what worked... and what didn't.

2

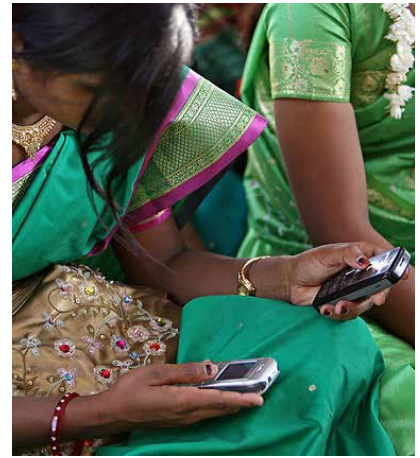
### Set clear policy objectives

A successful campaign starts with clear objectives that are specific, measurable, achievable, relevant, and time-bound. Make sure your objectives are linked to policy change and existing evidence, and that they include the following: a policy actor(s) or decision-maker(s), the action or decision you want them to take, and a timeline by which you want them to act or decide.

3

### Build strong partnerships

Working in coalition or partnership with others is the best way to demonstrate support for your issue. Identify a core group of organizations that will work together to drive the campaign forward on a day-to-day basis. Next, identify a range of old and new allies willing to speak out in favor of your objectives. To identify those allies, look to civil society and professional or business groups from the health, education, and economic and scientific sectors.



4

### **Know the political landscape**

Understanding the policy-making process and which decision-makers and influencers to target is key to achieving your objectives. Once you understand the political landscape, strategize about when during the process you can successfully engage, intervene, and influence your targets. You will also need to know decision-makers' positions on your policy change objectives and identify any opposition you will encounter.

5

### **Help develop legislation or regulations**

Early on in the process, you'll want to prioritize drafting of the actual policy, using the strongest wording possible. As an advocate, the role that you will play during this phase is likely to vary. Having a lawyer or policy expert as a resource is very important. At a minimum, they can help you analyze the strengths and weaknesses of existing or emerging policies in accordance with evidence-based best practices.

6

### **Determine what is non-negotiable**

Compromise is sometimes necessary in advocacy. However, it is important to know your limits. You won't necessarily help your cause if you support the passage of weak policies. You and your core partners will need to determine together what is non-negotiable, ideally early in the advocacy process.

7

### **Identify legislative sponsors and policy champions**

Strong sponsors willing to champion a policy throughout the process are valuable assets for any campaign. Seek out influential and respected policymakers on relevant committees or in key positions who you can trust to act as loyal partners and effective champions. Remember that it takes time to cultivate such champions. Meet with them regularly to understand their concerns and needs, agree on how best to work together, and share information. Always be available to act as a resource for your champion.

8

### **Develop your key strategies**

Persuading decision-makers to take action is essential for affecting changes in policy. There are many ways this can be done, but most successful campaigns employ some combination of the following three strategies: 1) direct interaction with decision-makers and influencers, 2) using media and social media to influence decision-makers and the public, and 3) grassroots mobilization to engage a strong base of supporters and organizational allies to encourage change and counter opposition or indifference.





9

### **Prepare to communicate effectively**

Effective communication underpins every successful advocacy campaign. First, define your different audiences and work to understand their information needs, interests, concerns, and the best communication channels to reach them. Using this information, you can then design targeted, persuasive messages and identify the most compelling messengers and spokespeople. Make sure you have collected the most up-to-date and accurate information to use in your communication activities, and consider commissioning your own reports if you lack credible information supporting your argument. Message research such as focus groups or polling can help you ensure you have chosen the most compelling messages. Finally, it's important to monitor media and social media engagement on your issue so you know what is being said about your campaign and can respond quickly.

10

### **Formulate your campaign action plan**

The campaign action plan is your roadmap for the campaign, leading from objectives to strategies and then to messages. Carefully consider all the elements of your plan in collaboration with your core group of partners. In addition to key activities, the action plan should also outline the necessary resources, responsible persons, and timeline. Remember that your plan is a living document that should be reviewed regularly and updated as the political landscape changes.

11

### **Run your campaign**

With a detailed plan in place, it's time to implement. Keep in mind that a successful campaign requires strategic planning alongside strategic implementation. The campaign process is dynamic and ever changing, and every campaign will require you to respond to unanticipated events, disagreements within your network, changing decision-makers and new opposition. Don't be afraid to be flexible, revisit your plan and update it as needed.

12

### **Monitor and evaluate progress**

Monitoring and evaluating implementation of your advocacy plan will be one of the most critical activities of your campaign, but is often overlooked. Reviewing your progress at regular points will not only help to hold you and your partners accountable for planned actions, but will also reveal whether or not your actions are accomplishing your goals. If your campaign is not making progress, you'll need to reassess and adjust your plan.

13

### **Celebrate success and remain engaged**

Successful advocacy campaigns take time. Even if you don't secure your policy change right away, you will have made progress in educating decision-makers, the media, and the public on your issue. Celebrate milestones both big and small, and make sure you thank supporters for their ongoing commitment. Once you have achieved your policy change, ensuring successful implementation is the next objective. A campaign doesn't end with the change in law or policy change: Now it's time to push for implementation.



#### HELPFUL HINT:

Consider working with a legal or issue expert to support you in gathering information, obtaining copies of existing policies, and connecting with individuals responsible for implementation of current policies. Doing your “homework” early will help familiarize you with gaps and policy areas that need to be strengthened.



## Gather background information: What you need to know

### WHY IS IT IMPORTANT?

Before you start your advocacy campaign, you'll need to gather background information, which will create a strong foundation for developing your campaign objectives, strategies and communications. Without a solid understanding of the nature of the problem you are trying to address, you'll find designing an effective campaign difficult, if not impossible. The most effective campaigns tend to be based on accepted facts and figures about public health impact and lives saved, the costs of inaction, and proven solutions. As you learn more about the issue, be certain that policy change will help to solve the problem. If not, you will most likely want to focus your efforts on other types of interventions.

### WHAT NEEDS TO BE DONE?

The focus of your campaign will help determine what information you need to gather. However, the following types of information are generally useful for an effective campaign and provide a good place to start:

- Up-to-date and credible data about the public health problem you want to address, as well as any evidence-based solutions.

**Potential Sources:** respected bodies such as the World Health Organization (WHO), Demographic Health Survey (DHS) or Health Management Information System (HMIS) data, ministries or agencies overseeing the issue.

- Existing laws and regulations related to your public health issue.

**Potential Sources:** online data sources, parliamentary or legal libraries, and connections with decision-makers, technical leaders, and legal experts.

- Background on previous, related campaigns—both successful and unsuccessful—including what works, what didn't, and the opposition.

**Potential Sources:** key informant interviews with campaign leaders and participants; media reports.



**HELPFUL HINT:**

If your policy objective contains these three items and is based on your background information, it will almost always be SMART

## Set clear policy objectives: What you need to know

### WHY IS IT IMPORTANT?

Developing a policy objective may be the most essential step of your campaign plan. Your objective describes the change you want to see happen and helps to identify the actions needed in order to achieve that change. You'll only want to choose actions that you're sure will advance you towards that goal.

Since your policy objective serves as a guide for your overall campaign plan, the clearer your policy objective is, the stronger your campaign will be. Clear objectives help you to develop targeted strategies and communications. Without a clear objective, it will be impossible to determine whether your efforts have been successful.

### WHAT NEEDS TO BE DONE?

Analyzing the background information you have gathered will help you identify the best policy objective(s). Ideally, your policy objective will address a gap or weakness in the existing policy environment and provide an evidence-based solution.

**Here is a generic example of a policy objective: By December 2016, Parliament will approve a ten percent increase in the national health budget. Are you able to identify the actor, action and timeline for change in this example?**

As a guiding framework, check to make sure your objectives are all SMART, or Specific, Measurable, Achievable, Relevant, and Time-bound. Policy objectives should also always contain three key items:

- **A policy “actor” or decision-maker** – the person(s) or decision-making body with the power to make your desired change a reality  
**Examples:** Member of Parliament, minister, relevant parliamentary committee, sub-national legislature, or ministerial office.
- **A policy “action” or decision** – the specific action you want them to take or decision you want them to make  
**Examples:** enact, amend or repeal a policy, allocate funds, or issue a mandate to affect change
- **Timeline for change** – The date by when you want them to act or decide.  
**Examples:** the day, month, project quarter, or year







#### HELPFUL HINT:

Before recruiting new partners, the leadership group should have a draft campaign plan in place and know what each current member brings to the campaign. This strategy will provide insight into the types of organizations you will want to recruit to your network. Ideally, new organizations can help to fill existing gaps. On occasion, they may also bring new ideas and activities to the campaign.



## Build strong partnerships: What you need to know

### WHY IS IT IMPORTANT?

Successful campaigns are most often the result of groups of people or organizations effectively working together towards a common goal. By bringing together partners with different expertise and influence, campaigns are better able to carry out a range of coordinated advocacy actions and reach a broader set of decision-makers. Working in partnership also helps to demonstrate broad-based support for your policy objective, which is more likely to inspire decision-makers to act.

Effective public health advocacy campaigns can involve many types of organizations – civil society, business and professional groups are some examples – and may represent the health, education, economic, legal and scientific sectors. Human rights groups, as well as community leaders and individuals directly impacted by the public health issue, may also be powerful allies. As you think about how to engage partners, consider how to best leverage each one based on their individual level of commitment and engagement.

### WHAT NEEDS TO BE DONE?

You will want to form a core group of partners that will act as the leadership group for the campaign. This should be a small number of select allies; otherwise, it will be challenging to make decisions and get things done quickly. To be most effective, the leadership group should:

- Agree to support a common policy objective and commit to being engaged in the campaign on a day-to-day basis.
- Have contacts with key decision-makers and strong knowledge of the policy environment and the policy issue.

In addition to the core leadership group you will likely want to build a broader network of advocates and active supporters. While these partners may not be engaged in day-to-day decision-making, they can play vital roles at strategic moments of a campaign. These additional organizations often:

- Represent a mix of traditional allies and more 'unusual' allies that help to demonstrate wide and diverse support for your issue.
- Are mobilized by the core group to raise their voices at opportune moments, reach select decision-makers, or carry out specific activities or strategies.



**HELPFUL HINT:**

**Monitor your target decision-makers' position on your issue, as it may change over time. Also, continue to monitor your opposition for new messages and activities. Establish strong working relationships with decision-makers' staff, as they can provide useful information about your key targets, including useful information about the opposition's influence on decision-makers.**

**Regularly update your mapping as you receive new information. Consider working with a legal expert or political "insider" to ensure this document is up-to-date.**



## Know the political landscape: What you need to know

### WHY IS IT IMPORTANT?

An in-depth understanding of how the policy-making process works is critical no matter whether your campaign is trying to help pass legislation, reform a regulation, issue an executive order, or push for improved implementation. Analyzing the political environment to understand all the important decision-makers, policy processes and opposition viewpoints relevant to your issue is called "political mapping."

### WHAT NEEDS TO BE DONE?

Political mapping takes time and resources, but the more comprehensive the mapping, the better prepared you will be to carry out a strong campaign. Mapping may vary depending on your country's political system, the kind of change you are seeking, and the type of information that is openly available to the public. But no matter the format you use, always try to include:

- The steps a proposed policy must pass through in order to be approved and implemented. These steps may vary depending on the type of policy.
- The decision-makers that matter in each step of the process, their interests and concerns, and their position on your issue: Are they supportive, opposed or neutral?
- The individuals — like government staff, political party leaders, and quasi-state or select non-governmental representatives — who advise or are well positioned to persuade decision-makers throughout the process. These individuals are often called "influencers."

Your political mapping should also review any opposition you might face. You will want to consider:

- Individuals and groups that might oppose you and their reasons for doing so.
- Your opponents' messages, tactics, and connections with key decision-makers, which can help you to develop powerful counter messages and think of ways to lessen their influence.



**HELPFUL HINT:**

Use your political mapping to help identify openings within the policy-making process for you to provide input on laws and regulations. Try to monitor the draft policy at each and every step of the process so you can ensure the final version contains your desired language. The actual text in a draft policy often becomes weaker as it proceeds through the process, and you will want to continue to advocate for the strongest, most effective language possible.



## Help develop legislation or regulations: What you need to know

### WHY IS IT IMPORTANT?

Making a change in policy is most likely the primary objective of your policy advocacy campaign. Creating or supporting meaningful legislation or regulations requires a great deal of thought and, usually, significant expertise. Identify your role in the actual development of policies early on in your campaign process.

### WHAT NEEDS TO BE DONE?

Your role in the development of legislation and regulations depends on your country context. In many countries, civil society has the opportunity to formally assist the government with:

- Drafting policies
- Reviewing or providing comments on policies
- Monitoring policies

In places where only members of government can participate in the policy process, consider working with supportive decision-makers or friendly staff that you have identified through political mapping to share drafts and provide unofficial or informal feedback.

Whatever your role, you need to be very clear on the provisions you want to see included in laws and regulations. Each provision you suggest should be supported by evidence and best practice legislation from other jurisdictions. Knowledgeable lawyers or supportive legal experts can help you gather and frame evidence, as well as help you analyze text and ensure that policies contain strong language to achieve the change you want. Remember that even very minor changes in wording can significantly affect a policy's impact.





**HELPFUL HINT:**

Once your campaign's leadership group has determined your non-negotiable issues, keep this information strictly confidential. Wide distribution could give the opposition an advantage and weaken your chances of achieving the strongest possible policy.



## Determine what is non-negotiable: What you need to know

### WHY IS IT IMPORTANT?

As an advocate, your goal is to ensure the passage of laws and regulations that will save lives. While the policy-making process can require compromise, the creation of weak or ineffectual policy may not help your cause and could even hurt it over the long term. Agree with your partners early on about what provisions you are unwilling to sacrifice in your quest to pass a policy. If you don't determine this ahead of time, opponents may be able to take advantage of any divide between you and your allies at the negotiating table.

### WHAT NEEDS TO BE DONE?

During the policy-making process, your campaign's leadership group will often be required to make quick decisions about whether to support a proposed compromise. Anticipating possible compromises and agreeing in advance on how best to address them will reduce the risk of disagreement among your core partners at key moments. Conflict within your group – even when temporary – can weaken your group's overall negotiating position and the policy you are trying to promote.

Ask yourselves the following questions to help decide if you want to support a potential compromise:

- Does the compromise undermine meaningful progress on our issue?
- Does the compromise set a harmful precedent for the region?
- Does the compromise make it difficult to come back later and revise or strengthen the policy?

If you answer yes to any of these questions about the proposed compromise, it is likely a non-negotiable for your campaign's leadership group. You and your core partners may choose not to support and even oppose the potential law or regulation.



**HELPFUL HINT:**

Developing a sponsor or policy champion takes time and usually requires multiple meetings. Consider designating 1-2 liaisons from your organization that can commit to building trust by communicating regularly with your target sponsor's office. (Two focal points are useful in case one person is unavailable or leaves the organization.)

That way, you will not have to start completely over building your organization's relationship with your sponsor.

## Identify legislative sponsors and policy champions: What you need to know

### WHY IS IT IMPORTANT?

To move a law or regulation from an initial idea through to approval, you will need strong government sponsors to champion its passage during each step of the policy-making process. Your campaign leadership group should seek out influential and respected decision-makers who hold key positions or sit on relevant committees that you can trust to serve as committed champions and partners.

### WHAT NEEDS TO BE DONE?

Your political mapping can help you identify sponsors for your law or regulation. A thorough political mapping will indicate decision-makers that are supportive of your campaign's policy objective and who may become active champions. Take time to meet with your potential sponsor(s) in order to better understand:

- Their interests in, and reasons for, supporting your policy objective.
- The provisions they would like to see included in the policy and how they might differ from yours.
- Their suggested strategic approach to passing the policy.
- Their ideas about how best to work together.
- How to keep each other informed throughout the campaign.

In order to have a positive and trusting relationship with your sponsor(s), you need to serve as a resource for them throughout the policy-making process and should communicate that clearly. You can act as a resource to your champions by doing the following:

- Providing or securing issue expertise to inform policy development
- Providing background research, fact sheets, or policy briefs on the issue
- Drafting policy language and/or reviewing drafts and providing comments
- Building public support for the policy objective
- Educating other decision-makers on the issue
- Engaging the media to cover the issue
- Mobilizing audiences for legislative hearings and providing public testimony
- Engaging in joint strategizing to advance the policy throughout each step of the process





## Develop your key strategies: What you need to know

### WHY IS IT IMPORTANT?

In addition to securing policy champions, you will likely need to persuade a broader set of decision-makers to support your issue. The strategies you choose to reach these target decision-makers are critical because they can make or break your campaign. Common strategies include 1) direct interaction with decision-makers and influencers, 2) using media and social media to influence decision-makers and the public, and 3) grassroots mobilization to engage a strong base of supporters and organizational allies to encourage change and counter opposition or indifference. To determine the best strategies to influence them, you will need to consider their interests and concerns, as well as any cultural and political factors that affect how advocacy takes place in your country.

### WHAT NEEDS TO BE DONE?

#### Direct Interaction with Decision-makers

In countries where personal interaction with decision makers is customary, direct communication can be a powerful outreach strategy and might include the following activities:

- Letter writing
- In-person meetings or phone calls
- Briefings, workshops, and conferences
- Providing testimony at hearings
- Attending receptions or other events where decision-makers are present
- Providing position papers and other forms of information and data.



## Section 1

### Elements of a Policy Advocacy Campaign



#### HELPFUL HINT:

Policy advocacy is considered lobbying when you attempt to influence political officials regarding a specific piece of legislation. Many donors restrict lobbying with their funds, while many countries have specific rules governing lobbying activities of NGOs.

Be sure you understand your donor and government rules before pursuing any lobbying.

Direct in-person meetings with decision-makers are often the quickest and most persuasive tactic. For a successful meeting, it is important to be well prepared.

#### Before the meeting, do the following:

- Invite attendees known to and influential with the decision-maker.
- Develop an agenda.
- Identify a meeting leader and assign talking points to other representatives.
- Familiarize yourself with your decision-maker's history on the issue and prepare responses for likely concerns or questions.
- Prepare an information packet with proposed policy language and select background materials (e.g. fact sheet, news article, and polling data).
- Assign a note-taker to track issues raised and commitments made by the decision-maker.

#### During the meeting, be sure to:

- Ask if you can count on their support. If a decision-maker is not able to commit, ask what it would take to gain their support.
- Avoid confrontation and remain positive, even when interacting with decision-makers supporting the opposition. Follow-up with authoritative information to correct misperceptions. If you come up against truly committed opponents, you should consider whether it is worth the effort to try and persuade them to your point of view.
- Ask decision-makers that are friendly to your issue if they can suggest other potential supporters.
- Ask how you can be helpful to them in the future and ensure you know how to remain in contact.
- Thank decision-makers for their time and consideration.
- Send a follow-up letter summarizing the meeting and include relevant materials to address outstanding concerns.



Remember that it will usually take more than one meeting to establish credibility and gain a decision-maker's support. Until that time, be sure to maintain regular communication and provide helpful data and information. If you are not able to directly access a target decision-maker, consider how you might be able to reach them through an influencer or partner.



**HELPFUL HINT:**

**A multi-strategy approach is usually the most effective to reach a variety of decision-makers. Remember to keep track of your decision makers' positions as you engage in your persuasion efforts so you'll be certain how many supporters you have when it's time to make key decisions.**



**Media Engagement**

Using media is an advocacy strategy that can help to raise visibility, get people talking, and place your issue on a decision-maker's agenda. Media advocacy includes the following types of coverage:

- Earned media, which means convincing a media outlet to cover your issue
- Paid media, which entails paying for a media outlet to present your issue
- Owned media, which requires that you create and disseminate content over your own website, blog or other channels you control
- Social media, which includes using Facebook, Twitter, YouTube and other interactive platforms to create attention and generate dialogue

To gain earned media, you must think like a journalist and pitch compelling stories. Creative story elements might include:

- An event, data, report, etc. that provides new information to a reporter and the outlet's audience
- Compelling visuals (for print media)
- Sharp sound bites (or succinct quotes that convey your main messages)
- Easy-to-understand statistics on an issue people care about
- Authentic voices of real people who have been impacted by your issue

**Grassroots Mobilization**

In addition – or as an alternative – to reaching decision makers and the public through media, grassroots mobilization can be an effective strategy in places where decision-makers are responsive to voters or public opinion. To find out whether this strategy makes sense for your campaign, first consider the types of individuals and organizations your target decision-makers care about most. Membership groups and interest groups can be extremely powerful and influential, particularly if you can mobilize them to advocate to your target decision-makers during critical campaign moments. Sending action alerts to supporters through social media is a great way to engage them in meaningful action and keep them up to date throughout the policy process. To further spread your message, ask your partners to disseminate action alerts to their networks and write to policy makers on their letterhead.



**HELPFUL HINT:**

**After you develop your best messages, share them with partners and emphasize the importance of a unified, limited set of messages. Delivering one strong message many times is more effective than sending a multitude of messages. Use focus groups or polling to help identify your most effective messages and instill message discipline.**

# Prepare to Communicate Effectively: What you need to know

## WHY IS IT IMPORTANT?

In order for your advocacy strategies to prove successful – whether direct interaction with decision-makers, media outreach, grassroots mobilization, or all of the above – they must be grounded in effective communication. To ensure your communications are as persuasive as possible, you will need to plan them in advance of your campaign.

## WHAT NEEDS TO BE DONE?

The most important principle of effective communication is to know your audience. Depending on your chosen strategies, your audiences may range from decision-makers to journalists and community members. These groups each have different communication needs; the materials and messages that work for one group won't necessarily work for another. The more you know about your audience, the more targeted and effective your advocacy outreach will be.



Once you have determined your audiences, gather the following information:

- How best to reach them (e.g. TV, radio, print media, social media, SMS)
- The questions, concerns or attitudes they have about your issue and the specific information they will need in order to take action

Your target audience members are likely busy people. This means you need to develop short, simple messages to inspire them to learn more or take action. Though the specific content of your message will vary for each audience, your messages should generally contain the following:

- A short problem statement about what you want to change and why
- A few key attention-grabbing facts that illustrate the problem or potential solution
- A specific action that the audience can take to help
- A human story that highlights how the issue has impacted individuals. (This is optional but can be quite effective.)

Your messengers are equally as important as your messages. To most effectively reach your target audience, identify and deploy individuals or groups that they will listen to and believe.



**HELPFUL HINT:**

**The campaign process is dynamic and ever changing, and your leadership team should regularly revisit your shared action plan and adjust it based on current circumstances.**



## Formulate your campaign plan: What you need to know

### WHY IS IT IMPORTANT?

Now it's time to combine all the various planning elements of your campaign — defining your policy objective, choosing your campaign strategies, and identifying your target audiences — into one comprehensive action plan. This plan will give you and your partners a roadmap to achieving your policy objective. It will also help ensure accountability among partners and that everyone remains on track as the campaign is executed.

### WHAT NEEDS TO BE DONE?

Campaign action plans can differ in format and level of detail, but at the minimum your plan should include the following:

- Your policy objective
- Your target decision-makers and influencers
- Your opponents and their planned tactics
- The timeline for relevant policy process
- Your core partners and your agreed process for communicating and decision-making

An action plan should also include a detailed work plan that is based on your selected advocacy strategies and anticipated communications. It should highlight:

- Planned activities and their timelines
- Persons/partners responsible for carrying out the activities
- Required resources for the activities and who is providing them
- Indicators for monitoring activities and tracking progress

Make sure that your plan also includes a risk assessment and crisis management plan. This should highlight any major dangers to your campaign and what actions you will take to mitigate them.

It should also outline how you and your partners will respond — including specific roles and responsibilities — if a crisis arises. By anticipating risks and having a mitigation and response plan in place, your campaign leadership team will be more likely to minimize any impacts.





**HELPFUL HINT:**

Carefully track and monitor the policy process in collaboration with your sponsor's office. Get on the distribution lists for the committees and other bodies that will consider your proposed legislation or regulation and check their websites regularly.

Watch for new draft policies that appear and are related to your issue, as they may be designed to undermine your legislation or regulation.



## Run your campaign: What you need to know

### WHY IS IT IMPORTANT?

Now that you have a strategic and well-documented campaign action plan in place, it's time to carry it out. Your plan is important, but remember that there will be times when you will need to deviate from it. Naturally, unanticipated opportunities and setbacks may arise to which your leadership team will need to rapidly respond.

### WHAT NEEDS TO BE DONE?

Common situations often arise during a campaign that can require you and your partners to make quick, strategic decisions. They might include:

- **Timing:** Your core partners may be pressured by members of your advocacy network, your target decision-makers, and your policy champions to move forward despite lacking the necessary votes or support.
- **Policy content:** You may face pressure to significantly weaken the proposed policy in order to ensure passage. Similarly, you may be asked to consider changes to your policy to secure a vote or support from a decision-maker.

Now is the time to refer back to what items your core group decided were non-negotiable. If a proposed change appears to be minor or consistent with the compromises your network has previously agreed upon, arrange a meeting with your sponsor to discuss your options.

- **Opposition:** You might face opposition tactics that could jeopardize your efforts. Respond immediately and proactively, and maintain regular contact with supportive policymakers and key "influentials" that may know about opposition maneuvers designed to disrupt your efforts.

Be prepared to help your sponsors troubleshoot these and other types of unanticipated events as your policy moves through the process.



**HELPFUL HINT:**

Sometimes even when you and your partners have done everything “right,” your desired law or regulation will not pass at the preferred moment. Don’t give up.

As a result of your efforts, many stakeholders will now believe in your cause. In addition, the media, public and decision-makers will be more educated on your issue, which will put you in a better position when the next opportunity arises. Most campaigns responsible for landmark public health policies experienced defeat before achieving their ultimate objective.



## Monitor and evaluate progress: What you need to know

### WHY IS IT IMPORTANT?

Monitoring and evaluating your progress is an essential part of any policy advocacy campaign and ensures that planned actions are taking place at the correct time. It also helps you know whether you are gaining support over the course of your campaign. A good monitoring plan can tell you which of your strategies are working best and which may need to be adjusted.

### WHAT NEEDS TO BE DONE?

There are many ways to monitor and evaluate progress. At a minimum, your core group of partners should conduct:

- Regular collection of information to measure progress according to indicators in your campaign action plan.
- After-action debriefs following big campaign moments, such as the launch of a report or event with parliamentarians, to discuss what went well, what should be improved and any important outcomes.
- Periodic, routine check-ins to make sure your campaign activities are progressing according to plan and resulting in the desired outcomes.

If these actions reveal that your campaign is not making steady progress, take the time to ask why and be prepared to make changes. This may include shifting strategies, updating your messages and messengers, or planning new actions to counter emerging opposition. It may also involve adjusting timelines or responsibilities. If a partner is not able to carry out their assigned roles or planned actions, you may need to shift responsibility to keep moving forward. This is a decision best discussed and determined by a core group.



**HELPFUL HINT:**

Sometimes even when you and your partners have done everything “right,” your desired law or regulation will not pass at the preferred moment. Don’t give up. As a result of your efforts, many stakeholders will now believe in your cause.

In addition, the media, public and decision-makers will be more educated on your issue, which will put you in a better position when the next opportunity arises. Most campaigns responsible for landmark public health policies experienced defeat before achieving their ultimate objective.



## Celebrate success and remain engaged: What you need to know

### WHY IS IT IMPORTANT?

Successful advocacy campaigns take time. Make sure that you celebrate successes — both big and small — when they happen. This helps keep you and your supporters energized, inspired and engaged with your issue over the course of your campaign and beyond.

### WHAT NEEDS TO BE DONE?

Make sure to acknowledge and thank your supporters along the way. Your aim is to keep people motivated. Activities may include:

- A formal thank you letter to a decision-maker
- Using social media to congratulate grassroots supporters
- An award and ceremony for supporters who have supported your campaign in some special way
- An event to celebrate achievement of the campaign's policy objective

Remember that when the policy objective is achieved, your work as an advocate is not over. In fact, that moment is likely to usher in an entirely new campaign to ensure successful implementation. As an advocate your role in successful implementation might include:

- Ensuring that additional laws or regulations are drafted, approved and released at various levels of governance
- Countering any actions to repeal or amend the policy in order to lessen its impact
- Encouraging the agency responsible for implementation to both educate stakeholders about the new policy and provide training to those who will carry it out or enforce it
- Monitoring implementation of the law and reporting violations
- Documenting any industry or opposition attempts to circumvent the policy
- Working with the media to publicize implementation activity, or lack thereof
- Filing complaints or bringing legal action, if necessary, when the government fails to enforce the law



## Setting Policy Priorities: A 3-Step Process

---

### Why is it important?

Setting policy priorities should be the first step of your policy advocacy campaign. These priorities describe the change you want to see happen and provide the foundation that will allow you to develop targeted strategies and communications. Only by defining clear policy priorities will you be able to determine whether your campaign efforts have been successful.

---

### What needs to be done?

When setting policy priorities, there are three major steps.

#### 1. Determine the issue your policy advocacy campaign will address.

This is one of the most challenging, but important, parts of developing an advocacy campaign. Public health policy advocacy campaigns address risk factors that contribute to injury or death, and your primary challenge will be to make your issues specific enough to guide a targeted campaign.

For example, you might be interested in designing a policy advocacy campaign to address road safety. Road safety is a broad issue, with many constituencies and issue areas. To make your issue more specific and manageable, you could focus on one of the main risk factors associated with increased injury and death from road crashes, such as:

- Low helmet use
- Low use of seat belts and child restraints
- Drinking and driving
- High speed
- Poor road infrastructure
- Limited and/or unsafe urban transport





**HELPFUL HINT:**

Before you begin setting your policy priorities, conduct background research on your big-picture public health issue (in the current example, that would be road safety), including problems and trends at national and sub-national level. Focus your review on major risk factors – for example, low use of helmets or seat belts – that are well established through evidence. Then identify the policies currently in place as well as gaps that need to be filled to improve safety.



**2. Develop a campaign goal.**

Once you've identified your advocacy issue, develop a campaign goal. A campaign goal is the long-term result, or impact on public health, that you hope to see emerge from the advocacy effort. It is your vision for change.

Let's take our road safety example again. In road safety, the goal will usually relate to the reduction of road crash death and injury, or improvements in road safety outcomes (e.g. increased helmet wearing rates, reduction of drink-driving, improved pedestrian safety, etc.). The following are two examples of specific objectives:

- Reduce road traffic crash deaths by 25%.
- Increase wearing of safe helmets by motorbike users.

**3. Develop a clear policy objective.**

Developing a clear policy objective is the most critical component of setting policy priorities. Policy advocacy campaigns are unique because they seek to address an issue by fixing a gap or a weakness in the policy environment. Your policy objective names the specific policy change you want to achieve. Ideally, the rationale for that change should be supported by strong evidence.

Your policy objective should be **specific**, **measurable**, **achievable**, **relevant** and **time-bound** or **SMART**. It should also outline a policy actor or decision-maker, a policy action or decision, and desired timeline for change.

The following are several policy objectives related to road safety:

- By December 2016, the Standards Bureau will issue and implement new helmet standards under the National Road Safety Law.
- Parliament will pass a law to reduce speed limits to 25 km per hour within 2 km of all schools in the country by July 2016.





## Setting Policy Priorities

### Clarify Campaign Issues

You probably already have strong ideas about the focus issue for your policy advocacy campaign. In fact, this interest is likely what inspired you to develop a campaign in the first place. But no matter how strongly you feel about a certain issue, it is important to take the time to clarify and refine your issue. How well your issue is defined is a major determinant of its success or failure.

After completing background research, you now have an array of risk factors and policy gaps related to your issue. Write a sentence describing each of the factors or gaps identified in your review. Use additional paper as needed.

1.

2.

3.

4.

5.

## Section 2

### Setting Policy Priorities: A 3-Step Process

#### Evaluate Priority Issues

The gaps you described above serve as a solid foundation for your policy advocacy campaign. They likely provide a more narrow focus for your campaign than your larger public health issue, which will allow you to develop more concrete and meaningful goals and objectives.

To reduce these factors down to a manageable number that won't dilute your efforts, evaluate each in terms of strength of evidence, public health impact, political feasibility, your organizational capacity and partnership potential. As a first step in your evaluation, answer the following questions for each of the gaps/factors you listed above. Use additional paper to answer the following questions for each.

#### Specific Risk Factor or Policy Gap:

Is there strong evidence that addressing the issue will have a positive impact on public health? Please describe.

What is the expected impact of addressing the issue (e.g. how many people will it affect, what type of difference will it make in people's lives or a country's health status)?

Does tackling this issue address existing health inequities in a significant way? Please describe.

Will work on the issue result in an outcome that is greater than the human and financial resources needed to achieve the change? Please describe.

Is policy change among the best ways to impact the issue? Please describe.

Is there political will to address the issue? Please describe.

Is there support among key political stakeholders to address the issue? Please describe.

Is it possible to reasonably address the issue in the near-term (e.g. three to five years)? Please describe.

Does your organization have experience, expertise, and reputation to reasonably advocate on the issue? Please describe.

Are there potential partners willing and able to collaborate with you on addressing this issue? Please describe.

## Section 2

### Setting Policy Priorities: A 3-Step Process

#### Rank Priority Issues

Once you have answered the above questions for each of the identified risk factors and policy gaps, it is helpful to make a relative comparison using the following criteria: strength of evidence, public health impact, political feasibility, your organizational capacity and partnership potential.

Write the potential issues (e.g. the risk factors or political gaps) in the top row. If you would like to assess more than three, use extra scrap paper to make additional columns. Use the criteria in the left column to rate each of the issues as high, medium, or low – keeping in mind the answers to the questions above. Then total the number of highs, mediums, and lows.

Use the scores as a guide to choose the risk factors or policy gaps that would be best to target with policy advocacy and write that in the bottom box. While there are no absolutes, focusing on the gaps with the most highs and mediums usually brings the greatest chance of success. Make sure you do not choose too many issues.

Criteria	Issue 1:	Issue 2:	Issue 3:
<b>Strength of Evidence</b>	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
<b>Public Health Impact</b>	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
<b>Political Feasibility to Make Change</b>	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
<b>Organizational Capacity to Advocate</b>	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
<b>Partnership Potential</b>	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
<b>Totals</b>	# of Highs _____ # of Mediums _____ # of Lows _____	# of Highs _____ # of Mediums _____ # of Lows _____	# of Highs _____ # of Mediums _____ # of Lows _____
<b>Final Advocacy Issue(s)</b>			

## Section 2

### Setting Policy Priorities: A 3-Step Process



#### Define Goals

Now it's time to articulate your campaign goal. Remember your campaign goal is the long-term result, or impact on public health, that you hope to see emerge from the advocacy effort. It describes your vision for change.

Write your campaign goal(s) below. They will serve as inspiration for you, your partners, and your policy targets over the course of your campaign.

#### Campaign Goal(s)



## Section 2

### Setting Policy Priorities: A 3-Step Process

#### Develop Policy Objectives

Now its time to develop your policy objectives. A policy objective is different from your campaign goal. While your campaign goal identifies the big change you want to see in the world, your campaign objectives articulate the policy change that will help reach that goal.

Your objective should be **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound or **SMART**. Policy objectives should also always contain three key items:

- A policy “actor” or decision-maker – the person(s) or decision-making body with the power to make your desired change a reality  
*Examples: Member of Parliament, minister, relevant parliamentary committee, sub-national legislature, or ministerial office.*
- A policy “action” or decision – the specific action you want them to take or decision you want them to make  
*Examples: enact, amend or repeal a policy, allocate funds, or issue a mandate to effect change.*
- Timeline for change – the date by when you want them to act or decide  
*Examples: the day, month, project quarter, or year.*

To develop your policy objectives answer the following questions. If you are developing multiple objectives, use additional paper and answer the questions for each objective.

Who are the decision-makers or the decision-making institution with the authority/ability to make your desired change a reality?

What is the specific policy-related action they should take to help accomplish the desired change?

What is the desired timeline for their action to occur? (Keep in mind the steps of the policy-making process in order to set a realistic timeframe.)

Now combine your answers into a concise statement describing your policy objective (see previous example).

**Congratulations - you have now set your campaign's policy priorities!**

## Strong Partnership Coordination: A 5-Step Process

### Why is it important?

Successful policy advocacy campaigns often result from a group of organizations working together toward a common goal. Collaboration is valuable because it will help you reach and persuade a wider set of decision-makers and influencers, increase resources, strengthen your legitimacy with target audiences, and add specific skillsets and expertise – potentially filling your organizational gaps.

By adding organizations you can expand the scale and diversity of support for your issue, especially if partners are from different sectors. Effective public health campaigns often engage a range of civil society, professional and business groups from the health, education, economic/employment, and scientific/research sectors. Human rights groups may also be powerful allies.

### Ways of working together

There is a spectrum of different types of cooperative working, what will be appropriate for you will depend on how much your aims and objectives align. If you are working on the drink driving side of road safety and another organization is working on child safety and yet another organization working on cyclist safety; you might want to share information but you probably wouldn't have a coordinated campaign.



However you decide to work with others, you should engage in **sharing information and regular communication** with one another. By exchanging information you can make sure you know when other NGO's active in road safety are having events or launching reports so that you can support each other and not compete.

It will not help your campaign if other organizations are asking the same parliamentarians for different legislative changes in road safety at the same time. This is why **it is advisable to go one step further** than just sharing information, and to be formally cooperating and

coordinating. If you can harmonize what you are asking for so that you are all focusing on the same aim, then you are giving law makers a much clearer message, which in turn makes it much harder for them to avoid taking action. When your advocacy aims are completely aligned then it is possible to be in a collaborative partnership.

If your aims are the same, and you are each bringing different skills to the table, then sharing resources and helping one another becomes the natural path.

Level	Activities
<b>Level 1:</b> <b>Information Sharing</b> <b>and Communication</b>	<ul style="list-style-type: none"><li>● Talk with one another</li><li>● Willingness to help on an ad hoc basis</li><li>● Share information</li></ul>
<b>Level 2:</b> <b>Cooperation</b> <b>and Coordination</b>	<ul style="list-style-type: none"><li>● Undertake joint planning on specific campaign components</li><li>● Coordination meetings</li><li>● Factor in what partners are doing when planning and operating campaigns</li></ul>
<b>Level 3:</b> <b>Collaboration</b>	<ul style="list-style-type: none"><li>● Informal/Formal joint planning</li><li>● Joint activities and events</li><li>● Joint statements, press releases, and/or briefing documents</li><li>● Defined roles and responsibilities between different organizations sharing different roles within a campaign</li></ul>

### **What needs to be done?**

Effective campaigns often combine a broad group of high-level organizations and individuals with a smaller core group of organizations that have more time and resources to “drive” the campaign.

Steps for working together collaboratively include:

#### **1. Identify your campaign’s leadership team.**

This core group will drive advocacy strategy and make sure that day-to-day actions are completed. Keep in mind that the core group does not always need to include the same members. Different organizations can be more involved at certain points in the campaign.

#### **2. Agree on how you will work together.**

Once you have identified your core group, meet to determine how you will work together. Establish objectives and assign the activities you each will perform. Work out a system of collaboration that will fit your group. If this isn't clear from the beginning, disagreements may come up during the height of the campaign. Once you have agreed on how you will work together, write it down and share it among the group.



Also, it is very important that everyone in the group understands the campaign vision, goals and policy objectives. Ideally, you will want to build consensus. However, if this is not possible, having open discussions ahead of time will help the group to understand the positions of each member, allowing individuals to opt out of certain activities without causing disruptions.

### **3. Determine campaign chairs.**

Having a chair or co-chairs to lead the core group is essential. A chairperson's responsibilities include scheduling meetings, drafting agendas, chairing meetings, sharing minutes and making sure that people follow up on their action points. When you are chairing a campaign, keep in mind that:

- You are working for the good of the campaign. The more you work with people and make them feel important and respected, the harder they will work for the campaign.
- You do not have the power to make decisions on behalf of the group. You have to support and lead the group to take decisions together, which is often much harder and requires diplomacy.



#### **HELPFUL HINT:**

**While there are many benefits to working collaboratively, they can also bring challenges. Having too many partners can undermine your advocacy strategy, lead to ineffective communication, and cause a lack of cohesion. Sometimes competition between partners may arise. Luckily, these challenges can be overcome through careful planning and collaboration.**

### **4. Identify additional partners.**

Campaigns require a wide range of skills and expertise. The more partners in your campaign, the more likely it is that you will be able to handle any scenarios that arise. Remember though that it's not the number of partners but the range of expertise and level of commitment that will lead to success.

It is useful for the core group to brainstorm organizations that can strengthen your team. Do you have any skill gaps in your core group? If so, how can you address these gaps by bringing new organizations on board? Similarly, what resources are needed to achieve your policy goals and how will collaborating with others bolster those resources?

### **5. Identify sub-groups as needed. (Optional)**

Depending on your number of campaign partners and their areas of expertise, you might want to split into sub-working groups. Some examples include media or communications, grassroots mobilization, and lobbying. Sub-groups can be particularly important at times of heightened activity. Or you may choose to have sub-groups operating throughout your campaign. Either way it's important for sub-groups to share their outcomes and decisions with the full partnership.



## Building a Core Group Checklist

Before embarking on political mapping or strategic planning, you need two things in place: **1) your campaign's leadership team** and **2) a plan for how you will work together**. Follow this simple checklist to ensure cooperation and coordination among your campaign leadership team. The same checklist can also be applied to your campaign's larger partnership if you choose.

### ☒ Identify your Campaign Leadership Team

- ☒ Your campaign leadership team should be made up of no more than five to seven organizations. Otherwise, it can be difficult to reach consensus and/or make quick decisions. Include each organization's primary representative. Remember that your core group may change over time.

Organization	Representative
1.	
2.	
3.	
4.	
5.	
6.	
7.	

### ☒ Determine Policy Objective

- ☒ Your policy objective describes the change you want to see happen and helps to identify the actions needed to achieve it. While the core team does not have to agree on all aspects of a campaign, it is important to reach consensus on the policy objective since it provides the overall strategic direction.

Make sure your objectives are linked to policy change and existing evidence, and that they include the following: a policy actor(s) or decision-maker(s), the action or decision you want them to take, and a timeline by which you want them to act or decide. The Setting Policy Priorities tool provides guidance on how to develop clear policy objectives.

Policy Objective:

---

---

---



**HELPFUL HINT:**

It is also imperative to plan how you are going to communicate in times of crisis. Who will be involved in decision-making? What process will determine if a rapid response is required? What actions will be taken to mitigate it? The tool Managing Risks and Crises tool can help your core group with risk assessment and crisis management planning, including developing crisis communication processes.



☒ **Determine Group Communications**

- ☒ Your core group should determine how you will communicate with each other – email list, phone calls, face-to-face meetings, or some combination – and how often. Consistent communication among all core members will serve to strengthen your campaign. You may choose to increase or decrease the frequency of communication as necessary.

When we will communicate?

How we will communicate?


☒ **Agree on Responsibilities**

- ☒ It can be helpful to develop an outline of what each member of the campaign steering committee will be responsible for and how they will fulfill their commitment. (This may include financial obligations.) Have all organizations formally endorse the terms of reference.

The roles and functions of the Campaign Steering Committee are defined as:


### Identify Chairpersons

- ☒ Every group needs to have a leader and every meeting needs to have a chairperson. This position can rotate between organizations or it can be fixed. Either way it is essential to always have someone filling this role. Chairpersons can be selected via an election, volunteering, or being nominated.

**Chairperson(s):**

**Term:**

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

**☑ Identify Additional Partners.**

- ☑** Congratulations! Your core group is solidified. It is now time to identify and recruit additional partners for your campaign. Ideally, this will be done as part of a larger campaign action planning process. The Strategic Planning: How to Guide tool has a section on identifying broader partners expressly for this purpose. First, though, it is helpful to answer the following questions to help guide your partner selection. Use the following questions to assess your core group's strengths and gaps then brainstorm potential partners to fill in the gaps.

**1. What are our biggest assets and gaps as a core group?  
Which partners might fill our gap areas?**

---

---

---

**Section 3**  
Strong Partnership  
Coordination:  
A 5-Step Process

**2. Which partners have access to our policy targets and/or the strongest influence with our policy targets?**

---

---

---

**3. Which partners mobilize the public and stakeholders to speak out on our issue?**

---

---

---

**4. Which partners can get media attention on the issue?**

---

---

---

**5. Which partners are allies? Have we have worked with them before?**

---

---

---

**6. Which partners have available funds or resources?**

---

---

---

**7. Which partners have something to gain by collaborating with us?**

---

---

---

**8. Which partners do we have direct access to?**

---

---

---





#### HELPFUL HINT:

Complete the political mapping process as early as possible, ideally prior to developing your campaign plan. Once you've completed the mapping, regularly update it throughout the course of the campaign. Remember that the political map is a living document that reflects your current understanding of the political environment. As the political environment changes — as a result of an election or your advocacy efforts — your political map should, too.



## Political Mapping: How-to Guide

### Why is it important?

Preparing for an advocacy campaign can feel overwhelming. But conducting a political mapping during the early planning stages can provide clarity by helping you understand the complex policy-making process through which your draft bill or regulation must pass before becoming law or policy. It will also help you identify opportunities to engage with and influence decision-makers — knowledge that will be critical to your campaign's success.

Political mapping serves as the foundation for your campaign plan and can help guide decision-making throughout. The following mapping techniques can be applied whether your campaign is focused on passing legislation, reforming a regulation, issuing an executive order, amending a budget, or pushing for improved implementation.

### What needs to be done?

A political mapping exercise generally outlines the following:

- Government bodies and agencies with the power to approve, amend or reject your proposal;
- Steps and timelines for moving your proposal through these bodies and agencies, including opportunities for civil society input into the process;
- Important decision-makers during each step of the process, including their positions on your proposal and broader interests;
- Individuals and organizations able to influence the process and what might motivate them to champion or support your efforts; and,
- Potential opponents, motivations and tactics.

Once you have completed your political mapping, you can use this information to help you design advocacy activities and messages, as well as decide how to direct your outreach efforts. You'll also have the information you need to track the positions of your target decision-makers as they evolve.



**Imagine you are going on a journey. What features would you look for in a useful road map? Many of these will be shared by a good political map.**

**The right type of map.** A topographic map is useful for hiking in the mountains, but will not help you drive across a city. Similarly, a political map should be tailored toward your policy objective and the specific processes required for it to pass. If your initiative is focused on an administrative regulation, for example, a map that tracks the process for a law will not be useful.

**Directions.** A useful map tracks your start point, endpoint, and a way to connect the two. A political map should also track the political process from beginning to end, laying out all the steps in between.

**Up-to-date information.** A map of ancient Rome will not help you drive across Italy. Likewise, a political map must contain current information. Years can pass from the start of a campaign to the end. Decision-makers can change. Events may shift political priorities. Regularly refresh the political map.

**The right amount of information.** A World Atlas may contain all the maps of the world, but you probably only need a few of those pages for your journey. In a similar way, your political map does not need to include every single government body or department – only those details relevant to your policy objective.

At the same time, you need enough information to guide your way. Note where you have large gaps in information that might hinder your efforts, and make an effort to fill those.

**Easy-to-read.** Road maps cluttered with confusing icons and technical jargon may become unreadable. Likewise, your political map should be easy to read and understand. It is not intended to be a published, academic paper, but rather a tool for advocates.

**Alternative Routes.** A good road map shows you multiple routes so you can easily adjust your travel if an unexpected obstacle presents itself. A political map should also outline alternative avenues for reaching your policy objective.



## Getting Started

### Gather your team

Developing a political map is usually a collaborative effort, and you should assemble a small team of dedicated, knowledgeable colleagues and partners to help you populate your map. The size of the group will depend on the level of skill, knowledge, and trust existing between you and your partners. You'll definitely want to ensure that your political mapping team represents your campaign's core leadership. You may also want to engage a consultant, such as a policy/legal expert or a political insider, to conduct research or help you complete specific sections of your map. Journalists and friendly government officials can also be useful sources of information.

### Define your policy objective(s)

Before you begin, your team must reach a consensus on your campaign's policy objective(s), as that objective will set the direction for your policy mapping. The objective should address a gap or weakness in the existing policy environment and provide an evidence-based solution that your advocacy campaign can achieve. Your policy objective should be **Specific, Measurable, Achievable, Relevant, and Time-bound** or **SMART**. It should also contain the following three items:

- A policy "actor" or decision-maker - the person(s) or decision-making body with the power to make your desired change a reality.
- A policy "action" or decision - the specific action you want them to take or decision you want them to make.
- Timeline for change - The date by when you want them to act or decide.

The tool Setting Policy Priorities can help you and your partners to define your campaign's policy objective.

Your team should also agree on the overall purpose of the political map, including how it will be used and who will have access to it. Your political map will likely contain sensitive information that you may not want to become public. You will probably want to share the mapping with the team that is responsible for developing and implementing your overarching campaign plan, but be selective. Ultimately, the entire group will share responsibility for ensuring that sensitive information remains confidential.



---

### **Determine roles and responsibilities**

Once you have agreed on your policy objective, it's time to determine the roles and responsibilities for completing the mapping process. Appointing a “point person” or “map administrator” who holds overall responsibility for developing and maintaining the political map is a good first step. That person is usually central to the campaign and can then assign team members or outside experts to collect various information required.

Political mapping can be costly. Early on, the team should discuss what financial support and other resources will be necessary to complete the project. If you choose to hire outside policy or legal experts to help, ensure that you have adequate resources in place before you begin.

It's now time to complete your political map. Ideally, after conducting research, you'll complete the map together during a team exercise or workshop setting. During this process, team members can debate, discuss, and develop consensus, which will lead to a shared understanding and a more complete map. If such an exercise is not possible, an alternate option is for one person to compile the map using information gathered by the team members. Use additional sheets of paper as needed to complete your political map.





# Political Map

Define the Policy Objective
<p>The policy objective(s) addresses a gap or weakness in the existing policy environment and provides an evidence-based solution that your advocacy campaign can achieve. Your objective will set the direction for both your political map and overall campaign plan.</p> <p>Write your SMART policy objective at the beginning of your political map.</p>
Policy Objective(s)
<div></div>





**Determine the Policy-Making Process**

No matter what your policy objective is – passing or amending a law, issuing a ministerial regulation, reforming a budget, or some combination – you need to know and understand the appropriate legal and policy process that can make it a reality.

A general understanding of the political system in your country will allow you to identify the most relevant process. If you're unsure, then you may need to make your policy objective more specific or engage the help of an expert on the political system, like a policy expert or lawyer, in order to complete this section of your political map.

**Relevant Policy-Making Processes**



Identify Government Bodies and Departments

In the next step, you'll identify the government bodies involved in helping you achieve your policy objective. They may be executive, ministerial or legislative bodies, or some combination thereof. Depending on your policy objective and country's political system, you may also need to consider bodies at multiple levels of governance.

List the relevant government bodies as well as the specific departments or committees that will have a formal role in approving your policy objective.

NATIONAL	
Government Body	Departments and Committees

SUB-NATIONAL (e.g. provincial, county, district)	
Government Body	Departments and Committees

LOCAL (e.g. city, township)	
Government Body	Departments and Committees



## Outline Rules and Procedures

Each government body will have its own set of rules – both formal and informal – for approving, rejecting or amending any policy matter it considers. While there's no need for you to know every detail of policy-making procedure, a basic understanding will help you determine where and how your campaign can provide input into the process.

For each government body previously identified, answer the guiding questions below. Remember to include specific roles and responsibilities of departments or committees.

### Government Body:

#### Agenda-Setting and Approvals

How is a policy proposal introduced, prioritized and placed on their agenda?

How do they approve your policy objective?  
*Example: Majority vote, consensus, multiple individuals signing off*

What type of documentation must accompany your policy proposal  
*Example: supporting evidence, letters of support, economic analysis*

What happens after the government body approves the policy proposal?

What happens if they do not approve the policy? Is there another body that can override their decision?

#### Channels for Input

In what ways are their meeting processes open and transparent?  
*Example: notice of meetings provided, open to members of public, public records available.*

Who has the right or privilege to provide input into the government body? How is this input provided?  
*Example: topical experts*  
*Example: oral or written testimony, informal meetings or hearings*

Is there a public comment period before decisions are taken? When does this occur? What form do comments take?

Who must be notified once a decision is made? How are they notified?



Outline the Government Calendar

The policy-making process is often characterized by intense activity followed by long periods of little movement, and it's easy for policy advocacy campaigns to underestimate how slowly government bureaucracies move. While you may not be able to accurately estimate the timeline for most policy-making processes, mapping the annual government calendar can provide helpful clues for timing advocacy activities. It can also prepare you for times when events are likely to move quickly and when they might stall.

Calendar items to consider include the beginning and end of government sessions, timing of the annual budgetary cycle, elections, holidays and recesses. Enter those here.

January	February	March
April	May	June
July	August	September
October	November	December



Identify Decision-makers	
<p>The individual policymakers with formal decision-making power during the policy-making process are likely to become the primary targets of your advocacy outreach. These could include heads of state, ministers, permanent secretaries, and parliamentarians. In bodies where there are many decision-makers, such as a parliament, it is helpful to focus on specific members who sit on key committees, hold leadership positions, or are known as highly influential among their colleagues.</p> <p>When identifying decision-makers, be as specific as possible. Note down names in addition to titles or positions.</p>	
Government Body:	
Decision-makers	
Government Body:	
Decision-makers	
Government Body:	
Decision-makers	
Government Body:	
Decision-makers	





Identify Influencers

Once you have named your decision-makers, it's time to identify their key "influencers." Influencers are individuals who have sway over individual policymakers and hold informal power to move policy forward. Some of the most powerful influencers are government staff advisors since they prepare reports and recommendations on proposed policies. Other powerful influencers might include political party leaders and quasi- or non-governmental organization representatives. Consider which influencers are accessible to your campaign and could accelerate your efforts to reach and persuade decision-makers.  
As you did when you identified decision-makers, note down names and titles of key influencers.

Decision-maker	Influencers
Decision-maker	Influencers
Decision-maker	Influencers
Decision-maker	Influencers
Decision-maker	Influencers



**Determine decision-makers' Positions**

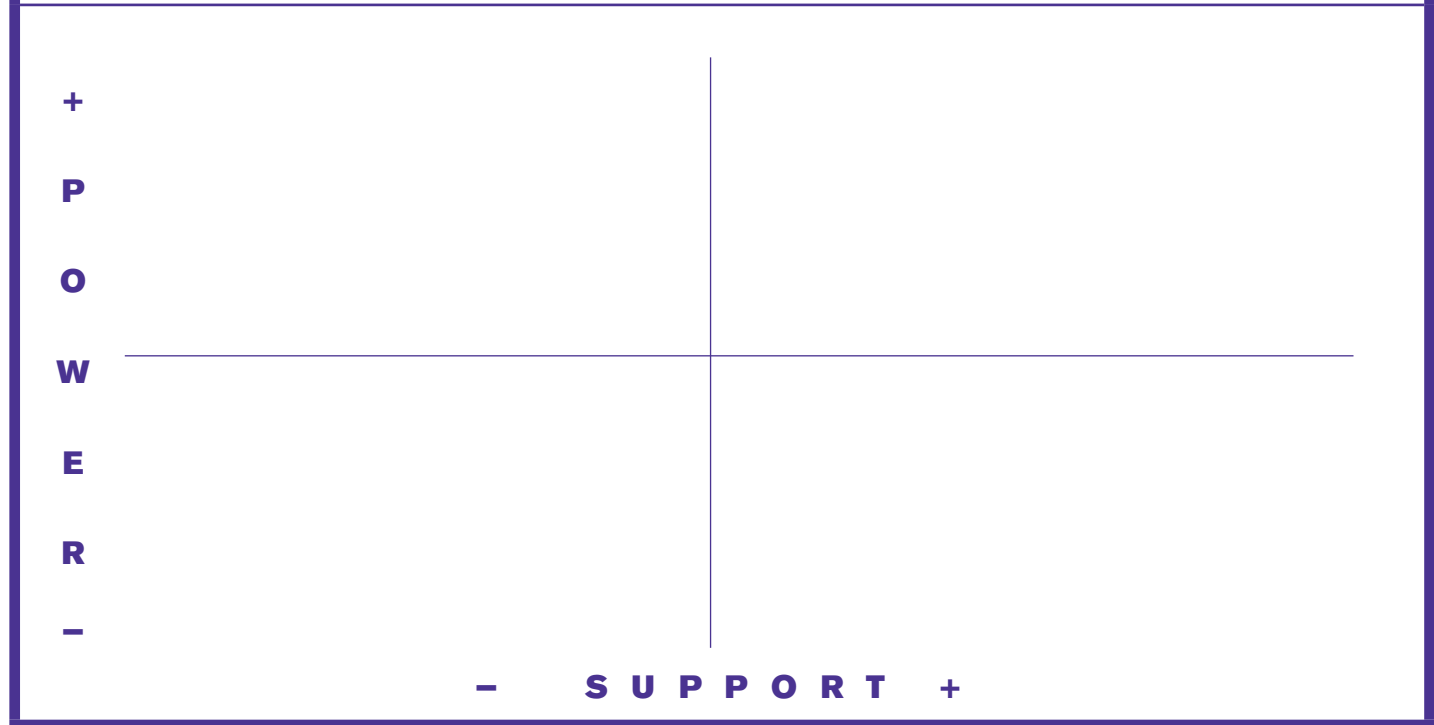
While identifying your decision-makers is important, you also need to understand their background and constituency, as well as their position on your policy objective and why they hold that stance.

To gather this information, you may need to meet with the decision-maker or their staff. Try to gather the following:

- Voting records
- Positions on comparable issues
- Public statements they have made
- Personal background and history
- Their base of support, including constituents, benefactors, stakeholders or interest groups
- Past and current relationship with the affected industry and its allies
- Self-interest with regard to your policy objective
- Superiors' or staff stance on your policy objective
- Potential political risk for taking a particular position

Once you have determined the position of a decision maker, plot them on the “power map,” which is a visual representation of both a policymaker’s level of power and his or her support for your issue. The vertical line represents how powerful the decision-maker is; the more powerful they are, the higher they should be plotted along the vertical line. The horizontal line represents their level of support for your issue; the more supportive they are, the further to the right they should be plotted. You can use this map to determine which individuals will be more receptive to your campaign, which will in turn help you decide where to direct outreach efforts. Try to ensure that you don't have too many decision-makers in the top left box, which would indicate high levels of power but strong opposition to your objective.

Revisit this section of your map often, in order to track how key decision-makers positions' shift over the course of your advocacy campaign.





Identify Policy Champions

Now that you have classified your key decision-makers' positions on your objective, you can use this information to identify potential policy champions. A policy champion is a decision-maker who will take a lead role in pushing a policy through the necessary steps to reach your objective. Picking the right policy champion(s) is important. Ideally you will work closely together to advance your shared policy goal. In addition to being a strong supporter who is willing to actively and vocally support the objective, your champion should also sit in a key position and be well respected and influential.

As you consider your power map, ask yourself who would be your preferred champions. Decision-makers in the upper-right corner tend to provide a good starting point because they are both supportive and influential.

Policy champions

Track Parliament Votes

If your policy objective requires approval by a parliament, it's critical that you know how much support there is for your objective at any given time. While you have already identified the key decision-makers and policy champions who will be your campaign's main targets, you should still track the positions of other members since you will need their support to achieve your goal.

In an excel spreadsheet, type the names and contact details of each member of parliament (MP) and categorize their level of support: supportive, neutral, or opposed. This is a quick-and-easy technique for coding and referencing large numbers of decision makers. You can use filters to sort as needed and organize mail merge emails at key moments. You will want to update this section often.

This list will likely be long, but you can concentrate your efforts by working with your policy champions to convert neutrals to supporters. By using this system you may also be able to advise your champion on when it is time to push for a vote and when to wait until there is sufficient support for your proposal.



Understand the Opposition		
<p>No matter how noble your cause, you can expect some form of opposition. Your political map should identify any groups or individuals that are likely to intervene against your policy objective. It should also detail the arguments that objectors are likely to use, and the decision-makers with whom they have influence.</p> <p>You can find information on opposition in the media and online. If you have strong relationships with key government staff, they may also be able to provide talking points, proposed language changes, and policy papers that can help you understand opposing voices. These staff relationships can be invaluable in keeping this section of your map updated.</p>		
Opponent	Arguments	Decision-maker Influence
Opponent	Arguments	Decision-maker Influence
Opponent	Arguments	Decision-maker Influence
Opponent	Arguments	Decision-maker Influence
Opponent	Arguments	Decision-maker Influence



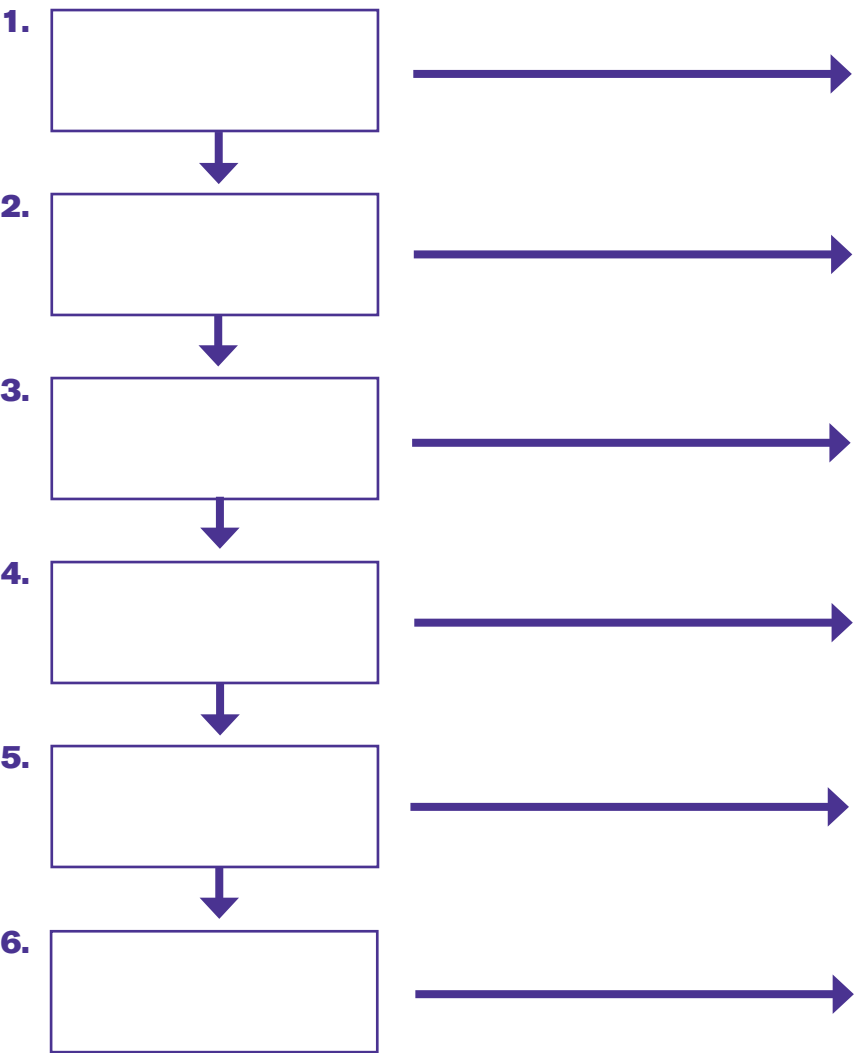
Put It All Together

Now that you have completed the necessary research, it's time to prepare a flowchart that shows each step in the political process that is necessary to achieve your policy objective. This simple diagram will provide guidance throughout your campaign planning and implementation.

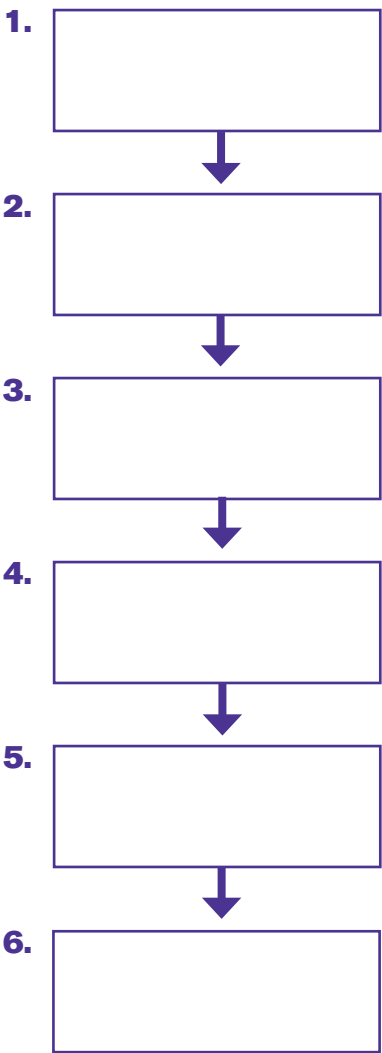
When developing your flowchart, try picturing your policy proposal being passed from desk to desk within the government. When it leaves one desk, where does it go next? Perhaps, a minister needs to approve your bill before it is submitted to parliament, but within the ministry several desks need to approve the bill before it reaches the minister. Your flowchart should show the progression from policy idea to final approval with every desk in between. It should also clearly delineate when and how you plan to exert influence during the process.

You can use the template provided as a guide for mapping the policy-making process. However, you may need to use additional sheets of paper to ensure that all steps are represented.

Policy-Making Process



Path of Influence



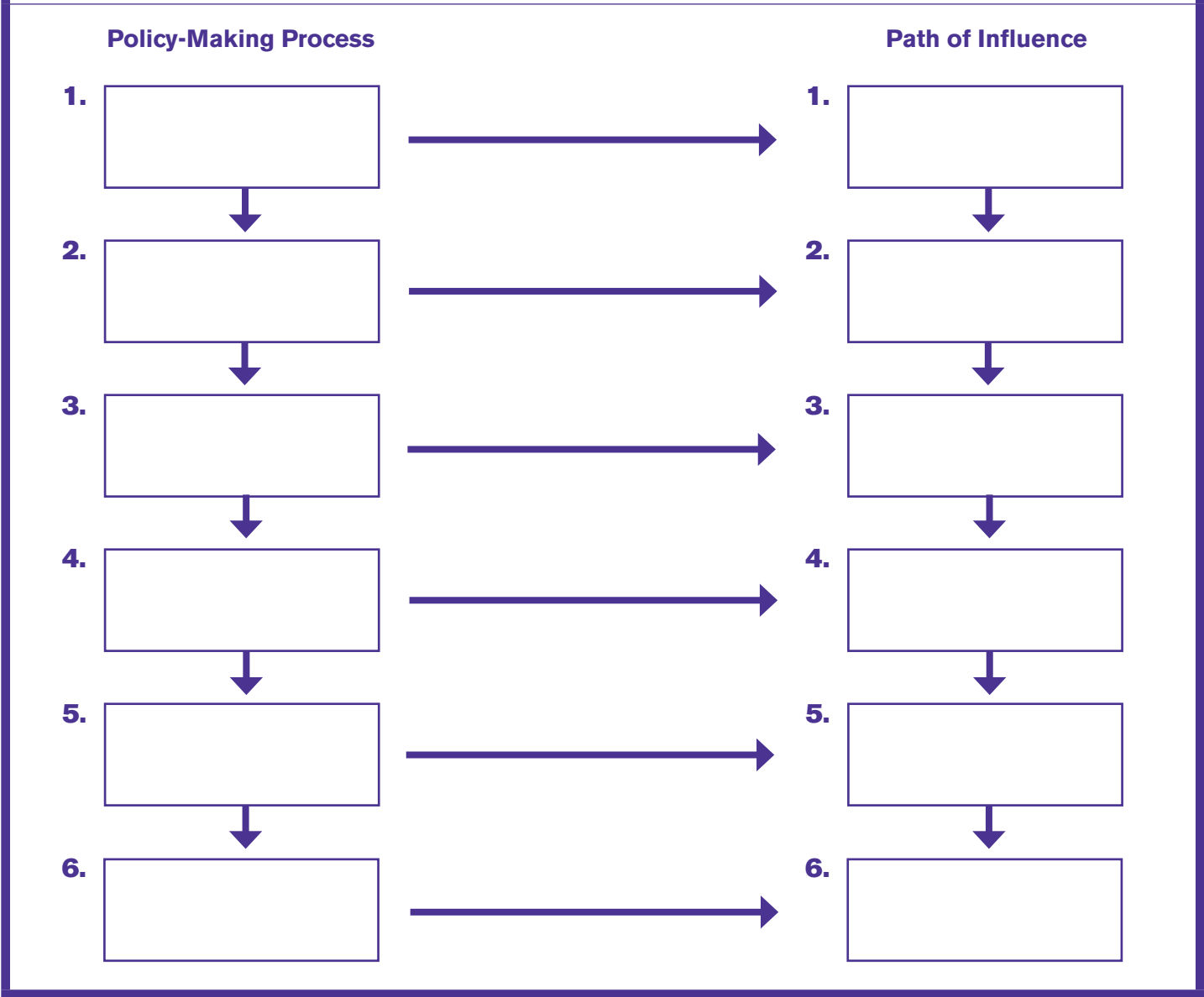




Identify Back-Up Paths to Success

Now that you have mapped the step-by-step process for approving your policy objective and your path of influence, it's important to critically examine your map for any alternate pathways so you can create a back-up plan. If the obvious path becomes stalled or blocked during your campaign, being able to deploy an alternate plan will be a major advantage. For example, consider that the key minister you were persuading to champion your policy objective as a government bill decides not to act. Is there a member of parliament who can introduce the legislation as a private members' bill? Answering this question, and others like it, before it happens will allow you to act quickly if and when circumstances change.

Use the template provided to map out alternative paths of influence throughout the policy-making process. If you only see a single path for success at this point in time, consider whether another policy-making process can be leveraged to make your desired change. For example, can a ministerial decree take the place of legislation? Can the budget process be used to move forward a topic that would not be supported as stand-alone legislation? While there's no need to map these secondary processes in extensive detail, it's important to consider them now.





## Using your Map

It's almost time to start developing your campaign plan. First, review your political map for any major gaps in information. While you don't need to know every detail of the policy-making process before you begin planning, it is important to identify where you have missing or incomplete knowledge so you can determine how to fill those gaps.

You will also want to develop a plan to continuously update your political map. You have just invested immense time, energy, and possibly resources, so you'll want to get the most out of it. Assign a team member to maintain your political map and present updates as part of regular meetings.

With the knowledge gained from your political mapping, you are now ready to develop a powerful campaign action plan!



**HELPFUL HINT:**

**Regularly update your action plan throughout your campaign. Remember that the campaign action plan is a living document that reflects the current advocacy environment – and that as the environment changes, whether as a result of an election or your advocacy efforts, so too should your plan. Examine the plan regularly to determine whether its initial strategies and activities are bringing you closer to achieving your policy objective. Designate periodic check-in times with the campaign leadership to review and revise your political mapping, monitoring and evaluation data, and campaign action.**

## Strategic Planning: How-to Guide



### Why is it important?

An action plan provides a practical roadmap for achieving your campaign goal and is a critical part of the campaign process. An action plan helps to refine policy objectives, set policy-maker targets, clarify roles and responsibilities among partners, and determine campaign strategies. Over the course of your campaign, you will use your action plan to guide strategic decision-making and help you effectively monitor progress.

### What needs to be done?

Campaign action plans can differ in format and level of detail, but they generally include the following types of information:

- Policy objective(s)
- Decision-maker targets and other key stakeholders
- Campaign strategies
- Communication tactics
- Partners

An action plan should also include a detailed work plan based on your selected campaign strategies. That workplan should highlight the following:

- Anticipated campaign activities and timelines
- Persons/partners responsible for carrying out the activities
- Required resources for the activities and who is providing them
- Indicators for monitoring activities and evaluating progress

A strong campaign action plan requires a thorough understanding of the political environment. Before you begin, do the necessary research to ensure that policy change is, in fact, the best way to address your public health concern. Examine the latest science and evidence in support of your public health issue, make certain you understand related laws and regulations and ensure that you've identified policy gaps. Also consider researching past advocacy efforts, so you know which strategies did or did not work. Your research should include creating a political map, which will detail the policy-making process and which decision-makers and influencers are involved.

Your action plan will be most effective if it is developed as part of a collaborative process among campaign partners. Identify a core group of organizations that can provide leadership throughout the planning period.



## Getting Started

---

### Gather your team

The size of your planning team may vary according to the scope of your campaign, but consider assembling a core leadership group of five to seven organizations that are skilled advocates and deeply dedicated to achieving your policy objective. (A larger group may prove unwieldy and make it difficult to reach consensus on critical campaign decisions.) Each of these organizations should send one or two senior-level representatives to participate in the action plan development process.

Whilst you are action planning, discuss which organization has expertise in a particular area, as well as resource constraints. This will help you to plan more effectively.

---

### Gather background information

Once you have determined your campaign's core leadership team, divide responsibility for gathering and summarizing existing background information related to your public health issue. This may include the following types of information:

- Global, regional, national, and/or sub-national mortality and morbidity rates
- Primary causes of morbidity and mortality
- Economic costs-benefits analysis
- Relevant literature reviews and scientific studies
- Global and regional best practices and standards, including WHO guidance
- Recent media coverage
- Existing laws and regulations and any gaps in policy and/or their implementation
- Model policies from other jurisdictions
- Historical attempts to change related policy and their outcomes (successful and unsuccessful)



As part of the research process, the team should also conduct a comprehensive political mapping (see the Political Mapping: How to Guide), which includes identifying:

- Steps and timelines of the policy-making process
- Government bodies and decision-makers engaged in the process
- Individuals and organizations that can influence the process – and their potential motivations for supporting (or not opposing) your campaign.

Your team can likely conduct much of the necessary research, but consider engaging technical consultants to address any complex research needs. This might include technical or subject-matter experts, policy/legal analysts, media professionals, or political insiders. Consultants will likely speed up the research process, though they may require financial compensation. Once the research phase has been completed, ask all researchers to develop one to three page summary briefs (approximately one to three pages). Package the summaries together and distribute for review in advance of action planning.

Prior to action planning, you will likely identify minor holes in your background information and political mapping. That's OK! As the campaign progresses, you will naturally uncover additional information. However, if you identify major gaps in required data or analysis, you may want to consider commissioning research studies, packaging evidence, or conducting your own analysis as part of your campaign strategies and activities. Discuss this as part of your campaign action planning.

---

### **Initiating action planning**

Complete the action plan with your leadership team over a one- or two-day period. In a group setting, participants will find it easy to share, debate and discuss information and ideas, which will help foster shared ownership and result in a more complete plan. The action plan can be completed either by the entire group or with small groups that work on specific sections and then re-convene as a large group to review and finalize content.

Consider identifying an external facilitator that can help guide your leadership team to complete the plan. A good facilitator can help all team members to fully participate, minimize power dynamics and conflicts, encourage in-depth discussion, ask clarifying questions, and help your team to arrive at consensus.

The campaign guidelines *Essential Elements of a Policy Advocacy Campaign* may be a useful resource for you, your campaign leadership team, and/or your external facilitator as you complete your advocacy action plan. Share before action planning.





Campaign Action Plan

Refine Policy Objective

Before you begin planning, you should already have a strong sense of your policy objective. Ideally, a shared policy objective is what brought you and your campaign partners together and guided your political mapping. During action planning, take the time to review and refine your policy objective as appropriate.

Remember: policy objective(s) represent the change you want to see happen, or the goal you are working towards, and as such set the direction for your overall campaign plan. Your policy objective should address a gap or weakness in the existing policy and provide an evidence-based solution for your advocacy issue. Your policy objective should be **Specific**, **Measurable**, **Achievable**, **Relevant**, and **Time-bound** or **SMART**. It should also contain the following three items:

- A policy “actor” or decision-maker - the person(s) or decision-making body with the power to make your desired change a reality
- A policy “action” or decision - the specific action you want them to take or decision you want them to make.
- Timeline for change - the date by when you want them to act or decide.

The tool Setting Policy Priorities can help you and your partners to further refine your campaign's policy objective.

Policy Objective(s)



Campaign Action Plan

Determine Policy Provisions and Non-Negotiables

Now that you've defined a policy objective as a starting point for your campaign action plan, your team needs to determine what policy provisions and specific language you would like to see included.

Based on background information you've collected prior to the meeting – in particular any global standards and examples of model policies – as a group list the main provisions you want to see included in the proposed policy. This will help you come to consensus on your “gold standard,” or ideal policy.

Next, identify the possible provisions you would oppose and discuss the reasons why.

Because quick decisions may need to be made during a campaign about whether to support a proposed compromise, your group should use this opportunity to anticipate possible compromises and what you are willing or unwilling to accept. Review each provision together and decide if there is an acceptable compromise.

If there is no compromise, then these are your non-negotiable items.

**Keep this part of your action plan confidential.** If opponents know in advance what you are willing to compromise, that may weaken your chances to secure the strongest possible policy

“Gold standard” provisions	Possible compromises
1)	1)
2)	2)
3)	3)
4)	4)
5)	5)
Provisions to oppose	Possible compromises
1)	1)
2)	2)
3)	3)
4)	4)
5)	5)

Non-negotiables:



Campaign Action Plan

Identify Policy Targets		
<p>Now that you have refined and expanded upon your policy objective, it is time to prioritize your policy targets. Targets include key decision-makers with the power to make your policy objective a reality and their “influencers” within the policy-making process. Your list of policy targets should also include other stakeholders – such as non-governmental organizations, academic institutions, media members, constituent groups, and private sector representatives – that you can leverage to effectively reach and persuade decision-makers and influencers.</p> <p>Reference your political mapping, in which you outlined the decision-makers and influencers engaged in the policy-making process, to help you in this prioritization exercise. You might not have the time, resources or access to target everyone included in your political mapping, so be thoughtful and specific about those who you will target for support.</p>		
Decision-maker (name and title)	Their Influencers (names and titles)	Stakeholders (may include individual names, organizations/groups or categories of people)

## Determine Strategies

- Providing policy support by drafting legal or technical language
- Monitoring implementation of policies and highlighting gaps in follow-through to decision-makers, media and the public
- Cultivating key policy champions to lead efforts in parliament or relevant ministries
- Building support for your policy objective within key government agencies and ministries
- Conducting outreach with policy-makers to marshal support or votes
- Using media to activate public dialogue and influence policy-makers
- Mobilizing grassroots supporters to voice support for your policy
- Building coalitions of key stakeholders to conduct outreach and build support
- Gathering, packaging and disseminating evidence

[illegible]

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Campaign Action Plan

Plan Communications

No matter which strategies you've chosen, communications will be an integral component of implementation. Review your list of individual policy targets and organize them into categories of potential audiences for your communication efforts (e.g. parliamentarians, ministerial leaders, technical experts, health professionals, health activists, journalists). Once you have defined your audiences, determine the most effective communication channels, materials and messengers to reach them. Be as specific as possible. Channels are information conduits, like newspapers, social media sites, community meetings, or town halls. Materials are the communications tools, like briefing papers or SMS messages. Messengers are specific individuals, like a staff deputy or a respected colleague with influence over your target. During action planning, it can be useful to have individual small groups identify the channels, materials and messengers for your different target audiences.

Following development of your action plan, the tool Developing Advocacy Messages can be used to help craft targeted and persuasive messages for your various campaign audiences.

Audience	Channels	Materials	Messengers





NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Campaign Action Plan

Address Opposition

Nearly every advocacy campaign will encounter some form of opposition. As part of your political mapping, you identified groups or individuals with the potential to intervene against your policy objective, the arguments they use, and the decision-makers over whom they have influence. As part of your strategic campaign planning, you now need to consider how you will monitor and mitigate opposition activity throughout your campaign.

Following development of your action plan, the tool Developing Advocacy Messages can be used to help craft effective arguments and messages to counter opponents.

Opponents	What types of information/ resources will you monitor in order to learn about opposition activity?	How will you get the information?	Who will get the information?	What types of actions will you take to preempt or mitigate opponents' efforts to defeat your policy objective?



NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Campaign Action Plan

Identify Partners

Your campaign leadership team is responsible for the day-to-day management and implementation of your plan, but additional partners can be invaluable. Identifying and mobilizing a range of old and new allies willing to speak out in favor of your objectives is one of the most powerful methods for building policy-maker support. You can utilize additional partners to help reach specific policy targets, carry out your strategies, support communications, and monitor and mitigate the opposition. Map out the potential partners you want to support your action plan and the specific roles you want them to play. Then identify the person on your campaign leadership team who is responsible for recruiting them.

Partner	Desired Role	Recruiter

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Campaign Action Plan

Finalize Workplan

You are almost finished! It's now time to combine the various elements of your overall campaign plan into a detailed workplan. While many campaigns last more than a year, having an initial workplan of about 12-months is extremely useful. For each of your main strategies, your work plan should delineate activities, needed resources, responsible persons and approximate timelines. In addition to reflecting your critical strategies, make sure your work plan captures intended communication activities, as well as efforts to monitor and mitigate the opposition and mobilize partners.

Your work plan also includes space for monitoring and evaluating whether your activities are bringing you closer to achieving your policy objective. At this point, you will want to create indicators to measure success. The documentation column can be used to verify indicators following completion of your activities. During work planning, it can be useful to have individual small groups complete the tables for the various strategies you identified.

Strategy:

Activity	Resources	Person(s) Responsible	Time-frame	Monitoring & Evaluation	
				Indicator of Success	Documentation



## Using your Campaign Action Plan

Congratulations! You have completed your campaign action plan. Before you begin implementing, review your plan one last time to ensure that you can realistically accomplish the activities you laid out and you did not overlook any key opportunities. Make note of any missing information in your action plan and determine how you will fill those gaps.

Next, take the time to determine when and how your campaign team will regularly review and update your plan. Specifically, discuss the frequency of your review and update meetings, methods of communication and data review, and approaches to decision-making (e.g. consensus, majority-vote or other). Consider who else may need to learn about your plan and whose feedback you want to capture. While your action plan may contain sensitive information that you won't want to become public, you may need to secure the buy-in of important stakeholders like policy champions or other committed partners. Think carefully about how to gain buy-in without breaching confidentiality.

Finally, discuss any potential risks or threats to implementing your action plan and determine how the campaign leadership team will respond if a potential crisis were to arise. This should include specific roles and responsibilities and will help to minimize negative impact to your campaign. The tool Managing Risks and Crises can help your team to assess and anticipate risks and develop an appropriate crisis response plan.

**You are now ready to begin implementing. Good luck on your campaign!**



**HELPFUL HINT:**

Using one convincing fact or figure in a key message can be very powerful. But including more than one statistic can cause a message to become confusing and lose its effectiveness.

## Messaging



A critical component of your advocacy campaign is developing and delivering the messages to communicate your policy goals to the people who can make the changes that will help you meet your objective.

Identifying your target audiences, formulating key messages, and choosing the most effective spokesperson and channel to communicate those messages are all important pieces of your advocacy campaign. Once you know your target audiences, your next step will be developing convincing messages specific to each. Depending on your audience and the action you want them to take, your message may change slightly. Your method of delivering the message will also vary, based on the most effective means of reaching your audience.

To formulate your key messages, you'll need to answer the following questions:

- What is the problem?
- Why does it matter?
- What is the action that needs to be taken?
- When does this action need to be taken by?

---

### Key overall message

First, develop a top-line, or overall, message. The top-line message sums up what policy needs to change, outlines the campaign's objective, and describes why it's important. All other secondary messages focused on specific audiences should be developed from this one.

For example, if you were working on passing a road safety helmet law in Thailand, your key message could be:

- 50,000 people die on the roads every year in Thailand. Strengthening Article 17 of the Traffic Law now, making helmet wearing compulsory, will save lives by preventing head injuries. This law will ensure everyone, including small children, are covered.

After the overall key message is formulated, more specific secondary key messages can follow. For example, if focusing on the compulsory use of children's helmets, you could use the following secondary message:

- Children under six are the most vulnerable to accidents and death, yet they are currently not required to wear helmets. Article 17 of the Traffic Law needs to also protect Thailand's children. The future of Thailand is dying on our roads.

### Messages for different audiences

Your campaign will most likely have multiple audiences, each of whom can influence the final decision in a different way. In order to make a message appealing to the group that you are targeting, you need to consider “what’s in it for me” (WIIFM) from the perspective of each target audience.

When communicating to policymakers and other influencers, your message needs to convey exactly what you want them to do and why they would want to do it. To create this part of the message, put yourself in their position and establish their reasons and motivations for championing your campaign’s policy change.

If we were to again focus on a Thailand helmet law as an example, the Minister of Transport WIIFM could be:

Minister of Transport – WIIFM	
Lowering the number of deaths on the roads	Bring Thailand up to speed with global best practise in road safety
Had a young nephew that died in a motorcycle crash	Getting a popular law passed that can be used as political leverage by the Minister’s political party

To construct a message for this Minister you should clearly describe the action you need him or her to take, why this action is needed, and why he or she would want to champion your cause based on “what’s in it for me.”

- “50,000 people die on the roads every year in Thailand. Changing Article 17 of the Traffic Law now to make helmet wearing compulsory will saves lives. Thailand citizens overwhelmingly support a stronger road safety law that follows international best practice and helps protect children on the road. This change will help establish Thailand as a global leader in road safety.”

You should create a variation of the main message for each audience, tailored to its needs and motivations. Keep in mind that every message, regardless of audience, should include your advocacy ask. It is also important to ensure consistency between primary and secondary messages. For example:

- When speaking to mothers, communicate how the law can save their children’s lives, why it is important and how their support can influence decision makers.
- When speaking to journalists, provide evidence-based information in a format that is easy to read and understand. Be sure to include a news hook such as new data, a human interest story, or an update on where the legislation stands.





### **Constructing Your Message**

**ADVOCACY OBJECTIVE:**

**TARGET AUDIENCE:**

**WIIFM RESULTS:**

**Core Message 1 – What is the problem?**

**Core Message 1 – What is the problem?**

**Core Message 3 – What is the action that needs to be taken? When does this action need to be taken by?**



#### Delivering your message

Once you have developed your messages, the next step is to decide on the most effective delivery method. There are three different categories of communication channels: earned, paid, and owned. Each category has its benefits and challenges, and careful consideration should be given to which channel will be most effective in reaching your target audience. The chart below will help you decide which category will best suit your needs.

Once you have the category identified, you will then need to decide which specific channel will be most effective. For example, if earned media is the best way to influence a policymaker, should you reach out to reporters with a press release, an op-ed or a press conference? Think not only through the best way to reach your audience, but also the time and resources that each channel will require.

Media Type	Examples	Role	Benefits	Potential Challenges
<b>Earned</b>	<ul style="list-style-type: none"> <li>Articles generated by a news event, or by pitching a newsworthy story to a journalist through a press release, press conference, etc.</li> </ul>	<ul style="list-style-type: none"> <li>To generate debate in public dialog</li> <li>To raise awareness of the issue, causes and solutions</li> </ul>	<ul style="list-style-type: none"> <li>High credibility; earned media seen as unbiased.</li> <li>High impact.</li> <li>Potential for wide reach.</li> </ul>	<ul style="list-style-type: none"> <li>No control over the story.</li> <li>Can be negative.</li> <li>Hard to measure response or impact.</li> </ul>
<b>Paid</b>	<ul style="list-style-type: none"> <li>Public service announcements</li> <li>Display ads</li> </ul>	<ul style="list-style-type: none"> <li>To reach a specific audience at a specific time and place</li> </ul>	<ul style="list-style-type: none"> <li>Can be timed and planned to your schedule.</li> <li>Total control of contents.</li> <li>Can measure reach and frequency.</li> </ul>	<ul style="list-style-type: none"> <li>Lacking credibility. Many view paid media as they do a commercial or ad.</li> <li>Expensive.</li> </ul>
<b>Owned</b>	<ul style="list-style-type: none"> <li>Websites</li> <li>Email (Newsletter)</li> <li>Blog</li> <li>Twitter account</li> <li>Facebook page</li> <li>YouTube</li> <li>Mobile text message</li> </ul>	<ul style="list-style-type: none"> <li>To raise awareness</li> <li>To engage and mobilize your audience to take action.</li> </ul>	<ul style="list-style-type: none"> <li>Ability for two-way relationship with audience Cost effective.</li> <li>Potential to go viral.</li> <li>Messages are shared peer-to-peer, authentic messengers</li> </ul>	<ul style="list-style-type: none"> <li>Takes time to scale and cultivate an audience.</li> <li>Conversation is not controlled but rather facilitated Needs dedicated staff to post and respond on daily basis.</li> </ul>

Once a channel has been chosen, the message should be tailored for that particular communication channel. Each channel has a format that is generally used and the message needs to be tailored for that format. For example:

- For social media you'll need to modify your message to fit the format, as platforms such as Twitter only allow for 140 characters. Helpful hint: Choose hashtags that communicate key element of your message, such as #helmetssavelives or #passroadsafetybill
- A press release targeted at media needs to be timely, include a newshook, and be no longer than two pages.
- A paid print ad should include compelling visuals to attract attention and be no larger than one page.

Target Audience	Communication Channel	Example Key Message for Specific Channel

### When the message changes

During the campaign, you'll want to review your message at various times, based on changing circumstances. For example, there may be times when a law is being debated but does not include the non-negotiable provisions that make up a strong and effective public health law. In response, you may consider revisiting your messages and tailoring them to that situation. The following are times when you may want to consider a proactive, tailored response:

#### WHICH UNANTICIPATED EVENTS WARRANT A TAILORED RESPONSE?

- ✓ Threatens to weaken or stop enactment of an effective policy
- ✓ Discredits a strong supporter or advocacy group
- ✓ Provides new and counter arguments that might be accepted by the public or decision makers
- ✓ Violates an existing law
- ✓ Publicly overwhelms your messages, e.g., a billboard campaign
- ✓ Reveals corruption, lack of transparency in the policy process
- ✓ Reveals close ties between a policymaker and the opposition that could derail your campaign

## Section 6 Messaging

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

### Unexpected Incidents During Your Advocacy Campaign: Should You Tailor Your Response Or Not?

Put an X next to each that holds true for your unanticipated event.								
	Threatens Policy	Discredits Supporters	Counter Arguments	Violates Law	Overwhelms Messages	Reveals Corruption	Reveals Close Ties	Should You Tailor Your Response or Not??
Unanticipated Incident:								
Unanticipated Incident:								
Unanticipated Incident:								
Unanticipated Incident:								
Unanticipated Incident:								

Re-evaluating your messages from time to time is good practice during any campaign. Most often, if your key message is strong enough it will withstand any changes to the campaign, but at times it may be useful to update secondary messages to remain relevant. When faced with opposition or criticism from opponents that ultimately do not impact your policy objective, it is important to stay on message and not diverge.



## Talking with Policy-Makers

As part of political mapping and campaign action planning, you should have identified key decision-makers and influencers you want to target. The next step is to persuade them to take action on your policy objective. Follow the checklist below to help build relationships with your policy targets and effectively engage them in your policy advocacy campaign.

Remember: your time will be best spent on those who support the policy objective and those who are neutral or undecided. Staunch opponents are rarely converted. Nevertheless, it is important to understand all opposition arguments and be prepared to counter them.

---

### Before Meeting with Policy-Makers

#### ☒ Do your research

- ☒ Review your political mapping, which should provide basic information on your target(s), including their position on your issue – supportive, neutral or opposed.
- ☒ Update your political mapping with any new information on your targets' background, other issues they support, and their interests in public health.

#### ☒ Prepare what you are going to say

- ☒ Use your research to help you define your objective (or “ask”) for the meeting and determine any key facts or statistics that will help you make your argument.
- ☒ Consider which messages will be most compelling to an individual policymaker and adjust accordingly. It is important to know what to emphasize (and what NOT to emphasize) to win people to your cause.
- ☒ Boil your message down to two to three main points that provide a clear and rational argument for why they should support your cause. Policymakers are busy people. You often won't have a lot of time with them to make your case.
- ☒ Anticipate any opposition arguments and be prepared to respond.
- ☒ Practice delivering your talking points with colleagues or friends and adjust content as necessary.

## Section 7

### Talking with Policy-Makers



#### HELPFUL HINT:

When developing an advocacy message, put yourself in your target's shoes. Why should they be interested in or care about the issue? It may not be the same reason as your own. Use the Developing Advocacy Messages tool to help craft targeted and persuasive messages for your various policy targets.



#### HELPFUL HINT:

If the solution to your issue lies in policy change, then your brief should contain language that will help elicit that change. If the solution lies in more effective implementation of existing policies then the brief should give practical examples of what actions need to be taken. The key thing to remember is your policy brief should be solution-oriented.

#### ✓ Develop materials to leave behind

- ✗ Create a two-page policy brief that outlines the problem, provides supporting evidence, and defines solutions. The policy brief can provide information you were unable to cover in the meeting and serve as a reference point for the decision-maker after the meeting.



#### ✓ Arrange an introduction and meeting

- ✗ Does anyone in your network have good relationships with your targets? Ask them to introduce and recommend you. This helps to cultivate good standing with the policymaker.
- ✗ Organize a 30-minute meeting with your policy target via email, phone, or letter and outline what you would like to discuss. Remember, policymakers are busy; you don't want to take up too much of their time.
- ✗ Cultivate good relationships with your targets' assistants and advisers. Often it is the staff that will determine your level of access.
- ✗ Develop an internal agenda that outlines the time you have with the policymaker and the topics you wish to cover. You may not be able to lead the meeting (the policymaker may wish to), but having an agenda helps ensure that all the most important issues are addressed in the time allowed.

---

### When Meeting with Policy-Makers

#### ✓ Have the right people in the room

- ✗ Do not send a junior staff member to meet with a senior official. For example, if it is a first meeting with a very important cabinet minister then brief your chief executive and have them conduct the meeting. If the meeting concerns legal text options, include a lawyer who can advise on legal language.





**HELPFUL HINT:**

If you don't have the answer to a policymaker's question, be honest and say so. Do not make something up. Tell them that you will get the information, and then keep your word.



☒ **Have a clear request**

- ☒ Know the responsibility or level of authority of the person that you are meeting so you understand what they can and cannot do to help your cause.
- ☒ Make a specific request and leave with a clear outcome. Your request may vary from asking the policymaker to take a specific action on your issue to simply meeting with you again.

☒ **Clarify next steps**

- ☒ Note any requests for additional information or questions for which you were unable to provide answers. Promise to provide the information soon.
- ☒ Close the meeting with a clear picture of the next step and which party is responsible. Note if you have agreed to remain in touch via email or phone or to meet again in person.
- ☒ Distribute your policy brief. It is a good idea to have contact information included in the brief.

---

**After Meeting with Policy-Makers**

☒ **Conduct follow up**

- ☒ Always follow up the meeting in writing. Send an email thanking the person for their time, summarizing the conversation that took place, and detailing next steps and their timing.
- ☒ Answer any outstanding questions, provide requested information, and send them to the policymaker and their staff in a timely manner.

☒ **Assign a main contact**

- ☒ Identify one person from your organization or coalition who will be the primary point of contact for each policy-maker. Main contacts should have strong interpersonal skills and follow-through.

## Section 7

### Talking with Policy-Makers



#### HELPFUL HINT:

While more than one person from your organization may interact with the policy-maker, ALL communications should funnel through your group's main contact. Clear relationship management will make sure that communication is not duplicated—or worse, forgotten!

#### ✓ Cultivate on-going communication

- ☒ Regular communication by phone, email, or in-person helps your organization demonstrate expertise and offer assistance as needed. A one-time meeting is unlikely to turn a decision-maker into a policy champion.

#### ✓ Be a regular resource

- ☒ Provide your targets with background information and model policies, such as examples of strong legislation from other countries.
- ☒ Make yourself available as an expert for timely, accurate information about your issue.
- ☒ Offer to assist policy-makers in developing statements and drafting policy language.

#### ✓ Seek policy-maker counsel

- ☒ Ask for advice and/or information from policy-makers and their staff, such as recommendations for other decision-makers to contact and suggestions for how your network can help them throughout the policy-making process.

#### ✓ Maintain confidentiality

- ☒ Protecting information told to you in confidence is critical. Always clarify whether information your contacts provide is public or private. Even if you aren't able to use it publicly, it might help to inform your strategies and tactics.

### CAN'T GET A MEETING WITH A DECISION-MAKER?

If you are struggling to schedule an initial meeting with your target, try these other strategies for making face-to-face contact:

- ✓ Organize events such as round-table discussions, panels, workshops and report launches. These are an excellent way to engage policy-makers and grow your support base. Make sure to capture the contact information of attending policy-makers and introduce yourself at the event.
- ✓ Attend events you know policy-makers will also be attending.
- ✓ “Bump into” them in an informal setting, such as at a restaurant or worship services. Use these instances primarily as a chance to secure a time for a meeting. Don't go into too much detail.
- ✓ Enlist friendly journalists to call the policy-maker as research for an article. This helps the policy-maker see your issue as one they need to be briefed on.



## Managing Risks and Crises: Planning Guide



### HELPFUL HINT:

**When a high-risk/high-reward opportunity arises during your campaign, you can apply a risk assessment to help you decide whether or not to engage in the activity and/or how to mitigate any associated risks.**

### Why is it important?

The advocacy process is dynamic and ever-changing. Over the course of your campaign, unanticipated events may arise with the potential to derail your campaign efforts. While it is not impossible to foresee every crisis, conducting a risk assessment and developing a complimentary crisis management plan early in your campaign enables you to respond rapidly and minimize the damage should a crisis occur.

### What needs to be done?

You will first want to conduct a risk assessment, using a risk matrix, following development of your campaign action plan. A risk assessment is the process by which your team tries to understand the potential risks to your plan. Next, your team will want to engage in contingency planning, where you develop strategies—including specific roles and responsibilities—to mitigate risks and respond efficiently to crises.

In order to work through the risk assessment and crisis management plan templates included in this guide, you will want to gather a core group of campaign partners. Ideally, these will be the same partners who developed the campaign's action plan. The campaign leadership team should complete these elements in a group setting so that ideas can be debated, discussed, and built upon—making for a more complete plan. This process should take no more than a few hours..

Your risk assessment and crisis management planning documents should be completed at the beginning of a campaign. However, similar to political mapping and campaign action planning, both are living documents that should be regularly updated to reflect changes to the advocacy landscape and any new or emerging threats.

#### Risk Assessment Matrix

As you complete your risk assessment matrix you will want to reference your campaign action plan with an eye toward identifying what disruptions may occur. In brainstorming potential risks, you will want to consider where and when things are likely to change and what outside factors may impact or influence your campaign. Use additional paper as needed.

#### Rank Potential Risks

In the left-hand column, list factors likely to impact your campaign. Common risks include:

- Elections that cause a policy champion to lose a seat or be reassigned
- Policy champions or partners' positions on other issues negatively affecting others support for your campaign
- Partners not fulfilling their parts of the campaign action plan
- Opponents receiving high-profile attention for a report or interview that voices opposition to your argument
- No resources to sustain campaign action plan over the long-term

Once you have brainstormed the various risks – including those unique to your particular campaign – identify the potential consequences of each risk in the second column. In the next two columns, you will want to evaluate both the probability of the risk occurring and the threat it poses to the campaign. Finally, you will use these two criteria (probability and threat level) to provide an overall risk assessment of low, medium or high. This will inform the amount of time and energy your campaign should spend monitoring and mitigating the risk.

Risks that are high probability and high threat are clearly high risks overall. Similarly, low-probability and low-threat risks are low risks overall. When a risk presents a combination of high, medium or low rankings, the overall risk is less clear cut. Make sure the team weighs the variables and comes to consensus on in order to determine how much attention the risk deserves.

Description of Risk	Potential Consequences	Probability of Risk	Threat Level	Overall Risk
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low

## Section 8

### Managing Risks and Crises: Planning Guide

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low

#### Monitor Risks

For risks ranked high or medium overall, your campaign team will want to plan how to monitor them over the course of the campaign using the criteria below.

High or Medium Risk	What types of information/ resources will you monitor in order to learn about risk?	How often will this information be monitored?	Who on the campaign team will monitor the information?	How (and when) will they share it with their wider campaign team?

Risk Assessment Matrix

Mitigate and Manage Risks

Your campaign leadership team will want to brainstorm ways to reduce the chance that high or medium risks will happen and/or lessen their impact should they occur. Common strategies include:

- Preparing talking points, messages or communication materials for the team to reference if a risk occurs
- Identifying and developing additional champions if leads cannot continue on with the campaign
- Deciding in advance how the team will respond if partners are not able to carry out their assigned roles or planned actions
- Developing a fundraising plan
- Pro-actively countering opposition arguments to key decision-makers and influencers

Don't limit yourself to these strategies, however. Make sure you design actions that address risks unique to your particular campaign. Be as specific as possible in describing the types of steps you will take, using the columns below as a guide.w

High or Medium Risk	Risk Mitigation and/or Management Actions	Resources Needed	Persons Responsible	Timeframe



NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Crisis Management Plan

When a risk that you've identified as a possibility occurs, crisis management is relatively straightforward. You simply enact your contingency and management plan and adapt as needed.

In many campaigns, however, crises will occur that you were unable to anticipate. In these instances, it is important to have campaign protocols in place that allow you to take immediate, direct action.

Set Criteria

Not every unanticipated event is a "crisis." That means you and your campaign leadership team will want to establish criteria you can apply to help you decide if you want to respond and implement your crisis management plan.

In the left-hand column below, list the different criteria you intend to use. Examples of criteria might include whether the event:

- Threatens to delay, weaken or stop enactment of an effective policy
- Provides new counter arguments that might decrease public or decision-maker support
- Publicly overwhelms your messages, e.g., an aggressive paid media campaign
- Reveals corruption, lack of transparency in the policy-making process

Then for each of the criteria, rank the unanticipated event as high, medium, or low in the right-hand column. Next, total the number of highs, mediums, and lows. While there are no absolutes, events with several highs and mediums will likely require your team to respond.

Criteria	Unanticipated Event:
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low

## Section 8

### Managing Risks and Crises: Planning Guide

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
<b>Totals</b>	<b># of Highs</b> ____ <b># of Mediums</b> ____ <b># of Lows</b> ____
<b>Implement Crisis Management Plan</b>	<b>Yes</b> ____ <b>or No</b> ____

Crisis Management Plan

Define Roles and Responsibilities

When a crisis occurs, knowing the roles and responsibilities of campaign team members in advance – such as who can make decisions and who can serve as spokespeople – will help your team respond rapidly. Use the chart below to help establish your crisis management leadership team.

Crisis Role	Responsible Person
Crisis Point Person: Directs all activities throughout the crisis phase.	
Final Decision-maker(s): In a crisis, turnaround time is crucial. Identify someone who can make clear and decisive decisions, or establish a system for getting clear and decisive decisions from a group quickly. Generally, the fewer people whose sign off is required, the faster you will be able to act. The final decision-maker(s) does not necessarily have to be the same as the point person.	
Spokespeople: Delegate persons who are permitted to deliver messages and speak publicly on behalf of the campaign throughout the crisis.	
Communications Person: Identify whose role it is to continue to monitor the situation and keep the rest of the team informed of any decisions and actions at all times.	
Other: Include any other roles your team believes are relevant for your policy advocacy campaign.	

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Crisis Management Plan

Develop Response Plan

Once an event occurs, your crisis management leadership team should come together immediately to develop an action plan. This will save valuable time and prevent disorganization. Use the chart below to establish objectives, strategies, and specific activities. The plan should also clearly outline who needs to be involved in the planning and execution of any activities, responsible parties and the timelines for carrying out those activities. Be sure to routinely monitor the impact of your effort and adjust your plan when necessary.

Your team will also need to be prepared to adapt as things continue to play out. Be flexible, calm and focused, and stick to any agreed upon messages at all times. The tool Developing Advocacy Messages tool can be used to help you craft specific messages for this crisis time.

Routinely monitor the impact of your effort and adjust your plan when necessary.

Objective:

Strategy	Activity	Person(s) Responsible	Time-frame	Monitoring & Evaluation	
				Indicator of Success	Documentation

Evaluate Efforts

Once the crisis is over, the team should come together in an after-action meeting to discuss what went well, what should be improved and any important outcomes. This takes discipline and is often overlooked in the heat of the moment. Nevertheless it is a valuable learning tool and should not be skipped. Answer the following questions and make adjustments to your risk assessment matrix and crisis management plan as necessary.

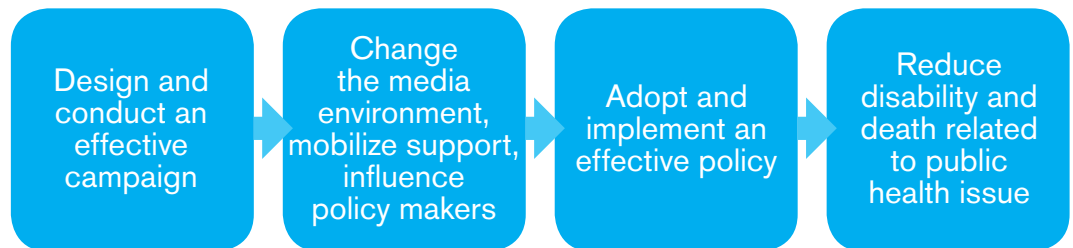
What could have prevented this crisis, if anything?	
What worked well in the response?	
What could have made the response easier?	
What could have turned the crisis back into the campaign's favor faster?	
What will we do differently if something similar arises in the future?	

# Evaluation

## Why is it important?

Campaigns to change policy and legislation can take many years. As campaigns unfold, it is essential to assess progress at regular intervals to both identify the strengths of the campaign and areas where it can be improved. Evaluating progress will also help you reach conclusions about the effectiveness of your campaign and prioritize your next steps. These tools are designed to help you improve your campaign and enhance the likelihood of success. We encourage you to take your time and be straightforward about your strengths and weaknesses, as that will allow the results to be the most helpful to your organization and campaign.

## Framework to improve public health through effective policies



The ultimate measure of an advocacy policy campaign's success is improvement in public health. However, this outcome takes time to achieve, and measurement often relies on external sources, such as academics or government officials. The three tools in this guide instead focus on the campaign, the campaign's impact on factors that lead to policy advocacy success, and the quality of the policy and its implementation.

**Tool 1** – Assess the advocacy campaign – An assessment of the key elements of your campaign allows you to evaluate the strengths and weaknesses and help ensure the campaign is as effective as possible. The Advocacy Action Guide provides information on each of these key elements, so you can refer back to the corresponding tools for suggestions on how to develop or strengthen these key campaign elements.

**Tool 2** – Assess the impact of the campaign on the media environment and the support of the public and policy makers - This tool reviews the impact your campaign is having on the media environment, public and policy-maker support, and moving the legislative process forward. The results of this assessment can be used as a feedback mechanism to further refine your next campaign steps in areas where you may not be seeing change.

**Tool 3** – Assess the campaign's impact on policy change. This assessment looks at whether the new policy has been adopted, and if so:

1. Does it meet international standards of best practice?
2. Is it being implemented and enforced effectively?
3. Does it have strong enough support to ensure it won't be reversed or weakened?



**Directions**

Advocates and their campaign partners can use these tools to self-evaluate progress.

As you begin, you will want to involve a small group of people who are directly involved in the campaign, and have the best understanding of progress and any barriers that are impeding the campaign. Allow at least two hours to complete the assessment.

There are no scores. Rather, each campaign element in the Advocacy Action Guide is listed, and includes indicators of progress, which are intended to stimulate discussion, reflection, and analysis of the strengths and weaknesses of your campaign.

This column lists the different indicators of progress for each campaign element.

Use this column to describe how well you are meeting the indicators.

Use this column to describe any gaps or barriers.

Campaign Element	Description of Progress	Description of Gaps and Barriers	Rating
•			

Rate your progress as Red, Yellow or Green.

Discuss the indicators of progress included under each campaign element to help your group summarize its progress, identify gaps and barriers, and agree on a rating of your efforts. The ratings should be coded as Green, Yellow, or Red. The colours signify the following:

- Green – the indicators are met at this moment in time
- Yellow – the indicators are partially met, but improvement is needed
- Red – the indicators have been met very little or not at all

These ratings are not intended as a pass/fail, but as a way for you to quickly visualize the progress of your campaign and identify which elements need to be strengthened to achieve policy change. The initial assessment should help you prioritize your next steps and develop strategies to address the gaps and barriers that are impeding your campaign.

A description of progress that simply records “achieved” or “no gaps” will not help strengthen your campaign. Detailed assessments will be key in helping you update the campaign as needed. As you work through the tools, have a note-taker write down the group's description of progress, description of gaps and barriers, and the rating using additional sheets of paper if necessary. If you have not yet reached a certain element of a campaign or didn't complete that element for some reason, just note that and move onto the next. At the conclusion of the meeting, draw up a list of issues and follow-up actions, and update your campaign plan to address them.

Consider using the first two tools on a periodic, regular basis to monitor campaign progress – for example, quarterly or every six months. At the end of the campaign, use all three tools to evaluate how well you have achieved your policy objective, and to determine which successful elements can inform future advocacy efforts.

## Section 9 Evaluation

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

### Tool 1 – Assess the Advocacy Campaign

This tool provides an assessment of the key elements of your campaign. It helps you to evaluate the strengths and weaknesses, and help ensure the campaign is as effective as possible. The Advocacy Action Guide provides information on each of these key elements, so you can refer back to the corresponding tools for suggestions on how to develop or strengthen these key campaign elements.

Campaign Elements and Corresponding Indicators of Progress	Description of Progress	Description of Gaps and Barriers	Rating
<b>Gathers background information</b> <ul style="list-style-type: none"> <li>You seek and use evidence and global best practice that supports the adoption or implementation of the public health policy.</li> <li>You include or have access to technical experts in public health policy.</li> <li>You understand what contributes to strong laws, legislation, and policy implementation.</li> <li>You create evidence-based materials (fact sheets, reports, etc.) to educate policy makers, media, and the public on the issue.</li> </ul>			
<b>Determines policy provisions and non-negotiables</b> <ul style="list-style-type: none"> <li>You assess the strength of existing and proposed legislation and regulations.</li> <li>You set SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) policy objectives.</li> <li>You ensure that new policies or amendments to policies that are drafted advance your policy objectives.</li> <li>Your campaign team agrees on which elements of the policy proposal are non-negotiable.</li> </ul>			
<b>Conducts political mapping</b> <ul style="list-style-type: none"> <li>You create a comprehensive political map that describes the policy-making process.</li> <li>The political map identifies important decision-makers, key influentials (decision maker's aides or advisors), and other stakeholders for each step and assesses your existing relationships with them.</li> <li>You regularly monitor and update the political map.</li> </ul>			
<b>Cultivates legislative sponsors and policy champions</b> <ul style="list-style-type: none"> <li>You identify a policy sponsor or sponsors.</li> <li>You engage in regular, effective outreach to your policy champions and key government staff to build their support for this issue.</li> <li>You identify and cultivate additional champions.</li> </ul>			

## Section 9 Evaluation

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

### Tool 1 – Assess the Advocacy Campaign (continued)

This tool provides an assessment of the key elements of your campaign. It helps you to evaluate the strengths and weaknesses, and help ensure the campaign is as effective as possible. The Advocacy Action Guide provides information on each of these key elements, so you can refer back to the corresponding tools for suggestions on how to develop or strengthen these key campaign elements.

Campaign Elements and Corresponding Indicators of Progress	Description of Progress	Description of Gaps and Barriers	Rating
<b>Develops and maintains strong partnerships and alliances</b> <ul style="list-style-type: none"> <li>You network with other organizations/ advocates actively working on this issue.</li> <li>You work collaboratively with key partners to influence decision-makers and communicate effectively among each other.</li> <li>You engage with good technical partners and issue experts to advance your policy objective.</li> </ul>			
<b>Develops key strategies</b> <ul style="list-style-type: none"> <li>You develop campaign plans with your partners that map the process for achieving a policy objective, including target audiences, concrete actions, time-bound benchmarks, and a monitoring plan.</li> </ul>			
<b>Has clear communication strategies</b> <ul style="list-style-type: none"> <li>You have a communication strategy that guides the development and use of communication channels and materials.</li> <li>You develop and deliver effective advocacy messages to targeted audiences.</li> <li>You choose appropriate messengers to deliver your advocacy messages.</li> <li>You use different channels to deliver your message.</li> </ul>			
<b>Conducts media advocacy</b> <ul style="list-style-type: none"> <li>You actively and effectively use a wide range of materials and earned, paid, and owned (including social) media channels.</li> <li>You undertake on-going media outreach.</li> <li>You create media opportunities to get your policy message out.</li> <li>You proactively build relationships with journalists and become their go-to resource for information.</li> </ul>			

## Section 9 Evaluation

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

### Tool 1 – Assess the Advocacy Campaign (continued)

This tool provides an assessment of the key elements of your campaign. It helps you to evaluate the strengths and weaknesses, and help ensure the campaign is as effective as possible. The Advocacy Action Guide provides information on each of these key elements, so you can refer back to the corresponding tools for suggestions on how to develop or strengthen these key campaign elements.

Campaign Elements and Corresponding Indicators of Progress	Description of Progress	Description of Gaps and Barriers	Rating
<b>Builds policy-maker support</b> <ul style="list-style-type: none"> <li>You proactively build relationships with key policy makers and become their go-to resource for information.</li> <li>You engage in effective outreach to policy champions and key government staff to build support for your issue.</li> <li>You leverage the media and external stakeholders to increase support among policy-makers.</li> </ul>			
<b>Builds public support</b> <ul style="list-style-type: none"> <li>You organize activities to generate public support.</li> <li>You take action through direct contact, public events, e-mail, social media, etc. to mobilize external stakeholders, and/or grassroots support (as appropriate) for the policy.</li> </ul>			
<b>Counters opposition</b> <ul style="list-style-type: none"> <li>You track the statements and actions of policy opponents.</li> <li>You develop responses to their arguments as necessary.</li> </ul>			
<b>Monitors campaign progress and adjusts plans as necessary</b> <ul style="list-style-type: none"> <li>You track any changes in attitudes among supporters, opponents, and neutrals.</li> <li>You schedule regular meetings with partners (every 4-6 months) to evaluate the effectiveness of your campaign.</li> <li>You use findings from the evaluation to adjust strategies and improve future activities.</li> </ul>			
<b>Manages risks and crisis events</b> <ul style="list-style-type: none"> <li>You identify potential risks and are prepared to respond rapidly when needed.</li> <li>(If crises have occurred) You respond to crisis rapidly and effectively.</li> </ul>			

Need help getting your campaign off the ground or improving it? Below you'll find a tool that corresponds to each campaign element. These tools can help you identify key strategies to address your gaps and plan next steps.

Campaign Element	Corresponding Tool
Gathers background information	Setting policy priorities
Conducts political mapping	Political mapping
Determines policy provisions and non-negotiables	Strategic planning
Cultivates legislative sponsors and policy champions	Talking with policy makers
Develops and maintain strong partnerships and alliances	Strong partnership coordination
Develops key strategies	Strategic planning
Has clear communication strategies	Strategic planning and messaging
Conducts media advocacy	Messaging
Builds policymaker support	Talking with policy makers
Builds public support	Strategic planning and messaging
Counters opposition	Political mapping and strategic planning
Monitors campaign progress and adjusts plans as necessary	Strategic planning
Manages risks and crisis events	Messaging and managing risks and crises

## Section 9 Evaluation

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

### Tool 2 - Assess the impact of the campaign on the media environment, and public, and policy maker support.

A groundswell of support often comes before a policy change. This shift is usually marked by increased attention to your issue by the media, policy makers, and the general public as the policy moves on to the political agenda. During this period, you will want to evaluate the impact your campaign has had on increasing awareness, shaping public opinion, and moving the legislative process forward, while identifying any gaps or barriers that are hindering the campaign.

Indicators of Progress	Description of Progress	Description of Gaps and Barriers	Rating
<b>The media environment is changing</b> <ul style="list-style-type: none"> <li>● Increased coverage of the public health issue, e.g., problem, cause, solutions.</li> <li>● Increased coverage of the specific policy issue.</li> <li>● Increased editorial support of the policy issue.</li> <li>● Key messages appear in the media more often.</li> <li>● Some media coverage occurs without campaign management (earned media).</li> <li>● Increased positive social media about the issue.</li> <li>● Media relies on advocates as resources and content experts.</li> </ul>			
<b>The base of public support is increasing</b> <ul style="list-style-type: none"> <li>● Unexpected and additional allies and supporters contribute to the debate, and new organisations have joined the campaign.</li> <li>● Decision-makers, key-influentials, and external stakeholders are debating the policy issue.</li> <li>● Public support is increasing, perhaps in opinion polls.</li> <li>● The public is actively supporting the policy by engaging in social media, attending meetings, and advocating directly with policy-makers.</li> </ul>			
<b>Policy maker support is increasing</b> <ul style="list-style-type: none"> <li>● A strong Bill that meets international good practice has been drafted and introduced.</li> <li>● The number of co-sponsors and supporters of the Bill has increased.</li> <li>● Champions are actively encouraging discussion and debate.</li> <li>● The Bill is moving through the legislative process.</li> <li>● Support for the Bill among policy-makers is increasing.</li> <li>● Policy-makers are expressing support publicly and via the media.</li> </ul>			



## Section 9 Evaluation

NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

### Tool 3 – Assess the short-term success of policy changes.

Once legislation or policy is approved, you need to assess whether the new policy meets international standards of best practice, has strong enough support to ensure it won't be reversed or weakened, and is being implemented and enforced effectively.

Indicators of Progress	Description of Progress	Description of Gaps and Barriers	Rating
<b>A strong policy that meets international standards has been passed</b> <ul style="list-style-type: none"> <li>The policy that has been adopted meets international standards.</li> <li>Strong regulations are in place to ensure implementation.</li> </ul>			
<b>Sufficient on-going support exists for the policy</b> <ul style="list-style-type: none"> <li>Policy-maker and public support for the policy continues, and there is little to no risk of the policy being reversed or weakened.</li> <li>Funding levels are adequate to sustain policies or programs.</li> </ul>			
<b>Compliance rate is high</b> <ul style="list-style-type: none"> <li>The policy is being implemented and enforced consistently.</li> <li>There is an implementation plan, along with funding, resources, or quality assurance to ensure it is implemented properly and achieves intended impact.</li> <li>You continue to track the policy regularly to ensure it is being implemented properly and achieves intended impact.</li> </ul>			

If you scored the last row, Yellow or Red, refer to the Guide to Implementation for ideas on how to ensure the policy is being implemented as intended.



**HELPFUL HINT:**

The content of your announcement will vary depending on whether you are celebrating a victory or conceding defeat. If your campaign had a positive outcome, outline the specifics of the policy change and what is needed to implement or enforce the policy. If you did not achieve your desired policy change, your announcement should outline the final outcome, why it is unacceptable for public health, and whether anything is being done to continue the fight.

No matter the outcome of the campaign, your announcement should thank those involved.

## Concluding Your Campaign: A Checklist

Whether win or lose, it's important to bring your advocacy campaign to an appropriate close once the outcome has been determined. Follow this checklist to effectively shut down your campaign and continue to cultivate positive relationships that will ensure support for your next advocacy initiative. Depending on the specifics of your campaign, all actions may not apply.

☒ **Issue a press release or media announcement**

- ☒ Recognize individuals and groups who played important roles in your campaign.
- ☒ Send the announcement to all the media and special contacts you made throughout the campaign, including any government decision-makers with whom you worked closely.
- ☒ Post the announcement on organizational websites and social media.

☒ **Optional**

- ☒ Conduct a final media briefing for journalists focused on details of the new policy, needs for enforcement, and any related policies still underway. You can also use this opportunity to explain why a policy change did not go through and emphasize the ramifications of inaction.
- ☒ Place an advertisement in a major daily newspaper highlighting your policy win and thanking supporters.
- ☒ Develop a special celebratory graphic for use on social media and websites.



**☑ Thank Supportive Decision makers**

- ☒ Make individual calls or send personalized emails to thank supportive decision-makers and explain next steps.
- ☒ Thank other organizations and individuals who played a special role.

Make your “thank you” as meaningful as possible by having your organization's executive director or campaign manager issue thank-you calls and notes. Alternately, you might assign the responsibility to individuals in your organization that had the most contact with a given supporter or partner group. You may also want to send personal thank-you notes to journalists who you would not include in a press release or media announcement, but nonetheless had a profound influence on the campaign outcome.

**☑ Update social media**

- ☒ Issue an update to your Facebook, Twitter and other social media sites about the campaign and thank followers for supporting the campaign and sharing messages.
- ☒ Ask supporters to join a new campaign on a related topic. Make sure to provide them with new handles and page locations. (e.g. Please follow us @ XXX for more information on XXX).
- ☒ Provide alternative sources of information for supporters on related issues. This might be as simple as providing a website address.

If your campaign ended with a policy win, you might want to develop a unique celebratory hashtag.

**☑ Update the campaign contact list**

- ☒ Notify contacts within your campaign about the result via email or newsletter.
- ☒ Ask contacts if they would like to continue to receive information from your organization about the issue and other campaigns.

Make sure to incorporate individuals on your campaign contact list into your organizational contact list, with their permission. The most simple way to gain permission is to include an explicit “Sign Up” option online or by email when notifying them of the campaign result. Opting in will allow them to receive information about the organization and the next campaign. A large percentage of your contacts will likely sign on to the next phase or issue.

**☑ Close websites**

- ☒ If a special website was developed for the campaign, shut down the URL.
- ☒ Migrate the information to a website that is active and regularly updated.

Once you have moved the content from your special campaign website to a wider organizational website, campaign information does not need to be regularly updated.

**☑ Determine next steps for partnerships or coalition**

- ☒ Determine whether your coalition will continue to formally work together. You and your partners may choose to end the coalition, periodically suspend the coalition, meet at a reduced level, or continue to work together on a related issue.
- ☒ Determine who will be in charge of archiving advocacy materials (e.g. factsheets) and where they will be stored.
- ☒ Determine the process for deciding if and when you will use the advocacy materials again – for example, during re-launch of the campaign.

Campaign photos can often be repurposed; however you may need special permission. To gain consent, follow up with the photographer and people in the photos. For your next campaign, consider negotiating broader use at the outset.

**☑ Review media coverage**

- ☒ Collate, evaluate and archive all media coverage related to your campaign.

Archiving media coverage will be simple if you have monitored media from the beginning of your campaign. If not, you should still do it retroactively to the best of your ability. Some of the issues raised in articles may be relevant in the future, and journalists who wrote them will remain valuable contacts.

**☑ Evaluate your campaign**

- ☒ Document your campaign efforts, including your objectives, strategies and tactics, what worked, what didn't, and any other lessons learned. This analysis will serve as an invaluable resource for your next campaign.
- ☒ Use the tool Monitoring and Evaluating your Campaign to help you evaluate the overall effort.

Consider developing a case study, particularly if you led a winning campaign. Feature it prominently on a website so other advocates can learn from your experiences.

**FUNDING CHALLENGE?**

If your campaign is coming to an end simply because you have run out of funds, you need to develop a plan to continue the work. Ask yourself:

- ✓ **Are there further actions that supporters can take to advance the cause?**
- ✓ **What is possible for us to do with minimal funding and effort (e.g. social media can be inexpensive and simple)?**
- ✓ **Are there other funding sources to maintain the campaign?**
- ✓ **Is there another organization that can take on the remaining work? If so, who will approach the organization and handle the transition?**



#### HELPFUL HINT:

If possible, identify an external facilitator that can help guide your organization through this assessment tool. A good external facilitator can provide a number of benefits. Their presence may enable all staff members to more fully participate in the dialogue, as well as encourage in-depth discussion, ask guiding questions, and help your team to arrive at consensus. This tool is intended as an organizational self-assessment, which means that an outside facilitator should not act as an evaluator or auditor, simply a neutral guide to the process. This tool is all about you and your organization!



## Policy Advocacy: Capacity Assessment Tool

### Why is it important?

Before you embark on a policy advocacy campaign, you should have a thorough understanding of your organization's advocacy capacity. Understanding your team's strengths and weaknesses by using this assessment tool can help you to design campaign plans that capitalize on your strengths – as well as identify areas for growth. Knowing where you have room to grow can help you identify future training or technical assistance needs and develop a long-term capacity building plan for your organization. Implementing a capacity building effort will position your team to be a more effective advocate for public health policies, both today and in the future.

### What needs to be done?

This tool measures capacity in the following five areas: 1) Policy Analysis and Development 2) Stakeholder Mapping and Mobilization 3) Advocacy Communications and Outreach 4) Advocacy Campaign Planning, and 5) Monitoring, Evaluation and Learning. For each area, the tool asks you to score your organization's current capabilities in several sub-components according to three stages of advocacy capacity. It is important to remember that there is no such thing as a bad score! Scores are simply intended to help you to prioritize topics, and not all topics will be relevant to your specific advocacy issue or country context.

This assessment tool is intended to be a team exercise, and participating staff members should discuss and agree on the scores for each area. Depending on the size of the organization, approximately three to seven participants are recommended, including the organization's executive director and advocacy staff. At the end of the tool, you'll find a list of organizational documents that you should gather and refer to as you complete the assessment.

As you work through the tool, have a note-taker write down the organization's reasons for the scores, using additional sheets of paper if necessary. Discuss the guiding questions that are included to help your team to score, define issues and potential follow-up actions. Once complete, the staff should prioritize focus areas related to campaign strategy as well as action steps and technical assistance needs that can address growth areas. While it's tempting to try to tackle everything at once, choosing a few select areas carefully and then moving on to others will increase your likelihood of success.

Make a one-year plan and then reassess after the year is over. Update your initial plan to address new priorities. It can be useful to update your capacity-building plan at the same time you update your campaign workplan as you want to prioritize capacity-building areas that will be of most benefit to your campaign.

**Date/Facilitator(s):** \_\_\_\_\_

**Name/title of organization:**

**Names and titles of organizational participants:**

**When organization was established:**

**Contact details of the organization:**

**Geographic scope of where organization works:**

**Policy advocacy objectives (Please note if objectives are yet to be defined):**

**Brief description of organizational structure and staff:**



CAPACITY AREA: Policy Analysis and Development	Capacity Score		
	1	2	3
Organizational capacity to:	For each component, please circle the corresponding level of capacity that best describes the organization – only one can be circled.		
Define policy objectives	Organization has not defined its policy objectives	Organization has defined its objectives, but they are not clearly linked to policy change and are not Specific, Measurable, Achievable, Relevant, and Time-bound (SMART)	Organization has defined SMART objectives that are clearly linked to policy change
Gather and use evidence	Organization does not collect evidence to inform its policy objectives and larger campaign	Organization semi-regularly collects statistics and general background information to inform its objectives and campaign	Organization routinely collects up-to-date evidence from credible, scientific sources to inform its objectives and campaign
Analyze strengths and weaknesses of policy	Organization is unfamiliar with the policies that govern or impact its advocacy issue	Organization is familiar with the appropriate policies but is unclear about strengths and weaknesses of existing or proposed policies	Organization has clearly identified existing gaps in policies and has developed recommendations to successfully address gaps
Understand the policy-making process	Organization is unfamiliar with the steps in the policy-making process relevant to their policy objective	Organization has a general understanding of the steps in the policy-making process, but is unclear at what points it can effectively engage in and influence the process	Organization has completed a detailed mapping of the steps in the policy-making process and has identified at which points it can effectively engage in and influence the process
Develop policy	Organization has no experience helping to develop or respond to draft policies on its advocacy issue	Organization has some experience collaborating with decision-makers to inform or comment on draft policies	Organization has developed, provided detailed comments, and/or strengthened wording on draft policies





<b>Discuss some or all of the following guiding questions:</b>		
What are your campaign's policy objectives?		
How are your objectives supported by evidence?		
What gaps in policy exist relative to your issue? How do they need to be improved?		
Which policy-making process are you trying to influence? What are the major steps in this process?		
How successful do you consider your efforts to influence this process?		
How have you helped to develop policy on your issue?		
<b>Average Score</b>	<b>Discussion notes/Rationale for scoring on individual components</b>	<b>Notes on potential internal and external actions to build capacity</b>



CAPACITY AREA: Stakeholder Mapping and Mobilization	Capacity Score		
	1	2	3
Organizational capacity to:	For each component, please circle the corresponding level of capacity that <b>best</b> describes the organization – only one can be circled.		
Engage with decision-makers	Organization has not identified the key decision-makers throughout the policy-making process	Organization has mapped the key decision-makers and identified their positions on the policy objective and their broader interests	Organization routinely engages in outreach with mapped decision-makers; map is updated to reflect successful efforts to line up supporters
Develop policy champions	Organization has not identified policy champions to collaborate with on their policy objective	Organization has identified policy champions and engages with them occasionally to advance their objective	Organization routinely engages with its policy champions to jointly strategize on how best to advance their objective
Mobilize “influentials” <sup>1</sup>	Organization has not identified “influentials” to reach out to target decision-makers on behalf of their policy objective	Organization has identified potential “influentials” but has not mobilized them to reach out to decision-makers	Organization has successfully mobilized “influentials” to reach out to decision-makers
Mobilize grassroots	Organization does not mobilize the public in support of its policy objectives	Organization makes occasional efforts to mobilize the public, but efforts have not resulted in mobilizing critical mass	Organization has an active grassroots supporter base that they are able to effectively mobilize at key moments within their campaign
Mobilize partners	Organization has not identified potential advocacy partners	Organization has mapped other partners working on the policy issue and they are occasionally participating in some joint activities	Organization is working collaboratively with partner organizations to develop and implement a joint campaign plan
Mitigate opposition	Organization has not gathered information on opponents	Organization has mapped its opponents’ policy positions, messages, tactics and influence	Organization routinely monitors its opposition and has developed strategies and messages to mitigate their influence

<sup>1</sup> “Influentials” are those with influence over decision makers, though not directly part of the decision making process.



<b>Discuss some or all of the following guiding questions:</b>		
Who are the main decision-makers you are targeting? What role do they play in the policy process? What are their positions and interests related to your issue?		
What does your outreach to decision-makers include? How successful would you say these efforts are? Do your target decision-makers take your preferred actions?		
Who has influence on the policy-making process related to your objective? How do you engage these individuals or groups?		
How do you work with the public to influence decision-makers?		
Who are your advocacy partners? How do you work together? How successful would you say your partnerships are?		
Who are your opponents? Why and how do they oppose you? How do you manage the opposition?		
<b>Average Score</b>	<b>Discussion notes/Rationale for scoring on individual components</b>	<b>Notes on potential internal and external actions to build capacity</b>



CAPACITY AREA: Advocacy Messaging and Communications	Capacity Score		
	1	2	3
Organizational capacity to:	<b>For each component, please circle the corresponding level of capacity that best describes the organization – only one can be circled.</b>		
Determine audiences	Organization has not identified key audiences for their communications materials and activities	Organization has identified key audiences, but has not analyzed their specific interests, information needs and preferred communication channels	Organization has assessed their key audiences' specific interests, information needs and preferred communication channels
Develop messages	Organization does not have documented advocacy messages for use in their communication materials and activities	Organization has advocacy messages; however they have not been pre-tested for their effectiveness and are not adapted for different audiences	Organization has pre-tested messages that are routinely adapted for their different audiences
Identify communication channels	Organization uses a limited set of advocacy materials and communication channels to reach their audiences	Organization uses a wide range of materials and channels to reach their audiences	Organization uses a wide range of materials and channels that they adapt for their different audiences
Identify messengers	Organization has not identified campaign messengers	Organization has identified general messengers but has not provided orientation for messengers	Organization deploys different messengers given their target audience; messengers have been oriented
Engage the media	Organization has little experience engaging the media	Organization has experience successfully producing and placing media materials (e.g. press releases, op-eds, spokesperson quotes)	Organization has on-going relationships with media members, allowing it to acquire high-profile coverage and influence the media narrative for their campaign
Use social media	Organization does not use social media for advocacy	Organization has social media accounts, such as Facebook and Twitter, that they occasionally use for advocacy	Organization actively uses a range of social media for advocacy and implements digital campaigns



<b>Discuss some or all of the following guiding questions:</b>		
Who are the audiences for your advocacy communications? What are their interests and information needs?		
What are your standard advocacy messages? How do you adapt them for different audiences?		
What types of communication materials or channels do you use to reach and persuade your audiences?		
How do you engage the media? Would you describe your efforts as successful? Why or why not?		
How do you engage on social media? Would you describe your efforts as successful? Why or why not?		
<b>Average Score</b>	<b>Discussion notes/Rationale for scoring on individual components</b>	<b>Notes on potential internal and external actions to build capacity</b>



CAPACITY AREA: Advocacy Campaign Planning	Capacity Score		
	1	2	3
Organizational capacity to:	For each component, please circle the corresponding level of capacity that <b>best</b> describes the organization – only one can be circled.		
Develop a campaign plan	Organization does not have a current campaign plan or strategy	Organization has a current campaign strategy, but it does not clearly align with its policy objective(s) and political and stakeholder/audience mapping; strategy is not supported by a detailed workplan	Organization has a current campaign strategy based on political and stakeholder/audience mapping; strategy is supported by a detailed workplan that outlines targets, advocacy activities, responsible persons and timeframe, in alignment with policy objective(s)
Adapt campaign plan	Organization does not make changes to its campaign strategy given shifts in the political environment	Organization makes changes over the course of campaign implementation, but they are done in an ad-hoc manner and are not documented	Organization has a systematic process for regularly consulting its campaign strategy when making decisions and updating its strategy based on changes in the political environment
Manage risk and crisis events	Organization has not engaged in any risk mitigation or crisis management <sup>2</sup> planning	Organization has identified potential risks and/or crisis events, but has not developed a formal mitigation or response plan	Organization has developed a risk mitigation and crisis management plan that outlines roles and responsibilities and conducts after-action reviews, updating plan as needed

<sup>2</sup> Risks may include but are not limited to upcoming shifts in political leadership, partners not being able to complete assignments, negative ramifications on other topics or programmes that your organization advocates on. Crises may include but are not limited to negative press associated with your organization and/or policy champions, a new report receiving media attention that undermines your position.



<b>Discuss some or all of the following guiding questions:</b>		
Do you have a written campaign plan? What does it include?		
How do you use your campaign plan to make strategic decisions about what activities you will do or not do?		
What is your process for updating your campaign? How regularly do you update it?		
Do you have a risk mitigation or crisis management plan? What does it include? What actions do you take when a crisis occurs?		
<b>Average Score</b>	<b>Discussion notes/Rationale for scoring on individual components</b>	<b>Notes on potential internal and external actions to build capacity</b>





CAPACITY AREA: Monitoring, Evaluation and Learning (MEL)	Capacity Score		
	1	2	3
Organizational capacity to:	<b>For each component, please circle the corresponding level of capacity that <i>best</i> describes the organization – only one can be circled.</b>		
Develop indicators	Organization has not developed indicators for its campaign plan	Organization has developed output indicators for its campaign plan, but has not developed outcome indicators that effectively measure progress towards their policy objective(s)	Organization has developed both output and outcome indicators that effectively measure progress towards their policy objective(s)
Develop a MEL plan	Organization does not have a MEL plan	Organization has a general MEL plan; data and information is collected on a semi-regular basis	Organization has a comprehensive MEL plan and routinely and systematically collects data and information
Learn and adapt	Organization does not use monitoring and evaluation data to adjust activities and campaign strategies	Organization can demonstrate occasional adjustments to its campaign activities and strategies given monitoring and evaluation data	Organization systematically reviews and adjusts campaign activities and strategies given monitoring and evaluation data
Document and report progress	Organization does not report on campaign progress to key stakeholders	Organization reports on campaign progress to key stakeholders on a semi-regular basis; information is incomplete or not appropriately targeted	Organization systematically provides appropriately targeted and comprehensive reports on campaign progress to key stakeholders



<b>Discuss some or all of the following guiding questions:</b>		
Do you have a MEL plan?		
What do you monitor related to your advocacy campaign?		
How do you know your activities are resulting in progress towards policy objective(s)?		
What is your process for updating your campaign relative to your MEL data? What examples can you provide about changes you have made to your plan using MEL data?		
What type of information do you report on your campaign and to whom?		
<b>Average Score</b>	<b>Discussion notes/Rationale for scoring on individual components</b>	<b>Notes on potential internal and external actions to build capacity</b>



NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Capacity-Building Action Plan

The action plan should be completed as part of a group exercise. Rank the various capacity areas (e.g. advocacy campaign planning) in order of priority to be addressed. Not all areas must be listed. Focus on areas you want to prioritize for improvements over the next year. Next, identify the individual challenges and issues for the priority areas (e.g. lack a crisis management plan) that were previously noted. Again, only include items that are priorities for the next year. Don't try to do all things at once.

Indicate what action the organization will take to address each priority challenge (e.g. develop risk management plan), the person responsible for making sure the action takes place, and the time by which the action should occur. The responsible person is not expected to complete the action by himself or herself. They will need the support of internal teammates. External assistance may also be needed. If necessary, include the type of external assistance (e.g. crisis management planning template) required in your plan and how you may obtain that assistance. Finally, use the plan to track your progress and note when an action has been completed and by when. Use extra paper as needed.

Capacity Area (ranked in order of priority)	Year 1 priority issue(s) to be addressed	Organizational Action	Person Responsible	Timeline M/D/Y	Assistance Desired	Follow Up on Activities	
						Status	Date



NOTE: When printing in Adobe Acrobat, please select "Auto portrait/landscape" in the print dialogue box, under "Orientation". This will allow both vertical and horizontal pages to print correctly.

Capacity-Building Action Plan continued

Capacity Area (ranked in order of priority)	Year 1 priority issue(s) to be addressed	Organizational Action	Person Responsible	Timeline M/D/Y	Assistance Desired	Follow Up on Activities	
						Status	Date
Participants Organization:				Facilitators:		Other:	



### Complete List of Advocacy Documents

Capacity Area	Documents (Please only provide documents that currently exist; do not develop any new documents for purposes of the assessment)
Policy Analysis and Development	<ul style="list-style-type: none"> <li>● Political mapping</li> <li>● Examples of policy recommendations or copies of policies that organization has helped develop</li> </ul>
Stakeholder Mapping and Mobilization	<ul style="list-style-type: none"> <li>● Political and/or stakeholder mapping</li> <li>● Opposition mapping</li> </ul>
Advocacy Messages and Communication	<ul style="list-style-type: none"> <li>● Documented messages or talking points</li> <li>● Examples of advocacy communication materials</li> <li>● Examples of media outreach materials and media coverage</li> </ul>
Advocacy Campaign Planning	<ul style="list-style-type: none"> <li>● Campaign plan</li> <li>● Risk mitigation and crisis management plan</li> </ul>
Monitoring, evaluation and learning	<ul style="list-style-type: none"> <li>● Monitoring and evaluation plan</li> <li>● Examples of campaign reports</li> </ul>



# Country Reconnaissance (Recon) Visit Guide

## Background

---

### Why conduct a reconnaissance visit?

This guide is intended as guidance for organizations that are planning reconnaissance (recon) visits to other countries to gather information that can help inform advocacy campaigns. Areas of focus for the visit might include exploring a country's political will, feasibility of potential policy objectives, and advocacy capacity of local groups.

The purpose of a recon visit will be determined by the extent of a group's advocacy infrastructure and the country's history of policy advocacy.

- In countries with little or no public health policy advocacy infrastructure, the objective of your recon visit may be geared toward identifying civil society organizations (CSOs) with the potential to advocate for policy objectives and gaining an understanding of the policy landscape.
- In countries with known civil society advocates and a history of effective public health policy advocacy, a recon visit may focus more on an assessment of the political landscape, political readiness, and feasibility of pursuing specific public health policies.

---

### What needs to be done?

There are three phases to a recon visit.

- **Preparation:** Preparation includes identifying the team, consensus on objectives of the visit, a desk review of the public health issue and policy environment in the country, and the logistics of the visit.
- **Visit:** The visit itself provides the opportunity to gather valuable information from CSOs and government officials.
- **Post-visit follow-up:** Follow-up includes a synthesis, analysis and post-visit action plan.



## Phase 1: Preparation Phase

Phase 1 is intended to prepare the recon visit team with background information about the country and devise a schedule of meetings that will inform your plan to move a policy objective forward.

---

**Estimated time: Four to Six Weeks**

### The Team

Generally a recon visit is conducted by staff of relevant partners responsible for supporting advocacy efforts in a country. To ensure a smooth, efficient visit, one organization should assume the role of lead organizer. At the outset, the team should clarify the main objectives of the recon visit and agree to roles and responsibilities of each member in order to coordinate preparation and planning. Roles may include gathering background information, identifying organizations to meet with, arranging and facilitating meetings, summarizing meeting results, and following up with contacts.

### Objectives of the visit

Each country has its own set of circumstances, so make sure you tailor your goals to that country's advocacy context. Usually, the main objective of the recon visit will be one of the following:

1. To identify CSOs and other key players with the advocacy capacity to positively influence public health policy.
2. To assess the feasibility of policy objectives by learning more about the political environment, process for policy adoption, history of policy progress to date, and main facilitators and barriers to achieving public health policy objectives.

---

### ACTION:

Organize a discussion with the full recon visit team to gain consensus on the advocacy campaign's policy objectives, the objective for the recon visit, and team roles.

List potential policy objectives: \_\_\_\_\_

\_\_\_\_\_

List your recon visit objective: \_\_\_\_\_

\_\_\_\_\_

Team member	Organization	Role





## Desk Review

The desk review will result in a briefing and serves two key purposes:

- to provide the team with important information about the country prior to the visit and
- to identify potential candidates for interviews during the visit.

**NOTE:** The briefing materials do not need to be formal. In fact, an informal compilation of materials obtained from a variety of sources is often more useful. Because the desk review will inform which CSOs and government officials to meet with, complete the research at least one month prior to the recon visit.

## ACTION:

What does your team need to know? Use the following list of categories to identify the scope of the desk review.

Be sure to decide who will be responsible for gathering and sharing the information with the other team members. Keep an updated agenda as meetings are scheduled, including easy access to contact information for each organization, in case you need to reschedule before or during the recon visit.

Information needed	Who will gather and share	Timeline
General description of the country, e.g., population, capitol and major cities, main languages, religions.		
General information on the health status of the population affected by the issue, economic costs caused by it		
National government's main priorities and political commitment to public health, e.g., relevant public health policies, legislative committees responsible for public health, level and type of commitment to compliance with and enforcement of current laws		
General description of the government, e.g., its structure and legislative process, leaders, political parties, political climate, election cycle		
Information about non-elected government officials including the Ministers and staff of main ministries, and other government agencies involved with the public health policy objectives under consideration.		
Information about the staff of parliamentary committees that review and recommend positions on public health policies, e.g., Ministries of Health, Transport, Finance, Consumer Protection, Justice and Communication.		
Information about CSOs currently involved in the relevant public health issue and/or with a history of effective advocacy.		
Other		

Once you answer these questions, you may find that the desk review suggests more government and CSO stakeholders than you are able to meet, so prioritize the ones who are most relevant. Review the list side by side with your recon visit objectives to identify those people most likely to 1) educate you about the policy environment 2) brief you on the feasibility of policy objectives, and 3) represent the CSOs most likely to engage in successful advocacy.



### Logistical Prep

Typically, a recon visit will last 5 to 7 working days but will vary based on an assessment of the current situation and the number and availability of staff who will participate in the visit.

Here are some key points to keep in mind for scheduling:

- Ideally, two people should attend each meeting: one to lead conversation and one to listen carefully and take notes. These roles may be alternated from meeting to meeting.
- Senior staff will be more likely to offer assessments and opinions, while junior staff will more likely offer facts.
- Access to senior government officials or CSO leaders may require introductions by individuals they already know and trust.
- Schedule meetings early in the visit with umbrella organizations or multilaterals, such as the regional WHO office, that might identify other organizations to meet. Leave some open time in your calendar to accommodate meetings with staff or organizations that you learn about during the visit.
- Consider travel time between meetings. Do not try to schedule more than three or four meetings each day, unless you can schedule multiple meetings in one location.
- The team should try to arrive/depart on the same days and stay in same hotel in order to facilitate communication and debriefs each day.
- Ideally, begin the visit with an on-site meeting to ensure that all are clear on roles, agenda outlines for meetings, and expected outcomes.
- Allow time at the end of each day to write up meeting notes and send thank you's to the people you met with.
- Conclude the visit with a meeting to debrief, summarize what was learned, and begin to identify next steps.



## Phase 2: Recon Visit

### Estimated time: One Week

Guidance for the Recon visit is divided into two sections: Section 1 addresses meeting with CSOs and Section 2 addresses meeting with government officials.

**TIP: The following sections are only intended as a guide for planning. Your final plan for the visit should consider what is most feasible to achieve in the time allotted for a visit.**

### Section 1: Civil Society Organizations

You will likely want to hold meetings with two types of CSOs: larger, international CSOs with knowledge of the political environment that may not be eligible for grants, and in-country advocacy CSOs that would also be candidates for grants.

#### *Large, International CSOs*

Here are some key questions to consider when meeting with large, international CSOs:

Questions	Notes
Which civil society organizations are currently, or have previously, engaged in public health advocacy?	
Which are the well-respected CSOs with a track record of successfully managing donor grants and delivering on projects?	
Which organizations should be avoided and why?	
Which CSOs are influential? How and why are they influential?	
Which of policy objectives under consideration would you consider feasible at this time? Why? Why not? (Probe for assessment of political will, or the lack of it.)	
Other?	



## In-country CSOs

Conducting interviews with potential CSO grantees can allow you to:

- Assess the viability of a grant-funded project, including the type of capacity building the CSO might need to conduct an effective advocacy campaign
- Better understand the nature of current public health policy proposals or debates
- Identify additional players capable of influencing public health policy change or implementation
- Assess the feasibility of policy objectives under consideration
- Gauge the level of political will to support passage of public health laws, and how to increase it.

## Key questions to consider:

Questions	Notes
<b>1. Advocacy Background</b> <ul style="list-style-type: none"> <li>● What experience does your organization have that could be relevant to public health policy change?</li> <li>● Is advocacy to achieve policy change an organizational priority?</li> <li>● What experience does your organization have with advocacy? What has worked and what hasn't? What lessons have you learned from your previous advocacy work?</li> <li>● How interested is your organization in working on these issues?</li> </ul>	
<b>2. Understanding of and access to political environment</b> <ul style="list-style-type: none"> <li>● How does the government currently manage the relevant public health issue?</li> <li>● What ability does your organization have to reach and mobilize political contacts and other opinion leaders, engage the public etc.?</li> <li>● What is your understanding of governance and enforcement structures?</li> <li>● What is the current level of political will for policy change in this area? How important or relevant do you think political will is for this policy change?</li> <li>● What kind of access and ability does your organization have with: political contacts, media contacts, ability to conduct high-level legal/legislative analysis, ability to mobilize other opinion leaders, engage public etc.?</li> <li>● Has your country made any international commitments that would call for strong relevant public health legislation?</li> </ul>	



Questions	Notes
<p><b>3. Assessment of policy objectives under consideration</b></p> <ul style="list-style-type: none"> <li>● How relevant do you think this public health issue is to the government?</li> <li>● Where does this public health policy stand in terms of government priorities? What other priorities is the government focused on?</li> <li>● Among the agencies/ministries involved, where is support/opposition?</li> <li>● Outside of the relevant ministries/agencies, what is the level of support and awareness within the government or the public?</li> <li>● What are potential deterrents to the policy passing?</li> <li>● Who could potentially oppose our policy objective? What is their relative level of influence within government?</li> <li>● Who could potential champions be within government, civil society?</li> </ul>	
<p><b>4. Agency capacity</b></p> <ul style="list-style-type: none"> <li>● Is your organization able to receive, or have you ever received, project funding from an international organization?</li> <li>● What advocacy experience does the staff have – e.g. communications/media, legal, issue-specific, etc.?</li> <li>● Who are your core partners, and what relevant alliances/coalitions exist?</li> <li>● Does your organization have any potential conflicts of interest relevant to this issue?</li> </ul>	
<p><b>5. Other</b></p>	



## Section 2: Government officials

In addition to CSOs, it's important to conduct interviews with non-elected government officials, including Ministers and staff of main ministries involved in the issue, as well as other government agencies responsible for approving or implementing your policy objectives. These individuals can provide insights into the political environment. They also may be able to suggest CSOs that could be effective partners or grantees.

When meeting with government officials **to discuss policy objectives and civil society more generally**, consider the following types of questions:

Questions	Notes
<b>1. Assessment of the political environment</b> <ul style="list-style-type: none"> <li>● What is the governance structure?</li> <li>● How important or relevant is political will in policy change?</li> <li>● How effective is advocacy in influencing the political process?</li> <li>● What kind of access is needed to move a policy forward?</li> </ul>	
<b>2. Assessment of policy objectives under consideration</b> <ul style="list-style-type: none"> <li>● How would you assess the feasibility of the policy objectives under consideration?</li> <li>● What is the political will for change?</li> <li>● Where does this public health policy stand in terms of government priorities? What other priorities is the government focused on?</li> <li>● Among the agencies/ministries involved, where is support/opposition?</li> <li>● Outside of the relevant ministries/agencies, what is the level of support and awareness within the government or the public?</li> <li>● What are potential deterrents to the policy passing?</li> <li>● Who could potentially oppose our policy objective? What is their relative level of influence within government?</li> <li>● Who could potential champions be within government, civil society?</li> </ul>	
<b>3. Assessment of CSOS</b> <ul style="list-style-type: none"> <li>● How is civil society perceived and how successful has it been in facilitating policy change</li> <li>● How can civil society enhance the likelihood of success?</li> <li>● What CSOs or individuals do you recommend that we engage (current advocates, leaders, experts, supporters)?</li> </ul>	



When meeting with government officials to discuss civil society and specific CSOs that can work on the policy objective at hand, consider the following types of questions:

Questions	Notes
How is civil society perceived generally and to what extent has it been successful to date in facilitating policy change?	
How can civil society enhance the likelihood of success?	
Recommendations for potential CSOs to engage in public health (current advocates, leaders, experts, supporters)?	



---

## Section 3: Post-Visit Follow-Up

### **Estimated Time: Two Weeks**

Draft a report immediately after the recon visit to document the details of each meeting. The report should be no longer than 15 pages and should highlight key findings from the visit and interviews. In addition to notes from the discussions, make sure the report includes:

- 1.** A feasibility assessment of the policy objectives under consideration
- 2.** An analysis of current political will and a summary of opportunities and deterrents to achieving policy change
- 3.** An assessment of civil society's capacity to push for the adoption and implementation of policy priorities.
- 4.** An analysis of the current and prospective CSOs that could carry out or coordinate an advocacy campaign, as well as any support they might need to prepare grant submissions.
- 5.** An action plan that outlines next steps for the staff of relevant international partners responsible for supporting the advocacy efforts of local partners in the country.

Lastly, make sure you send follow-up emails to everyone you met to thank them again and, if appropriate, an outline of next steps.