

# Advocacy Action Guide

A ToolKit  
for Strategic  
Policy Advocacy  
Campaigns



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### 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.

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### 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.

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### 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.

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### Acknowledgement

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## 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.



## 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.



### 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.

### 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.

## 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:

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







## 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.



### 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.

### 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.



## 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.”



### 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.

### 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.



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



### 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.

### 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.



## 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.



### 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.

### 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?

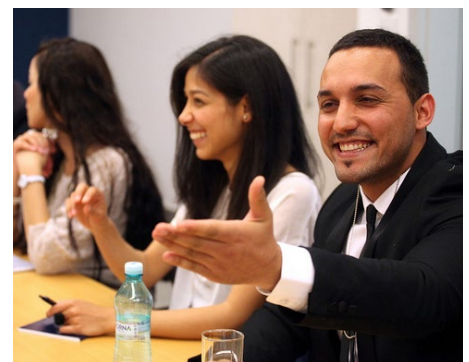
In addition to securing policy champions, you will likely need to persuade a broader set of decision-makers to support your issue. The strategies you choose to reach these target decision-makers are critical because they can make or break your campaign. Common strategies include 1) direct interaction 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.

## Section 1 Elements of a Policy Advocacy Campaign



### 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.



# 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:

**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.**



**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.



## 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:

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.



**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?

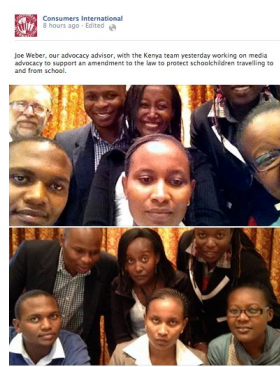
Monitoring and evaluating your progress is an essential part of any policy advocacy campaign and ensures that planned actions are taking place at the correct time. It also helps you know whether you are gaining support over the course of your campaign. A good monitoring plan can tell you which of your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



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



### 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.

### 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

## Section 2

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



#### 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 **s**pecific, **m**easurable, **a**chievable, **r**elevant and **t**ime-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)**

A large, empty rectangular box with a dark blue border, intended for writing the 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 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 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:

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



**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?

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**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:

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

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

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

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

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

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

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

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## 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.



### 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.

### 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 **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-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.

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### **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

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.

Write your SMART policy objective at the beginning of your political map.

### Policy Objective(s)

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### **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**

A large, empty rectangular box with a dark blue border, intended for the user to list 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? <i>Example: Majority vote, consensus, multiple individuals signing off</i>	
What type of documentation must accompany your policy proposal <i>Example: supporting evidence, letters of support, economic analysis</i>	
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? <i>Example: notice of meetings provided, open to members of public, public records available.</i>	
Who has the right or privilege to provide input into the government body? How is this input provided? <i>Example: topical experts</i> <i>Example: oral or written testimony, informal meetings or hearings</i>	
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

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.

When identifying decision-makers, be as specific as possible. Note down names in addition to titles or positions.

#### 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



### Determine decision-makers' Positions

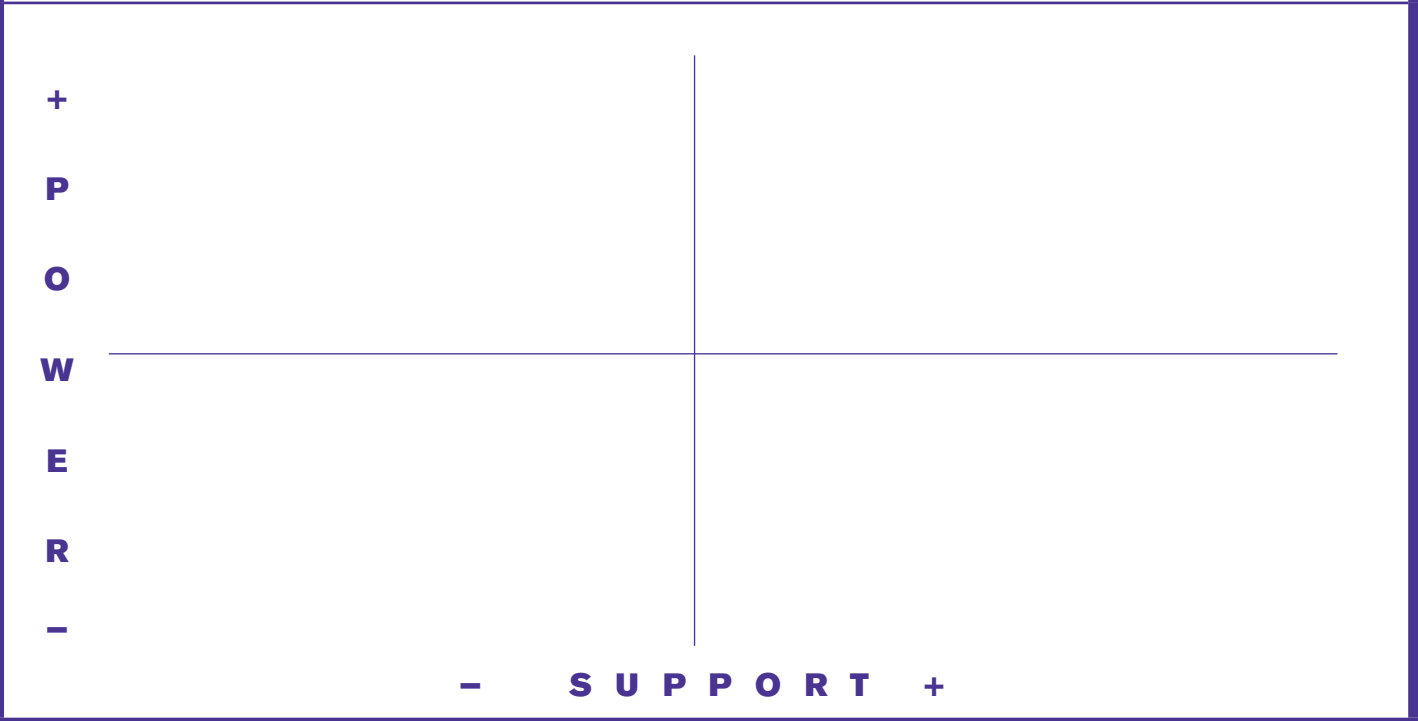
While identifying your decision-makers is important, you also need to understand their background and constituency, as well as their position on your policy objective and why they hold that stance.

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**

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.

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.

<b>Opponent</b>	<b>Arguments</b>	<b>Decision-maker Influence</b>
<b>Opponent</b>	<b>Arguments</b>	<b>Decision-maker Influence</b>
<b>Opponent</b>	<b>Arguments</b>	<b>Decision-maker Influence</b>
<b>Opponent</b>	<b>Arguments</b>	<b>Decision-maker Influence</b>
<b>Opponent</b>	<b>Arguments</b>	<b>Decision-maker Influence</b>



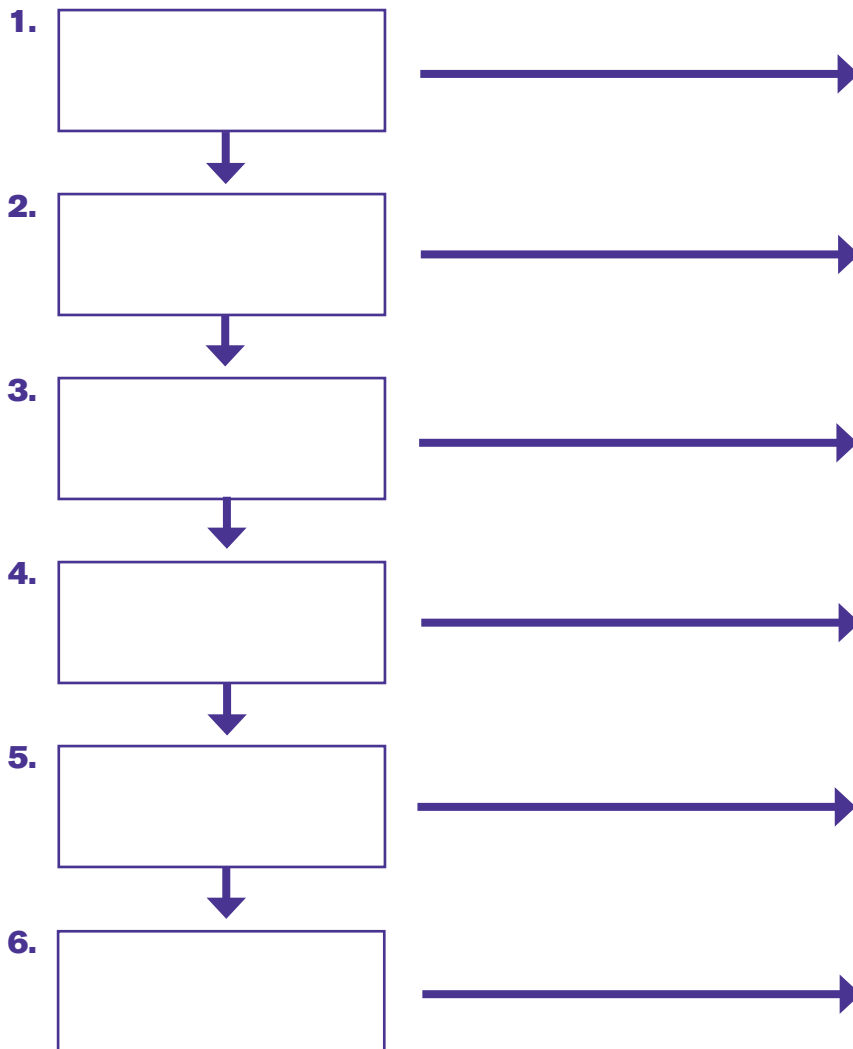
**Put It All Together**

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.

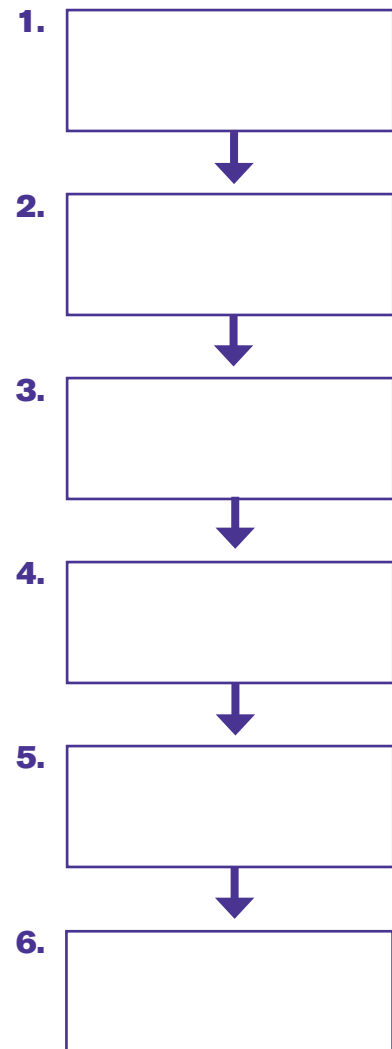
When developing your flowchart, try picturing your policy proposal being passed from desk to desk within the government. When it leaves one desk, where does it go next? Perhaps, a minister needs to approve your bill before it is submitted to parliament, but within the ministry several desks need to approve 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**



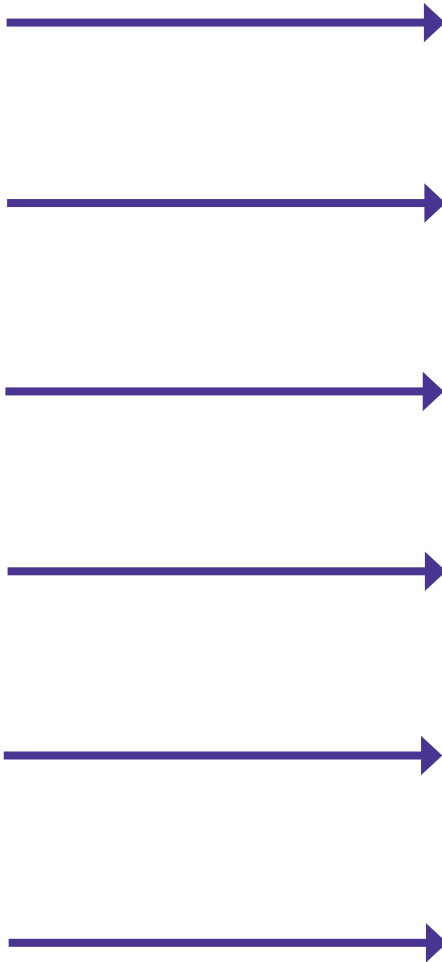
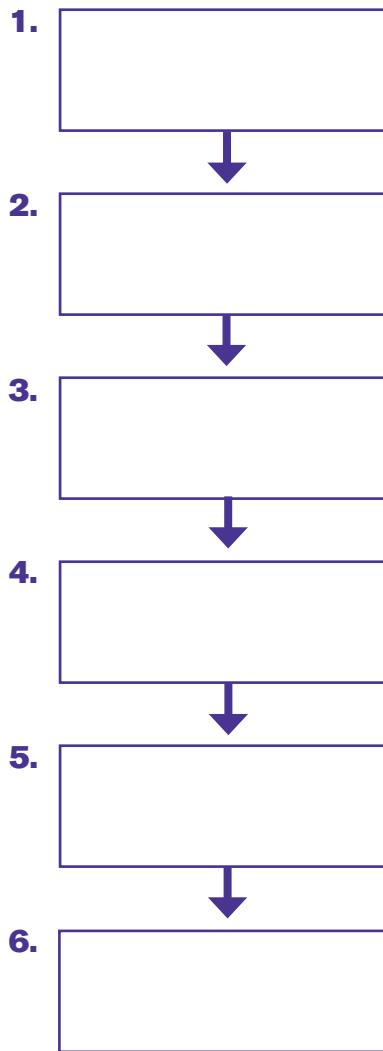


**Identify Back-Up Paths to Success**

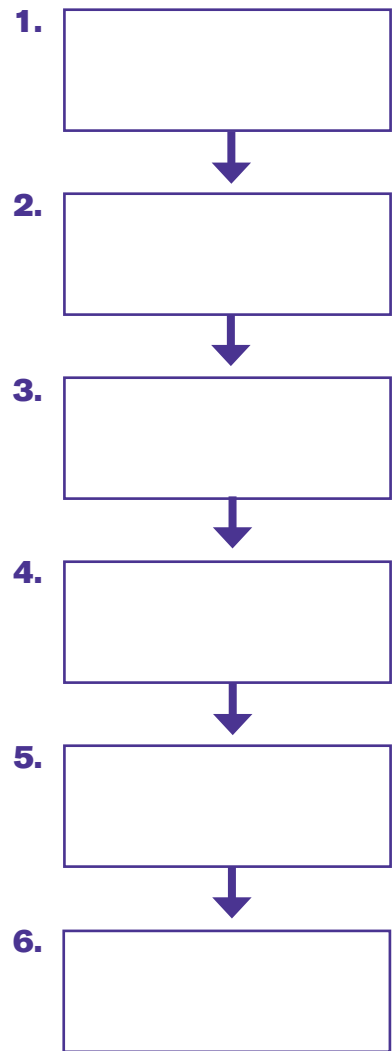
Now that you have mapped the step-by-step process for approving your policy objective and your path of influence, it's important to critically examine your map for any alternate pathways so you can create a back-up plan. If the obvious path becomes stalled or blocked during your campaign, being able 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.

**Policy-Making Process**



**Path of Influence**





## 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

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### 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.

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### 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.

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### **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 **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-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:**













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**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!**





## 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?



### 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.

### 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**



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**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.

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### 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.





**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.



**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.

---

**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

### 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.



#### 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.**

## Section 8 Managing Risks and Crises: Planning Guide

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### 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

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		<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?

## Section 8 Managing Risks and Crises: Planning Guide



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### 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.

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

## Section 8 Managing Risks and Crises: Planning Guide

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### 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**



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	<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
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	<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> ____





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**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.	

## Section 8 Managing Risks and Crises: Planning Guide



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### 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

## Section 8

### Managing Risks and Crises: Planning Guide



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#### 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?	



**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?**