

SESSION ONE: OVERVIEW OF ADVOCACY

LEARNER OBJECTIVES

By the end of the session, participants will be able to:

1. Define advocacy
2. Identify the steps in the advocacy process
3. Distinguish advocacy from related concepts [such as information, education, communication (IEC), social marketing, etc.]

TIME

2 hours, 30 minutes

SESSION OVERVIEW

- A. What is Advocacy? (45 minutes)
- B. Steps in the Advocacy Process (1 hour)
- C. Advocacy and Related Concepts (45 minutes)

MATERIALS

- Flipchart and paper, markers, tape
- Workshop agenda on flipchart or as a handout
- Learner objectives for Session One on a flipchart
- Sample advocacy definitions on a flipchart
- Three sets of pre-printed cards containing steps in the advocacy process

HANDOUTS

- 1A—Sample Definitions of Advocacy
- 1B—Steps in the Advocacy Process
- 1C—Advocacy and Related Concepts
- 1D—Trainer's Resource: Template for Preparing Advocacy Cards

PREPARATION

Before the training session, transfer the sample advocacy definitions (see Handout 1A) onto a flipchart using one sheet for each definition. Post the definitions around the room so they are clearly visible. Fold up the bottom half of each sheet and tape it to the top so that the participants cannot read the sheets as they enter the room.

★ NOTE TO THE TRAINER:

The definitions on Handout 1A are samples to assist the trainer. The trainer is encouraged to research and include definition(s) of advocacy developed by local organizations.

The trainer should also prepare three sets of advocacy process cards using the template provided as Handout 1D. Since participants will be working in three teams, it is useful to use index cards or stiff paper of three different colors. The text on each set of cards will be identical, however the sets will vary in color.

A. What is Advocacy? (45 minutes)

STEP 1

Welcome the participants to the advocacy workshop. Explain that over the course of the three-day workshop, participants will learn how to use advocacy as a tool for influencing decision-makers in order to bring about more favorable reproductive health policies and programs.

Review the agenda for the three-day workshop, printed on a flipchart or as a handout. Check for questions and comments about the workshop agenda and purpose.

★ NOTE TO THE TRAINER:

As an opening activity, the trainer is encouraged to invite an experienced advocate or reproductive health specialist to provide some opening comments. Ask the speaker to consider topics such as:

- the ability of non-governmental organizations (NGOs) and community-based organizations (CBOs) to represent populations who have traditionally been without a voice in decision-making processes
- the expanding role of NGOs in international fora such as Cairo, Cairo +5, and Beijing
- a personal account or local success story illustrating how advocacy has led to policy change

STEP 2

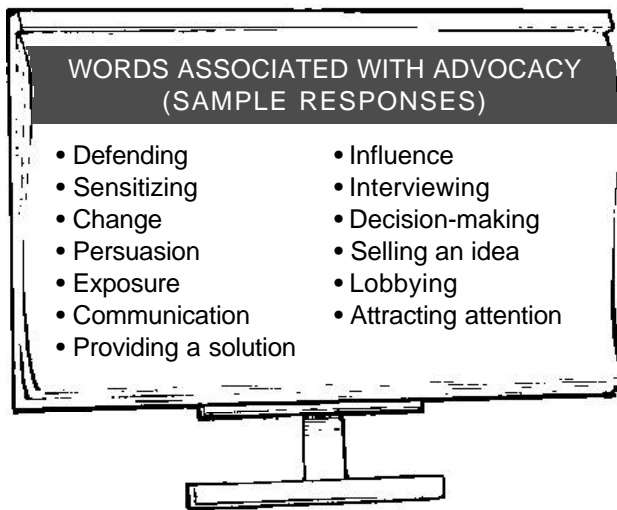
Review the learner objectives for Session One: Overview of Advocacy.

STEP 3

As a first step, the group will agree on a working definition of advocacy. Many participants will come to the workshop with a solid understanding of advocacy. As a starting point, lead the participants in a brainstorm of words they associate with **advocacy**. In order to relax the group, the trainer can simply go around the room and ask each person to say one word that comes to her/his mind when s/he thinks of advocacy.

Record these words on a flipchart, being careful to include all contributions. Repetition is not a problem; simply add a tick mark (✓) next to the phrases that are repeated.

The flipchart that follows shows the responses generated through this brainstorm at a recent workshop in Mozambique.



STEP 5

Add two or three other definitions from Handout 1A or local sources.

Once you have unfolded and reviewed all of the definitions, ask participants to look at the posted definitions and identify the terms that appear on the initial brainstorm list. You can use a bright marker to circle the concepts that the participants came up with on their own.

What are the key differences and similarities among all the definitions?

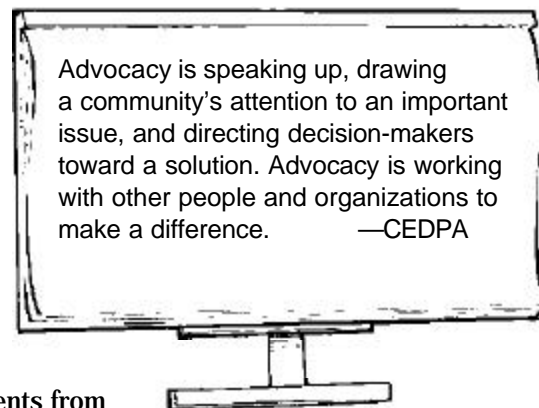
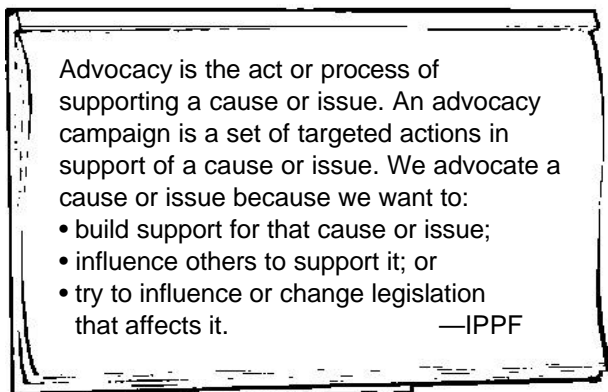
STEP 6

Next the group should agree on a working definition of advocacy to be used throughout the remainder of the workshop. If the time is available, you can lead the group in choosing the most important elements from

STEP 4

Once the group has generated a long list of terms associated with advocacy, share with them some definitions developed by different organizations and networks. Walk around the room and uncover the definitions you copied from Handout 1A (or from your own research). Read each sample definition aloud.

Sample definitions of advocacy on flipchart:



their brainstormed list and complement those with concepts from existing definitions. If time is more limited, the group can begin with their preferred definition among those posted, and modify it until their additions are well-reflected. The definition they agree upon is simply a reference point; it can be perfected over time.

★ NOTE TO THE TRAINER:

CEDPA has facilitated advocacy workshops in many non-English speaking countries. Workshops have been conducted in Arabic, Spanish, Russian, French, Portuguese, and Hindi, to name a few. CEDPA trainers consult with local **advocacy** groups to determine the most appropriate term to express advocacy in the indigenous language. Trainers then check with the participants to confirm or validate the selected term.

The preferred term for advocacy may vary from one country to another, even if the two countries share a common language. For example, one hears the term **defensa pública** in Mexico while neighboring Guatemala uses the term **incidencia**. In some Romance languages, there is concern about the phrase **abogacía** (Spanish), and **advocacia** (Portuguese). Colleagues in Romance language-speaking countries point out that the term that sounds like **advocacy** in English is too closely connected with lawyers and legal defense.

It is often helpful for the trainer to point out that these words share the common root of **voc-** or **voz**, meaning voice. In that context, ad-**voc**-acy means **giving voice** to a group or population that has traditionally been voiceless. This point further illustrates the role of NGO advocacy networks as intermediaries between marginalized populations and policy makers. Advocacy networks give a voice to their constituents and clients.

STEP 7

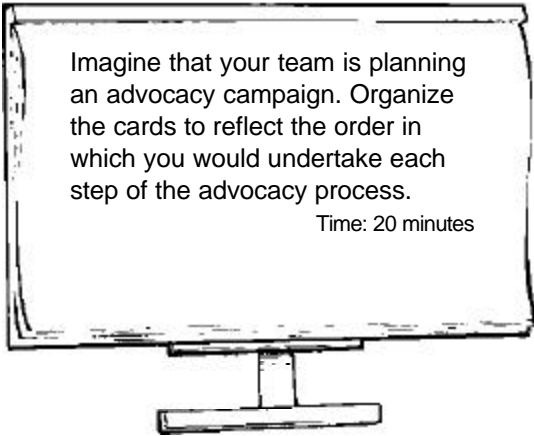
Distribute Handout 1A as a reference for defining advocacy.

B. Steps in the Advocacy Process
(1 hour)

STEP 1

Now that the group has reached consensus about a working definition, they will look at the various steps that make up the advocacy process. Experience shows that advocacy is very rarely an ordered, linear process. Some of the most successful advocacy networks operate opportunistically amidst a chaotic environment. The ability to seize opportunities, however, does not reduce the importance of a sound process and careful planning. The following exercise will demonstrate that looking at advocacy in a systematic way will help the participants to plan effective advocacy activities.

First, organize the participants into three teams with each team seated around a working table. You can ask the participants to count off by three or to count off by color according to the color of your advocacy card sets.

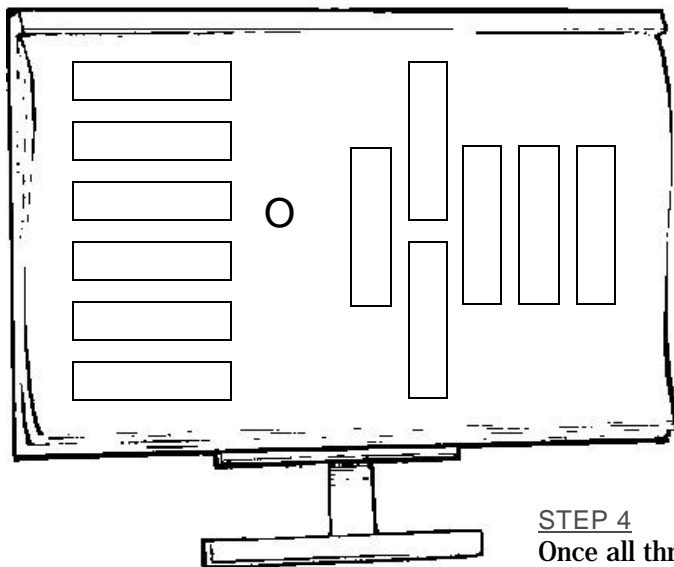


STEP 2

When you have the participants organized into three groups, distribute one set of advocacy cards to each group. (Note: the model for making these cards appears as Handout 1D at the end of the section.) Point out that each card has one step in the advocacy process written on one side, and a definition of that step or term on the other side. Present the following task on a flipchart (see left):

Each group can order its cards on a table top, on the floor, or posted on a wall.

For the trainer's information, groups generally order their cards to look something like this. Creativity is encouraged, of course!



STEP 3

After 20 minutes of work, circulate to see if each group has completed the task. Make sure that each team has organized their cards in a location (i.e., wall, floor, table top) that can be viewed by the whole group.

When the groups have finished, turn everyone's attention to the first group and ask them to present their work. Ask the presenters if there was any debate or discussion over certain cards. Check to see if the others have any questions or need clarification. Proceed to the next group for their presentation.

STEP 4

Once all three groups have presented, lead a discussion about the similarities and differences in the way the various groups ordered their steps.

- Did the groups have the same or different starting points? Same or different ending points?
- Were there any steps that were ordered together as a "package" by more than one group? (Often, the groups will link audience + message + channels or implementation + evaluation)
- Are there any important steps that were left out of the process?

STEP 5

In order to synthesize the activity, present Handout 1B—Steps in the Advocacy Process. You may wish to present this on an overhead transparency or flipchart. This handout shows the way that CEDPA generally orders the advocacy process.

1. The advocates generally begin with the **issue** around which they want to promote a policy change. The issue is focused, clear, and widely felt by the constituents of the advocacy group.

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2. Then the advocates articulate an advocacy **goal** (medium- or long-term, like a vision) and an **objective** (short-term, specific, measurable) based on the advocacy issue.
 3. Next, the advocates identify the key policy **audience**—the decision-makers who have the power to bring about a policy change.
 4. Then the advocates develop a compelling advocacy **message** and tailor it to the interests of the policy audience.
 5. The appropriate **communication channels** are selected to deliver the advocacy message to the policy audience. This may include a press conference, an executive briefing packet, a public debate, a conference for policy makers, etc.
 6. As a next step, the advocacy group seeks to broaden its **support** base among civil society members and other allies.
 7. The advocacy group **raises funds** and mobilizes other resources to support the advocacy campaign.
 8. Finally, the advocates **implement** their advocacy strategy according to a plan of action.
 9. **Data collection** runs up the side of the model because it supports many of the other steps. In order to select an important advocacy issue, the organizers often need to gather information. They often need to research the position of a policy audience vis-à-vis the advocacy issue. Data collection is an on-going step.
 10. Likewise, **monitoring and evaluation** take place throughout the advocacy process. Before undertaking the advocacy campaign, it is important for the advocates to determine how they will monitor their implementation plan. In addition, the group should decide how they will evaluate or measure results. Can they realistically expect to bring about a change in policy, programs, or funding as a result of their efforts? In specific terms, what will be different after the completion of the advocacy campaign? How will the group know that the situation has changed?

STEP 6

Remind the group that we often carry out advocacy activities in a very turbulent environment. We are not always afforded the opportunity to follow each step in the advocacy process according to a model on paper. Nevertheless, a systematic understanding of the advocacy process will help us plan well, use resources efficiently, and stay focused on our ultimate advocacy objective.

C. Advocacy and Related Concepts (45 minutes)

STEP 1

Now the participants have reviewed various definitions of advocacy and familiarized themselves with the steps in the advocacy process. Reproductive health NGOs have been using advocacy skills and techniques for years. Nevertheless, advocacy is often confused with other concepts that share common elements. These concepts include information, education, communication (IEC); social marketing; public relations; and

others. In order to achieve a clearer understanding of what advocacy **is**, it is helpful to clarify what advocacy **is not**. The following is a short exercise to compare and contrast advocacy with related concepts.

Draw the following on a flipchart:

ADVOCACY AND RELATED CONCEPTS			
Concept/Approach	Target Audience	Objective	How Do You Measure Success?
IEC			
Public Relations			
Advocacy			

STEP 2

As you lead participants through the completion of this chart, there will be many opportunities to draw on their experience with IEC and other approaches to social change. Ask if anyone in the group has experience managing an IEC campaign and use those participants to help complete the IEC row of the chart.

Ask: *Who is the “target” audience of an IEC campaign?*

Possible responses include: women, men, youth, the members of a predetermined geographical area.

The answers will vary from one IEC strategy to another, but most often the target is a particular population as defined by sex, age, geography, etc. Write the participants’ responses in

the appropriate box on the chart.

Ask: *What is the objective of an IEC campaign?*

Possible responses include: raise awareness, change behavior. Write behavior change in the appropriate box.

Ask: *How do you measure the success of an IEC campaign?*

In other words, what objective indicators of change will tell the IEC campaign organizers that their campaign has been successful? Responses will vary according to the campaign’s objective but write up several examples provided by participants such as *% of youth using condoms* or *% of adults who know how to access family planning services*.

STEP 3

Most people are familiar with the public relations (PR) or advertising campaigns that large, private companies use to sell their products. Ask participants to identify a local company that is widely known by the general public. Apply the questions above to the case of a PR campaign.

As background for the trainer, the following is an example from Mexico of how the row was completed. The company was Aeroméxico, a large Mexican airline.

Target audience: the Mexican consumer

Objective: promote company image and boost sales

Measure of success: increased ticket sales; % increase of new passengers

Using the local example, complete the PR row in the chart.

STEP 4

Finally, help the group consider an advocacy campaign. Repeat the same questions and fill in the answers on the chart. Common answers for the advocacy questions are:

Target audience: policy makers (those decision-makers with the authority to affect the advocacy objective)

Objective: change policies, programs, or the allocation of public resources

Measure of success: adoption of a new or more favorable policy/program; % shift in resource allocation; new line item in a public sector budget, etc.

STEP 5

In order to summarize the exercise, ask the participants to consider:

What elements do these approaches have in common?

Possible responses:

- They are all strategies for promoting change
- They are all most effective when planned systematically
- They all involve identifying an audience and tailoring messages accordingly

Reinforce how advocacy stands apart from the other approaches because advocacy always seeks to change a policy or program. Like IEC, advocacy requires the intermediate step of raising the awareness of key audiences. However, advocacy does not stop at awareness-raising. The advocacy process is complete when a decision-maker takes a prescribed policy action. Participants often point out that the general public can be the target of an advocacy campaign. In most cases, however, public awareness is raised in order to pressure a particular policy maker.

Remind participants that they will be able to distinguish an advocacy strategy from an IEC or PR strategy by focusing on the objective.

STEP 6

Distribute Handout 1C—Advocacy and Related Concepts and review it with the participants.

HANDOUT 1A

SAMPLE DEFINITIONS OF ADVOCACY

The definitions below reflect how several organizations understand and operationalize advocacy:

“Advocacy is the act or process of supporting a cause or issue. An advocacy campaign is a set of targeted actions in support of a cause or issue. We advocate a cause or issue because we want to:

- build support for that cause or issue;
- influence others to support it; or
- try to influence or change legislation that affects it.”

—International Planned Parenthood Federation: IPPF Advocacy Guide 1995

“Advocacy is a process that involves a series of political actions conducted by organized citizens in order to transform power relationships. The purpose of advocacy is to achieve specific policy changes that benefit the population involved in this process. These changes can take place in the public or private sector. Effective advocacy is conducted according to a strategic plan and within a reasonable time frame.”

—The Arias Foundation (Costa Rica)

“Advocacy is speaking up, drawing a community's attention to an important issue, and directing decision-makers toward a solution. Advocacy is working with other people and organizations to make a difference.”

—CEDPA: Cairo, Beijing and Beyond: A Handbook on Advocacy for Women Leaders

“Advocacy is defined as the promotion of a cause or the influencing of policy, funding streams or other politically determined activity.”

—Advocates for Youth: Advocacy 101

“Colleagues in India describe advocacy as an organized, systematic, intentional process of influencing matters of public interest and changing power relations to improve the lives of the disenfranchised. Other colleagues in Latin America define it as a process of social transformation aimed at shaping the direction of public participation, policies, and programs to benefit the marginalized, uphold human rights, and safeguard the environment. African colleagues describe their advocacy as being pro-poor, reflecting core values such as equity, justice, and mutual respect, and focusing on empowering the poor and being accountable to them.”

—Institute for Development Research: Advocacy sourcebook

“Advocacy consists of different strategies aimed at influencing decision-making at the local, provincial, national, and international levels, specifically:

Who decides—elections, appointments and selection of policy-makers, judges, ministers, boards of advisors, managing directors, administrators, etc.

What is decided—policies, laws, national priorities, services, programmes, institutions, budgets.

How it is decided—accessibility of citizens to information and the process, extent of consultation, accountability and responsiveness of decision-makers to citizens and other stakeholders.

Policies and decisions are solutions to concrete problems. Effective advocacy requires sharp understanding and analysis of a concrete problem, and a coherent proposal for a solution.”

—InterAction: Women's Advocacy Workshop materials

MONITORING & EVALUATION

- Issue
- Goal and Objectives
- Target Audience
- Message Development
- Channel of Communication
- Building support
- Fundraising
- Implementation

DATA COLLECTION

HANDOUT 1C

ADVOCACY AND RELATED CONCEPTS

The following chart illustrates the difference between advocacy and several related concepts. Advocacy can usually be distinguished from other approaches by its objective—advocacy.

APPROACH	ACTORS/ ORGANIZERS	TARGET AUDIENCE	OBJECTIVE	STRATEGIES	MEASURING SUCCESS
Information, Education, Communication (IEC)	<ul style="list-style-type: none"> • Service providers 	<ul style="list-style-type: none"> • Individuals • Segments of a community (women, men, youth) 	<ul style="list-style-type: none"> • Raise awareness and change behavior 	<ul style="list-style-type: none"> • Sort by audience • Mass media campaigns • Community outreach • Traditional media 	<ul style="list-style-type: none"> • Measuring knowledge/skills acquired and behavior change • Process indicators • Focus groups • Service Delivery statistics
Public Relations	<ul style="list-style-type: none"> • Commercial institutions 	<ul style="list-style-type: none"> • Consumers 	<ul style="list-style-type: none"> • Improve the company's image and increase sales 	<ul style="list-style-type: none"> • Large-scale advertising (radio, TV, print media) • Public events 	<ul style="list-style-type: none"> • Improved public perception • Increased sales • Increased market share
Community Mobilization	<ul style="list-style-type: none"> • Community members and organizations 	<ul style="list-style-type: none"> • Community members and leaders 	<ul style="list-style-type: none"> • Build a community's capacity to prioritize needs and take action 	<ul style="list-style-type: none"> • Door-to-door visits • Village meetings • Participatory Rural Appraisal (PRA) 	<ul style="list-style-type: none"> • Issue-specific process and outcome indicators • Quality of participation
Advocacy	<ul style="list-style-type: none"> • NGOs • Research institutions • Universities 	<ul style="list-style-type: none"> • Public institutions and policy makers 	<ul style="list-style-type: none"> • Change policies, programs, and resource allocation 	<ul style="list-style-type: none"> • Focus on policy makers with the power to affect advocacy objective • High-level meetings • Public events (debates, protests, etc.) 	<ul style="list-style-type: none"> • Process indicators • Media scans • Key informant interviews • Focus groups • Opinion surveys

<h1>Issue</h1>	<p>The problem that requires a policy action.</p>
<h1>Goal Objective</h1>	<p>Goal: A statement of the general result you want to achieve</p> <p>Objective: Incremental steps toward achieving your goal that are:</p> <ul style="list-style-type: none">• specific • measurable• realistic • time-bound

Target Audience

The policy makers you are trying to influence to support your issue, e.g., parliamentarians, local officials, ministry officials.

Message Development

Statements tailored to different audiences that define the issue, state solutions, and describe the actions that need to be taken.

Channels of Communication

The means by which a message is delivered to the various target audiences, e.g., radio, television, flyers, press conferences, meetings.

Building Support

Building alliances with other groups, organizations, or individuals who are committed to supporting your issue.

Fundraising

Identifying and attracting resources (money, equipment, volunteers, supplies, space) to implement your advocacy campaign.

Implementation

Carrying out a set of planned activities to achieve your advocacy objectives (action plan).

Data Collection

Gathering, analyzing, and using appropriate quantitative and qualitative information to support each step of your campaign.

Monitoring Evaluation

Monitoring: A process of gathering information to measure progress toward your advocacy objectives.

Evaluation: A process of gathering and analyzing information to determine if the advocacy objectives have been achieved.