Explore and define the problem you are trying to solve, and identify the solutions that will form your advocacy objective.

**The Steps:**

1. Start by writing your problem in your own words in worksheet 01. Keep it short and easy to understand - it doesn't have to be perfect.
   **Tip:** Ideally, your problem is conservation or environment related (e.g. 'a rise in elephant poaching and skinning'). But you shouldn't get stuck deciding on the formulation of your problem. The Problem Tree tool also works when analysing policy related problems (e.g. 'no ban in place to stop elephant poaching and skinning'), or social problems.

2. Now reflect on your problem statement. Brainstorm together:
   - What is causing the problem? Write down all causes.
   - Dig one level deeper: for each cause; what are the root causes?
   - Reflect on all causes: What do you believe to be the most important causes? Are they related to policy? Will you be able to influence them through advocacy work? If the answer is 'yes', take this input into worksheet 02.
   **Tip:** Policy advocacy is not always the solution to your conservation problem. Sometimes the causes that have an effect on your problem are not because of policy, laws or budgetary decisions. Perhaps awareness raising, behavioural change, or direct engagement with stakeholders to address the problem will be more powerful. Be mindful of this.

3. Write down the most important policy-related root causes from worksheet 01. Now look back at your problem. Can you identify a central theme or challenge that is present across all these policy-related root causes? Write this down in a single sentence on worksheet 02 (step 3) - this is your advocacy issue.

4. Describe the relevance of your advocacy issue to your conservation and/or strategic plans, previous and current projects, the external agenda and stakeholder needs. Make sure to describe how addressing your advocacy issue contributes to your desired long-term conservation impact on biodiversity, ecosystems and the climate. If you agree on the relevance of your issue, and the long-term conservation impact it can have, you can move to the next step.

5. As a final step, transform your advocacy issue into an objective: Look again at the most important policy-related root causes, which are negative statements, and re-formulate these as positive statements. Summarise these positive statements into a objective, by describing the desired policy, legal or budgetary change you want to see happening. This objective might still change, depending on the results of other exercises in the 'explore' phase.
   **Tip:** Try to formulate the advocacy objective in a ‘How Might We...?’ question to make your exercise action- and solution-oriented (e.g. ‘How might we ensure the government adopts a law to ban all wildlife trade?’).
The steps in short:

1. Describe in as few words as possible what the problem is you are seeking to solve.

2. Brainstorm to identify all potential causes for this problem. For each cause: think about the root causes behind it.

   Are these root causes related to policy? Can you influence them with advocacy work? If yes, please take your input to worksheet 02, step 3.

IDENTIFY PRIMARY & ROOT CAUSES

Identify the causes and underlying 'root causes' for your problem.
The steps in short:

3. Write down the challenge that reflects on the most important policy-related in a single sentence - this is your advocacy issue.

4. Describe the relevance of your advocacy issue to your conservation and/or strategic plans, previous and current projects, the external agenda and stakeholder needs.

5. As a final step, transform your advocacy issue into an objective by describing the desired policy, legal or budgetary change you want to see happening.

03 DEFINE YOUR ADVOCACY ISSUE

04 WHAT IS THE RELEVANCE OF YOUR ADVOCACY ISSUE

02 PRIMARY & ROOT CAUSES

05 SUMMARISE YOUR ADVOCACY OBJECTIVE
Create an understanding of the external context impacting upon your advocacy issue and objective.

**The Steps:**

Gather relevant colleagues and, if you can, key stakeholders and rights-holders related to the issue, to fill in the Context Map together.

If you are more than six people, divide your team in sub-groups and assign each group a Context Map. You can make print-outs of the worksheet, use Post-its, or do this digitally.

1. Place your previously identified advocacy objective at the top of the Context Map. The objective needs to be clear enough so you can be focused in analysing the contextual factors that will have an impact on your objective and its underlying issue(s).

2. In your group, identify the key contextual factors for each area which may have an influence on your advocacy issue and note these down. Try to be as exhaustive as possible.

   **TIP:** You can also carry out desk research prior to doing the Context Map, or can refine the information gathered afterwards by carrying out further research.

3. The impact and relevance of each of these contextual factors in relation to your advocacy issue will vary. For each of the factors identified in step 2, discuss in your group how likely these factors are to have an impact and how significant their impact would be on your advocacy issue. Those factors that are very likely, and have a high impact, should be highlighted.

4. Summarise the conclusions (the most important factors) with the whole group in the Context Map worksheet.
The steps in short:

1. Place your previously identified advocacy objective at the top of the Context Map.

2. Identify the key contextual factors for each area which may have an influence on your advocacy issue and note these down.

3. For each area, highlight the factors that are likely to have a high impact on your advocacy issue.

### 01 WHAT IS YOUR ADVOCACY ISSUE?
Write down the advocacy issue defined in the ‘Problem Tree’

### 02 IDENTIFY THE KEY FACTORS OF THE ISSUE
Write down the contextual factors influencing the problem for each area

#### RULES & REGULATIONS
Which existing rules and regulations have an influence on your advocacy issue and how?

#### POLITICAL
What role is the government playing on a local, national and global level in relation to the issue? Describe the decision making structures, timelines and processes if you know any of these already

#### TECHNOLOGICAL
Which technological developments have an influence on your advocacy issue and how?

#### ENVIRONMENTAL
What are the main environmental trends (climate, biodiversity, ...) that relate to your advocacy issue?

#### ECONOMICAL
What are the main economic and development policies that currently influence the advocacy issue and how?

#### SOCIAL
What are the relevant sociological factors and trends (education, media landscape, gender equality, income ...) that may relate to your advocacy issue?
Identify the decision makers, stakeholders and rights-holders who have, should have or do not have, power over your advocacy objective.

The Steps:

1. Place your previously identified advocacy objective in the middle of the first worksheet of the Stakeholder Map. The objective needs to be clear enough so you know what is at stake when decisions about this issue are going to be taken.

   **TIP**: In case your advocacy objective is complicated and just one stakeholder map is not sufficient, you can duplicate the worksheet for each sub-objective.

2. Identify the people that can directly make a decision about your objective. They are the key decision makers and have a seat at the table. Think of governments, parliamentarians, different ministries and their officials. What do they want? Why are they at this table? Place them in the inner grey circle according to how closely involved they are in the decision making process (the closer to the objective, the more involved they are).

3. Define the stakeholders that do not have direct access to the decision making, but that have potential power to influence, or are rights-holders in relation to the issue. What role do they play? Place these stakeholders/rights holders on the map according to how close they are to the decision makers you listed in step 2.

4. Analyse the relationship between these decision makers and stakeholders/rights holders - do any of these stakeholders have influence over some of the decision makers? Move 'actors' around the map so that they are positioned according to their relationships (e.g. you can cluster them). Draw a line between the stakeholders/rights holders and the decision makers that they have influence over.

   **TIP**: You might have identified some decision makers, stakeholders and rights-holders in the Context Map that you can use as a starting point to identify key actors and individuals in the Stakeholder Map.

5. On the second Stakeholder Map, you move over the identified decision makers, stakeholders and rights holders from the first map and now you place them according to how much interest (urgency) they have in the issue, and how much power (influence) they have over the issue. Some might not currently use their influence on this issue, but have potential to do so if we can mobilise their interest.

6. Next, you highlight those who are champions (high urgency, high influence) and blockers (low urgency, high influence) in relation to your advocacy objective.

7. This analysis will help you decide your advocacy strategy and approaches, and select the priority decision makers and stakeholders to engage with, to form potential coalitions with etc.
The Steps in short:

1. Fill in the advocacy objective in the center.
2. Identify direct stakeholders and decision makers and place them in the inner circle.
3. Identify stakeholders without direct influence and place them on the map.
4. Analyse the relationships between direct and indirect stakeholders and draw lines to illustrate their influence.
5. On the second worksheet (see next page), place stakeholders according to their interest power and influence related to the issue.
6. Highlight the champions and blockers in relation to your objective.
7. You are now ready for analysis!
<table>
<thead>
<tr>
<th>NO SENSE OF URGENCY WITH POWER</th>
<th>SENSE OF URGENCY WITH POWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>People that do not share the same issue as you but do have the power to influence decisions.</td>
<td>People that have the same issue as you and have enough power to influence decisions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NO SENSE OF URGENCY NO POWER</th>
<th>SENSE OF URGENCY NO POWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>People that do not share the same issue as you and do not have the power to influence decisions.</td>
<td>People that have the same issue as you but do not have enough power to influence decisions.</td>
</tr>
</tbody>
</table>
Analyse your strengths and weaknesses against opportunities and threats from outside, in relation to your advocacy objective.

The steps:

1. Place your previously identified advocacy objective at the top of your worksheet. The objective needs to be clear enough so you know what is at stake when decisions about this objective are going to be taken.

2. Research your organisation in relation to your advocacy objective. What is happening around this topic within your organisation? And outside? What are the key developments and drivers? Use the information you have collected in your Context and Stakeholder Maps as a basis.

   TIP: Before meeting in a group for a brainstorm, you may want to encourage participants to carry out desk research beforehand to ensure enough information is available to share.

3. List the strengths and weaknesses of you, your team or office or coalition. What assets are available through your colleagues, financial, human and other resources, contacts, skills, credibility and knowledge? What (dis)advantages are there in your team and in the organisation? Would you consider the level of capacity and resources available a strength or a weakness? Can any of these be strengthened by partnerships with others who have the capacity you lack?

4. List potential opportunities and threats for you, your team or organisation or coalition. What technologies, partnerships or (political) developments have positive or negative influence? Note that these are distinctly different from the factors you have identified in step 3. Strengths and weaknesses are internal - things you have control over and can change. Opportunities and threats are external - which you cannot control but have an impact on you.

5. Now you’ve created an overview of your ability to work with the advocacy objective, and the elements you might need to address with your team, based on your SWOT analysis.

6. Finally, explore ways to address issues in the SWOT by asking the following questions: How can we take advantage of our strengths and opportunities? How will we minimise our weaknesses and threats? Which collaborations or actions could compensate for weaknesses, leverage opportunities and minimise threats? Use the outputs from this exercise when you develop your Advocacy Plan and decide on your Theory of Change, keeping in mind your strengths, weaknesses, opportunities and threats.
**SWOT ANALYSIS WORKSHEET**

The steps in short:

1. Fill in the advocacy objective at the top.
2. Research your organisation in relation to your advocacy objective.
3. List the strengths and weaknesses of you, your team, organisation or coalition.
4. List potential opportunities and threats for you, your team or organisation or coalition.
5. You have now created an overview of your ability to work with the advocacy objective.
6. Finally, explore ways to address key issues identified in the SWOT. Use these ideas when you develop your Advocacy Plan and decide on your Theory of Change.

**ADVOCACY OBJECTIVE:**

<table>
<thead>
<tr>
<th>HELPFUL</th>
<th>HARMFUL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STRENGTHS</strong></td>
<td><strong>WEAKNESSES</strong></td>
</tr>
<tr>
<td>• What do we do best?</td>
<td>• What could we do better?</td>
</tr>
<tr>
<td>• What unique knowledge, talent or resources do we have?</td>
<td>• What knowledge, talent or resources are we lacking?</td>
</tr>
<tr>
<td>• What programs are effective and strong?</td>
<td>• What disadvantages do we have?</td>
</tr>
<tr>
<td>• In what areas do the staff excel?</td>
<td>• What do staff and team members see as challenges?</td>
</tr>
<tr>
<td>• What are we known for?</td>
<td>• What programs need improving?</td>
</tr>
<tr>
<td>• What resources &amp; capacity do we have available?</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OPPORTUNITIES</strong></th>
<th><strong>THREATS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• What interesting trends could we respond to?</td>
<td>• What obstacles do we face?</td>
</tr>
<tr>
<td>• What are the advantages of engaging in the new trends/initiatives?</td>
<td>• Who and/or what might cause us problems in the future? And how?</td>
</tr>
<tr>
<td>• What funding / financing could be utilised?</td>
<td>• Which relationships are at risk while engaging in certain advocacy tactics?</td>
</tr>
<tr>
<td>• What potential partnerships could we close to reach our goal?</td>
<td>• What actions taken by competitors or blockers could negatively impact us?</td>
</tr>
<tr>
<td>• How is our field changing?</td>
<td>• Are there any policies, and/or legislation changing that might negatively impact us?</td>
</tr>
<tr>
<td>• Who can we support? And how could we support them?</td>
<td>• Are we competing with others?</td>
</tr>
<tr>
<td>• How can we turn our strengths and weaknesses into opportunities?</td>
<td></td>
</tr>
</tbody>
</table>
Develop an overview of the causal links between the key activities and outcomes that will help you achieve your advocacy objective.

The steps:

1. Share in advance with participants to this exercise the results of the Problem Tree, Stakeholder Map, Context Map and SWOT analysis. These will help inform your Theory of Change.

   **TIP:** Expect the brainstorm process to be messy at first - the examples of Theories of Change you see are always the end product.

2. Fill out your advocacy objective and expected impacts in your Theory of Change worksheet, as you have identified them through the Problem Tree exercise.

   **TIP:** For complicated and multi-year advocacy projects, you may want to develop a single overarching Theory of Change, and develop more detailed Theories of Change for advocacy sub-objectives.

3. Think about all the decisions/changes in behaviour that need to happen by external actors before you can consider your overall advocacy objective achieved. Try to be exhaustive and come up with as many outcomes as possible. You can draw arrows between outcomes if they have a causal effect on each other. Once you’ve gone through them, try to isolate the 3-5 most important main outcomes that are needed, in order for your overall advocacy objective to be achieved.

4. For each of your main outcomes, think about how you can contribute to these changes. What are activities that can help achieve your outcomes? You may want to focus your activities around your strengths you have identified in your SWOT. Again try to be exhaustive and then reduce the list to a manageable number of key activities.

5. Map out assumptions. Ask yourself what beliefs, values and perspectives have shaped your Theory of Change. These assumptions will be about the links between your outputs and outcomes, and outcomes and advocacy objectives. Discuss these assumptions in your group.

6. Check for consistency. Ask yourself whether your key activities and their outputs will help turn your planned outcomes into reality. Sometimes it can help to ask an outsider to check this for you. Similarly, ask yourself whether your planned outcomes will help achieve your advocacy objective.

   **TIP:** Consider whether you have sufficient financial and staff resources to implement your Theory of Change. If not, you should either find more resources or you may have to adjust your level of ambition.

7. Summarise at the end. Use the template to capture the main ideas, to ensure that everyone in your team shares the same thinking. This Theory of Change will also be a key tool when analysing - and possibly adapting - your Advocacy Plan as you are making progress.

What are …

- **Key approaches or activities:** What you do, either as organisation or in collaboration with partners. These can be expressed by a verb (“research”, “provide”, “facilitate”, “share”). In a theory of change these do not need to be specific yet.

- **Outputs:** What you produce. Outputs are the tangible products as a result of the activities. They are usually expressed as nouns, are tangible and can be counted (15 trainings, 5 events, 20 meetings). Their result is entirely under your control.

- **Outcomes:** What you achieve. Outcomes are the behavioural changes in external actors (your key audiences) as a result of your outputs (them voicing a position, making proposals, engaging with actors ...). You can influence these changes, but will never have full control over them.

- **Advocacy objective:** The policy, law or budgetary change you believe is needed to contribute towards the desired impacts in the natural environment.

- **Impacts:** Why you do it. Long-term improvement in the natural environments are the results that arise from an accumulation of outcomes. Sometimes this will be hard to describe, especially when working on drivers of environmental harm or degradation such as finance, markets or governance.

- **Assumptions:** The necessary conditions for change, or the “underlying conditions or resources that need to exist for the planned change to occur”.
THEORY OF CHANGE WORKSHEET

The steps in short:
1. **Work from right to left:**
   - Fill out your advocacy objective and expected impacts in your, as you have identified them through the Problem Tree exercise.

2. **Map the needed outcomes and isolate the 3-5 most important areas where change is needed. These are your main outcomes.**

3. **Map out activities and associated outputs. Take your SWOT into consideration.**

4. **Map out assumptions. Ask yourself what beliefs, values and perspectives have shaped your Theory of Change.**

5. **Summarise and use this template to capture the main ideas, to ensure that everyone shares the same thinking.**

---

**MAIN ACTIVITIES**
What should we do to make the identified outcomes more likely to happen?

**OUTPUTS**
How will we know we have completed our activities?

**MAIN OUTCOMES**
Who will be influenced by our outputs to change their behaviour/actions and how will they change?

**ADVOCACY OBJECTIVE**
What policy, law or budgetary change are we working towards?

**IMPACTS**
What are the positive change(s) that will take place in the natural world as a result of our work?

**ASSUMPTIONS**
What are the underlying beliefs about how your advocacy will work, the people involved and the context?
## ACTIVITY OVERVIEW

### ELABORATE IN DETAIL FOR EACH ACTIVITY

Fill in this worksheet for each activity.

### TIMELINE

Sketch the overall timeline for this activity from start to finish. Highlight key dates/moments.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>WHAT TYPE OF ACTIVITY IS IT?</th>
<th>Describe it in general terms.</th>
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<thead>
<tr>
<th>OUTCOME</th>
<th>WHAT OUTCOME DOES THE ACTIVITY CONTRIBUTE TO?</th>
<th>Describe how it links with your Theory of Change.</th>
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<thead>
<tr>
<th>STAKEHOLDERS &amp; DECISION MAKERS</th>
<th>WHO ARE THE KEY PEOPLE MOST RELEVANT TO THIS ACTIVITY?</th>
<th>Link back to your Stakeholder Map.</th>
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<thead>
<tr>
<th>APPROACH &amp; TACTICS</th>
<th>WHAT IS THE APPROACH YOU WILL USE TO ENGAGE AND COMMUNICATE?</th>
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<thead>
<tr>
<th>COMMUNICATION CHANNELS</th>
<th>WHICH COMMUNICATION CHANNELS WILL BE USED TO REACH OUT?</th>
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<thead>
<tr>
<th>RESOURCES</th>
<th>WHAT PEOPLE AND RESOURCES DO YOU ALREADY HAVE AVAILABLE AND WHAT DO YOU NEED EXTRA?</th>
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<td></td>
<td></td>
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<thead>
<tr>
<th>OUTPUTS</th>
<th>WHAT METRICS WILL YOU TRACK IF YOU’VE FULFILLED YOUR ACTIVITY? HOW WILL YOU TRACK THESE? E.G. HOW MANY DECISION MAKERS DO YOU WANT TO ATTEND AT YOUR EVENT?</th>
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<tr>
<th>SUCCESS CRITERIA</th>
<th>WHAT ARE THE LIMITS OF THE METRICS? DEFINE CRITERIA BASED ON THESE METRICS. E.G. WHAT IS THE MAXIMUM BUDGET/TIME?</th>
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</table>
Create key messages to support consistent communication throughout all advocacy activities.

The steps:

1. Start by reflecting on the existing positions on this issue, if relevant. What is your overall position statement? Formulate your position (sometimes also called your ‘ask’) into 1-3 sentences, bearing your key audiences in mind (use your Stakeholder Map).

   **TIP:** Some decision makers and stakeholders have only limited time for you, so be sure to have an “elevator pitch” ready, which is a persuasive speech of max. 30 seconds to land your points - keep this as short and simple as possible!

2. Now think about how you can split that position into three key messages, again 1-3 sentences each. What are the three most important things to communicate in relation to your overall position statement? Each of these messages could relate to your key policy recommendations.

   Remember to check again that your messages align with other communication by your organisation.

   **TIP:** you can start by brainstorming together on a variety of messages. Then, select the strongest ones by voting for your top 3 and discussing the results with the group.

3. For each message, think about how you can support this message: what evidence (facts, figures) do you have to support it? What examples do you know that can support it? List the most compelling evidence and examples in the box, for further exploration later when you write your Advocacy Plan.

4. Summarise the answers to the questions above in the Message House template.
### Message House Worksheet

**The steps in short:**

1. Formulate your overall position statement into 1-3 simple sentences.

2. Split that position into three key messages, again 1-3 sentences each.

   Remember to check again that your messages align with other communication by your organisation.

3. For each message, list the most compelling evidence and examples in the foundation.

4. Summarise the answers to the questions above in this worksheet.

---

### Overall Position Statement

Summarise your position

---

#### Key Message 1

**What is essential to communicate?**

---

#### Key Message 2

**What is essential to communicate?**

---

#### Key Message 3

**What is essential to communicate?**

---

### Foundation: Evidence & Examples

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ADVOCACY MEETING CHECKLIST

01 BEFORE THE MEETING
Reflect on why and who you are meeting - and how you will get your messages across.

WHAT DO YOU WANT TO ACHIEVE?
Tip: consult your Advocacy Plan and Activity Overview to make sure this meeting is aligned with your Theory of Change.

WHO ARE YOU MEETING?
Are the attendees a key stakeholder or decision maker? What are their beliefs and positions on your issue? Is the contact familiar with your organisation and its work on the issue? Tip: use the Stakeholder Map and Context Map.

WHAT IS YOUR MESSAGE?
And how are you getting it across? How do you request the meeting? Tip: use the Message House.

WHO DO YOU BRING ALONG?
Would you stand stronger when other stakeholders join your meeting? Do you need to involve any other experts? Tip: use the Stakeholder Map.

HAVE YOU DONE YOUR HOMEWORK?
Do you need to bring any supporting documents to hand over to the person you are meeting? Have you prepared for any difficult questions or conversations that may arise?

HAVE YOU PLANNED OUT THE MEETING?
What will be the agenda? How long will the meeting last? What will be the roles if you join as part of a delegation?

02 DURING THE MEETING
Be clear and succinct. Listen, observe and ask questions. Capture what’s being said.

HAVE YOU INTRODUCED YOURSELF?
Were you able to grab their attention? Were you able to personally connect with the person, or anything positive they have recently been engaged on?

HAVE YOU AGREED ON SPECIFIC ACTIONS AFTER THE MEETING?
Did you send out a follow up or summary to participants?

HAVE YOU EXPLAINED THE GOAL OF THE MEETING?
Do all attendees see this in the same way? And is the agenda clear for everyone?

DO YOU FEEL THE PERSON YOU MET WITH HAS THE SAME ADVOCACY OBJECTIVE AS YOU?
Which obstacles do you see? Which opportunities?

ARE YOU LISTENING, TAKING NOTES AND ASKING QUESTIONS?
Did you present your issue and proposals clearly and succinctly? Did you leave enough time for the person to respond and for you to listen? Did you ask questions to start a conversation?

ARE YOU SENSING THE ROOM?
How is everyone reacting to your proposals? What is their body language? Do you need to adjust your speaking pace or the level of complexity?

ARE YOU GETTING A RESPONSE TO YOUR PROPOSALS AND MESSAGE?
Have you asked for confirmation or reactions?

HAVE YOU CONCLUDED THE MEETING?
Before ending the meeting, do all participants agree on the conclusions of your meeting? Can you identify any follow-up actions for you or the person that allow you to continue the contact?

03 AFTER THE MEETING
Follow up and evaluate your approach for future actions.

HAVE YOU AGREED ON SPECIFIC ACTIONS AFTER THE MEETING?
Did you send out a follow up or summary to participants?

DO YOU FEEL THE PERSON YOU MET WITH HAS THE SAME ADVOCACY OBJECTIVE AS YOU?
Which obstacles do you see? Which opportunities?

DO YOU FEEL YOUR ADVOCACY ACTIVITIES SHOULD BE CHANGED AFTER THIS MEETING?
Did the meeting change anything fundamental? Does your Theory of Change remain valid? Tip: use Regular Logs or Three Page Evaluations to reflect on your progress.
Advocacy events should help move your issue forward and contribute towards achieving your advocacy objective. It is a joint effort between teams at policy and communication level. Below is a rough guide with key considerations and steps to taken into account when organising an event.

01 FORMAT

DEFINE THE TYPE OF EVENT
Define the type of event: a workshop, a breakfast or lunch debate, a specialised conference, a conference for the wide public, a one-off event or a series, a closed-doors meeting, an exhibition, the screening of a movie, a cocktail party, a buffet, a gala. Each of these formats has a purpose.

DO A REALITY CHECK BEFORE
Assess if there is enough budget, time and resources. Events can be very rewarding and impactful, but generally also demanding on resources.

02 CONTENT

DEFINE THE TITLE OF THE EVENT
Names matter. This is what your participants will remember this event by.

MAKE A LIST OF INTERNAL COLLEAGUES WHO NEED TO BE INVOLVED
Include them in your preparations from the very start.

DEFINE THE PURPOSE AND DESIRED OUTCOMES
Write a brief concept note with the rationale for the event. You can use this as a basis for internal communication.

DEFINE THE TARGET AUDIENCE
Decision-makers, businesses, media, a combination of all of them? This will determine the list of people to be invited and affect the budget.

DEFINE THE MESSAGE
It should be simple, clear, short and have impact. This is what people will remember after the event.

MAKE A LIST OF POTENTIAL SPEAKERS
This can include external experts, scientists, decision makers, civil society and business representatives or people who can present a case study.

RESPECT GENDER BALANCE AND REGIONAL BALANCE OF SPEAKERS
They should also be well-known in their field and/or good speakers, able to keep the audience's attention.

DEFINE THE PROGRAMME OR AGENDA
Follow a logical sequence of speakers and the topic they will be asked to cover, as well as the timing of each speech (and make sure they agree with it). Remember that speeches longer than 20 minutes tend to be boring, unless it is an excellent speaker. An event should not last more than 2 hours. If people are standing up, speeches should not be longer than 3-5 minutes and be very simple as people cannot take notes. The programme should state if questions and answers are possible at the end. Having a good moderator who controls time and the debate can be very useful. Food should be served before and after, not during speeches or guests will be distracted.

DEFINE THE RULES OF THE GAME
Clarify if the event is on or off the record or under the "Chatham House rule" (quotations are possible, without mentioning the name of the speaker). If an event is off the record journalists should not be invited, unless they can get useful background information and speakers agree to their presence.
# Advocacy Event Checklist 2/3

## Logistics

### Prepare a Work Plan
This includes a list of things to be done, by whom and when. Build margins into the timeline. The work plan should be reviewed during regular meetings with people involved in the preparations.

### Identify the Date and Consider the Timeline
Is this the right time to do this activity? Can a good event be realistically organised in time? High-level speakers need very early notice for participating in a public event. Check that there are no clashes with other events targeting the same people at the same time in the same place.

### Identify the Best Location
Consider the target audience, the logistics and the technical requirements.

### Book a Space for the Event
Make sure there are technical facilities, such as a screen, laptop for Powerpoint presentations, microphones, chairs and tables, sound equipment etc. When choosing the room, take into account the number of participants: half-empty rooms do not give the feeling of a successful event, while over-crowded rooms do not allow participants to focus on and enjoy the event.

### Invite the Speakers
Best with a personalised message – a letter or an email – specifying all information, including title, purpose, audience, programme of the event and the rules of the game. Be prepared to cover their travel and accommodation costs, or let them know immediately if this is not possible.

### Decide on the Official Language of the Event
Is interpretation needed? It is usually quite costly.

### Prepare the List of Invitees
Check it with colleagues to make sure no one is forgotten. For larger events, expect a turnout of approximately 30-50%.

### Prepare Invites
Is a printed or an electronic invitation best? Sometimes it is good to send a printed invitation and a reminder via email. Work with communication experts to prepare the invitation. The invitation should include information such as date, time and location of the event, guests or speakers, a deadline and a contact person for RSVP.

### Send Invites
Send it out as early as possible before the event and allow enough time for people to respond. A reminder might be sent out via email or made with direct phone calls one week before the deadline.

### Plan Communications
Communication might be needed before, during and after the event as appropriate (including social media). Work with communication experts on this. The event can also be announced on your external channels, if appropriate.

### Distribute Communication Materials at the Event
Decide this with communication experts. Could be folders with background information, publications, brochures, etc. Make sure there is enough time for production.

### Consider Decoration Materials for the Location
Decide with communication experts if this will be logos, posters, banners, images projected on a screen, photos, movies etc. Make sure there is enough time for production.
ADVOCACY EVENT CHECKLIST 3/3

**DO A MEDIA LAUNCH - IF NEEDED**
If there is one, involve communication experts and follow their guidance.

**CONTACT SUPPLIERS FOR NEEDED SERVICES**
E.g. catering, music, renting of material etc. Contact the administration unit in your organisation for the purchase requests and the necessary contracts. Brief them on what is needed, ask for conditions and estimated costs. Follow your internal procurement rules.

**ARRANGE CATERING**
When dealing with catering, choose a sustainable menu and follow your organisation’s guidelines if these exist.

**ENSURE VISUAL DOCUMENTATION**
If needed, book a photographer or filmographer to document the event.

**BRIEF THE SPEAKERS**
Speakers need to prepare. If needed, set up a preparatory call between you and all speakers a few days ahead of the event so everyone gets to know each other.

**MAKE A FINAL LIST OF PARTICIPANTS**
One week before the event all guests should have confirmed their participation.

**PREPARE FOR IDENTIFICATION**
If needed, prepare badges for speakers and guests and keep a number of blank badges available for people who forgot to confirm. Remind participants if an ID/passport is required to enter the building, for example if it is a government or UN building.

**PREPARE A WELCOMING SPEECH**
At least three days before the event, prepare the speech (remember to thank everyone) and/or make sure all presentations are available.

**GET MATERIALS READY**
Three days before the event, all material to distribute should be ready.

**SET UP THE ROOM**
2 hours before the event, access the room to make sure that everything is set-up.

**HAVE EXTRA STAFF AVAILABLE TO HELP**
Make sure you have some people ready to help for anything unexpected that might occur at the event.

**FOLLOW UP**

**SHARE OUTCOMES FROM THE EVENT INTERNALLY**
If appropriate, share info on an internal platform or use email to share results with your colleagues.

**EVALUATE YOUR EVENT**
Did it fulfil the purpose and did it have any outputs or outcomes that you can monitor and report? How many and who participated? You can also do a follow up survey to participants, either during or after the event.
WRITTEN COMMUNICATION CHECKLIST 1/2

**BEFORE**
Start preparing before you're actually writing.

**BE TIMELY AND RESPECT THE INTERNAL AGREEMENT PROCEDURES**
If you can't get your written communication ready in time for the decision you are seeking to influence, don't do it. Make sure to follow and respect your organisation's internal approval procedures. These will also influence the time you have to develop this.

**AGREE ON A PRODUCTION TIMELINE**
If your written communication needs lay-outing, raise this early-on with specialists in your organisation or seek external support to help you with this.

**HAVE A CLEAR POSITION ON YOUR ISSUE**
Talk your planned recommendations through internally and with your external partners, if any, in direct conversations, before writing, to avoid any misunderstandings.

**KEEP IN MIND YOUR AUDIENCE**
Write down a brief dissemination plan which lists who should read your document, and how you will succeed in them looking at your materials. Consider how much time your audience has. The more high-level your audience, the shorter your written communication should be (less than a page for the most senior of audiences).

**REALISE THAT YOUR TEXT MAY END UP BEING CIRCULATED FAR WIDER THAN YOU INITIALLY EXPECTED**
So always write assuming this information – even when shared in confidence - will end up in the public domain. If you have any concerns about this, don’t put it down on paper.

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**DURING**
Structure and content

**MAKE THE PURPOSE OF YOUR WRITTEN COMMUNICATION CLEAR FROM THE START**
Make sure to include this ideally in the title, or the first paragraph.

**PROVIDE A BRIEF SUMMARY OF THE KEY MESSAGES AND/OR RESEARCH FINDINGS AT THE START**
Especially if your text is more than two pages.

**LIMIT YOURSELF TO KEY (1-5) POLICY RECOMMENDATIONS OR MESSAGES**
Present real solutions which are actionable by your audience.

**THE BEST WAY TO OVERCOME AN OPPOSING ARGUMENT OR PERSPECTIVE IS TO ADDRESS IT**
Anticipate what issues will be of concern and embed this in your recommendations.

**PROVIDE LINKS TO ADDITIONAL INFORMATION SUCH AS STUDIES, DATA AND MORE DETAILED RECOMMENDATIONS**
Do this throughout the briefing with footnotes or hyperlinks, never breaking up the flow of your text. If you have more technical information you wish to share from the onset, put this in an annex.

**INCLUDE SUPPORTING MATERIAL: GRAPHS, COMPELLING FACTS & FIGURES, ILLUSTRATIVE EXAMPLE, CASE STUDY**
Make the text come to life, but don't overdo it either. Choose the most powerful figures, visuals and stories only - and think how these will resonate with your audiences.

**PROVIDE YOUR CONTACT DETAILS**
And include that of any relevant colleagues or partners for further information, follow-up and accountability.
DURING
Presentation and writing style.

03 APPLY A SOBER, OBJECTIVE AND POLITICALLY NEUTRAL WRITING STYLE
Consider the local culture and etiquette when presenting your issues.

04 IDEALLY WRITE IN THE NATIVE LANGUAGE OF YOUR AUDIENCE
When it is not possible, seek external support or ensure you write in simple and accessible language.

USE AN ACCESSIBLE LAYOUT
Choose a standard readable font, set a sufficiently large font size (at least 11 pt), use standard page margins and make use of line spacing.

USE HEADINGS AND SHORT PARAGRAPHS, AND STICK WITH ONE KEY MESSAGE PER PARAGRAPH
This makes the text accessible. Avoid unnecessary repetition of words in the same sentence and write with a combination of short, medium and long sentences to provide variety.

AVOID EXCESSIVE USE OF ACRONYMS
When you do use them, write them out in full at first and/or include a glossary.

AFTER
Keeping up momentum.

04 FOLLOW YOUR DISSEMINATION PLAN PREPARED AT THE START
When you share your written communication, always offer your willingness to further dialogue by providing further information and answering any questions.

BE TRANSPARENT
Try to make your information available publicly through your website, or share it with policy makers across the political spectrum – even when they may oppose your views.
| 01 | DID YOUR ACTIVITIES CONTRIBUTE TO A KEY SHIFT? WHY OR WHY NOT? |
| 02 | HAVE THERE BEEN UNEXPECTED OUTCOMES? WHAT HAPPENED? |
| 03 | HAVE YOU ENCOUNTERED ANY (NEW) CHALLENGES? WHY? |
| 04 | DO YOU SEE ANY CHANGE IN STAKEHOLDER/DECISION MAKER AWARENESS OR COMMITMENT TO CHANGE IN RELATION TO YOUR ADVOCACY OBJECTIVE? |
| 05 | TOP: WHAT WENT WELL? |
|  | TIP: WHAT WILL YOU DO DIFFERENTLY GOING FORWARD? |
A more elaborate moment to reflect on your advocacy efforts.

The steps:

1. In the left column, list all the outcomes that occurred on your advocacy issue. You can collect these via a brainstorm, listing as many outcomes as you can come up with as a group. For each outcome, describe in 1-2 sentences the change in a social actor’s behaviour, relationships, activities, actions, policies or practices that you believe to have influenced in some way - and that may have contributed to progress towards your advocacy objective.

   **TIP:** remember, outcomes are the behavioural changes in external actors (your key audiences), often as a result of your outputs. You can influence these changes, but will never have full control over them. If you make use of Regular Logs, these can be a good source of information.

2. Describe in 1-2 sentences for each outcome why this change is relevant. How does it represent progress towards your advocacy objective? Or why does the change make it harder for you to achieve your objective?

   **TIP:** take a look at your Advocacy Plan. Is the outcome relevant, in light of your Theory of Change, the Activity Overview and your Monitoring Plan?

3. What were the main activities you carried out that contributed to the outcome? Give a summary in 1-2 sentences. Consider critically whether these activities really contributed to the outcome. Were the activities planned as part of your Theory of Change and Advocacy Plan?

4. Advocacy rarely happens in isolation from others. Other stakeholders will have been carrying out activities as well - sometimes their positions and work will be aligned with yours. Sometimes not at all. List the main stakeholders that were engaged around this outcome, and the work they did.

   **TIP:** review your Stakeholder Map. Did these stakeholders engage on your issue as expected? Were there any other stakeholders you did not anticipate when preparing your Stakeholder Map?

5. Provide evidence of your claims. Are there any resources or records that can be used by others to verify these outcomes took place?

6. Write down your main reflections when reviewing the filled out worksheet. To what extent do these outcomes to which you contributed represent progress towards your advocacy objective? Were your efforts in proportion with the results?
**Reflection Worksheet 01**

**01 WHAT HAPPENED OR CHANGED?**
List all outcomes, expected and unexpected, that took place as a result of your work. You can list as many as needed by making a copy of this worksheet.

<table>
<thead>
<tr>
<th>WHAT HAPPENED OR CHANGED?</th>
<th>WHAT IS THIS IMPORTANT?</th>
<th>WHAT WAS OUR CONTRIBUTION?</th>
<th>WHAT DID OTHERS DO?</th>
<th>HOW DO WE KNOW THIS?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe the relevance of each outcome in relation to your advocacy objective and theory of change.</td>
<td>Describe how other stakeholders positively or negatively influenced the outcome.</td>
<td>Describe how other stakeholders positively or negatively influenced the outcome.</td>
<td>Provide evidence that can support your claims.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>NOTEWORTHY PROGRESS?</th>
<th>EFFORTS VERSUS RESULTS?</th>
<th>PROVEN SUCCESS?</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent do these outcomes to which you contributed represent noteworthy progress towards your advocacy objective? Describe in a few sentences.</td>
<td>Were your efforts in proportion with the results? Describe in a few sentences.</td>
<td>Were there any strategies, key activities or approaches that proved to be more successful in contributing to the most relevant outcomes? Describe in a few sentences.</td>
</tr>
</tbody>
</table>
The issue we are trying to address is...

Tip: try to be concise & use the tools from phase 4 for filling in the worksheet.

We are therefore advocating for...

What changes and outcomes did we observe, as a result of our advocacy efforts?
What was unexpected?
Why is it important to us?

What did we learn?
What do we continue?
What are we improving?
**TIME TO DECIDE WORKSHEET**

**YOUR ADVOCACY OBJECTIVE**

**DO WE FEEL WE NEED TO REFRAME OUR ADVOCACY OBJECTIVE?**
- **YES**, we need to reframe our advocacy objective because...
- **NO**, we do not need to reframe our advocacy objective because...

If answered yes, please re-visit your **Theory of Change and Advocacy Plan**, and consider hosting a workshop with key partners and colleagues to reframe your advocacy objective.

**DO WE FEEL WE NEED TO SLIGHTLY ADAPT OUR ADVOCACY PLAN?**
- **YES**, we need to adapt our Advocacy Plan because...
- **NO**, we do not need to adapt our Advocacy Plan because...

If answered yes, please re-visit your **Advocacy Plan**, and consider hosting a workshop with key partners and colleagues to adapt your activities.

**DO WE FEEL WE WANT TO EXIT THIS PROJECT?**
- **YES**, we feel we want to exit this project because...
- **NO**, we do not feel we want to exit this project because...

If answered yes, please visit the **toolkit** to learn more about how to ‘exit’ from your advocacy project.
EXIT CHECKLIST

Use this checklist when you’ve decided to exit from your advocacy work on a particular policy issue. Either because you have achieved your advocacy objective, or because you have decided to discontinue the work.

**HAVE WE MADE INTERNAL AND EXTERNAL STAKEHOLDERS AWARE?**
Did we share a message or organise an event to conclude our engagement on the issue? Was there an opportunity to put them in touch with other stakeholders or actors who will continue to work on the issue? Any other phasing out activities we need with them?

**HAVE WE DISSEMINATED THE RESULTS OF OUR ADVOCACY?**
Are there any successes to share with others - inside or outside the organisation? Did we recognise the positive contributions made by other stakeholders, and even decision makers?

**HAVE WE CARRIED OUT AN EVALUATION OF OUR WORK?**
Did we carry out an ex-post or final evaluation? Did we achieve what we set out to do? What was our contribution to the outcomes and change that occurred? What did we learn for the future?

**TIP:** You can do evaluations with a small or large budget. It can be an informal internal assessment if a more formal external approach is not possible and still provide a great opportunity for a structured reflection and learning session on your work.

**DID WE SHARE OUR LESSONS LEARNED IN A WAY TO SUPPORT ORGANISATIONAL LEARNING?**
Did we make our lessons learned available to others in our organisation and to partners?

**TIP:** check whether your organisation uses any internal archiving system.

**HAVE ALL IMPORTANT DOCUMENTS AND KNOWLEDGE BEEN STORED IN AND MADE AVAILABLE TO OTHERS?**
Have we collected all stakeholder information and stored it in the right place in your organisation? What about key publications, reports and evaluations? Make sure these files don’t remain on your own computer, but are shared with the wider organisation.

**SHOULD AND CAN WE KEEP MONITORING THE ISSUE?**
Are we sure a follow-up is no longer needed? Is the issue certain to be resolved? Will someone still act as a contact point for further questions or clarifications?

**DID WE CLOSE OUR PROJECT OPERATIONS APPROPRIATELY (OPTIONAL)?**
Projects have dedicated budgets, deliverables and - very often - donors. Be sure to carry out good financial management, and relationship management with everyone who supported your advocacy work.

- Have all project deliverables been fulfilled?
  Did you and other partners engaged in the project carry out all activities and deliverables as agreed with the donor(s)?

- Have we met all financial obligations?
  Have all expenses been billed, and all income received?
  Have we met all our financial obligations per the agreements made with your donor?

- Have we shared the final financial and technical report with the donor(s)?
  Has the final financial and technical report been approved by the donor(s)? Did you need to carry out any financial audits? Has the report been well received by the donor?

- Keep in touch
  Can the donor support you on other issues in the future? What are they interested in? Be sure to maintain relations for future opportunities.

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