WWF POLICY ADVOCACY TOOLKIT

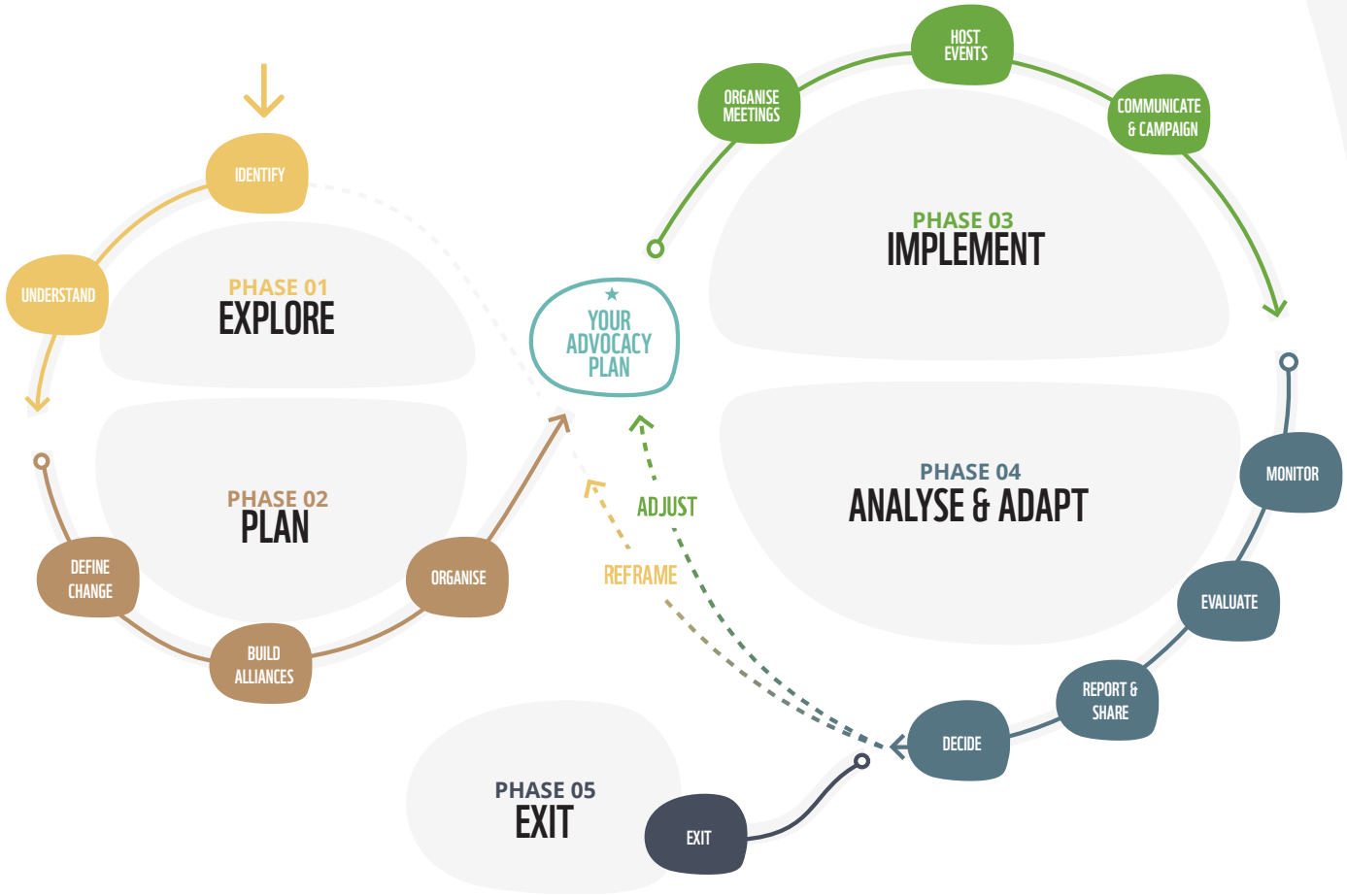
VERSION FOR USE WITH WWF PARTNERS

WWF POLICY ADVOCACY TOOLKIT:

TOWARDS STRATEGIC AND EFFECTIVE ADVOCACY

17-06-2022

ADVOCACY PROCESS OVERVIEW



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TOWARDS STRATEGIC ADVOCACY

Policy advocacy – **taking action to create policy or legal change** – is critical to sustaining the natural world for the benefit of people and the planet. Laws, policies and budgets related to nature, climate and sustainability create the conditions for conservation failure or success. There have been some important wins in influencing policy towards climate neutrality and a nature positive world. But we need to be even more effective at being proactive on the sustainability agenda and reacting to the climate and biodiversity crises. And we need to propose workable solutions to complex resource use issues that require compromise between different interest groups.

To take effective action, we need the right tools. This toolkit and guide aims to support and encourage the policy and advocacy work of WWF and its partners. When implemented, the toolkit and guide will help strengthen your advocacy and its effectiveness.

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WHO IS THIS TOOLKIT FOR

This toolkit was developed by and for the WWF network. The version you have in front of you has been adapted for external use by WWF partners. It contains the same tools and guidance but references to internal WWF resources have been omitted.

If you already do advocacy, this toolkit can help make your advocacy more strategic and effective. If you have no experience with advocacy work, it will help you understand how advocacy works, why it is important to you and how you can integrate it in your work.

CONTEXT & BACKGROUND

Creating the change you want to see

Advocacy is about creating the change you want to see. It can be explained as: '*A systematic and strategic process used to influence governmental and institutional policy and practice*'. It is a process that aims to influence decisions within political, economic and social institutions. The advocacy work of conservation organisations like WWF focuses on changing the key drivers of conservation issues and the conditions which enable these (such as policy frameworks) to enable more effective and inclusive conservation.

Why advocacy is important to conservation

Conservation organisations need to work with a range of different partners and stakeholders. Different forms of advocacy focus on different target audiences and may be integrated into your activities and programmes. **Policy advocacy** is the tool to influence the development of legislation, budgets, policies and programmes at different levels of government. It may also be used to ensure the effective implementation and enforcement of laws and regulations.

Public advocacy is done to reach a broad range of the public for awareness raising, for field projects, for fundraising and more engagement from the private sector. **Business advocacy** is done to influence businesses towards more sustainable practices.

This toolkit focuses on policy advocacy. Some elements of this toolkit are however also applicable to these other types of advocacy, including towards the public and the business sector.

CONTEXT & BACKGROUND


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General and golden rules for strategic advocacy

- **Be science- and evidence-based:** make sure all of your work is supported by evidence.
- **Integrate a human-rights based approach** and respect traditional, Indigenous Peoples and local community rights and knowledge.
- **Be gender responsive and transformative** by supporting gender equality and actively challenging inequality in your positions, activities, relationships and communication.
- **Collaborate for impact:** build strong and clever collaborations to enhance the impact of your advocacy. Rely on each other's strengths and make more impact together with partners.
- **Recognise diversity**: ensure you are aware of the different values, interests and power dynamics of stakeholders and rights holders, including yourself.
- **Act independently and non-partisan:** engage with politicians and decision makers for the benefit of nature and people without aligning with any particular political party.
- **Be clear and transparent about your organisation's role:** in any given context be conscious of the role you take; when to lead or be a champion, when to play a supporting role and let others speak for themselves; when to collaborate, be a catalyst, work behind the scenes or take centre stage.
- **Take a solution-oriented, problem solving approach:** provide concrete policy proposals, and try to propose constructive solutions.

PRACTICAL GUIDANCE


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How to use this toolkit

Before diving into the details of this toolkit, this reading manual will help you understand how the toolkit is structured and how you can make the most of it.

In the introduction you have seen the overview of the advocacy process. Each phase of this process has its own chapter, which is structured as follows:

- Short introduction of the phase
- Overview of key steps and tools
- Context & background with relevant in-depth information for that phase
- Tools to help you navigate the phase

The toolkit is built as an interactive PDF. There are hyperlinks and buttons within the toolkit that you can use to navigate through the chapters.

Please look at the infographic in the ***advocacy process overview*** to understand how you can navigate the document.

PRACTICAL GUIDANCE

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Tools: Exercises, checklists and deliverables

In this toolkit different types of tools are offered to help you realise a strategic and effective approach to advocacy. We distinguish between 3 different types of tools:

Deliverables

These tools are an essential part of your advocacy work; they are the key milestones and documents that you will need to produce. To help you produce these documents, we offer guidance and structured templates that you can fill in to build your deliverables.

The key deliverables in this toolkit are:

- ***Message House***
- ***Advocacy Plan***
- ***Sharing Learnings***

Exercises

In this toolkit we also offer a lot of exercises. These exercises are there to support you in having structured discussions and analysis and develop structured input to put into your key deliverables. The exercises consist of practical guidance and a worksheet to support the exercise. The output of these worksheets is not a final deliverable, but doing the exercise will give you the input to create your deliverables in the end.

The exercises in this toolkit are:

- ***Problem Tree***
- ***Context Map***
- ***Stakeholder Map***
- ***SWOT Analysis***
- ***Theory of Change***
- ***Activity Overview*** ***(in the Advocacy Plan)***
- ***Regular Logs***
- ***Reflection***
- ***Time to Decide***

Checklists

Especially when moving into the implementation phase of advocacy, this toolkit focuses on practical checklists, tips & tricks to support you in effective implementation of your plans. These checklists will help you prepare for specific activities and reflect on them - from start to finish. Some checklists will follow the structure of an actual checklist, others will offer lists of tips & tricks.

Checklists in this toolkit will help you organise successful events and meetings, write effective documents, carefully evaluate and exit a project.

The checklists in this toolkit are:

- ***Advocacy Meeting Checklist***
- ***Advocacy Event Checklist***
- ***Written Communication Checklist***
- ***Advocacy Exit Checklist***

PRACTICAL GUIDANCE


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Think together

Most of the tools in this toolkit can be used on your own, but yield much better results when you use them together with colleagues or even partners and key stakeholders where applicable. Of course this requires some time and a structured approach. Doing exercises with a small group of 2-6 people is highly recommended. The estimated time required to complete a tool will vary depending on how many you are, and how interactive you want to be. Below you will find some practical tips to get you started.

Best practices to make the most of your exercises

- **Decide who you want to invite:** which expertise and whose voice needs to be represented? Consider whether for example conservation, policy, legal or communications experts need to join in.
- **Send calendar invites well in advance and confirm attendance:** Don't hesitate to send a reminder with more details on what people can expect well in advance.
- **Plan ahead:** Think about how you want to approach the exercise and prepare an agenda with estimated timings. This will help you keep track of your progress during the exercise.
- **Be clear who is responsible for the work:** who has the deciding voice in the end? Make this clear from the beginning.
- **Prepare your materials:** Make sure you have your materials ready (worksheets, post-it notes, markers, etc.) Look at the section below for tips on doing the exercises in an online setting.
- **Share objectives:** At the start of an exercise, always share a clear objective, agenda and ways of working. What do you want to achieve? And how will you approach it? Some examples of ways of working: Every opinion counts, Be constructive & creative, ask if anything is unclear, switch off phones and email to focus, have fun!
- **Manage energy levels:** Find a balance between individual, group and plenary work. Especially in larger groups, it can be difficult to focus and contribute. Therefore, allow time for people to think individually, discuss in groups and then present back to draw shared conclusions.
- **Define next steps:** Define clear next steps and assign responsibilities; make sure everyone knows who will carry the work forward.

PRACTICAL GUIDANCE


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Working in an online setting

Putting people together in one room is usually the most effective way to collaborate. It is easier to have discussions, write things down on a worksheet and keep energy levels high. But when you are collaborating with people in different locations, switching to an online setting makes a lot of sense.

To make sure discussions run just as smoothly, it is important to consider some key points in preparing and moderating the discussions. Here are the most important ones:

- **Set up an online environment:** When doing exercises online, working with a digital whiteboard is the way to go. We recommend exploring tools like Jamboard (free) Miro (paid) or Mural (paid) for example. You can put the worksheet in there and work with virtual sticky notes to fill it in collaboratively. Whatever tool you choose; make sure to spend some time beforehand to find out how it works. If you do not have access to an online whiteboard space, another option is to place your worksheet in a Google Sheet (online powerpoint) where you can collaborate.

- **Appoint an extra facilitator:** If you are the one facilitating the discussion, make sure someone else in the group is there to help you take notes. This makes it easier to moderate the discussion online, and capture key learnings at the same time.

- **Lead the break-out groups:** Zoom offers the great feature of hosting break-out groups, which allows you to have discussions in smaller groups. If you do this, make sure someone is in the lead in every group to manage discussions.

- **Share your screen:** if people are struggling with the online worksheets it is up to you to take charge. Share your screen and make notes for the group (or ask the extra facilitator to do so, so you can lead the discussion).

- **Keep track of time:** online sessions require more energy from the group. Make sure you keep the sessions to a maximum of 3 hours and schedule a break every hour. If you need more time: split the exercise in parts and divide it over multiple days.

- **Keep cameras on:** When cameras are off, people easily disconnect from the conversation. They can switch to 'doing emails' or something else altogether. To keep people engaged, stimulate them to keep their cameras on. Even when it is more difficult to understand body language through a screen, it does make it easier to see how people are feeling, when they need a break or if an 'intervention' might be necessary.

- **Push for direct input, but keep the chat open:** Ideally, people will share their input directly on the worksheet or in the online space. But to capture important comments, always keep track of the chat. You can ask your co-facilitator to do this for example.

PHASE 01: EXPLORE

Before engaging in advocacy work, it is important to identify and explore what you will be advocating for. In this phase, you will lay the groundwork for your advocacy by defining the issue you are trying to solve. You will also analyse in detail the internal and external context you will be operating in and the decision makers, stakeholders and rights-holders and their roles and interests. This is the foundation on which you will build your position, and eventually your Advocacy Plan in the next phase.

KEY STEPS AND TOOLS

IDENTIFY

The policy and conservation challenges and potential solutions to your issue.

UNDERSTAND

Scan the external context and stakeholders, and assess the internal strengths and weaknesses to undertake advocacy on your issue. Once ready, you can start developing your position.

PHASE 01 EXPLORE

EXERCISE: PROBLEM TREE

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

EXERCISE: CONTEXT MAP

Create an understanding of the external context impacting upon your advocacy issue and objective.

EXERCISE: STAKEHOLDER MAP

Identify the decision makers, stakeholders and rights-holders who have, should have or do not have power over your advocacy objective.

EXERCISE: SWOT ANALYSIS

Analyse your strengths and weaknesses against opportunities and threats from outside, in relation to your advocacy objective.

CONTEXT & BACKGROUND


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Start by defining your advocacy issue

When engaging in advocacy work, it is essential to have a good understanding of what you are getting into. This is what the 'Explore' phase is all about: you need to define the issue. What is the problem exactly? Why is it a problem? Who would benefit from a solution? So, before going into exploration, start by defining a clear problem statement that will help you to understand the challenge and find the right solution(s) - which will become your advocacy objective. The Problem Tree tool will help you do just that.

Explore the context you will operate in - and its stakeholders and rights-holders

Once you have a clear issue defined, and potential solutions in mind, you need to create a deep understanding of its context. What external context will you operate in, who are the key decision makers and stakeholders, what are their key roles and what power do they have. To support this exploration, we offer two tools: the Context Map and Stakeholder Map. These tools will help you get more insight into the complexity of your advocacy project.

As a next step, you can use the SWOT Analysis tool to build on this information and define what the strengths (S) and weaknesses (W) of your office and team could be in relation to your advocacy objective, and what the potential opportunities (O) and threats (T) are.

CONTEXT & BACKGROUND


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How to operate at different levels: from global to local and vice-versa

Broadly speaking, there are four different levels where civil society can carry out advocacy.

While not always as apparent, all these different levels are often connected and the interactions that take place between the debates and decisions both upstream and downstream from the level that you are engaged on, can have important implications for your advocacy. It is therefore important to understand where and how these levels interact. Collaboration with others is relevant at all these levels.

Global

You can carry out advocacy in relation to numerous United Nations (UN) conventions and processes as well as intergovernmental forums. These include the Convention on Biological Diversity (CBD), Convention on Climate Change (UNFCCC), the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), the High Level Political Forum (HLPF) on Sustainable Development and the Sustainable Development Goals (SDGs), the G7 and G20, and World Health Assembly.

Regional

You can promote your recommendations with political and economic unions such as the European Union, the African Union, ASEAN or less formalised or intertwined regional initiatives such as the Central and Eastern European or Latin-American Regions.

National

You can carry out national advocacy towards governments and representatives to help shape national level legislation and policies, and promote the adoption and implementation of global and regional commitments.

Local

You can do advocacy work at the sub-national and local levels, with provincial and state governments, local governments and authorities. Especially for implementation of national policy or laws this is a critical level to work, often in collaboration with stakeholders, local civil society or Indigenous Peoples and local communities.

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TIPS & TRICKS

01 Connect and collaborate with stakeholders and rights-holders from the start

In advocacy, there's only so much you can do on your own. The best results are achieved when you engage in powerful collaborations to bring your position forward. In the 'Explore' phase, it may seem too soon to build these alliances, but it is never too soon to connect. During your stakeholder analysis, reach out to start the conversation, first alignment and lay the groundwork for fruitful collaborations in future phases. It will help you to further develop your understanding of the context you're in and will give valuable input in defining your position. You might even invite some other civil society stakeholders or rights-holders to co-create your Theory of Change in the next phase with you - if it feels right.

02 Apply a rights-based approach and gender responsive and transformative perspectives

A whole-of-society approach recognizes that everyone (government, business, civil society, Indigenous Peoples and local communities, women, youth, individuals, people with disabilities) plays a role in conservation and therefore everyone, especially those most impacted, should be part of decision-making and actions to respond to the nature and climate crises. This applies to policy advocacy efforts as well. Only by understanding and integrating these important principles in your advocacy approaches can you effectively meet your objectives.

EXERCISE

PROBLEM TREE

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

Get started

DOWNLOAD PROBLEM TREE WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

To approach a problem with advocacy, you first need to define it and see whether or how policy is actually related to your problem. Why is there a problem and what is causing the problem? And what underlying causes are at the roots of this all. Can policy change actually help you solve these (root) problems?

To define the advocacy issue behind your problem you use the Problem Tree tool. This tool helps you to dig deeper into the problem and its causes, to identify the advocacy issue and help you find the right solution(s). These solutions can then be turned into a first draft of your 'advocacy objective'.

In some cases, this exercise may have already been done for you. Your organisation may already have a (conservation) strategy or plan in place which addresses a set of problems, and identifies the role of policy. In such plans, advocacy objectives may already have been defined. If this is the case, you could skip this exercise.

Key question

What is the problem and advocacy issue you have identified, and the advocacy objective that can help solve it?

Sub-questions

1. *What do you believe to be the main root causes that have an impact on your problem?*
2. *Are these root causes related to policy?*
3. *Can you influence them with advocacy work?*

Results

- A good understanding of the primary and root causes behind your problem.
- Whether policy change can actually help solve your problem, or if you need to focus on other interventions (e.g. business engagement, public awareness, implementation, finance).
- A solution-oriented definition of your advocacy objective, on which basis you can start digging deeper into the context and stakeholders.

EXERCISE

CONTEXT MAP

Create an understanding of the external context impacting upon your advocacy issue and objective.

Resources

- The results of your Problem Tree

Get started

DOWNLOAD CONTEXT MAP WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

To achieve your advocacy objective, you need to understand the current situation and the context. The Context Map tool is used to identify the key factors that will influence your advocacy, such as existing laws, budgets, decision-making structures and political processes, and any other relevant factors such as environmental, socio-economic and technological trends, and more.

Having a good understanding of the context from the beginning is one of the most important steps in the process of developing an Advocacy Plan. Yet, this step is one that is too often overlooked or not given enough attention. It is essential that this analysis is done together with relevant stakeholders and rights-holders at an early stage, to enrich and strengthen the outcome.

Key question

How is the external context impacting your advocacy issue and objective?

Sub-questions

1. *What are the key contextual factors influencing the issue you are trying to solve? (These could be political, economic, social, technological, legal and environmental factors)*
2. *How do decision-making structures and processes impact your objective work? Do you have an idea about the timelines already?*
3. *What is the supporting evidence for your conclusions?*

Results

- An overview of key factors influencing the issue you are trying to solve.

EXERCISE

STAKEHOLDER MAP

Identify the decision makers, stakeholders and rights-holders who have, should have or do not have, power over your advocacy objective

Resources

The results from your Problem Tree and Context Map

Get started

DOWNLOAD STAKEHOLDER MAP WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

The Problem Tree and Context Map tools helped you do an initial exploration of the decision makers, stakeholders and rights-holders that are relevant to your advocacy objective. The Stakeholder Map tool is used as a next step to more exhaustively categorise decision makers, stakeholders and rights-holders according to their interests and power.

Think about all the decision makers who may have a part to play in the decision(s) you are seeking to influence, but also the stakeholders and Indigenous Peoples or local communities that have interests or rights in relation to your issue and who might be impacted by policy, legal or budgetary changes. The Stakeholder Map helps you understand how you could engage and communicate with key stakeholders who can possibly have an impact - positive or negative - on your advocacy objective.

Key question

Who are the decision makers, stakeholders and rights-holders that are engaged or could be engaged on your issue and how do they have power or influence over the issue?

Sub-questions

1. *Who are the decision makers who have the power to make final decisions? Are there any decision makers that should be involved, but are at risk of being excluded?*
2. *Which stakeholders have the interest in, or rights to, your issue (sense of urgency) and ability to directly influence the decision makers and apply pressure indirectly or externally (power)? How close are they to the decision making process?*
3. *Are there any rights-holders such as Indigenous or vulnerable people or groups who have rights related to this issue, and may be impacted by the advocacy work? How do they analyse and describe their situation?*

Results

- An overview of the decision makers that have the power over, or are involved in, the policy, legal, or budgetary changes you wish to influence.
- An overview of stakeholders and rights-holders that have rights or power and influence in relation to your issue.
- An understanding of who the likely champions or blockers are.
- Information that can be used when deciding on your Theory of Change and Advocacy Plan, and who you will need to have dialogue or collaborate with (as well as those who you will have to monitor).

EXERCISE

SWOT ANALYSIS

Analyse your strengths and weaknesses against opportunities and threats from outside, in relation to your advocacy objective.

Resources

The results from your Problem Tree, Context Map and Stakeholder Map

Get started

DOWNLOAD SWOT ANALYSIS WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

During the 'Explore' phase you need to analyse your current ability to carry out advocacy on your issue. A SWOT analysis is a simple and effective framework for identifying internal strengths (S) and weaknesses (W), and external opportunities (O) and threats (T) that you (i.e. your organisation, your team or even your coalition of external partners) are facing. When carrying out advocacy, it is important to leverage strengths, minimise threats and weaknesses, and to take advantage of available opportunities.

Key question

What is your current situation and capacity, in relation to the issue you are trying to solve?

Sub-questions

1. *What advantages do you have that can help you achieve your advocacy objective?*
2. *What disadvantages do you have in relation to achieving your advocacy objective?*
3. *What are your finance and communications capacities, and what are the audiences, sponsors and partners that you can engage with? How many staff resources do you have available to allocate to this issue? Can any potential partners provide the capacity that you lack?*
4. *What knowledge do you have of the decision-making processes and relationships with the decision makers that are relevant to your issue, and what laws, rules or practices do you have to adhere to?*
5. *What are external trends and opportunities in relation to your issue that you can respond to?*
6. *What external obstacles or threats can negatively influence your advocacy?*

Results

- An understanding of your strengths and weaknesses in relation to your advocacy objective.
- Clear overview of the opportunities and threats in relation to your advocacy objective.

PHASE 02: PLAN

After exploring the issue and defining a clear advocacy objective and understanding of the context around that objective, it is time to define your Advocacy Plan, which outlines the steps you will take to achieve your objective. What is your strategy? How will you plan your activities, who do you want to involve in the process, and how?

KEY STEPS AND TOOLS

PHASE 02
PLAN

EXERCISE: THEORY OF CHANGE
Develop an overview of the causal links between the key activities and outcomes that will help you achieve your advocacy objective.

DELIVERABLE: MESSAGE HOUSE
Create key messages to support consistent communication throughout all your advocacy activities.

★ **DELIVERABLE: ADVOCACY PLAN**
Write a plan that helps summarise and communicate your strategy to others in your organisation, as well as close partners, and use it to analyse progress and adapt as required.

DEFINE CHANGE

Think through all the steps that need to happen for your advocacy objective to become reality. Much of what is decided here will guide you to craft a simple and actionable plan.

BUILD ALLIANCES

Together you stand stronger. Select and engage with key stakeholders and rights-holders to strengthen your position.

ORGANISE

Time to get specific. Make a plan with a timeline for you to reach your advocacy objective.

CONTEXT & BACKGROUND

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Three ways of doing policy advocacy

Depending on how challenging your advocacy objective is, the external timelines and the time and financial resources available, your strategies will be very different. Your activities can be grouped in three broad approaches which range from working very closely together with decision makers in a trusted relationship to being an outsider voice that puts constructive public pressure on decision makers. All three types can be, and often are, used simultaneously.

For example: when the advocacy objective is to influence a change or review in a national law, you might directly lobby the relevant minister, as well as work with partners to engage with decision makers on the issue, while also organising or being part of a public campaign to bring the issue into more prominence.

01 Direct lobbying

Direct lobbying of influential decision makers is a common advocacy approach by organisations such as trade unions, business groups or CSO's. When lobbying, organisations have direct and sometimes informal access to decision makers and are present and visible during government policy processes and public discussions. This includes one-on-one meetings, written exchanges, and being able to provide recommendations to decision makers that are open to hear from you. This approach is generally cooperative and could be described as influencing as an 'insider'.

02 Indirect lobbying

Indirect lobbying takes place when you mobilise others to speak on your issues e.g. other CSO's or the private sector. When lobbying indirectly, organisations seek to mobilise partner organisations and groups, and also make use of other channels such as media and social media to influence the key decision makers. Mobilising the general public and your supporters, as part of indirect lobbying, may also be part of undertaking public campaigns (see below).

03 Public campaigning

This approach is commonly used by organisations that monitor government actions and sound the alarm on shortcomings or malpractices. Adding a public campaigning approach to your lobbying enhances the public pressure on decision makers to take action. It can also be used when you do not have access to the key decision makers through direct lobbying. This advocacy approach could be described as influencing as an 'outsider' i.e. not being part of a formalised or institutionalised set-up with decision makers.

CONTEXT & BACKGROUND


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Choosing the right activities

The wide range of activities to select from to help implement your strategies is endless. This is your opportunity to be creative and explore different ways to carry out advocacy in practice. Just make sure that your activities fit within your Theory of Change. In the overview below, you can find a list of examples for activities or tactics.

- **Direct lobbying of decision makers** through face-to-face meetings, telephone calls, letter writing, or email and text exchange.
- **Advising decision makers and stakeholders** by preparing and distributing research studies and scientific reports, carrying out legal analysis, and bringing stakeholders and decision makers together to exchange views in round tables, workshops, conferences or webinars.
- **Engaging in formal government/ consultation processes** by participating in formal hearings, delivering formal complaints, participating as part of government delegations to multilateral policy processes and supporting affected communities/actors to participate in government consultation processes.
- **Mobilisation of your supporters or the general public** by organising (online) petitions, letter or email writing actions to decision makers, sharing posters or pamphlets, or organising and taking part in peaceful marches as well as peaceful street/ visibility actions.
- **Awareness raising and public education** by organising capacity building trainings, producing videos, organising film screenings, art installations and exhibitions, or sharing cartoons or comics.
- **Using media channels** such as social media or traditional TV, radio or written media to promote issues, for example through large social media awareness raising campaigns, running advertisements in on- and offline media, sharing information with journalists and organising press conferences, or working with ambassadors or influencers.
- **Litigation** through court cases that you lead or support.

CONTEXT & BACKGROUND


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Caution: understand your context!

Some of the activities listed may not be appropriate in your cultural, political and legal context. When identifying your activities, please make sure you are complying with local regulations and practices, and consult with the relevant staff members in your organisation/seek approval to avoid any risks. The Context Map and SWOT Analysis prepared earlier can help support you to make these assessments.

How can you be the master of your Advocacy Plan?

The activities that you will choose are going to be very diverse, depending on the strategies you have selected. Most often, they will represent a mix. When mapping out your activities you should carefully consider how these contribute to - and help implement - your Advocacy Plan. Failing to do so, may result in investing a lot of energy in activities which will have little resonance with the audiences you aim to influence.

It is likely that with a growing set of activities to prepare for, you won't be able to do this on your own. You will often need to collaborate with team members inside your organisation, and sometimes also partners in allied organisations. And you may also need to collaborate with other international civil society organisations/networks, when your issue has a relation to regional and international policy processes.

To master this phase of the advocacy process, making a good overview of your activities and related timeline and responsibilities together with everyone involved, is key.

TIPS & TRICKS

01 Collaborate!

To use the tools in this phase, you have to join forces with many different people (policy, conservation and communication experts, rights-holders, etc.) The sooner you start collaborating in this process, the stronger your Advocacy Plan will be and the less problems you will face when implementing your actions. All these people can help you.

02 Never skip the Theory of Change

The Theory of Change is your starting point to create an Advocacy Plan. The plan should be approached as a living document, which you constantly go back to when implementing the next phase. Developing a Theory of Change takes time. And you ideally do it together with others to bring in different perspectives.

EXERCISE

THEORY OF CHANGE

Develop an overview of the causal links between the key activities and outcomes that will help you achieve your advocacy objective.

Resources

The results of your Problem Tree, Stakeholder Map, Context Map and SWOT Analysis

Get started

DOWNLOAD THEORY OF CHANGE WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

The Theory of Change tool helps describe and illustrate exactly how and why you want to realise a desired change in behaviour of an external actor or outcome. It challenges you to write down your assumptions, and test whether your planned activities are effective enough to get from the present situation, to your vision of success: your advocacy objective.

A good Theory of Change should be credible, achievable and supported by all who are involved in your advocacy work.

Preparing a Theory of Change is often a visual and interactive process, which you should do in a group. The result of this process can be kept visually, but you can just as well summarise your Theory of Change in a narrative. Think about describing the overall change you want to see happening ('advocacy objective'), what needs to happen first in the external world for this to turn into reality ('outcomes'), and how you can contribute towards these outcomes ('key approaches or activities').

Key question

Through which key approaches or activities, and based on what assumptions, will you achieve your advocacy objective?

Sub-questions

1. *Which outcomes - changes in behaviour by external actors - are needed to achieve your advocacy objective?*
2. *Which key approaches or activities are needed to achieve your planned outcomes?*
3. *Which decision makers should be targeted through the Theory of Change?*

Results

- A visual overview of the causal links between the key approaches or activities and outcomes via which you will achieve your advocacy objective.
- A list of planned outcomes needed to achieve your advocacy objective, which you will monitor and adapt over time.
- A list of key approaches or activities, to further detail via the Activity Overview tool, as part of your Advocacy Plan.
- A description of your assumptions to test.

DELIVERABLE

MESSAGE HOUSE

Create key messages to support consistent communication throughout all advocacy activities.

Resources

The results from your Problem Tree and Stakeholder Map

Get started

DOWNLOAD MESSAGE HOUSE WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

A Message House is a tool that helps you and everyone involved establish your main message(s) and keep your messages consistent across the different communication channels that are used. Via a Message House and accompanying proof-points you define what you want to communicate and what evidence you have to support it.

The Message House can be used for different purposes, like the organisation's overall positioning and when preparing specific activities like events and conferences. You can even prepare multiple Message Houses, for each of your key audiences (e.g. decision makers, certain types of stakeholders or supporters).

Remember to include communication colleagues in this exercise, as they will develop messages for press and social media, and can help tailor the messages to different audiences.

Key question

What is the overall policy position (your main message) you are trying to communicate?

Sub-questions

1. *What are the core messages that contribute to this overall policy position?*
2. *What evidence or examples do you have to support these messages?*
3. *Will these messages resonate with the decision makers and stakeholders identified previously?*

Results

- A clear overview of your policy position and key messages, ideally supported by evidence and examples.

★ DELIVERABLE

ADVOCACY PLAN

Write a plan that helps summarise and communicate your strategy to others in your organisation, as well as close partners, and use it to analyse progress and adapt as required.

Resources

The results from all previous exercises in the 'Explore' and 'Plan' phases

Get started

DOWNLOAD ADVOCACY PLAN >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

Many of the tools offered so far, served as exercises to stimulate the thought process of developing your Advocacy Plan. Now the moment is there to write this plan, by bringing together the information you prepared. The act of writing everything down - together - is a critical step in the process as it challenges you to make sure you have everything in place. It also allows you to have a shared understanding with all involved colleagues and partners.

Besides summarising your advocacy objective, the context, the planned outcomes and key approaches, your Advocacy Plan will also contain the following components:

- **Activity Overview:** details on the activities you will carry out.
- **Communication Strategy**: the media channels, materials and tactics you will use to convince key stakeholders to support your advocacy objective.
- **Monitoring Plan**: a plan to monitor your progress, and to take pauses to reflect on and learn from this information.

This tool offers you a practical template to help you structure your Advocacy Plan. It also provides guidance on how to best prepare your Activity Overview, Communication Strategy and Monitoring Plan.

Advocacy Plans can take different shapes and formats. You can support text with visuals (pictures, graphs, timelines etc.) where possible to make the plan more interesting, and use different formats for the final product, such as a slide deck. As long as you ensure to include the major components of such a plan, it doesn't matter what it looks like.

Key question for your advocacy plan

What is your plan for reaching your advocacy objective?

Results

- An internal living document that outlines and guides your planned advocacy efforts, which you can use to inform colleagues and close partners. The plan should be used to analyse and monitor implementation. It can also be updated according to new developments and knowledge.

ACTIVITY OVERVIEW

Provide details on the activities you will carry out, and how you will do this, to reach your advocacy objective.

In the Activity Overview you will list the main actions (activities) you will take in order to implement your Theory of Change and achieve your objective(s). These will be further developed and prepared during the 'Implement' phase.

You can use the **Activity Overview worksheet** to further develop the key approaches from the Theory of Change exercise into planned activities. You will also need the results from the SWOT Analysis and Stakeholder Map to answer questions such as:

- What type of activity do you want to do with each stakeholder and towards which decision makers?
- How does this activity fit within your Theory of Change, and contribute to the planned outcomes you have identified?
- Which financial and staff resources do you need in order to carry out these activities? Do you have these resources at hand (see your SWOT Analysis)?
- When and who will carry out the activities, and when do you need to start preparing?

For inspiration you can go back to the ***list of activities*** listed in the Context & Background section of the 'Plan' phase.

COMMUNICATION STRATEGY

Identify media channels, materials and tactics you will use to convince key stakeholders to support your advocacy objective.

Communications as a discipline can play an important role in supporting advocacy efforts. Here, we are referring to the communications materials and tactics deployed by communications experts rather than your own personal communication with decision makers and stakeholders (see Message House tool).

For comprehensive advocacy projects, you should develop a Communications Strategy together with your communications experts, nationally or regionally, to ensure full ownership and active support from these experts in your advocacy work. These experts will be able to advise and guide you on how to best prepare such a strategy - so be sure to reach out to them in time!

For more background on how to build a communications strategy, please go to phase 3: 'Implement'.

MONITORING PLAN

Prepare a plan to regularly collect information, and to take pauses to reflect on and learn from this information, for effective advocacy.

Make a Monitoring Plan **before** you start implementing your advocacy activities, to ensure that you are able to properly evaluate the results of your work. The plan will help you to keep track of progress, your successes, and important context changes.

Also set aside time to periodically reflect on your progress and adapt your Advocacy Plan if needed. More info on how to do this can be found in phase 4: 'Analyse and Adapt'.

PHASE 03: IMPLEMENT

Once you have your Advocacy Plan ready, it is time to develop and implement the activities that will help you reach your objective. These can be very different; from events to well-prepared meetings. This phase is all about reaching out to stakeholders and decision makers and organising your activities together, with colleagues in your organisation and the partners you have identified.

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ARE YOU READY FOR IMPLEMENTATION?

Before implementing any activities, you should make sure you have done your 'homework'. Having an Advocacy Plan is a must, and you should have walked through the previous steps:

Problem Tree: Have you clearly defined whether your advocacy objective helps address your issue? (if not, you can use the Problem Tree tool)

Theory of Change: Have you identified your key approaches and desired outcomes to help achieve your advocacy objective ? (if not, you can use the Theory of Change tool)

Activities overview: Have you defined the why, how and who for each activity, and are you certain these activities will help achieve your desired outcomes? (if not, you can use the Activity Overview tool that is offered as part of the Advocacy Plan)

If you feel confident enough to answer all of the above with "yes", then we would like to invite you to continue.

KEY STEPS AND TOOLS

ORGANISE MEETINGS

Host policy meeting to discuss ideas or plans surrounding an advocacy issue with key stakeholders and decision makers.

HOST EVENTS

Organise events to build awareness, raise support, increase political pressure or possibly even fundraise.

COMMUNICATE & CAMPAIGN

Inform, persuade and move people to action through active communication and campaigning; targeting a wider audience.

PHASE 03
IMPLEMENT

CHECKLIST: ADVOCACY MEETING
To be prepared is half the victory.

CHECKLIST: ADVOCACY EVENTS
From preparation, to execution, to follow-up.

CHECKLIST: WRITTEN COMMUNICATION
Sharing your recommendations effectively through text.

CONTEXT & BACKGROUND

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The most common ways of doing policy advocacy

In the 'Plan' phase you have identified your main interventions through the Theory of Change tool. In your Advocacy Plan you have detailed these interventions further, into individual activities identifying timelines, audiences and desired outcomes for each.

During the 'Implement' phase, you will translate the ideas you formulated in your Advocacy Plan into practice. In this chapter we share guidance and checklists to help develop and implement the three most commonly used advocacy activities:

- **Meeting with decision makers:** how to get them, prepare them, run them, and follow-up.
- **Organising events:** when to organise and what to consider.
- **Writing for decision makers**: how to bring your recommendations across effectively.

Do not limit yourself to these three types of activities alone when designing your Advocacy Plan. Instead consider the context and your strengths and weaknesses, in order to identify effective - as well as memorable - actions that will get you heard and listened to (see the previous phase and for an overview of the diverse range of activities that you can apply).

Effective advocacy communications

Advocacy communications aims to influence key decision makers and stakeholders through various means, including, but not limited to:

Channels:
- Media outlets
- Social media
- Websites
- Events and speeches
- Paid content (e.g. adverts)

Materials and tactics:
- Key messages for communicators and spokespeople
- Internal Q&As
- Press releases, media advisories, interviews, press conferences
- Thought leadership via blogs and opinion pieces
- Videos
- Images, infographics, and online medium

You should look to create opportunities for impact through your advocacy communications. For example, this could be key voices coming together on a joint media statement or a tactical opinion piece placed in the media on a key issue. Communication campaigns can also be developed around advocacy priorities. At its core, advocacy communications should work to shape the media and social media narrative around key issues and events to convince key decision makers and stakeholders to support your priorities.

CONTEXT & BACKGROUND


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Mass communications is a supporting field of communications which can support advocacy efforts by increasing public awareness of an issue. Make the most of existing communication assets - for example, on your social media networks - to reach key decision makers and stakeholders.

As you plan and implement your communications, it is important to look at how communications messaging and tools can best be adapted to your local context and objectives.

For guidance on how to use communication materials and tactics, such as media outlets and social media, please always collaborate with communication experts in your organisation.

From local to global and vice-versa

In an increasingly connected world, local level policy actions can have positive impacts at a far wider scale than is first apparent - and global policy developments can trigger local level action.

In implementing your activities, try to be mindful of these interconnections and use them to your benefit to push for greater ambition - at all levels of policy making:

Advancing regional and global priorities through national and local level actions. Regional and global priorities are only achieved when a critical mass of involved countries and member states to these multinational bodies voices their support. This means that your advocacy to adopt and implement global agreements can only be successful when national level advocacy is carried out (e.g. in order for the Paris Agreement to be achieved, successive Nationally Determined Contributions, or NDCs, must represent a progression compared to the previous NDC and reflect its highest possible ambition).

Advancing local and national priorities through regional and global level actions. Sometimes you may be faced with political resistance to your local and/or national priorities. In these cases, the activities and events at a regional and global level can actually be of help. By being aware of any major regional and international commitments your national and local governments have endorsed, you can call on their responsibility to act on these commitments. By pushing for greater ambition at an international level, those member states that are lagging behind can also be encouraged to increase ambition.

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TIPS & TRICKS

01 Know your audience

Whether you are working in the field, are a policy expert, or a campaigner, you are communicating every day. When working with policy it is easy to get drawn into the details of the policy recommendations, and forget that your audiences may not always be familiar with these.

Keep in mind that decision makers are generally busy people with very limited time, and they are rarely experts themselves and thus rely on inputs from trusted experts or advisors.

When influencing policy, be sure to:

- Be clear, concise and avoid partisan language
- Tailor your message to the audience
- Always start with a problem statement, and use human stories to illustrate the problem
- Make the solution you are proposing clear
- Use (localised) evidence, facts and figures to support your argument. Encourage action
- Listen, ask questions and take many notes
- Strive to be memorable
- Always be ready to adapt and adjust your approach and plans, and don't be afraid to go back to the tools and check your analysis if the circumstances change

02 Track your stakeholder information and engagement

Manage information related to stakeholders and decision makers so that it can be shared with others if needed. This could be as simple as a spreadsheet with contact details of key stakeholders and decision makers, or as complex as a database storing this information along with other details such as the date they were last contacted (and the results of this).

These overviews can remind you to regularly check-in with your key stakeholders and decision makers, or give a reminder of what you discussed last with them. Over time, it can even help show how their positions have started to evolve as a result of your advocacy.

CHECKLIST
ADVOCACY MEETING

To be prepared is half the victory.

Resources

- The results of your Stakeholder Map and Context Map
- Any supporting advocacy documents

Get started

DOWNLOAD ADVOCACY MEETING CHECKLIST >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

Advocacy meetings are an opportunity to approach key decision makers and stakeholders who have the power to decide over your advocacy issue, in order to raise awareness for your cause. Effective meetings are tailored to the political and cultural context, they happen at the right point in time, bring together the right people, and constructively identify solutions. Smaller scale, maybe even informal, meetings are also very helpful to build long lasting relationships on which you can rely on for future advocacy.

How to use

Use the Advocacy Meeting Checklist and run through the questions for each of the steps to successfully prepare and run meetings. Make sure you're able to respond to all questions before moving forward. The tips and tricks below will already help you on your way.

Tips & Tricks

1. Keep your meeting request concise and to the point - it should trigger the stakeholder or decision maker to accept it.
2. Send the meeting request well ahead of time.
3. Decision makers could be busy so do not hesitate to send reminders or pick up the phone to ask whether they have seen your meeting request.
4. Research the topic and the person you are meeting - be sure to understand the topic, the stakeholders and their position (the Context Map and Stakeholder Map can help you).
5. If a colleague joins you, organise an internal pre-meeting - this is the perfect moment to run through the agenda and key messages, and allocate roles.
6. Start the meeting positively and give everyone the opportunity to briefly introduce or express themselves.
7. Make sure that the purpose and agenda of the meeting is clear to all participants.
8. Keep sensing the room, check the atmosphere and intervene if necessary, for example by changing the topic when you see no progress is being made.
9. Make sure to summarise what has been said before closing the meeting.
10. Set up a system to keep track of your meetings, for example by using the Regular Logs (see Phase 4: 'Analyse & Adapt), a document or spreadsheet.

CHECKLIST
ADVOCACY EVENT

From preparation to execution to follow-up.

Resources

- The results from your Stakeholder Map, Context Map and Advocacy Plan
- Any supporting advocacy documents

Get started

DOWNLOAD ADVOCACY EVENT CHECKLIST >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

Advocacy events are a gathering of stakeholders and decision makers, intended to raise awareness amongst them, and mobilise them for your cause. They are used to create a constructive and positive dialogue around the solutions you are proposing, and ensure that decision makers recognise and understand widespread support across all key stakeholders for your proposals.

How to use

Use the Advocacy Event Checklist as soon as you have decided to organise an event.

Type of Advocacy events

Advocacy events can take many different shapes, and you should decide on which best fits your objectives. The main types of events include:

- **Webinars:** an online, informative meeting, usually consisting of one or more short presentations by speakers, or a longer lecture with opportunity for questions and answers between the remote audience and speakers. Typically lasts between 1-2 hours.

- **Conferences**: a larger meeting, usually taking place over one or more days, with individual sessions focusing on different topics, often around a single overarching theme which brings together participants.

- **Side-events:** often organised in the context of UN or other international conferences, when conference participants have the opportunity to host in-person events of typically 1-2 hours long - on topics relevant to the theme of the international conference.

- **Roundtables or workshops:** An expert level discussion, intended to discuss a specific topic. Each person has equal rights to participate, and can come from different backgrounds of expertise. Typically, there is one moderator and several pre-selected speakers that initiate the exchange. These events last between 2-4 hours.

- **Consultations:** An event usually co-organised with a Ministry or Government that wants to invite civil society actors to hear their input on a topic, usually in preparation for a subnational or national plan, a global meeting or development of positions for global negotiations.

- **Receptions:** an opportunity to bring stakeholders and decision makers together in a less formal atmosphere, with drinks and food. These are often organised to celebrate a special occasion, and the level of presentations and speeches is kept to a minimum. They can last between 1-3 hours.

CHECKLIST WRITTEN COMMUNICATION

A practical checklist for written communication for decision makers.

Resources

- The results of your Stakeholder Map and Context Map
- Any supporting advocacy documents

Get started

DOWNLOAD WRITTEN COMMUNICATION CHECKLIST >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

Writing positions papers, briefings, memos, publications or any other type of written communication for decision makers can be daunting, especially if you're not regularly involved in decision making. Common mistakes include making these documents too technical or detailed, not relevant to the challenges your audiences are faced with and the context they find themselves in, or presenting your input too late in the decision making process.

How to use

This checklist provides you with the key points to consider as you start writing.

Tips & Tricks

- **Be clear**

There are many ways to write and speak clearly: say only what you need to say, explain jargon, make your sentences as simple as possible, highlight key information, and be accurate and consistent in your use of language.

- **Be bold**

Make sure you have your facts right. But facts alone don't change the way people think and act; compelling stories based on sound evidence can help do this. So, think like a storyteller more often: grab people's attention, bring an issue to life, and take them on a *compelling journey.*

- **Be human**

Too often, people use words in a way that doesn't sound natural – making them sound insincere or even unfriendly. It's particularly important to speak like a real person with the public. When preparing your words, it may help to imagine you are having a real conversation with someone.

PHASE 04: ANALYSE & ADAPT

While you are working to implement your advocacy activities and hopefully start seeing the first outcomes as a result of your activities, it is important to analyse your achievements, using the Monitoring Plan you developed as part of the Advocacy Plan. Are you on track or have you achieved what you have set out for?

Once you have that understanding, it is important to communicate the results to external and internal stakeholders. And share your learnings within your organisation to help other colleagues.

Also consider whether these findings require you to update or adapt your Advocacy Plan. Advocacy is rarely a linear process, especially when working on complicated issues. You will most likely be faced with unexpected developments, new information and knowledge, requiring you to adapt.

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KEY STEPS AND TOOLS

PHASE 04 ANALYSE & ADAPT

EXERCISE: REGULAR LOGS
A regular moment for short reflection on what has happened, to capture information and learnings.

EXERCISE: REFLECTION
A more elaborate moment to reflect on your advocacy efforts.

DELIVERABLE: SHARING LEARNING
A simple format to share your advocacy efforts and learnings.

EXERCISE: TIME TO DECIDE
Adapt, reframe or exit from your advocacy efforts.

MONITOR
Collecting and analysing the results of your advocacy activities.

EVALUATE
Reflecting on the results, discussing them and deciding next steps.

REPORT & SHARE
Reporting outcomes and learnings and sharing these within and outside your organisation.

DECIDE
Continuous decision-making on whether and how to adapt, reframe or exit from your advocacy efforts

ADJUST

REFRAME

CONTEXT & BACKGROUND


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Advocacy is an agile process

Throughout the implementation of your Advocacy Plan, many things can change; key stakeholders might change their position, a policy can be updated or a sudden event can put your position in the spotlight or under pressure. And even when your long-term objective has not yet been reached, your activities can spark subtle changes and short-term effects. These are all reasons to reflect on your progress and evaluate your approach. Is your plan still relevant or do you need to change anything? Will a small adjustment of your activities be enough, or does the situation require a serious reframing of your approach?

In fact, your advocacy work will never go completely as planned. Therefore, it is essential to keep an open mind and practice adaptive management. Regularly measure and assess your progress, and decide how to move forward.

Monitoring progress

Another key part of doing effective advocacy is monitoring. That's why your Monitoring Plan is an essential part of your advocacy plan:

- "Monitoring" usually refers to more short term regular information collection.
- "Evaluation" or "reflection" means taking a pause from action, and using the information you collected to analyse and learn from the past period.

Designing a Monitoring Plan doesn't have to be complicated. It is important to choose a small number of long-term and short-term indicators that will support your learning. Don't select too many indicators as you are unlikely to use them! In policy advocacy, most indicators are qualitative rather than quantitative and you may need to include 'proxy' indicators (i.e. providing an 'indirect' or less precise measure or sign of change), since the results of policy actions are often less tangible. Monitoring behaviour change with key stakeholders, as well as any key assumptions that your Theory of Change is built on, can be helpful.

Examples of long-term indicators

Typically only visible after a year or longer

- Changes in the reasoning of key decision makers
- Changes in wording of policies or conventions
- Ratification of conventions
- Changes in legislation
- Changes in budget allocation
- Extent to which policies are implemented (or harmful/regressive policies are not implemented)
- Environmental and social impacts of implemented policies
- Extent to which implemented policies achieve the desired effect
- Change towards sustainable business practices

CONTEXT & BACKGROUND

Examples of short-term indicators

Able to be identified/expressed on a monthly basis or even more regularly

- Speeches, policy documents and strategies, budget documents
- Minutes of meetings and events, parliamentary discussions
- Comments, anecdotes and feedback received from external actors
- Interviews and surveys with decision makers (often informal)
- Media mentions of key organisations or stakeholder
- Social media analytics (Facebook, blog, Twitter, etc)

Why it is important to report and share

Often, learnings are closely linked to people within the organisation. And when they leave, their experiences leave with them. Therefore, systematic reporting of outcomes and learnings is important so you can capture what you have learned, share it within your organisation - or even beyond - and continuously improve.

It is essential that you reflect regularly, share learnings from previous experiences and document these properly. This might be through donor reports, learning briefs or other types of communication.

The type of reporting that you do depends on the purpose. Why do you need to report and who is your audience?

Here we distinguish between two key types of reporting:

01 **Regular reflection and adaptive management**
Focused on capturing regular progress (monthly, weekly or even daily) of your advocacy work in a central overview. It is used to inform the team you are working with of ongoing progress and used as a basis to update key donors or stakeholders outside your team. The information in these reports can highlight the need to reflect and adapt your Theory of Change or Advocacy Plan.

The Regular Log provided in this toolkit can help you.

02 **Knowledge creation and sharing learnings**
Besides regular reflection, implementing an Advocacy Plan will also result in important knowledge and lessons learned. To keep strengthening your advocacy, it is important that this knowledge is captured and learnings are shared. Depending on your audience, these reports can take different forms - from short success stories to elaborate reports. See the Sharing Learnings tool to easily communicate and share learnings.

CONTEXT & BACKGROUND


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How to write a report

In order to make your reports effective, they need to be tailored to your audience and have a clear storyline. Consider the points below when starting to write your report:

1. Who is your audience: Donor, Public, other practitioners? What do they know/don't know and what does the report need to contain to meet their information needs?
2. Write the body of the report before writing the introduction or conclusion.
3. Use as much visualisation as possible, but not just for the sake of using visuals. Make sure every visual has a purpose.
4. Review your writing skills to craft a well-written report. Have a look at the ***Written Communication Checklist*** for guidance and tips.
5. Use quotes from stakeholders or decision makers, they enrich the report.
6. Don't overload readers with technical details so that the text becomes burdensome.

Adjust, reframe or exit?

After evaluating your progress, decide whether you need to make any changes to improve your advocacy, or even stop working on the issue.

Do you need to slightly tweak timelines, activities or resources employed? Then your next step is to **adjust** the existing plan(s) where needed.

Do you feel that the current approach is not working at all? Or did the external context change radically, making your advocacy out of tune with reality? Then you may need to go back to the drawing board and seriously reconsider and **reframe** your approach. This means going back to the foundation to review your Problem Tree, Stakeholder and Context Map, and then updating your Theory of Change and Advocacy Plan to create a new approach to the issue. You would also choose the "reframe" step if you have concluded your work and are going into a new stage. In this situation, you should still go through the main steps from the beginning of the advocacy cycle to check if something significant has changed and then develop your new plan.

If your reflection shows that you have reached the intended change, been successful in handing over the issue to other stakeholders to continue, or that the issue you wanted to work on is simply not relevant anymore, then you can decide to **exit**: stop working on the advocacy issue or objective. More details on how to successfully exit can be found in the next phase.

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TIPS & TRICKS

01 Keep your monitoring and reporting efficient

Do this by setting up a simple system early on in your advocacy - knowing what information to keep track of and trying to document this with minimal effort. Once you are deep into your advocacy work, you may find that it is much more difficult to start with monitoring. So start early, as part of developing your Advocacy Plan.

02 Regularly reflect and evaluate your achievements and learnings

within the team/colleagues to stay flexible in implementation and adapt your work as necessary.

03 Make documenting your learning as easy as possible

so that it is not intimidating or inconvenient and share your experiences. Others will thank you for this.

04 Share reflections and learnings with a trusted audience

to get a wider perspective once you have reached a critical junction in your advocacy work. These considerations may help the team to make final decisions for adaptation, or possible reframe/exit from the advocacy objective.

EXERCISE

REGULAR LOGS

A regular moment for short reflection on what has happened, to capture information and learnings.

Resources

- The results from your Stakeholder Map, Context Map and Advocacy Plan
- Any supporting advocacy documents

Get started

DOWNLOAD REGULAR LOGS WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

The Regular Log is a short evaluation method to keep track of what happened related to your advocacy objective. You reflect on what happened, your performed activities, expected and unexpected outputs and outcomes, new challenges, stakeholders involved - all related to the advocacy objective you defined - and what you are learning from it. Carrying out a log at regular intervals will give you better information to review later in a more elaborate evaluation.

How to use

Fill in the Regular Log and answer all five questions (together with your team).

Do this on a regular basis - at least after big advocacy milestones - and try to make it part of your ongoing process (weekly, monthly ... whatever fits your work best). You could make it part of your team meeting agenda or set an automatic reminder in your calendar.

Tips & tricks

1. Determine a scheduled time to fill in the Regular Log for evaluation
2. Assign one person to be responsible for the Regular Log
3. Ideally fill out the log with all team members/relevant colleagues and partners
4. If you have weekly or monthly team meetings, these could be a good opportunity to discuss the log all together, before moving ahead.

EXERCISE

REFLECTION

A more elaborate moment to reflect on your advocacy efforts.

Resources

- Your completed Advocacy Plan (including its Monitoring Plan)
- Regular Logs and other useful info you gathered over the period

Get started

DOWNLOAD REFLECTION WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

When putting advocacy into practice, it is important to continuously reflect on your efforts and ask yourself *'is what I am doing, contributing to the advocacy objective we had?'* This tool will help you to take a step back and reflect on your efforts. It focuses on collecting evidence of change and how this change contributes, or not, to your advocacy objective. You can use it on a specific activity or your whole process.

How to use

Follow the steps on the worksheet, try to answer the questions and fill in the blank spaces.

This tool is best used after six to twelve months of advocacy work around an objective, especially for larger initiatives. It helps you to reflect on progress towards your advocacy objective and see the bigger picture of change. You can use it when major developments have taken place on your issue, or when you are close to reaching the end of the activities or decision making process you initially planned for.

Tips & Tricks

- This tool will be most effective when used during a workshop (preferably with key stakeholders).
- This tool will spark discussion, make sure you appoint a strong facilitator and note-taker.
- This is not a standalone tool for evaluation, make sure you also reach out to external stakeholders for an outside perspective.

DELIVERABLE

SHARING LEARNINGS

A simple format to share your advocacy efforts and learnings.

Resources

- Your Regular Logs and the results of your Reflection exercise
- Your Advocacy Plan (including its Monitoring Plan)

Get started

DOWNLOAD SHARING LEARNINGS WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

This tool is meant for giving an overview of your advocacy efforts and learnings.

Based on the Regular Logs and Reflection worksheet you are able to share your learnings with others internally or externally. This is highly recommendable as you don't want other teams to make the same mistakes as you did. Help others by giving them advice.

How to use

In the worksheet you will write down a short summary with the key (unexpected) outcomes and provide your advice and experience which can be shared with others. This advice includes the lessons learned from your advocacy efforts, what you should continue doing and what can be improved for future work. It is important that after filling in the worksheet you actually share this information internally or with any close partners.

Consider sharing your learnings with others

For example, IUCN's '***PANORAMA Solutions for a Healthy Planet***' platform allow for cross-sectoral peer to peer learning and scale up of successful approaches for the implementation of the UN Agenda 2030.

Tips & Tricks

- **Tell a story and make it visual.** The Sharing Learnings tool helps you identify the main learnings. You could then integrate these in a slide deck, with photos and visuals of your advocacy work, to make your learnings even more engaging for those you share them with.

EXERCISE

TIME TO DECIDE

Do you need to adjust your advocacy, reframe or exit?

Resources

- Your completed Advocacy Plan
- Your Regular Logs and results of your Reflection exercise

Get started

DOWNLOAD TIME TO DECIDE WORKSHEET >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

Intro

Advocacy requires continuous internal decision making. Sometimes these decisions are simple to make, other decisions are harder and need more time and effort. After evaluating your advocacy efforts, it is time to use this valuable information to decide how to proceed with your work. This tool can make the process of deciding easier for you.

How to use

Every time you use the Reflection tool, you should consider whether to adapt, reframe or exit. You do this by comparing your Advocacy Plan with the results from your Regular Logs and Reflection exercise.

Tips & Tricks

- Invite people who can help you to objectively reflect, like a trusted partner, stakeholder or senior staff member.
- Focus your thinking and discussions on impacts and outcomes, not outputs and actions. Compare these against your Theory of Change.
- Don't hesitate to capture failures, we are all human and make mistakes sometimes, and we can learn from those.
- In your Advocacy Plan you have defined the criteria for success per activity. Gather these criteria and use these as a basis for decision making.
- Have policy documents archived in a way that you can easily refer to them whenever you are unsure what happened in the past, and how it happened (e.g. meeting minutes, recordings and the data from your Regular Log)

PHASE 05: EXIT

Your advocacy efforts may come to a close because your objective was achieved. This would be a great result, of course! Or after analysing and evaluating your work, the context and the progress made, you may have concluded that continuing your advocacy doesn't make sense anymore - or is no longer possible.

Either way, you will need to think about phasing out work with partners and stakeholders and share closing communications, like final reports, as well as closing operations (contracts, accounts, etc.) when your advocacy is externally funded.

CONTEXT & BACKGROUND

The importance of closing operations

Besides reporting and sharing your learnings, the most important thing is to ensure a smooth phasing-out of activities with colleagues, partners, stakeholders and, possibly, funders. This also means doing budget and resource evaluations and sharing any closing communications as required.

When concluding your advocacy, you also need to think about all the documentation that you've gathered over the course of your advocacy work and where to store it. You might have a stakeholder/decision maker database that needs updating and "rules" on how and where to best store relevant documents, such as reports and lessons learned. Check with relevant staff in your organisation how to do it.

Make sure not to let any information go to waste or be deleted! Someone else might be helped by it in the future.

Keeping an eye out

Regardless of the reasons, if you are stop the active advocacy work it may still be a good idea to keep an eye on how the advocacy context is developing, to see if the changes are there to stay, and whether you want to maintain contact with stakeholders or decision makers if new opportunities or needs for you to get involved arise.

CHECKLIST
ADVOCACY EXIT

How to conclude and exit from your advocacy work in a proper way.

Intro

If your advocacy work approaches its end, extra care needs to be given to closing activities. This means concluding your communications with decision makers, partners and internal and external stakeholders. And sharing your results as appropriate, evaluating your efforts and documenting and archiving your work.

If your advocacy work was externally funded, you will also need to consider legal and financial requirements like contracts or accounts. These activities may be led by the administrative and finance department in your organisation, who are experts and know what they are doing. However, you should still have an understanding of what is going on in order to support and make sure everything necessary has been done.

How to use

If you have decided to exit from your advocacy work, you can use this checklist to ensure you conclude your work in a proper way.

Tips & Tricks

- Don’t rush yourself through the checklist and make sure that everything is properly carried out.
- Dedicate enough time to each item on the list so you definitely know it is carried out properly.
- Execute the unchecked items immediately. Don’t wait as this might result in forgetting to do it.

Resources

- All project related documents.

Get started

DOWNLOAD ADVOCACY EXIT CHECKLIST >

EXPLORE EXAMPLES APPLIED IN PRACTICE >

WWF Policy Advocacy:
Toolkit Towards Strategic and Effective Advocacy

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Design by Fronteer

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