



Save the Children



**The Open
University**

Advocacy and Campaigning

3 Planning your advocacy strategy

Keywords: campaign, strategy, advocacy, plan, goals, objectives, risk, sequencing

Duration: 1.5 hours



Introduction

In the first sessions we have looked at the definitions of advocacy and campaigning and how they fit into Save the Children's theory of change. We are now moving on to look at the steps involved in developing an effective advocacy strategy and how to plan your campaigns.

This session looks at three main areas:

- How to set campaign goals and objectives
- The key ingredients of an effective advocacy strategy
- The practicalities of resourcing and implementing your plan

Investing time in planning is crucial to make your public engagement and influencing work successful. Planning is more than a collection of good ideas and a calendar; it's a strategic way of deciding what you want to achieve, setting out what needs to happen to achieve this goal, deciding how you will go about achieving this change and sequencing when you will implement activities to achieve the most effective result.

This session looks at how to set out and pull together your vision, ideas and insights into a coherent strategy and plans.

Effective strategies are driven by insights into the factors that will secure influence. This session draws on the tools and techniques set out in many of the other sessions in this module, which will provide you with the analysis you need to develop your strategy and decide on the activities you will deliver to achieve your goals.

This session also covers the practical considerations, such as recruiting a team and designing a budget to deliver your plan.

Planning is not a one-off linear process. Issues and context will change constantly, so that continuous re-strategising will be required. The final section of this module will help you think through how to apply learning to refresh your plans.

Learning Outcomes for this session

Knowledge and understanding

When you have studied this session, you should be able to:

1. Understand why planning is important to deliver effective advocacy work and campaigns.
2. Be able to identify the key parts of a campaign plan.
3. Know the steps you need to take to develop and write your plan.

Practical and professional skills

Develop and implement an advocacy strategy in a humanitarian situation.

1. Understand the basic parts of an effective advocacy strategy.
2. Set goals and objectives.
3. Select appropriate activities and tactics to achieve your goals and organise them coherently.
4. Assess risk and define mitigating actions.
5. Set out resource requirements.
6. Monitor progress, update and review your plan.

Duration: 1.5 hours

1 Why planning is important for campaigning and advocacy work

Advocacy and campaigning is not a tactic or a one off event, but a set of activities aimed at achieving a change which is aligned with your organisation's vision. Campaigns should draw on all the strengths of an organisation, bring together key actors and continue to build over time. The next sections will help you think through how to identify what it is that you want to achieve, how to break this down into a series of goals and objectives and how to structure your activities into a coherent and high impact plan.

Many of the principles of planning effective campaigns and advocacy are the same as apply to planning any project. You need to work out what you want to achieve and how, who will do what, when they will do it and how to follow up on results. You also need to be flexible to respond to changing events. Developing strategies and plans that achieve impact requires constant learning and a willingness to adjust course and take calculated risks.

The key parts of your campaign plan

The following is a guide to the key ingredients you will need in your plan.

Problem analysis	
Overall goal	These will be covered by this session
Objectives	
Strategic approach	
Targets	Sessions 5 and 6 on mapping the external environment and identifying advocacy targets
Power analysis	
Key messages	Session 7 on developing your message
Activities/actions	Session 10 on public mobilisation
Opportunities and events/timeline	
Human and financial resources	This session will cover these areas
Risks	
Monitoring, evaluation and learning	Session 4 on monitoring and evaluation

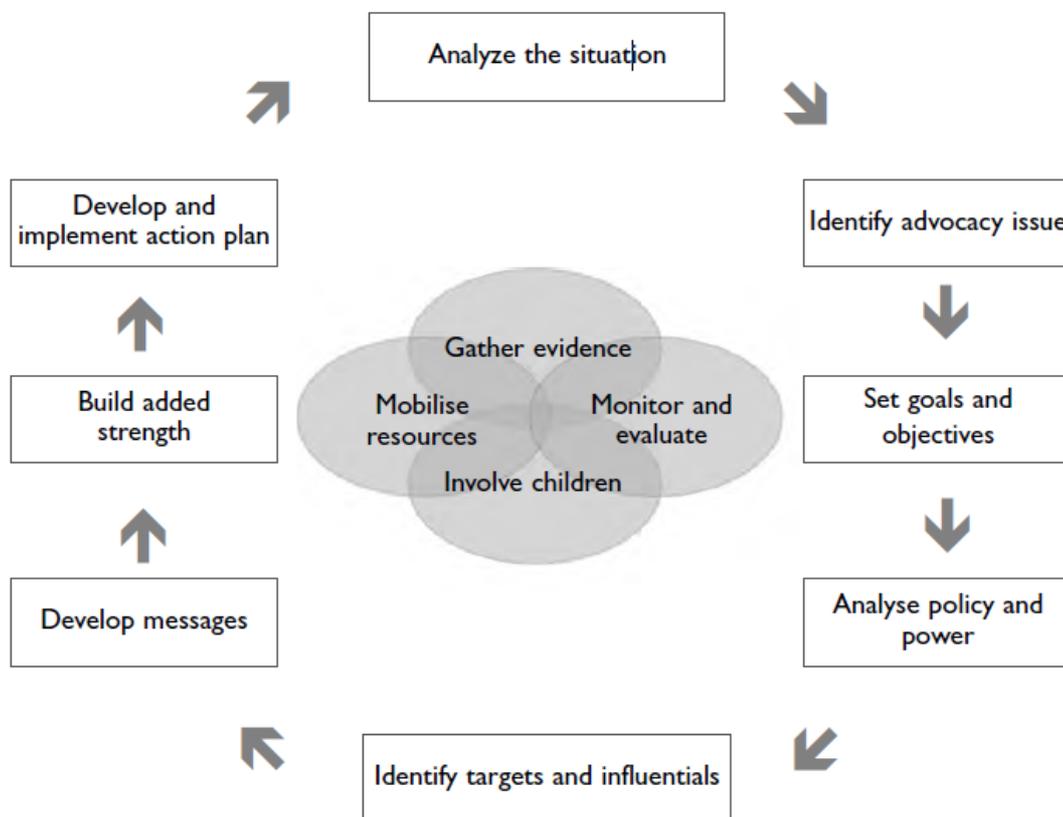
Other sessions in this module include guidance on more detailed aspects of a plan, such as child participation, engaging the media, and budget analysis, and should be used in conjunction with this session.

Be clear about the changes you want to see

Before you begin your campaign you will need to identify the issues that most affect children and decide on the best intervention to address them.

There are various tools including the Child Rights Situation Analysis (CRSA) that will help you understand the context and help you determine the key issues that children face. Experience shows that advocacy is very rarely an ordered, linear process. Some of the most successful advocacy organisations operate in a chaotic environment, seizing opportunities as they arise.

The ability to seize opportunities, however, does not reduce the importance of a sound process and careful planning. Advocacy usually achieves the best results where it is a systematic process with distinct steps and activities. Although these steps may not always occur in exactly the same order, it is important to consider and plan for each step as a critical piece of the advocacy effort. This advocacy cycle provides a framework to plan your strategy.



Important questions in the process

You need to answer the following questions to plan your advocacy:

What is going wrong?

- Provide strong, unambiguous evidence.
- What evidence do we have and what more do we need to find out?
- Analyse the situation.
- Look at children's problems and rights violations.
- Look at the underlying causes.
- Think how to address the causes.
- Who is responsible for respecting, fulfilling and protecting children's rights?
- Where can the system be changed – and where is it resistant to change?

✓ *Identify the advocacy issue*

What must change?

- Be very clear about what must stop, what must change or what alternative solution should be adopted, who should do it and by when.

✓ *Set clear advocacy goals and objectives*

Who has the power to make the change?

- Be clear that your target can actually make the change you're pursuing. What is their capacity to deliver change?
- Do they have formal or informal power, or both?

✓ *Identify advocacy targets and influentials*

Who are our allies and opponents?

- Be clear about who we work with and who we have to convince.
- Who is neutral or undecided? How can they become supporters?
- Do we need to mobilise the public to support us?
- Do we need to work with other organisations, such as civil society organizations or the private sector?

✓ *Build added strength*

How are we going to win?

- What are the best tactics and approaches to influence those targets?
- What do they need to hear, and who do they need to hear it from?
- How can you make sure they get your message and act on it?
- Produce a clear and effective plan of action.

✓ *Develop messages, and develop and implement an action plan*

How will you know if the change has happened?

- See how the plan is working and decide what to keep, and what to change or stop using.

√ Monitor and evaluate

2 Setting your vision

At the heart of an effective advocacy strategy and campaign is a clear vision for change. For example, in Save the Children:

- Our vision is a world in which every child attains the right to survival, protection, development and participation
- Our mission is to inspire breakthroughs in the way the world treats children, and to achieve immediate and lasting change in their lives.

These two statements set the focus and level of ambition. Your planning should be driven by this vision and mission.

Before embarking upon your planning your activities, you need to be very clear about what it is you want to change. Your campaign vision should set out an ambitious high level aim for the future. The vision is the big audacious aim that drives everything you do.

CASE STUDIES:

Campaign	Vision
<p>MAKE POVERTY HISTORY</p> <p>This campaign brought the anti-poverty movement together under the banner of MAKE POVERTY HISTORY in 2005 calling for urgent action for more and better aid, debt cancellation and trade justice ahead of the UK G8 summit.</p>	An end to extreme poverty
<p>ONE BILLION RISING</p> <p>ONE BILLION RISING FOR JUSTICE is a global call to women survivors of violence and those who love them to</p>	An end to violence against women and girls

<p>gather safely in community outside places where they are entitled to justice – courthouses, police stations, government offices, school administration buildings, work places, sites of environmental injustice, military courts, embassies, places of worship, homes, or simply public gathering places where women deserve to feel safe but too often do not. It is a call to survivors to break the silence and release their stories – politically, spiritually, outrageously – through art, dance, marches, ritual, song, spoken word, testimonies and whatever way feels right.</p>	
<p>The International Campaign to Ban Landmines</p> <p>The International Campaign to Ban Landmines (ICBL) is a global network in over 100 countries that works for a world free of antipersonnel landmines, where landmine survivors can lead fulfilling lives.</p> <p>The Campaign was awarded the Nobel Peace Prize in recognition of its efforts to bring about the 1997 Mine Ban Treaty. Since then, they have been advocating for the words of the treaty to become a reality, demonstrating on a daily basis that civil society has the power to change the world.</p>	<p>A world free of antipersonnel landmines, where landmine survivors can lead fulfilling lives</p>
<p>Save the Children’s EVERY ONE Campaign</p> <p>Since 2009 Save the Children has been campaigning around the world to end the injustice of children dying of preventable deaths.</p>	<p>An end to preventable child deaths</p>

Comment

Getting the vision right is important to set and revisit throughout the lifetime of your campaign and advocacy work. Test it out – explain to a friend or family member what your campaign is about. If they don’t get it quickly, you can be pretty sure no one else will either.

Key questions to ask when setting your campaign vision:

- What is the big ambitious goal you want to achieve with your campaign?
- Does this match the ambition set out in Save the Children’s vision?

After exploring your vision it is important to focus on your goals and objectives that will help you achieve your vision.

3 Setting goals and objectives

Setting goals

To focus your campaign and advocacy, create a sense of urgency, work out how you will achieve your aims and to get traction, you will need to set compelling goals. To do this you will need to break down the problem that needs to be addressed into a set of clear goals.

A goal describes the changes you want to see. It is the long-term result of your advocacy effort and a stepping stone to achieving your vision for change.

Campaigners should be constantly seeking to understand the context in which they are working and the opportunities and challenges in the external and internal environment. Campaign goals need to be:

- Evidence based and underpinned by our program knowledge and expertise
- Aligned to organisational strategies
- Tailored to the national policy and political environment

Campaign goals should not be confused with campaign metrics. Goals measure outcomes, rather than metrics which measure outputs. A goal might be a reduction by a third of the numbers of children in harmful institutions, whereas a metric could be 1000 action cards signed by the public in support of your campaign.

For example, Save the Children’s Global EVERY ONE Campaign has the following Vision (or Breakthrough) and Goal:

Breakthrough	That no child under the age of five dies from preventable causes, and that public attitudes will not tolerate high levels of child deaths.
Goal	Our goal is that Millennium Development Goal 4 – a two thirds

	reduction in child mortality rates by 2015 – is achieved
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Note how the campaign goal is a clear stepping-stone towards the breakthrough

Setting strategic objectives

Once you have set your goals – what you want to see achieved – it is time to set out the key strategic objectives that you think will bring about your goal.

Basically, what is your work trying to achieve? These are your objectives. Objectives usually describe the policy, budgetary or political change that you want to achieve by the end of your advocacy intervention.

Make your objectives a specific change that you can bring about that contributes to reaching your goal. Aim to make it specific and measurable and define what you will accomplish, where, when, and with whom.

Generally, the time frame for an advocacy objective would be 1-3 years, and the objective should focus on a specific action that an institution can take.

Advocacy objectives should be SMART (specific, measurable, achievable, realistic and resourced and time-bound).

Save the Children's advocacy strategies usually have a number of different objectives that all contribute to achieving the goal and overall vision.

When developing an advocacy objective, you need to be both realistic and ambitious. This means that you need to consider what you can realistically achieve in the time-frame you have, given your existing expertise of the policy issues, your relationships with policy makers, and the political context and opportunities.

Example from Save the Children's EVERY ONE Campaign:

Breakthrough	That no child under the age of five dies from preventable causes, and that public attitudes will not tolerate high levels of child deaths.
Goal	Our goal is that Millennium Development Goal 4 – a two thirds reduction in child mortality rates by 2015 – is achieved
Strategic Objective (What?)	<p>Governments, with other stakeholders, commit and take steps to ensure that every child has access to and uses quality, essential health care services and practices:</p> <ul style="list-style-type: none"> • High burden countries adopt, fund and implement at scale national plans that equitably address maternal, newborn and child mortality • Governments and donors remove demand-side obstacles to health care, including financial barriers • Steps are taken to strengthen health systems and address supply-side constraints, including by ensuring that there are sufficient health workers, trained, deployed and supported to tackle the key causes of child mortality • Donors support national efforts by mobilising sufficient and efficient funding for health care, and ensure that no country plan fails for lack of resources

Session 4 on monitoring and evaluating advocacy includes guidance on setting metrics and indicators to track objectives and goals.

CASE STUDY on problem analysis goal and objective setting:

In 2009 the Save the Children Country Office in Sierra Leone focussed its efforts on campaigning for free healthcare for pregnant mothers and children under 5. Our analysis showed that the cost of user fees was among the most significant underlying causes of the high number of preventable deaths of children under 5 and mothers during childbirth. To define the problem the team started fact finding to identify issues and solutions through desk research, semi structured interviews with the Minister of Health, First Lady, key CSO and INGO staff, the head of UNICEF in country and a consultation with affected communities and health workers in urban and rural settings. Having drawn this information together, the team held an internal workshop to set out the problem and set the goals and objectives. The team drew out the current state of child mortality and the desired state, and then went about identifying the key features of the ideal future (the goals) and the key changes that would need to take place from that day to achieve the ideal future (the objectives).

ACTIVITY

Write down examples of campaigns you know and what you think their vision and goals might be.

Comment

Here is an example from Save the Children's campaign in Sierra Leone:

Vision: No child under the age of five should die of preventable causes and no mother should die while giving birth.

Goal: The Government of Sierra Leone fulfils its commitment to provide free health care to pregnant mothers and children under the age of five.

Objective: The Government of Sierra Leone increases investment in maternal and child health (MNCH) to 30% of the annual health budget by 2015.

Sequencing your activities

Defining the influencing trajectory is what brings a campaign together. This is your view of the key steps that will be needed to reach your vision, goals and objectives.

When you plan your campaign, you need to set out your analysis into a clear pathway from today to your vision, and structure a roadmap of opportunities that will take you a step closer to the goals. This is not an exhaustive account of all the factors that need to change, but a critical path or single thread in the wider set of issues that can catalyse the wider change. Only then do you define your tactics and match your activities to it to set out how you will achieve your objectives.

You should see each piece of the influencing trajectory as a distinct campaign to achieve your objectives on the way to achieving your goals and ultimately your vision. Each point on the roadmap should reflect the same principles of the campaign as a whole ie be based on your values, tackle a real world problem and have a clear change.

Defining the path to achieving your change objective

There are several analytical frameworks you can use to define the path you need to navigate in your campaign.

Some key questions you might want to consider include:

- What are the key context barriers to tackling the problem you are seeking to address?
 - Demographics, geography, environmental factors eg climate change
 - Existing laws and regulations
 - Historical legacy, social and cultural norms
 - Access to technology
- What are the political barriers to tackling your problem?
 - Type of government, how decisions are made
 - Space for civil society actors, media and collective action
 - Priorities of key decision makers and what motivates the main actors
- What opportunities are there for influence?
 - What is a plausible pathway to achieve your goals?

- What actions can be taken along this pathway? What actions can you take and what do you need to do through others?

From this you can build a range of entry points for influencing the change you want to see to achieve your goals, the appropriate activities, and the sequence of these activities along your pathway.

ACTIVITY

Write down one tactic that you think might help deliver a change for each of the following scenarios:

- A key piece of legislation has been stuck in the parliamentary process for five years with no sign of moving because the Ministry of Finance is not convinced that it is the right thing to do
- The new Minister of Children and Family Welfare has been appointed, but knows nothing about the issue you are trying to tackle

Comment

It is important to match the activity to your target. You should seek to understand the issue by ‘putting yourself in the shoes’ of your influencing target, and thinking through what and who will most influence them at that point in time. A large component of advocacy is education, and finding a way to increase key targets and influential knowledge and understanding of your issues is crucial. This might be done by engaging your targets in roundtable discussions, sharing research, or inviting them to events or policy discussions to increase their understanding. Alternatively, it may be more effective to identify the people who have influence over your targets and include them in your approach; for example, who are the people your target respects, who has influence over their opinions, and who could be used to help change their perspective on your issue?

Setting up a Strategy Workshop

At this point, it will be helpful to bring together the key people who will deliver your campaign into a workshop to set out your campaign strategy and plan for your advocacy work.

ACTIVITY

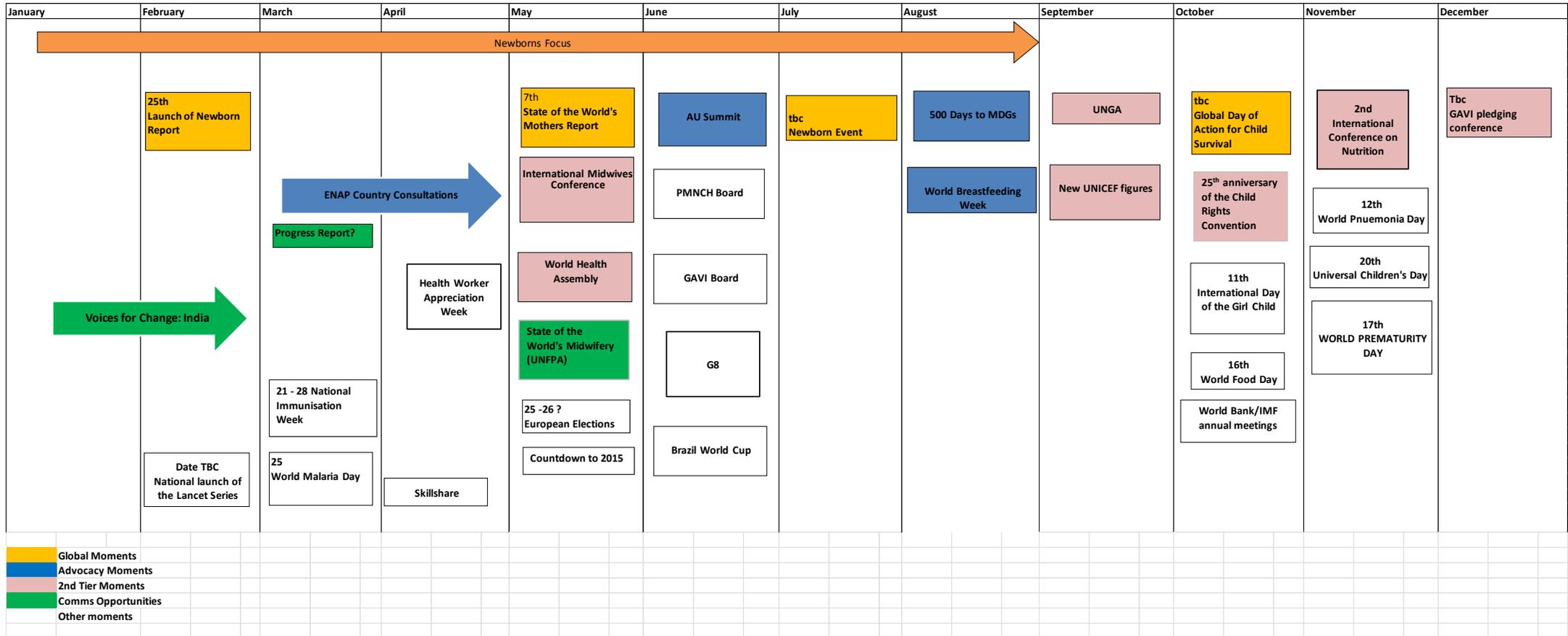
Imagine you are organising a workshop to agree on a campaign strategy, what would be the key sessions you would need to include? Who would you invite to the meeting

Sequencing your activities

An output of your workshop should be your campaign pathway. This should map out:

- the external trends, events and political developments that relate your advocacy goals and objectives
- the key decision points in the process
- opportunities to raise the profile of your issue
- your campaign activities

See Figure 2 is an example of an internal campaign planner



4 Conducting a risk assessment

There may be risks associated with your advocacy and campaigning, especially if the issue or the timing of the advocacy is sensitive, or if it polarises different constituencies. There may also be a risk of not taking action, in terms of our credibility as a child rights organisation.

Different tactics can carry different risks, depending on the issue and the context in which you are working. Here we will look at strategic risks.

Key questions in assessing risk:

- What possible risks may arise from engaging with this issue?
- What is at risk eg the reputation of the organisation?
- Are there relevant standards that should be applied, in particular child protection?
- What is the potential impact of this risk?
- What could you do to mitigate the risk?
- What is the level of risk remaining after mitigating measures have been taken?

It is important to consider whether your advocacy work might bring any risks to Save the Children's staff, partner organisations, programmes and individual children and their communities.

Write a brief summary of the potential key risks, ideally with external trusted partners.

Assess a) the likelihood and b) the scale of impact if this happens. This will give you an order of priority.

Outline the steps you intend to take to mitigate these risks eg selecting the right kind of the advocacy tactics and actions and by finding the right wording and tone for your messages.

Activity

Write down five potential risks that may affect your campaign and advocacy work, and mitigating steps you could take.

Example risk assessment:

Risk	Likely impact	Likelihood of occurring	Mitigating actions

Comment

There are a range of potential risks in campaigns and advocacy work, each of which can impact in different ways. An assessment of risk will help with your decision making about what tactics are the most appropriate to use in the context in which you are working.

5 Identifying resources

Before you set out on a long journey you would want to know what resources you have and what you can pick up on the way. The same is true in planning your Campaign. This section will help you think about what resources you will need.

Your campaigns team

The following is a suggested set of team roles

- Advocacy and Campaigns Director who is a visible, accountable lead for designing and delivering the advocacy strategy
- Policy and research Manager: to help understand the issues and set out your advocacy position
- Advocacy Manager to actively engage decision makers

- Communications Manager, including social media & traditional media to coordinate and implement communication strategies that support the achievement of the advocacy strategy
- Monitoring, evaluation and learning Manager

When organising your campaign team, you should:

- Set out how the team will communicate to clarify roles and avoid ad hoc decision-making
- Set out how to manage the quality of activities to deliver a good result
- Agree how and when your strategy will be reviewed and updated
- Identify what other knowledge, resources and support you need, internally and externally, to help achieve your strategy

Setting out a Campaign Budget

Examples of budget lines may include:

- Salaries of staff
- Creating materials (such as print and multi-media) with advocacy messages for targeted audiences
- Holding events (round table discussions, press conferences and workshops to support dissemination of reports and discussion on issues) with key stakeholders
- Documenting and packaging evidence and data to share with advocacy targets
- Visits, such as taking advocacy targets to the field to view first-hand the situation on which we're advocating or campaigning
- Investment in civil society partners to develop campaign platforms
- Involving children in consultation on strategy design, or in execution of the strategy

ACTIVITY

Consider some of the individual costs and outlays involved in the budget lines outlined above.

Comment

Costs vary depending on the country, and it is always advisable to gather multiple quotes against any individual cost to ensure you are getting maximum value for money. You must always follow the relevant procurement procedures within your part of Save the Children.

Some examples of the costs associated with the above budget lines could include: publishing research, hiring audio equipment, developing posters and banners for events; consultancy time, design work for materials and reports; travel costs, and accommodation for field visits.

Internal communications

Campaign plans should seek to focus groups of people and organisations behind shared goals. Your internal communications should:

- Gain commitment and buy in for the plan
- Celebrate success and set out future challenges
- Drive a sense of urgency

Refreshing the Plan

Campaign plans and advocacy work should be regularly refreshed, in a regular cycle, applying new insights, learning and analysis.

Figure 3 shows a cycle for reviewing plans.

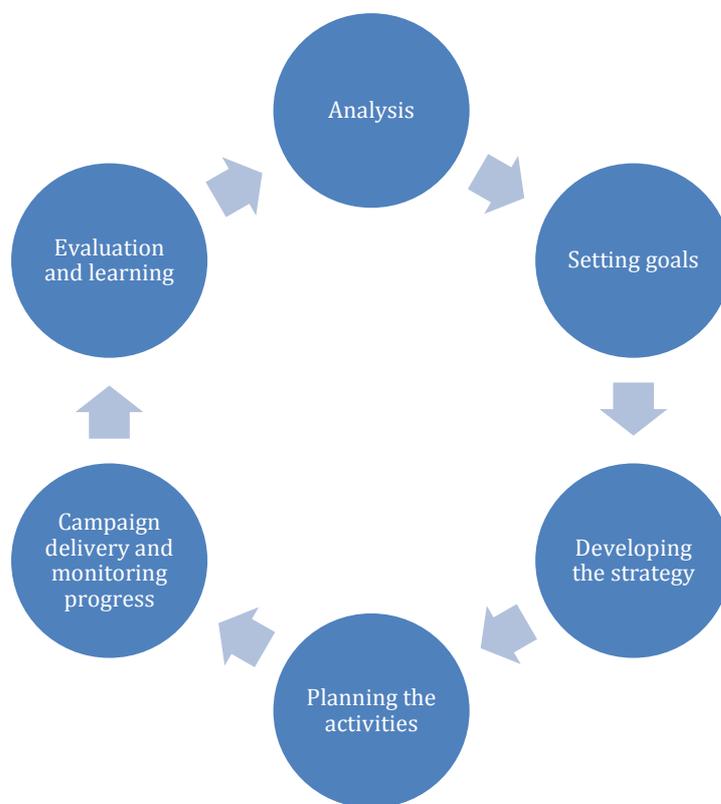


Figure 3 Review cycle

ACTIVITY

Write down how you might go about responding to a significant piece of new political intelligence, such as a recent government reshuffle.

Comment

Return to the tools in this session and Session 5 on mapping the external context. You may want to bring key staff together again to review in a group and adjust your plan and tactics.

Summary of Session 3

By the end of this session you should know more about how to plan your campaigns and advocacy work, including:

- knowing why good planning is critical for developing and delivering high-impact campaigns and advocacy work
- having tools and key questions to help you plan your campaigns and advocacy work, including decision-making tools to give you focus, examples of how to set your vision, goals and objectives, and outlines for planning workshops and a review cycle
- having a good understanding of some of the practical considerations, including the skills you will need in your team, questions to consider when setting your budget and how to account for risk.

Further reading

International Save the Children Alliance (2007) *Getting it Right for Children: A practitioners' guide to child rights programming*, London, Save the Children.

Save the Children (2007) *Advocacy Matters: Helping Children Change their World, An International Save the Children Alliance guide to advocacy*, London, Save the Children

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Acknowledgements

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