

International  
HIV/AIDS

Alliance

Supporting Community Action on AIDS in Developing Countries



ADVOCACY  
IN ACTION

A TOOLKIT TO SUPPORT  
NGOs AND CBOs  
RESPONDING TO HIV/AIDS

# Contents of the toolkit



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Woodpulp sourced from  
sustainable forests



Elemental Chlorine Free  
(ECF)

# Introduction to the toolkit



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## **1. What is this toolkit?**

This toolkit aims to support non-governmental organisations (NGOs) and community-based organisations (CBOs) in developing countries to plan and implement effective advocacy work around HIV/AIDS.

### ***What is this toolkit about?***

This toolkit aims to help NGOs/CBOs to have a clear understanding of what advocacy is and how it might support the work of NGOs and CBOs, and to provide practical assistance in how to actually undertake advocacy work.

The toolkit is about advocacy and HIV/AIDS – influencing people and organisations in power to create an environment which protects the rights, health and welfare of everyone, both HIV positive and negative.

For NGOs/CBOs involved in HIV/AIDS, this means understanding the role of advocacy in relation to other responses to HIV/AIDS, such as information, education and communication (IEC), community mobilisation and service provision.

It addresses the advantages of planning advocacy work systematically and how this can be achieved. It also helps organisations consider how advocacy could help them to achieve their mission, and to recognise the potential impact of advocacy work on their organisation.

The toolkit also aims to introduce NGOs/CBOs to advocacy methods that have worked in the past to address HIV/AIDS, and to understand when their use is appropriate.

# Introduction to the toolkit

***Advocacy in Action – A Toolkit to Support NGOs and CBOs Responding to HIV/AIDS*** is one in a series of toolkits and handbooks that are based on the practical technical support experience of the International HIV/AIDS Alliance (the Alliance), their partners and other organisations. The Alliance is an international non-governmental organisation that supports communities in developing countries to make a significant contribution to HIV prevention, AIDS care and support to children affected by the epidemic. Since its establishment in 1993, the Alliance has provided financial and technical support to NGOs and CBOs from more than 40 countries. In addition, the Alliance promotes good practice in community responses to HIV/AIDS more broadly through evaluation, operations research, the development of training materials and tools, as well as policy and advocacy activities.

By distributing these resources widely, the Alliance aims to:

- **Build practical skills** among NGOs/CBOs by using participatory activities and sharing experiences.
- **Provide a training resource** for NGO support programmes, training organisations and individual trainers.
- **Continue learning** about how NGOs/CBOs can be successful in their advocacy work.

## ***2. Why and how was this toolkit developed?***

The Alliance had an established relationship with the International Council of AIDS Service Organizations (ICASO) to jointly provide technical support on advocacy. It was agreed that the time was right to combine all the previous experience of its linking organisations and international technical support provision into one good practice participatory training manual (toolkit).

The development of ***Advocacy in Action – A Toolkit to Support NGOs and CBOs Responding to HIV/AIDS*** has therefore been inspired by the **experiences and ideas of many organisations in many countries**. In particular, this includes the groups that worked with us to develop and field test the toolkit. During the development of the advocacy toolkit, the Alliance drew heavily on the previous experience of advocacy training provided by the Philippines HIV/AIDS NGO Support Program (PHANSuP) for its partners and other sectors in the Philippines, and on workshops and training provided in Burkina Faso and Senegal by ICASO and the Alliance. An initial field test workshop was held in Mexico with Alliance partners Colectivo Sol from Mexico, Pela Vidda Niteroi and Grupo de Incentivo a Vida from Brazil and Kimirina from Ecuador. It was then field tested in Zimbabwe with Family AIDS Caring Trust (FACT), in India with Vasavya Mahila Mandali (VMM) and India HIV/AIDS Alliance, and in Mongolia with National AIDS Foundation (NAF).

The Alliance would like to thank ICASO, Alliance partners, consultants and staff who contributed their experience, imagination and ideas to develop the toolkit.

The Alliance would also like to thank the following donors who have supported its advocacy technical support work and toolkit development: the Bill and Melinda Gates Foundation, the United Kingdom Government's Department for International Development (DFID), and the United States Agency for International Development (USAID).

### 3. Who is this toolkit for?

This toolkit is for **people and organisations that support NGOs and CBOs responding to HIV/AIDS in developing countries**. These include NGO support programmes, training institutions and individual trainers. The toolkit can also be used by NGOs and CBOs themselves to build skills within their own organisations and implement advocacy work.

It is important that people using this toolkit already have some basic facilitation skills, for example in guiding large group discussions and small group activities. It is also helpful if they have some previous experience of advocacy work around HIV/AIDS, although this is not essential.

### 4. How can this toolkit be used?

This toolkit is designed to be **flexible** so that facilitators can tailor the work schedule to meet the needs of different NGOs/CBOs. For example, some groups may want to do most of the activities during one training workshop, while others may want to use a selection of activities over a period of time, or to focus on one or two activities to meet a specific, urgent need. To provide this choice, Sections 1, 3 and 4 of the kit are designed for ‘pick and mix’ – meaning that the activities can be used in any order or combination. However, it should be noted that Section 2 – which takes participants through a planning framework for advocacy work – is a series of linked activities that needs to be followed in order and as a whole.

For most of the toolkit, facilitators can use the activities with **either one individual NGO/CBO or a group of NGOs/CBOs**.

For Section 3, it may be more valuable for participants to work with colleagues from their own organisation. This is because this section addresses the relationship between HIV/AIDS-related advocacy work and the organisation carrying out the work.

This toolkit can be used with **NGOs/CBOs with different levels of experience** in advocacy. However, in the Alliance’s experience, NGOs and CBOs have found it beneficial to use the Alliance’s toolkit on building partnerships – *Pathways to Partnerships* – before moving on to this toolkit. Many of the skills from the *Pathways to Partnerships* toolkit are also useful for advocacy, particularly at the local level. A second Alliance toolkit, *Documenting and Communicating HIV/AIDS Work*, is also mentioned throughout this toolkit and has useful, complementary activities and information to support advocacy work. Both toolkits and other Alliance resources can be requested from the Alliance free of charge – for contact details, see the back cover of this toolkit.

## 5. What is in the sections of this toolkit?

Following this Introduction to the toolkit, the remainder of the kit is divided into the following sections:

**Section 1: Introducing advocacy**

**Section 2: Planning and implementing advocacy work**

**Section 3: Including advocacy in an organisation's work**

**Section 4: 'Advocacy in Action' Cards for developing practical advocacy skills**

### Section 1

Aims to develop a shared understanding of what advocacy is. This is achieved by focusing on previous experiences of advocacy, either from participants or from others, to help the development of a working definition for advocacy.

### Section 2

Aims to practise using a planning framework for advocacy work. The advocacy framework that is used in this section is an adaptation of a framework developed by ICASO. The planning framework is a series of steps, as follows:



### Section 3

Aims to analyse the relationships between organisations and advocacy work. This section focuses on three issues: a) how HIV-related advocacy can contribute to an organisation's mission, b) how HIV-related advocacy might affect an organisation, and c) how to ensure that advocacy is an integrated part of an organisation's work.

The contents of each part of Sections 1-3 follow the format below:



<b>Objective</b>	– stating what the activity is designed to achieve.
<b>Introduction</b>	– explaining the subject of the activity and the key issues involved.
<b>Instructions</b>	– outlining the steps to take to complete the activity, and the key questions to consider.
<b>Facilitators' notes</b>	– sharing 'useful ideas' about how to successfully guide participants through the activity.
<b>Example</b>	– showing how an NGO/CBO has put the activity into practice.

Facilitators can read through the **Objective** and **Introduction** for each point and use them as the basis for an initial group discussion. They can then work through the Instructions for the activity, using the **Facilitators' notes** for guidance and advice. Finally, they can use the **Example** to clarify any points that are unclear. It is important to note that although the ideas and activities in this toolkit have been tried and tested, they do not try to provide 'perfect' examples of how things should be done. Therefore, the **Instructions** should not be followed 'word for word' and should, instead, be adapted to participants' specific needs, skills and interests. Also, the **Examples** should be seen as just one of the ways in which the activity could be put into action – as opposed to the 'perfect way'.

**Handout sheets** can be found at the back of Sections 1, 2 and 3. These aim to provide additional technical information and case studies for some of the activities. Facilitators can use them in a number of different ways. For example, they can read them beforehand to prepare for the activities or use them during group feedback sessions. They can also share them with participants – for example, by copying them on to overhead transparencies or by making photocopies for people to take away with them.

### Section 4

Aims to provide activities and information in the form of '**Advocacy in Action**' Cards for developing practical advocacy skills.

The cards include:

**Card 1: Analysing and influencing legislation or policies**

**Card 2: Preparing a briefing note or position paper**

**Card 3: Working from inside the system**

**Card 4: Lobbying or face-to-face meetings**

**Card 5: Writing and delivering a presentation**

**Card 6: Persuading through drama**

**Card 7: Writing and using a press release**

**Card 8: Carrying out a media interview**

**Card 9: Preparing a press conference**

Each 'Advocacy in Action' Card is four pages long:

- An introduction with advantages and disadvantages of the advocacy method outlined in the card
- A skills-building activity that can be carried out to develop the skill
- An activity example or case study, and some advice on carrying out the advocacy method
- A 'How to...' handout.

This Section helps participants to explore the advantages and disadvantages of using different methodologies as much as to develop the skills themselves. The cards in this section provide suggested activities to practise these advocacy skills. The cards aim to provide enough information for facilitators to think creatively about how to approach skills building. They can also be used by NGOs and CBOs to facilitate their own skills building.

During the development of the toolkit, these cards were often used during the afternoons of workshops to balance the more conceptual and planning-orientated activities in Section 2. On other occasions, the cards were used by the participants at the end of the workshop to facilitate their own skills-building sessions, or the cards were introduced to the participants who were encouraged to practise the activities with their colleagues back in their NGOs/CBOs.

## ***6. How long does the toolkit take to use?***

Instructions for each activity in this toolkit include an estimated time for how long it will take to complete. These are based on the Alliance's experiences of using the toolkit in workshops with 20-30 participants. However, in practice, facilitators can make the activities shorter or longer, depending on the time available and the level of skills and interest of the participants.

Most of the main Sections of this toolkit can be covered in a five-day workshop. This provides enough time to introduce advocacy work, practise using the planning framework, consider how advocacy relates to their organisation and develop key advocacy skills using the cards.

## ***7. What materials are needed to use this toolkit?***

All of the activities in this toolkit can be used with a small number of simple resources. These are:

- Large sheets of blank paper (flip-chart, Manila paper or newsprint)
- Small pieces of blank paper
- Thick pens
- Sticky tape, Blu-Tack or Sticky Stuff.

Most of all, both facilitators and participants will need enthusiasm, energy and creativity!

***"As a direct result of the skills gained during this advocacy skills-building workshop, FACT's next staff development meeting will analyse the national policy on wilful transmission of HIV. As AIDS Service Organisations, it is vital for us to address policies which impact on HIV."***

Comment made by Lovemore Magwere, Director, Family AIDS Caring Trust (FACT), during the advocacy skills-building workshop held in Mutare, Zimbabwe, July 2001.

**ADVOCACY SKILLS-BUILDING WORKSHOP FOR HIV/AIDS WORK – Family AIDS Caring Trust (FACT) and International HIV/AIDS Alliance**  
**2-6 July 2001, in Mutare, Zimbabwe**

Time	Day 1	Day 2	Day 3	Day 4	Day 5
<b>08:00-08:30</b>			<b>Prayer and recap</b>		
<b>08:30-10:00</b>	Workshop welcome and Introduction to the workshop, expectations, ground rules	Introduction to the advocacy framework Step 1: Select the issue or problem	Step 3: Develop aims and objectives	Step 6: Identify your resources	Advocacy and your organisation: How does advocacy contribute to an organisation's mission? How to ensure that advocacy is an integral part of an organisation's work?
<b>10:00-10:30</b>	<b>Tea break</b>				
<b>10:30-13:00</b>	What is advocacy?	Step 2: Analyse and gather information on the issue or problem	Step 4: Identify your targets	Step 7: Create an action plan	How does advocacy around HIV/AIDS affect an organisation?
		Review Steps 1 & 2	Step 5: Identify your allies	Step 8: (Implement), monitor and evaluate	Follow-up to Workshop
			Review Steps 3, 4 & 5	Review Steps 6, 6 & 8 Review planning framework	Workshop Evaluation Certificates
<b>Lunch</b>					
<b>14:00-15:30</b>	Why do we advocate?	Skills-building: Handling an interview	Skills-building: Writing a briefing note or position paper	Skills-building: Writing and distributing a press release	
<b>15:30-17:00</b>	How do we advocate?	Skills-building: Analysing and influencing legislation or policy	Skills-building: Communicating through drama	Skills-building: Organising a press conference	

**Example Workshop Schedule**

***Your Notes***

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### Introduction

**Aim:** To develop a shared understanding of advocacy

- This section:
  - ♦ gives participants an opportunity to share their own experiences of doing advocacy work
  - ♦ asks participants to develop a working definition of advocacy
  - ♦ explores different reasons for doing advocacy work
  - ♦ explores possible advocacy methods.
- The activities in this section can be some of the most interesting, but are difficult to facilitate in this toolkit because participants sometimes have very different ideas about what advocacy is and why we should do it. **For example, there is often confusion between advocacy and information, education and communication (IEC) and community mobilisation. This is because IEC and community mobilisation can also involve influencing, persuading and mobilising people into action – which are all key advocacy ‘words’.** Handout 3, ‘Advocacy and related concepts’, aims to help clarify the difference between these concepts. It is important to keep focusing on advocacy as a means of persuading influential people to change – rather than IEC and community mobilisation, which are more about working with the general public or specific groups of people.
- There are no internationally agreed definitions of advocacy and it is not necessary for everyone to agree on all the issues raised. The most important thing is to think about these issues and to discuss them.

## 1.1 What is advocacy?

### *Example definitions of advocacy*

"Advocacy is a process to bring about **change** in the policies, laws and practices of **influential** individuals, groups and institutions."

Reference: Adapted from advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

"Advocacy is an ongoing process aiming at change of attitudes, actions, policies and laws by influencing people and organisations with power, systems and structures at different levels for the betterment of people affected by the issue."

Reference: Adapted from an advocacy skills-building workshop, India HIV/AIDS Alliance, India, November 2002.

"Advocacy is an action directed at changing the policies, positions and programmes of any type of institution."

Reference: **An Introduction to Advocacy, Training Guide**, SARA Project.

"Advocacy is pleading for, defending or recommending an idea before other people."

Reference: **An Introduction to Advocacy, Training Guide**, SARA Project.

### *Introduction*

- Advocacy is nothing new. Individuals and groups have always tried to influence people in power, in their private lives and as part of their work.
- Advocacy work takes on many shapes. In relation to HIV/AIDS it can include a child defending her orphaned cousin against stigma, a drama performed by actors living with HIV/AIDS concerning their rights, or a meeting with a country's president.
- It is possible to advocate for ourselves or for other people.
- Advocacy is only one approach to undertaking HIV prevention, care and impact mitigation work.
- Other approaches include community mobilisation, education, public health measures, distribution of condoms, good medical services and community support. Advocacy can make all these methods more effective, by gaining the support of people in power and changing the social environment in which we work.
- Almost all NGOs and CBOs already have experience of doing advocacy – even if they do not realise it, or do not use the word 'advocacy'. The purpose of the following activities is to reach a shared understanding of advocacy.

It is important to have a clear understanding of the differences between advocacy and other related concepts. The information contained in the table opposite may help to clarify these differences. However, it is necessary to consider this information's relevance to any one country and whether it needs to be adapted.

	<b>Advocacy</b>	<b>IEC</b>	<b>Community mobilisation</b>	<b>Networking &amp; partnerships</b>	<b>Fund raising &amp; resource mobilisation</b>	<b>Overcoming stigma &amp; discrimination</b>
<b>What can it change?</b>	Policies, implementation of policies, laws and practices	Awareness and behaviour	Capacity of communities to identify and address their problems	Isolation and duplication	Level of resources available for HIV/AIDS work	Level of stigma and discrimination against people living with HIV/AIDS
<b>Target group</b>	Decision-makers, leaders, policy-makers, people in positions of influence	Particular age group, gender, residents of an area, etc.	Members of a community	Individuals or groups who have a similar agenda	Communities, local councils, government, donors	People who stigmatise or discriminate
<b>Does it mainly target people who have influence over others?</b>	Yes	No	No	No	No	No
<b>Typical indicators of success</b>	Policies, implementation, laws or practices which enable improved HIV/AIDS prevention and care	Percentage of youth using condoms; changes in attitude to people living with HIV/AIDS	A community problem is solved; more people attend community meetings	Members of the network or partnership achieve more than they could if they worked alone	Farmer gives use of building for meetings; members of mosque give alms; donor gives grant	Fewer workers dismissed because of HIV status; less cases of depression among people living with HIV/AIDS

## 1.1A Objective: By the end of this session participants will be able to identify and describe practical examples of advocacy

### Introduction

- We can gain a practical understanding of advocacy by sharing experiences of doing advocacy work.
- These examples of advocacy can help us in the following activity, when we will develop a working definition of advocacy.

### Instructions

**Timing: 1 hour 15 minutes**

**1 Before the workshop** – ask selected participants to prepare a short case study (example or story) of their advocacy work, for presentation at the workshop. You will find ‘Guidelines for writing an advocacy case study’ in the Handouts at the end of Section 1. These guidelines can be sent to the participants before the workshop. If this is not possible, consider preparing some case studies yourselves, or use some from the end of Section 1. Try to prepare or select a range of case studies, i.e.:

From all levels:

- local
- national
- international

Covering a variety of:

- issues or topics
- methods of advocacy
- levels of collaboration with others.

**2 During the workshop** – explain the objective of the activity and introduce the topic.

**3** Ask 2-3 organisations to give a five-minute presentation about their advocacy work, ensuring a good variety of case studies as above.

**4** After each presentation, check the case study has been understood and plan time for brief questions about the presentations.

**5** Lead a group discussion about what has been learned, based on the following kinds of questions:

- ? What kind of issues were being addressed in the case studies?
- ? What different approaches to advocacy work were described?
- ? Why was advocacy used in the situations described?
- ? Who benefited from the advocacy work? Were those people involved in the advocacy work?
- ? Can you think of any proverbs, folk tales, stories or fables that also describe advocacy? For example, the Shona proverb from Zimbabwe: ‘*Kana mwana akaberekwa asinga cheme, anozorora nguva yose*’ (‘If the baby on the mother’s back does not cry, it will stay there all day’), i.e., if you do not complain about a problem, no one will act upon it.
- ? What were some of the key verbs used in the presentations to summarise or describe advocacy?

## Facilitators' notes

- ! Case studies that clearly describe examples of **advocacy** work will help participants to agree on a definition of advocacy in the next session. Try and avoid case studies that could be confused with IEC or community mobilisation.
- ! Before this session begins, check which participants have case studies they can present. Select one from each level (local, national and international – see Handout 2, 'Levels of Advocacy', at the end of Section 1). If there are more than three case studies, others can be presented later in the workshop. If the participants do not have case studies, consider carefully whether case studies from elsewhere (for example, those at the end of this section) will help to clarify the concept of advocacy or will create confusion.
- ! Make sure the group understands that advocacy can be achieved at different levels: local, national and international. These levels refer to the level where the power or influence lies, rather than where the advocates are working.
- ! Make sure the presentations are not too long, to allow plenty of time for discussion. Discourage the presenters from talking about wider issues or answering questions at great length.
- ! Encourage participants to discuss their own advocacy work. Be aware that they may have different understandings of what advocacy is. Take note of these differences and explore them during the workshop.

### **Example of Activity 1.1A: By a local NGO based in Mexico**

**During a workshop in Mexico, the case study of UNASSE, a Mexican NGO, was presented:**

**What was the problem?** Many women's sexual-health problems were caused by violence they experienced within the family.

**Who decided to advocate to address the problem?** UNASSE (Unidad de Atención Sociológica, Sexologica y Educativa para el crecimiento personal, a.c., or Psychological, Sexological and Educational Care Unit for personal growth), is an NGO with 14 years of experience working in sexual health and reproductive rights. It is a pioneering organisation in sexuality, sexual and reproductive rights, HIV prevention, the training of women in non-traditional trades and the issue of domestic violence.

**Who did you advocate to?** Judicial authorities in domestic violence court cases, decision-makers and government institutions.

**What methods did you use?** We decided to train our members to deal with this issue and to make it more visible and to seek solutions. We established a Care Centre in which psychological and legal advice was provided to women and also accompaniment/support through the judicial process. We began to review legislation in other countries and documented the experiences of other organisations working to stop domestic violence.

**What difficulties did you face?** The legal and administrative weaknesses of the judicial system when dealing with such cases.

**How did you overcome the difficulties?** We began to create friendly relationships with decision-makers, to raise their awareness and involve them in these issues. We also began to speak of the issue in the media to raise the visibility of the problem. We tried to raise society's awareness and draw the attention of the government institutions to the problem.

**What were the results of your advocacy?** A group of deputies contacted UNASSE and they worked jointly on a Legislative Proposal for Criminal and Family Areas, which was presented to State Congress. Unfortunately, some parts were removed from the criminal section (classification of Domestic Violence and Marital Violence).

We are continuing to promote legislative proposals that truly help to end this problem. We are also raising the awareness of staff in charge of health and judicial administration, and training them. We are training them to provide integrated care to the survivors of domestic violence, following the law. We are also undertaking advocacy work around public policies that establish prevention, care and re-education programmes in the area of domestic violence.

*Reference: Adapted from a workshop on advocacy, International HIV/AIDS Alliance, Mexico, October 2000.*

## 1.1B Objective: By the end of this session participants will have a working definition of advocacy agreed by the group, for use during the workshop

### Introduction

- There are many different interpretations of what 'advocacy' includes, and there is no single agreed international definition.
- Therefore organisations and individuals often have very different ideas about advocacy, which can cause problems when working together.
- We will be able to achieve more together if we can agree a working definition.

### Instructions

**Timing: 1 hour 15 minutes**

- 1 Explain the objective of the activity and introduce the topic.
- 2 Ask participants for some key verbs or other words commonly used when discussing advocacy.
- 3 Ask participants to write a definition of advocacy on flip-chart paper, in small groups. Divide participants into groups of 3-4 people.
- 4 Display the definitions where everyone can see them.
- 5 In one large group, ask the participants to identify and underline common key words in all the definitions.
- 6 Use these key words to facilitate the group in developing a joint definition. Support the participants (using the 'Advocacy and related concepts' table on page 13) to ensure that their advocacy definition cannot be confused with definitions for:
  - Information, education and communication (IEC)
  - Community mobilisation
  - Networking.
- 7 After agreeing a definition, lead a discussion based on the following kinds of questions:
  - ? Using this definition, which activities carried out by your organisations can be described as advocacy?
  - ? How does our definition help us to see the differences between advocacy and other activities, such as:
    - Information, education and communication (IEC)
    - Community mobilisation
    - Networking?
  - ? How suitable is our definition for describing advocacy at local, national and international levels?
- 8 Ask the group if their definition can be accepted as the 'workshop definition' for advocacy.

## Facilitators' notes

- ! If you identified common verbs in the case studies in activity 1.1A, use these as guides for a definition.
- ! Advocacy is a difficult concept to define, therefore the participants may not be able to reach agreement. If this is likely, it may be helpful to begin by using an existing definition (for example, the one developed in Zimbabwe, see below), and asking the participants to discuss and adapt it.
- ! If time is running out and participants have not reached agreement on a working definition, consider selecting a small group of able and articulate participants to work on a definition. Ask them to work after the session to draft a definition, to present to the rest of the group for comment and approval on the following day.
- ! Try to make sure that the advocacy definition includes 'what' advocacy is and also 'who' it is aimed at. This should help avoid any confusion between advocacy and IEC, counselling, awareness-raising, networking, community mobilisation, etc.
- ! Bring out the three levels of advocacy: local, national and international. If all the participants work at one of the main levels, for example, at local level, it may be appropriate to create sub-levels.
- ! Acknowledge that there are other good definitions for advocacy and discuss these where appropriate.
- ! Advocacy overlaps with many other kinds of HIV/AIDS work, i.e., education, external relations, etc. This means that many of the skills necessary to carry out advocacy work already exist in many organisations and indeed many undertake advocacy work without ever calling it advocacy.
- ! Make sure that there is awareness that advocacy around policies does not only include changing or creating policies – advocacy can also be about putting policies into practice (implementation).
- ! Advocacy can involve many specific, short-term activities which together combine to reach a long-term vision of change.

### Example of Activity 1.1B: By local NGOs/CBOs based in India



Facilitators holding up the participants' draft of a working definition for advocacy for debate. The definition reads: '*Advocacy is an ongoing process aiming at change of attitudes, actions, policies and laws by influencing the people with power, systems and structures at different levels for the betterment of those affected by the issues*'.

Reference: Photo taken at an advocacy skills-building workshop, India  
HIV/AIDS Alliance, India, November 2002.

## 1.2 Objective: By the end of this session participants will be able to explain the benefits of doing advocacy work

### Introduction

- In the previous sessions we developed a shared understanding of advocacy.
- In this session we will discuss why advocacy can help us in our HIV/AIDS work.
- Some problems can only be solved with the help of influential people or organisations, i.e., they can only be solved by advocacy.

### Instructions

**Timing: 1 hour 15 minutes**

- 1 Explain the objective of this activity and introduce the topic.
- 2 Explain that after the workshop participants will need to persuade colleagues in their organisation or other NGOs/CBOs of the benefits of including advocacy in their work. This activity is an opportunity to practise 'selling' advocacy by promoting its benefits.
- 3 Explain to the participants that they will be asked to persuade other NGOs to do advocacy work by creating a pretend advertisement for television, radio or a newspaper, or a short speech.
- 4 Divide the participants into four groups.
- 5 Display these guideline questions to help the small groups prepare:
  - ? Think of any examples or case studies of advocacy work: why was advocacy used to solve the problem (and not only community mobilisation, education, awareness-raising, etc.)?
  - ? Is there anything that advocacy can achieve that other methods cannot achieve?
- 6 After the groups have prepared, ask each group to perform or display their advertisement or bullet points.
- 7 With the whole group, discuss the benefits of doing advocacy work as identified in the advertisements or speeches:
  - ? What does advocacy offer to your organisation that you do not already have?
  - ? Is there anything that advocacy can achieve that other methods cannot achieve?
  - ? Were the advertisements or speeches 'selling' advocacy, or were they really selling other things, such as community mobilisation or IEC?
  - ? If advocacy is so good, why do many organisations not do it?
- 8 Contribute any key benefits that may have been missed by the advertisements or presentations.

## Facilitators' notes

- ! Emphasise that the advertisements and speeches in this activity should aim to persuade other NGOs, not the general public.
- ! Monitor the groups while they prepare to make sure they focus on advocacy and not other activities, such as community mobilisation, IEC, etc.
- ! Limit the discussion about the difficulties and problems of doing advocacy work – this will be discussed in more detail in Session 3.2. You could note any barriers/problems on a flip-chart and return to them in Session 3.2.

### Example of Activity 1.2: By NGOs/CBOs based in Mexico

#### Newspaper advertisement

DO YOU SUFFER FROM:

- EMPLOYERS WHO SACK HIV+ WORKERS?
- RELIGIOUS LEADERS WHO DON'T WANT TO KNOW?
- BAD LAWS?
- NON-IMPLEMENTATION OF GOOD POLICIES?
- ABUSE OF HUMAN RIGHTS?

MAYBE YOU'VE TRIED IEC, COMMUNITY MOBILISATION, IMPROVED SERVICE DELIVERY – BUT THE PROBLEM STILL WON'T GO AWAY?

YOU NEED ...

**ADVOCACY**

- ✓ Advocacy can guarantee quality of life for people living with HIV/AIDS.
- ✓ Advocacy can defend rights for the full exercise of citizenship.
- ✓ Advocacy can defend the rights of vulnerable groups.
- ✓ Advocacy can allow negotiation so that everyone's a winner.
- ✓ Advocacy can stop a harmful policy.
- ✓ Advocacy can put an issue on the agenda.

**ADVOCACY ... TRY IT TODAY!**

\* IMPORTANT INFORMATION: Only effective as part of broader programmes of work. Advocacy should always be used with full involvement or permission of the people affected. CAUTION: Advocacy can cause harmful side effects for your organisation. Advocacy should always be used with careful planning.

Reference: Adapted from a workshop on advocacy, International HIV/AIDS Alliance, Mexico, October 2000.



## ACTIVITY

**1.3 Objective:** By the end of this session participants will be able to:

1. Describe some of the most common methods for doing advocacy work
2. Explain how some of the skills they use in everyday life can be used in advocacy work

### **Introduction**

#### **Different ways of doing advocacy**

- Advocacy can take many different forms – for example, it can be written, spoken, sung or acted.
- It can also vary in the time it takes, from one hour to more than several years.
- We can do advocacy work on our own or with others.

#### **Involvement or permission from people affected by the advocacy issue**

- Some of the most powerful advocacy methods are led by the people affected by the problem or issue, or directly involve them.
- It is very important to receive the permission of the people affected by the problem if we use methods that do not directly involve them in the advocacy work. This permission allows us to legitimately advocate for them or represent them (legitimacy or representation). This is only possible if we have a very close relationship with people affected by the problem or issue.

#### **Proactive or reactive advocacy**

- Sometimes advocacy work is forced on us – the problem or issue is already there, and we use advocacy to reduce the problem. This is reactive advocacy.
- At other times it is possible to plan for the future, to ‘set the agenda’ and use advocacy to create a positive environment or prevent a problem before it happens. This is proactive advocacy.

#### **Purpose of this activity**

- We can improve our understanding of what advocacy is by identifying different possible methods. This builds on the case studies and working definition in Sessions 1.1A and 1.1B.
- We will look at these methods again when we practise planning for advocacy later in the workshop.
- In this activity we will see that in our daily lives we already use many of the skills and methods necessary for advocacy.

### **Instructions**

**Timing: 1 hour 15 minutes**

- 1** Explain the objective of this activity and introduce the topic.
- 2** Ask participants to make a list of ways they have persuaded community leaders, government officials, and government departments to change when an injustice or harmful practice has occurred.
- 3** Ask the participants to do this task in three groups.
- 4** After the groups have made their list, ask these same groups to make another list. This second list should include methods they have used to persuade members of their families, friends or neighbours of their point of view on an issue they have felt strongly about.
- 5** Bring everyone back into one group. Ask each group to briefly present their lists.
- 6** Facilitate a discussion to bring out the range of different possible methods used to do advocacy work, using questions such as these:
  - ? Do the two lists overlap? If so, what does this overlap tell us?
  - ? How do we decide which method to use?
  - ? Which methods can be used for HIV-related advocacy work?
  - ? How can the people directly affected by the advocacy issue be involved in advocacy work? Or how can they give their permission for the advocacy work?
  - ? What are some examples of proactive and reactive advocacy work?

## Facilitators' notes

- ! The aim is to make sure that the full range of methods are identified, so that the participants see that they are probably already doing advocacy work in some form or other.
- ! Consider whether the methods that the participants suggest are in fact forms of action other than advocacy – for example, community mobilisation, IEC, networking. Keep referring back to the working definition if confusion develops and to help you focus as a facilitator.
- ! Make sure that the list of activities includes using the legal system, joining committees and other decision-making forums and informal methods – for example, conversations, networking.
- ! If participants suggest methods that are illegal or dishonest (for example, bribery) explore the problems that could follow.
- ! If participants suggest 'activist' methods such as demonstrations, boycotts, etc., discuss the advantages and disadvantages of these methods.
- ! You can make your own list of advocacy methods before the activity so that you know the range of methods that you want the participants to be aware of. The list of methods described in Section 4 is a good check-list.

### Example of Activity 1.3: By NGOs/CBOs based in Zimbabwe

#### How do we advocate?

<b>How we have pressurised community leaders, government officials and government departments:</b>	<b>Ways in which we have pressurised our family members, friends and neighbours:</b>
<ul style="list-style-type: none"> <li>• Phone-in during a radio broadcast</li> <li>• Kongonyia (demonstration using dance and songs)</li> <li>• Inviting officials to special occasions</li> <li>• Stayaways (demonstration using boycott of workplace by staying at home)</li> <li>• Using celebrities like Oliver Mtukudzi (a famous singer in 2001 Zimbabwe)</li> </ul>	<ul style="list-style-type: none"> <li>• Use of children as intermediaries</li> <li>• Boycott of food</li> <li>• Stop communicating and behave badly</li> <li>• Mediation</li> </ul>

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS work, Mutare, Zimbabwe, July 2001.

# Handout 1

## Guidelines for writing an advocacy case study

A case study should be a story about working to change a policy, law or practice of an influential individual, group or institution.

The case study should take three to five minutes to explain.

Use these questions to help structure your case study:

- 1** What was the problem?
- 2** Who decided to advocate to address the problem (i.e., brief details of the NGOs/community groups involved, including any people directly affected by the issue)?
- 3** What was the advocacy objective?
- 4** Who did you advocate to?
- 5** What methods did you use?
- 6** What difficulties did you face?
- 7** How did you overcome any difficulties?
- 8** What were the results of your advocacy?
- 9** What sources of assistance/support did you find most helpful?
- 10** What did you learn from doing this advocacy?

Use photos, drawings or other 'visuals' to provide a human angle to your information.

Are the people and organisations featured in your case study aware of how it might be used, and what the consequences might be? If confidentiality is necessary, how can you ensure it?

**NOTE:** For more detailed guidelines, see the International HIV/AIDS Alliance toolkit *Documenting and Communicating HIV/AIDS Work – A Toolkit to Support NGOs/CBOs* – see back cover of this toolkit for contact details.

# Handout 1

## Case Study 1: Inclusion of sexual health education in military training curriculum, Mongolia

### What was the problem?

New recruits to the armed forces, especially those from the countryside, have low knowledge of STIs and HIV/AIDS. Therefore the rate of STIs is very high (10%, in a recent survey).

### Who decided to advocate to address the problem?

Mongol Vision, an NGO established in 1998 to implement activities on reproductive health and HIV/AIDS/STI prevention and control. Mongol Vision concentrates its activities especially among men, including officers and soldiers of the armed forces of Mongolia. The work was led by the Mongol Vision public health policy steering committee, which included the Deputy Commander of armed forces headquarters.

### What was the advocacy objective?

To gain support from the high-level authorities of the armed forces to increase STI/HIV/AIDS awareness and reproductive health for military staff/soldiers.

### Who did you advocate to?

High-level authorities and officials of the Ministry of Defence and headquarters of the armed forces.

### What methods did you use?

- Sent letters to Ministry of Defence and headquarters of the armed forces.
- Held official and unofficial meetings with high-level officials.
- Developed a project in co-operation with high-level officials.
- Ran a workshop for high-level officials.
- Commanding officers and military unit doctors presented a report on the current STI situation.

### What difficulties did you face?

Financial difficulties – otherwise we implemented our project successfully. It is comparatively easy to work within the military system.

### How did you overcome any difficulties?

We developed a small-scale project and gained funding from the UNDP. Small payments were given to military educators as incentives.

### What were the results of your advocacy?

- Sexual health is now included in the official education curriculum for military staff.
- Increased awareness of high-level officers.
- Increased support from the Ministry of Defence.
- Our activities are now being broadened.

### What did you learn from doing this advocacy?

- It is important to involve high-level authorities in the activities
- It is important to submit regular reports on activities and outcomes.

Reference: Ms Solongo Bekhbat, Mongol Vision public health organisation.

# Handout 1

## Case Study 2: Persuading police to stop harassing commercial sex workers in Darkhan, Mongolia

### What was the problem?

Under the Debauchery Law, police officers can arrest sex workers (SWs), detain them and submit them to forcible medical examinations. Sometimes they put SWs in an isolation ward at a clinic, then called a doctor to carry out examinations and do blood tests. They would read the law to them and warn them of penalties if arrested again. They detained them for 72 hours, and sometimes took the women's money because it was 'illegal earnings'.

### Who decided to advocate to address the problem?

Darkhan Uul Railway Women's Council has been operating for almost two years and has a team of 10 trained peer educators, some of whom have been with the project since the beginning. Peer educators do outreach work and training. At the Darkhan railway station there is a small room used as a support centre. They supply condoms, shelter, tea, health and safety advice and referrals for legal advice and training and other opportunities for other work and income generation.

### What was the advocacy objective?

To reduce arrests and harassment of SWs by police.

### Who did you advocate to?

The city mayor and 15 police patrol officers.

### What methods did you use?

The project gathered data on the impact of police arrest/harassment on the women, and found no change in the availability of commercial sex as a result of police action. Project workers gave detailed information about their activities to the police officers, and held an education workshop for police officers. This was very important psychological preparation for activities that followed. The project has also held seminars for specialist STI doctors and has kept the city mayor fully informed, through meetings and copies of project reports.

### What difficulties did you face?

The position of city mayor is regularly reappointed (there have been four since the project began), and police officers are transferred in and out of the area.

### How did you overcome any difficulties?

Advocacy meetings with every new mayor.

### What were the results of your advocacy?

Arrests, violence and extortion by police have declined. Police officers have a better understanding of the lives of SWs. The city mayor has provided a room for counselling and consultation (a few metres away from the police post!), plus some equipment. There have been some legislative changes, giving more emphasis to the social aspects of sex work. Voluntary medical investigations and examinations are now offered to SWs free of charge by STI doctors. The incidence of STIs among service users has declined over the year of the project.

### What sources of assistance/support did you find most helpful?

We work closely with National AIDS Foundation (national umbrella NGO), and receive financial assistance from Norwegian NGOs.

### What did you learn from doing this advocacy?

Project activities should be very visible so that the authorities can see you are making an impact with your work.

*References: Project Manager, Dr. Enkhjargal Erdenebat, Darkhan Uul Railway Women's Council; International HIV/AIDS Alliance technical support visit, 2001.*

# Handout 1

## Case Study 3: Advocacy and lobbying for counselling services, India

### What was the problem?

Lack of integration of quality counselling services in the national HIV/AIDS policy.

### Who decided to advocate to address the problem?

South India AIDS Action Programme (SIAAP), an NGO.

### What was the advocacy objective?

- Strengthen NGO-government collaboration for increased sustainability.
- Maximise effectiveness of existing health services.
- Increase recognition of counselling as an important element of HIV intervention.
- Increase acceptance of counselling by doctors and nurses.
- Improve and help set minimum standards for counselling interventions – for example, attempting to persuade the associations of sexually transmitted infection (STI) doctors in the state to obtain their patients' permission before testing and to provide more privacy and sensitivity.
- Strengthen bridging between institutions and communities.

### Who did you advocate to?

- The government.
- Associations of STI specialists.

### What methods did you use?

- SIAAP's advocacy strategy was based essentially on building partnerships at all levels.
- SIAAP held discussions with the Tamil Nadu government in 1995. The discussions focused on the possibility of Tamil Nadu becoming the first state in the country to have trained counsellors in all of its hospitals. In doing so, Tamil Nadu would secure its position as the premier state for HIV-related work in the country.
- SIAAP stressed that Tamil Nadu was not being asked to make huge investments, other than granting permission for SIAAP-trained counsellors to be placed in all of its hospitals.
- SIAAP invited representatives from the government's AIDS Control Societies and other professionals to participate in the evaluation of its counsellor training programme. This increased the professional communities' understanding of the programme and encouraged endorsement for the programme within the professional community and government.

### What difficulties did you face? How did you overcome any difficulties?

- Equally essential was a consistent presence in communities. In negotiating partnerships, SIAAP representatives had to have personal credibility and integrity and, most of all, sheer persistence. There were more than three years of often frustrating discussions before the project was approved.
- Doctors felt completely overshadowed and undervalued in the decision-making process for HIV-prevention programmes. SIAAP invited some doctors to join in SIAAP activities as colleagues and to participate in key national meetings. SIAAP also publicly acknowledged the doctors' services in HIV prevention. Since many of the doctors worked in government hospitals or were friends of those who did, there was a degree of built-in support for SIAAP in the workplace and not merely among policy-makers.

continued...

## Handout 1

### Case Study 3: Advocacy and lobbying for counselling services, India...continued

#### What were the results of your advocacy?

- Significant increases in people accessing and completing treatment.
- Significant increases in women accessing services.
- Marked improvements in privacy, confidentiality and sensitive treatment of patients.
- Non-judgmental treatment for PLWHAs, female sex workers and gay/bisexual men.
- Widespread recognition and acknowledgement of counselling as a critical intervention for HIV/AIDS.
- A network of 84 counsellors in three Indian states.
- Endorsement of SIAAP training programmes by state governments.
- SIAAP director chosen by the National AIDS Control Organisation, (NACO) and UNAIDS to review the national counselling policy.
- Doctors' requests for counsellor placement in hospitals where the service is unavailable.
- Doctors' insistence on SIAAP-trained counsellors to ensure minimum standards.

#### What did you learn from doing this advocacy?

- It was important to build upon the strengths and not concentrate on the weaknesses of existing services.
- SIAAP's past achievements gave credibility to what it said.
- Advocacy strategies are often not recognised until they have been successful, because they are not integral to the planning process. Planning must include an advocacy component in all projects.

# Handout 1

## Case Study 4: Introduction of the female condom in Zimbabwe

### What was the problem?

In the early 1990s, there were a lot of activities on HIV/AIDS prevention and we would talk about using condoms. But these condoms were male condoms. Yet we were speaking to women. So we were giving male condoms to women for them to bring home and ask their partners or husbands to use. And we found out that women were unable to negotiate the use of condoms in their bedrooms. So women had to think of how to approach their partners.

We think that HIV/AIDS is a population issue. And we asked ourselves: why is it that we only have one device?

### Who decided to advocate to address the problem?

Women AIDS Support Network (WASN), an NGO.

### What was the advocacy objective?

To ensure the availability of a woman-controlled HIV/AIDS/STI-prevention device, the female condom.

### Who did you advocate to?

Directly to parliamentarians, NGOs and women's organisations, and indirectly to the government.

### What methods did you use?

We lobbied women, networked with other AIDS service organisations and women's groups.

We took female condoms to a small town called Gokwe for women to try and share their experiences. We started with 45 women at our first meeting, and we asked them to tell their partners that they were going to use female condoms. At our second meeting, the figure dropped to 38. Some of the partners did not agree to be part of it. So we gave 10 female condoms and 10 male condoms to each couple. We would come back every two weeks to Gokwe to find out the views of the women. The experiment lasted six weeks in total. Whenever I went back all the female condoms were used.

At the end of the process, 36 women participated. Some of the male condoms were used while all the female condoms were used. Both women and men liked the female condom. We wondered whether the men liked the female condoms because of a shift in responsibilities. Maybe, but it was positive for us because they have accepted the use of female condoms.

WASN arranged meetings with parliamentarians, NGOs and women's organisations. Some were supportive but some were judgmental. WASN decided to organise a 'Celebrate Life' event for which 8,000 petitions for the availability of the female condom were signed by men and woman in all Zimbabwe's regions and gathered.

We invited the Deputy Speaker of Parliament to come to the Celebration. We asked her to bring the issue and the information about the 8,000 signatures to Parliament.

### What difficulties did you face?

Negative statements against the female condom on the radio and on TV.

continued...

# Handout 1

## Case Study 4: Introduction of the female condom in Zimbabwe...continued

### How did you overcome any difficulties?

Intensive lobbying.

### What were the results of your advocacy?

Three months after the Deputy Speaker raised the issue in Parliament, the female condom was allowed in Zimbabwe.

### What did you learn from doing this advocacy?

This was only a first step – the condoms are expensive, yet women are the poor of the poor. We have to do more.

# Handout 1

## Case Study 5: Advocating for school fees to be waived for orphans, Zambia

### Who decided to advocate to address the problem of the school fees?

Community care givers – people physically living with the children, particularly those who are not in formal employment, the grandparents, etc.

### Who did we advocate to?

The education schools authorities, i.e., Parents Teachers Association (PTA), school boards and then finally the Provincial and District Education Offices.

### What methods did you use?

Information packages on the number of children needing support in each particular school; i.e., we provided an up-to-date database on the scale of the problem and lobbied using this information.

### What difficulties did you face?

- Trying to make it clear to the schools that we are NOT a funding agency but merely community-based organisations.
- The mobility of children from schools.
- Letting the school authorities know that a child without parental support/care and love needs an education as a means of improving his/her life in the long term.
- More children wanting to be put on the list of orphaned children so as to benefit from the project.

### How did you overcome any difficulties?

- Making a contribution to the school as 'support cost'. This is the cost we give the school to help them out in general maintenance and office support.
- Only orphaned children are registered for non-payment of school fees.
- The involvement of the District Education Officials on the CINDI-Kitwe Steering Committee.

### What has been the result of your advocacy?

- Children have been expected to pay ordinary school-user fees (although currently, the Zambian education authorities have abolished school fees – exam fees at primary level).
- We have more discussion forums with the education authorities on the system being applied and implemented focusing on Orphans and Vulnerable Children (OVCs).
- OVCs have access to school places at school.

### What lessons did you learn from doing this advocacy?

- Let the community members/society have more information about what you want to do and achieve.
- Involve key players in the area to be part of the Steering Committee – for example, District Education Officer, local counsellors, etc.
- Lobby for any government policies that have not yet been enacted concerning children's rights to be implemented.
- Let the 'voices of the children' be heard at well-focused and organised fora.

# Handout 2

## Levels of advocacy

Advocacy work can target people with influence at all levels – from a local bar owner to the United Nations. Although there are multiple levels of advocacy work, for the sake of simplicity we can identify three key ‘levels’ of advocacy:

- ◆ Local (village, district, city, state, etc.)
- ◆ National (the whole country)
- ◆ International (more than one country)

For example, if our advocacy issue is the availability of condoms in hotels:

**Local level:** The owner of a local hotel has influence within the hotel, so persuading them to sell condoms will have a local impact.

**National level:** The owner of a national chain of hotels has influence over all their hotels, so persuading them to sell condoms could affect hotels all over the country.

**International level:** The board of directors of the Holiday Inn company has influence over every Holiday Inn hotel in the world, so persuading them to sell condoms could have an international impact.

In reality the problem or issue may have a combination of local, national and international causes, so the level of your advocacy work will depend on:

- The scale of the problem or issue (it may have a purely local cause)
- Where you can have the greatest impact on the problem or issue (a hotel may be part of a national chain, but it may be more realistic to persuade the local hotel manager first and then work with the manager to advocate at the national level afterwards)
- The resources of your organisation (i.e., different levels of advocacy take different amounts of staff time, skills and funds)
- Your organisation’s networks and relationships (for example, one of your trustees may know the owner of the national hotel chain)
- The mission of your organisation (for example, your activities may be purely within one district).

Working together in coalitions can be a strength at every level, but becomes particularly important as you move from local to national to international level and face greater bureaucracy and power.

# Planning and implementing advocacy work

## Section 2

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### Introduction

**Aim:** To practise using a planning framework for advocacy work.

- There are many different advocacy planning frameworks – this toolkit uses an adapted version of a framework developed by the International Council of AIDS Service Organizations (ICASO) which has been used for a number of years by AIDS service organisations around the world. ICASO is an international network of AIDS service organisations, covering all continents of the world. It is based in Canada and works through its regional offices in Asia, Africa, the Americas and Europe.
- The advocacy framework can be used in many different ways. This section focuses on its use to plan advocacy work systematically; however, it is also a useful check-list for making a quick advocacy response.
- This framework can be applied to advocacy action at all levels: local, national and international.
- Activities within this section will allow the participants to gain key planning skills by practising using the framework and learning from others.
- When participants are practising these planning skills they will also deepen their understanding of what advocacy is and how it can be achieved to address the issues they face.
- These activities provide an opportunity for the participants to build partnerships and alliances with other organisations attending the workshop.
- The framework can be introduced to the participants in a number of ways depending on:
  - ♦ time available
  - ♦ the needs of the participants
  - ♦ the possibility of carrying out advocacy fieldwork during the workshop
- Most workshops are an ‘artificial’ environment – including participants that are not necessarily natural allies or possibly limited representation from beneficiaries. Therefore this section aims to *practise* planning advocacy work rather than developing real action plans during the workshop time. However, in some exceptional cases this section can be, and has been, used to plan advocacy action that can be carried out during the workshop or implemented afterwards.
- Once this planning framework has been used a couple of times, it is possible to see how the steps are interlinked and how steps can be revisited during the planning process.

## Choosing how to facilitate Section 2

The advocacy framework in this section can be introduced to participants during a workshop in a number of ways. Three approaches have been described below:

- 1 Carry out the activities as described in this section with appropriate adaptation.** This allows the participants to carry out a participatory activity to practise each step of the planning framework by working in three groups. Each group identifies a general advocacy issue and practises planning how the issue could be addressed together.
- 2 Apply the advocacy framework to a case study of advocacy work and think through the planning it would have required.** The participants can be asked to work in small groups to choose an example of advocacy work (either their own, or one from the toolkit) and apply this to the advocacy framework. This can be achieved by imagining how the original advocates would have planned actions to achieve their aims.
- 3 Discuss the importance of each step of the advocacy framework by reflecting on past advocacy work and deciding how it could have been improved with better planning.** The participants can be asked to work in small groups to go through each step of the framework (using handouts and information from the toolkit that can be summarised) and discuss their experiences in relation to past advocacy work and what they have learned from planning (or not planning!) these steps in the past. The discussion could cover the following kinds of points:
  - Which steps are the most important to plan carefully?
  - Which steps are potentially the most difficult to plan and why?
  - Which steps might take longer than others to plan?

### *Advantages and disadvantages of the above three facilitation approaches*

	<i>Advantages</i>	<i>Disadvantages</i>
<b>1</b>	The participants can systematically practise each planning step in detail so that they can repeat the process as described in the toolkit with confidence within their organisations after the workshop.	This series of activities described in this section will take the equivalent of three mornings to implement.
<b>2</b>	This approach does not involve diverse groups planning 'real' advocacy work together (which can be difficult if their organisations are not natural allies). This process is also quicker than the first approach.	This process involves a lot of guesswork or may only be based on the experiences of one NGO in the group. Also there are fewer opportunities to develop new partnerships and alliances among the NGOs, or to put advocacy into practice outside the workshop setting.
<b>3</b>	The participants can share a lot of experiences and really discuss the importance of planning each step. They can also facilitate this section of the workshop themselves.	The participants will not be able to apply each step to one problem or issue to see how the planning process can be used as a whole. This activity also requires good facilitation on behalf of the participants.

## General facilitators' notes for Section 2

- ! Make sure that each group includes people with a range of skills, experience and ability.
- ! There are some steps within the advocacy framework which are key and which can be difficult to plan or address during a workshop – these include:
  - Selecting an issue
  - Developing aims and objectives
- ! Plan how you will manage timings during the workshop if these activities take longer than expected. You could include an unplanned session in the workshop schedule late in the week to allow you flexibility if the planning steps overrun into the next day. If this session is not needed for Section 2 it could be used to clarify any ongoing misunderstanding, share case-study examples or discuss future possible advocacy work after the workshop. Alternatively, Steps 4 and 5 can be combined to save time.
- ! As far as possible, ensure that all the participants understand each step correctly before moving to the next.
- ! Monitor the small groups closely, to ensure they have understood the activity. If there are enough facilitators, it is ideal if one facilitator takes responsibility for monitoring one group through the whole planning process.
- ! Make sure each group displays the results of each step somewhere visible in the room. Keep the work of each group together.
- ! There is usually not enough time in a workshop for each group to present their work for each step – so 'gallery walk' or 'market place' presentations and whole group discussions are suggested at three points during the eight steps.



Participants in Zimbabwe planning their advocacy work using the advocacy framework introduced in this section of the toolkit.

*Reference: Photo taken at an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.*

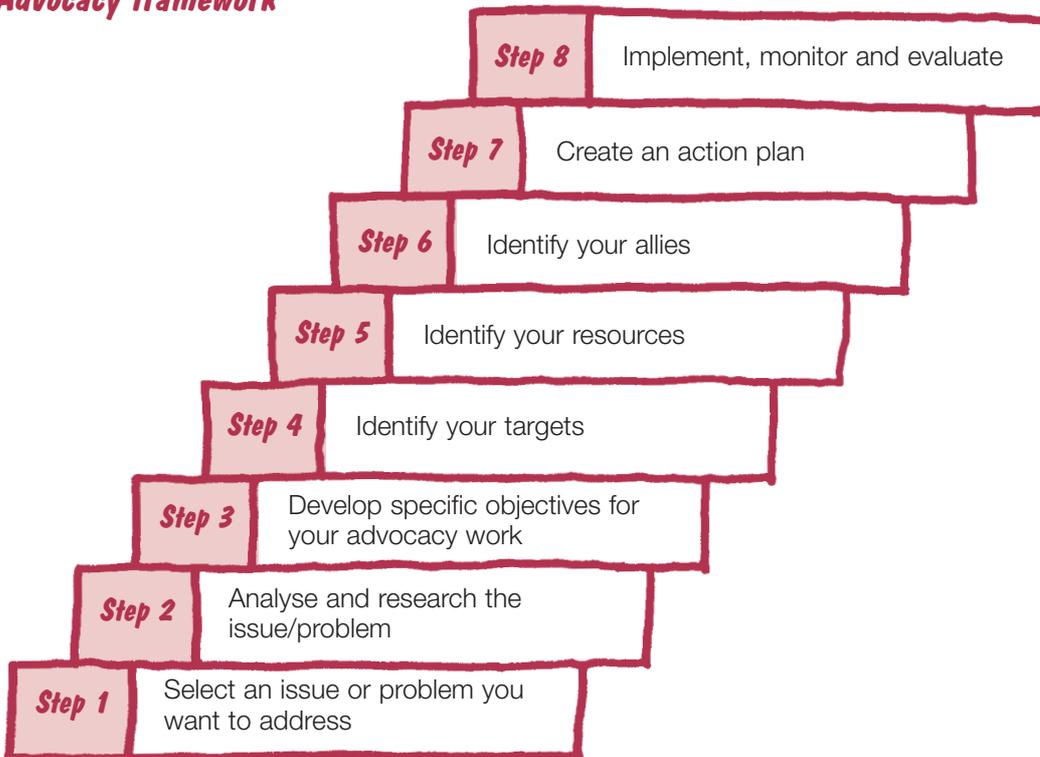
## 2 Objective: By the end of this session participants will be able to explain the benefits of planning their advocacy work systematically

### Instructions

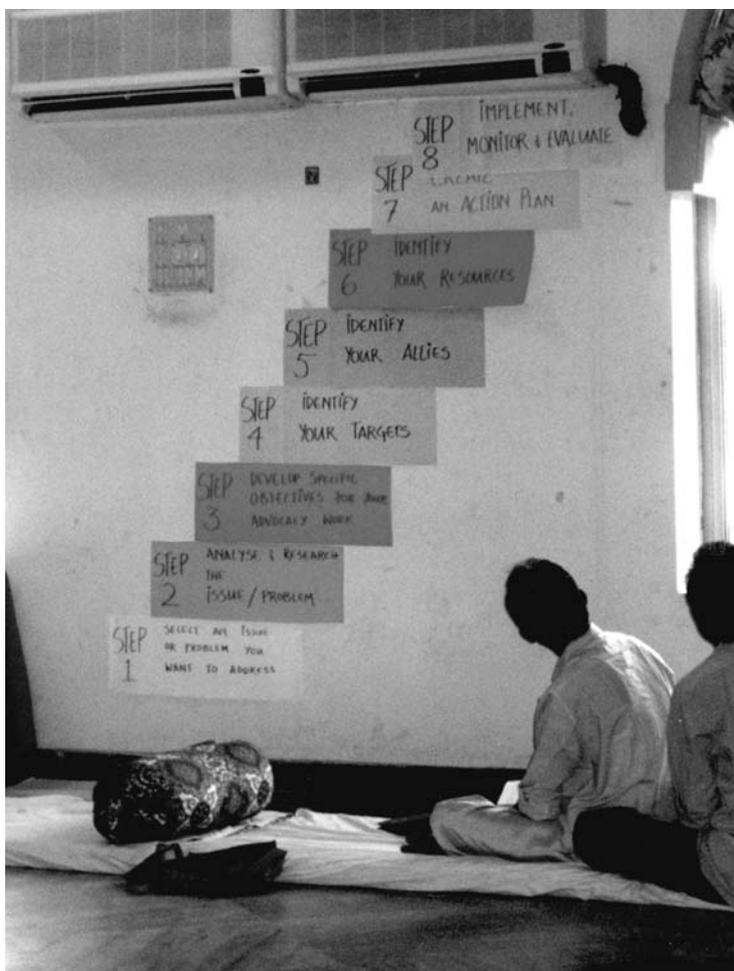
**Timing: 30 minutes**

- 1** Encourage participants to focus on the benefits of planning advocacy work in a systematic way by asking the following kinds of questions:
  - ? What are the advantages of planning our work?
  - ? Do the same advantages also apply to planning advocacy work?
  - ? What could be the effects of not planning our advocacy work?
- 2** Introduce the advocacy framework (see opposite page, and Handout 1, 'Advocacy Framework', at the end of Section 2).
- 3** Lead a brief discussion with the participants about the framework by asking the following kinds of questions:
  - ? Does the advocacy framework seem logical?
  - ? Can we plan for reactive advocacy work? Do the planning steps still apply?
  - ? As a planning process, are any of the steps more important than others? If so, which ones and why?
 Emphasise that:
  - They can adapt the framework after the workshop if they wish but that the framework will be followed in the existing order during the workshop
  - The planning steps stop after Step 7; Step 8 covers implementation (see Section 4, 'Advocacy in Action') and also covers monitoring and evaluation, which relates to implementation rather than planning
- 4** Explain to the participants that they will practise using this framework by working in three groups. Each group will address an issue of their choice. One group will plan advocacy work at the international level, one at the national level, and one at the local level (see Handout 2, 'Levels of Advocacy', at the end of Section 1). They will stay in the same groups for all the activities in Section 2.
- 5** Ask the participants to choose which group they would like to work in. Try to ensure that each group has roughly the same number of participants and range of skills, experience and ability. Explain that they will all have the opportunity to practise the same skills and use the same framework, whichever group they are in. The participants are likely to learn more if they work in groups where the other participants are from different NGOs.
- 6** Explain that the groups will practise each step of the framework by applying it to their chosen issue. There will be a chance to share ideas between the groups after every couple of steps.

### Advocacy framework



Reference: Adapted from an advocacy framework developed by the International HIV/AIDS Alliance.



Participants at an advocacy workshop in India being introduced to the advocacy planning framework.

Reference: Photo taken at an advocacy skills-building workshop for HIV/AIDS work, India HIV/AIDS Alliance and International HIV/AIDS Alliance, India, November 2001.

## 2.1 Objective: By the end of this session participants will be able to select an appropriate advocacy issue or problem

### Introduction

- It is important to think carefully about an issue before planning advocacy work. Steps 1 and 2 help this process.
- It is necessary to consider the different issues that could be worked with, and to select ones that are realistic and which will benefit from advocacy.
- It is important to define the selected problem or issue clearly.
- If possible, make sure that the people affected by the issue are involved in defining the issue and planning the process from the beginning. They will have expert knowledge of the situation, and will add strength and legitimacy to the advocacy work (see Handout 2, 'Effective Representation (legitimacy)' at the end of this section). For example, this involvement can be facilitated through drama (see Advocacy in Action Card 6, 'Communicating through drama').

#### Note:

If participants choose an issue that directly affects a group of people not represented at the workshop, it will of course be necessary to repeat the planning process after the workshop, with the involvement of the people directly affected. Because of this, the emphasis of the workshop should be on participants learning the advocacy planning process, rather than developing a real plan of action.

### Instructions

**Timing: 1 hour 30 minutes**

- 1 Explain the objective of this step, introduce the topic and the activity.
- 2 Working with the whole group, ask the participants the following question:
  - ? How do we decide which issues to address for advocacy work?
- 3 Explain that within their groups they will need a timekeeper, writer and rapporteur (presenter) for the activities within each step of the advocacy framework. Ask the groups to document all their work to present to the whole group at a later stage.
- 4 Using the following guideline questions, ask each small group to brainstorm a number of HIV/AIDS-related issues that could be addressed through advocacy at their assigned level (assigned during the previous activity):
  - ? What are you trying to achieve? What is your final aim or goal?
  - ? What barriers or problems do you face in your work? Which barriers or problems could be overcome by advocacy?
- 5 When the groups have made a list of possible issues, ask them to select the best one for advocacy, using matrix ranking. They can rank issues using the following kind of criteria:
  - ? To what extent can this issue be solved by advocacy?
  - ? To what extent would a solution to this issue help people directly affected?
  - ? Can people directly affected by the issue be involved in the advocacy work?
- 6 Circulate around the groups to ensure that they have all agreed on an appropriate issue to address. Ask them to write the issue on flip-chart paper and display it on the wall. It is not necessary for the groups to present their work at this stage.

### Facilitators' notes

- ! Encourage the groups to select issues that are real or 'live' as this will make the planning process more relevant and interesting.
- ! Make sure that each group chooses an issue or problem that relates to the level they have been allocated (local, national or international) and that they can address together as a group. Refer back to Handout 2 on 'Levels of Advocacy', at the end of Section 1.
- ! Make sure the local group has chosen an issue or problem relevant to an existing place (i.e., to a real village, district, province, etc.) so that it is a genuinely local issue.
- ! Make sure that the participants are aware that after the workshop they should not be limited by their allocated level of advocacy or the opinions of others in the group. After the workshop they will be able to apply the steps to suit the opinions and needs of their own organisation, a coalition of allies they choose, and those affected by the problem or issue.
- ! If participants have difficulties in choosing one issue, suggest that they consider other factors – for example, the priorities, resources and situation of their organisations – to help them in deciding.

### Example of Activity 2.1: By NGOs/CBOs based in India

#### Matrix ranking of possible local advocacy issues

Issues	Criteria			Totals
	Can this issue be solved by advocacy?	Benefits for people affected by issue	Possibilities to involve those affected	
Hostel facilities for children affected by HIV/AIDS	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■	13
Lack of shelter for PLHA	■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■	13
Denial of treatment for PLHA	■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■	13
Lack of income-generating projects for PLHA	■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■	11
Lack of nutrition for PLHA	■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■	12
Social stigma against PLHA	■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	14
<b>Discrimination against HIV-affected people at the workplace</b>	■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■	<b>15</b>

(Note: PLHA means people living with HIV/AIDS)

**Discrimination against HIV-affected people at the workplace** was selected as an issue that could be addressed through advocacy.

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS work, India HIV/AIDS Alliance and International HIV/AIDS Alliance, India, November 2001.

## ACTIVITY

**2.2 Objective:** By the end of this session participants will be able to:

1. Understand the issue or problem
2. Identify 2-3 possible advocacy solutions and gather information that supports their analysis

### Introduction

- We identified advocacy issues in Step 1. Now we need to analyse our issue, find information about it and suggest possible solutions.
- It takes time to analyse a problem, agree possible solutions and collect documentation and evidence on the problem – but it is time well used.
- Analysis, documentation and information can be used:
  - ♦ To influence and inform targets and allies
  - ♦ To provide evidence for our position or those of others
  - ♦ To disprove statements by people who oppose us
  - ♦ To change perceptions of a problem
  - ♦ To disprove myths, rumours and false assumptions
  - ♦ To explain why previous strategies have not worked
- It is also important to involve people who are directly affected by the issue or problem at this stage. They will have an in-depth understanding of the problem and its effects, and will have ideas about how it can be solved. For example, participatory drama (involving a discussion with the audience) or a cause-and-effect flowchart can be used to analyse issues and identify solutions with those affected.
- It is important to consider carefully the effects of any suggested solutions – some proposed solutions can cause more problems than they solve!

### 2.2 Step 2 Part A: Understanding the issue or problem

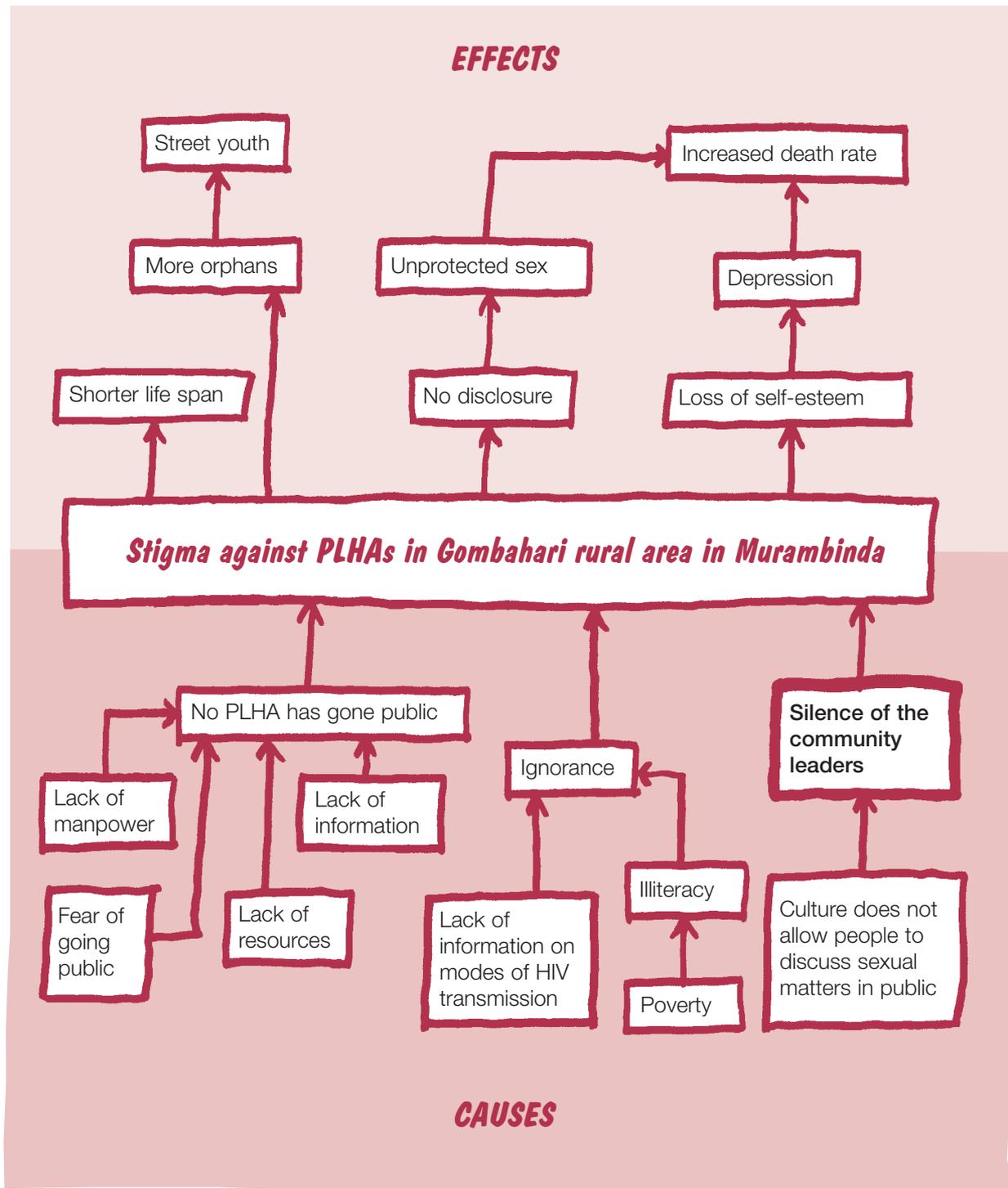
#### Instructions

**Timing: 1 hour**

- 1** Explain the objectives of this step, introduce the topic and the activity.
- 2** Explain how to create the cause-and-effect flowchart using a drawn completed example. Also give the following kind of instructions to the participants:
  - a) Ask the groups to write the issue or problem they have selected in the middle of a big piece of paper. At the top of the paper write 'Effects', at the bottom write 'Causes'.
  - b) In the space below the problem, ask them to draw or write as many causes of the problem as they can think of. Draw an arrow from each cause to the issue or problem in the centre. Causes can be people, organisations, attitudes, poverty, types of behaviour, lack of knowledge – anything.
  - c) Ask them to look at each cause and find deeper causes, by asking, 'What causes that cause?' They should add these causes of causes, connecting them with arrows.
  - d) Next ask the participants to write the effects of the problem in the top half of the paper. Draw an arrow from the problem in the centre up to each effect.
  - e) Look at each effect and ask, 'What further effect will that have?' Add effects of effects, and connect them with arrows.
- 3** After the groups have completed their cause-and-effect chart, ask them to look at the causes, and circle the ones that could be changed or improved with the help of influential people or institutions (i.e., the ones for which advocacy could be a solution).
- 4** Ask the groups to select 2-3 possible advocacy solutions. When thinking of solutions, they can also use their previous experience or the experience of others who have worked on the same issue or problem. Another way to identify solutions is to 'reverse' a cause of the issue or problem – for example, if one cause of stigma is the silence of community leaders, a solution would be the opposite: for community leaders to speak publicly in support of people living with HIV/AIDS.

**Example of Activity 2.2A: By NGOs/CBOs based in Zimbabwe**

**Local-level Group Cause-and-Effect Flowchart**



Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

**2.2 Objective:** By the end of this session participants will be able to:

1. Understand the issue or problem
2. Identify 2-3 possible advocacy solutions and gather information that supports their analysis

### **2.2 Step 2 Part B: Identifying advocacy solutions, gathering information**

#### **Instructions**

**Timing: 1 hour**

- 1 Explain the activity to the participants.
- 2 Explain to the participants the importance of collecting information to support their advocacy work. It is important to provide evidence of the causes and effects shown in the cause-and-effect flowchart.
- 3 In their groups, ask the participants to practise structuring their information-gathering as follows:
 

At the top of another big piece of paper write:

  - The problem or issue
  - The selected advocacy solution

Divide the rest of the paper into two columns:

  - Information/evidence needed
  - Where and how to get the information

Ask the groups to complete a table for each of their 2-3 solutions (there may only be time for them to focus on one solution). Give out Handout 3, 'Documentation and Information Gathering Skills', at the end of this section.
- 4 In their groups, ask the participants to think of all the factors or criteria that would help them to select the priority solution to address. Make sure that they identify the following kind of factors:
  - Do we have the legitimacy to advocate for change?
  - Are we the most appropriate NGO or coalition to advocate on the issue?
  - Are others already addressing the issue?
  - Can we access the kind of information we need as evidence?
  - Can and should those affected by the problem or issue be addressing the issue themselves?
  - Do we have the skills, time and resource to really achieve the solution?

Many of these factors are addressed in later steps in the planning process. Once participants are familiar with the whole planning framework, they will see how the steps are interrelated and build on each other as a thought process rather than sequence of steps.
- 5 Ask the group to choose one solution that they would like to use when practising the planning framework together.

#### **Facilitators' notes**

- ! Encourage participants to use their work from Step 1.
- ! There may be differing views about the issue or problem so it is important to take time to discuss them and try to reach agreement.
- ! Make sure that the groups focus on actions that can be tackled at their allocated level: local, national or international.
- ! Make sure that the groups focus on solutions that can be addressed through advocacy, rather than solutions that can be addressed through other methods. Refer participants to the workshop definition of advocacy.
- ! Stress that it is much easier for an organisation to advocate on an issue if they have collected good evidence to back up their arguments. Reinforce the link between the need for good documentation and monitoring to gather evidence to support their advocacy work.
- ! 'Advocacy in Action' Card 1, 'Analysing and influencing legislation or policy', could be distributed during this activity if it will not be addressed later.

### Example of Activity 2.2B: By NGOs/CBOs based in Zimbabwe

**Problem:** Stigma against PLHAs in Gombahari rural area in Murambinda

**Advocacy solution:** Encourage the community leaders to support people with HIV/AIDS

Information/evidence needed	Where/how to get the information
List of community leaders	District Administrator's office; local churches (church register); public meetings
Map of catchment area	District Administrator's office; draw our own map
Case studies of stigmatised people	PWHAs' testimonials; NGOs; one-to-one interviews; meetings; records; publications
Numbers of people who are HIV+	Hospitals; Ministry of Health; National AIDS Control Programme; NGOs
Information around stigma/policy, law, etc.	Zimbabwe National Network of People Living with HIV/AIDS; one-to-one interviews; analysing and influencing legislation

*Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.*

### Whole group discussion: Review of Steps 1 and 2

#### Objective

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

- Give feedback on the work of the other groups working at different levels.
- Identify advice for any NGO/CBO using the planning steps which will help them strengthen their own future planning.

#### Instructions

**Timing: 30 minutes**

- 1 Give ten minutes for the groups to look at the work of the other two groups, using this guide question:
  - ? How can the other groups improve their selected issue, possible solutions and plans for information-gathering?
 Ask the participants to provide constructive (helpful) feedback to each other about the work so far.
- 2 Ask participants to go back into their own groups and agree on one piece of advice for **any** NGO or CBO planning Steps 1 and 2 of their advocacy work.
- 3 Let each group present their advice to the whole group. Allow time for any final comments or questions.
- 4 Lead a short discussion on legitimacy and real-life experiences of these steps, using questions such as:
  - ? How can we involve those people directly affected by the issue or problem when planning and implementing Steps 1 and 2?
  - ? What can we learn from our real-life experiences of identifying advocacy issues and possible solutions?

## 2.3 Objective: By the end of the session participants will be able to write an aim and objectives for their advocacy work

### Introduction

- It is important to have a clear vision of what we want to achieve. This can help us to decide what changes are necessary to reach a solution that will solve (or at least improve) the issue or problem we have identified.
- Planning advocacy work is similar to planning other activities – it is easier to plan appropriate activities if we first identify aims and objectives.
- We need to understand the difference between an aim, objectives and activities:
  - Aim:** the long-term result that you are seeking
  - Objective:** a short-term target that contributes towards achieving the long-term aim; objectives describe the ‘outcome’ (end result) of activities.
- For example, when we are travelling on a journey from a village to the capital city:
  - ✦ The **aim** is to arrive in the capital city before night
  - ✦ **Objectives** are to arrive at each town and village along the road in good time
  - ✦ We then have a choice of **strategies** to fulfil our objectives – for example, going by bus, by car, walking, etc., and then specific **actions** – for example, catch the 203 bus to Dhaka.
- Without a clear aim and objectives, it is very difficult to evaluate our work. Unless you know your destination, you cannot know if you have arrived!
- Objectives should be ‘**SMART**’:
  - Specific** – for example in stating what will be done
  - Measurable** – for example to allow monitoring and evaluation
  - Appropriate** – for example for your vision, mission and aim
  - Realistic** – for example in relation to your potential capacity and experience
  - Time-bound** – for example in relation to when the work will be done.

### Instructions

**Timing: 45 minutes**

- 1 Explain the objective of this step, introduce the topic and the activity.
- 2 Ask the groups to write the advocacy solution they chose in the previous step as their advocacy aim.
- 3 Next, ask the groups to write detailed objective(s) for their advocacy work which describe how they will achieve their overall aim. Give the following guidelines for writing advocacy objective(s):
  - include the policy, practice or law that they want to change
  - include the influential individual, group or institution they are targeting
  - write SMART objectives.

When all the groups have written their aim and objectives, ask them to exchange their aim and objectives with another group. Ask the groups to review the aim and objectives using the guidelines in Instruction 3, and give feedback.
- 4 Ask each group to finalise their aim and objective(s), including the recommendations from the other groups if appropriate.

## Facilitators' notes

- ! There are many definitions of aims, objectives and activities. Try not to engage in a debate about this – instead focus on the groups developing objectives which are as SMART as possible.
- ! Explain that although an 'activity' has been defined during this step, they will identify their specific advocacy activities during Step 7, when further important information has been gathered and decisions made.
- ! Encourage participants to use their work from Steps 1 and 2.
- ! The process of discussing objectives is as useful as the final wording.
- ! The guidelines in Instruction 2 are intended to remind participants that advocacy is more than informing and educating – it is also influencing and changing.
- ! SMART can be introduced as a check-list to review their objectives.
- ! If participants have problems in writing objectives, ask them to complete this sentence: 'If we want to achieve our aim [write aim here], we will need to...'
- ! Explain to the participants that advocacy aims can be achieved by objectives and activities which are not themselves advocacy – this is a common cause of confusion between advocacy, awareness-raising, IEC, etc. For example, an organisation can advocate for the implementation of a good national HIV policy. To achieve this aim, it may do direct negotiation and lobbying with the central government and/or local government. It might also do general education work with those affected by the problem or issue, to ensure that they are aware of the policy and have enough information to also advocate for themselves. Both these activities help to achieve the overall aim, but the second activity is not advocacy – it is education for others to carry out advocacy work. Make sure that participants understand this difference.
- ! The groups will not have had enough time to gather information on their issue, therefore they may identify information-gathering tasks as objectives. Explain that information-gathering is not an advocacy objective. In some cases it could be an advocacy activity, but usually it is part of the advocacy planning and preparation process.
- ! Create a supportive environment for the exchange of feedback. Ensure that the feedback is related to the guidelines on Instruction 3 and not wider issues, such as the groups' approach to working on their problems or issues.

### **Example of Activity 2.3: By NGOs/CBOs based in India**

#### **Local level advocacy**

**Aim:** To ensure that all citizens of Mumbai have access to health care in public hospitals by November 2004 (in three years' time).

**Objectives:**

- ✓ To persuade the municipal authorities to ensure that the staff of public hospitals are aware of and implement the provisions of the government ruling (six-eight months).
- ✓ To persuade the municipal authorities to introduce inbuilt disciplinary checks with incentives and corrective measures and punishments in case of violation of provision of government ruling (within one year).
- ✓ To form NGO pressure group to work as a watchdog for public hospitals immediately after the disciplinary checks come into force.

*Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS Work, India HIV/AIDS Alliance and International HIV/AIDS Alliance, India, November 2001.*

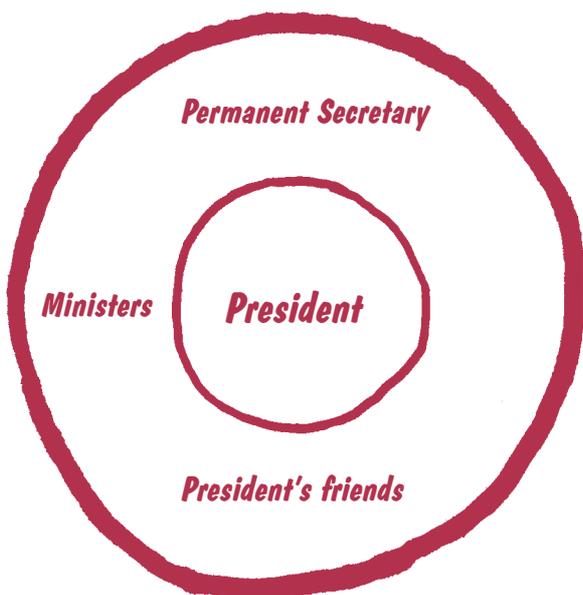
## ACTIVITY

### 2.4 Objective: By the end of the session participants will be able to identify and prioritise targets (influential individuals, groups or institutions) for advocacy action

#### Introduction

- Most organisations have limited resources available for undertaking advocacy work. Therefore it is important to focus advocacy efforts on the individuals, groups or institutions that have the greatest capacity to take action and to introduce the desired changes.
- At a national or international level these people are usually those with the power to make policy or programme decisions. At a local level there are often charismatic people who have power and influence at an informal level – for example, peer leaders, respected older people, traditional healers – as well as those who have formal influential roles.
- Now we have developed clear aims and objectives, it is much easier to identify our advocacy targets.
- Understanding the decision-making system is an important part of advocacy at all levels. Once the decision-making process is clear, it is possible that the most obvious target is not accessible and it is necessary to work through others to reach them. For example, it may be better to work with ‘those who can influence those with influence’ and who have sympathetic views, rather than targeting the decision-maker directly. These people can be called indirect targets, rather than direct targets (see diagram below).
- Identifying our targets will help us to plan strategically, and will also help us to choose the most appropriate methods or activities.

#### Indirect targets to influence the president



#### Indirect targets to influence a community leader



## Instructions

**Timing: 1 hour 30 minutes**

- 1** Explain the objective of this step; introduce the topic and the activity.
- 2** Before beginning the activity, ask the whole group to give examples of targets (direct and indirect) from their experience and from the case studies used in Activity 1.1A.
- 3** Ask participants to return to their groups. Ask each group to choose one objective, and write it in the middle of a big piece of paper.
- 4** Next, they can draw a Venn or other diagram of all the groups, organisations, businesses, government departments, religious leaders, individuals, etc. that could be targeted to influence the changes identified in their objective. It may help to classify them as direct and indirect targets, and to show the links between direct and indirect targets. Encourage the groups to be as specific as possible – for example, the Minister for Home Affairs, etc. You can show participants an example.

The diagram should show:

- How close the relationship is between each target and your organisation
- How much they agree with your advocacy objective
- How much influence they have over the advocacy objective

Ask the groups to complete a target information table as in the example on the following page (see Handout 4, 'Target information table', at the end of this section for blank table).

## Facilitators' notes

- !** Encourage participants to build on their work from Steps 1 to 3.
- !** Make sure that the groups use an objective that directly involves advocacy.
- !** Encourage participants to identify targets who may oppose their objective.
- !** Encourage participants to think strategically – for example, they may need to target the opposition parties, not only the governing party, or target all religious leaders, not only those from the main religion. Otherwise the advocates could be seen as partisan or biased by other decision-makers.
- !** This activity is easier to do if the group's objectives are specific. If participants find that their objectives need improving, discuss this constructively with them. Allow objectives to change during the planning process.
- !** The aim of this activity is to learn how to identify targets and prioritise them – the participants will not have time to complete this activity for all their objectives. However, they should identify targets for each objective when planning future advocacy work with their colleagues and those affected by the problem or issue.
- !** If there is no time for groups to present their diagrams, they can do this after Step 5.

## Example of Activity 2.4: By NGOs/CBOs based in Zimbabwe

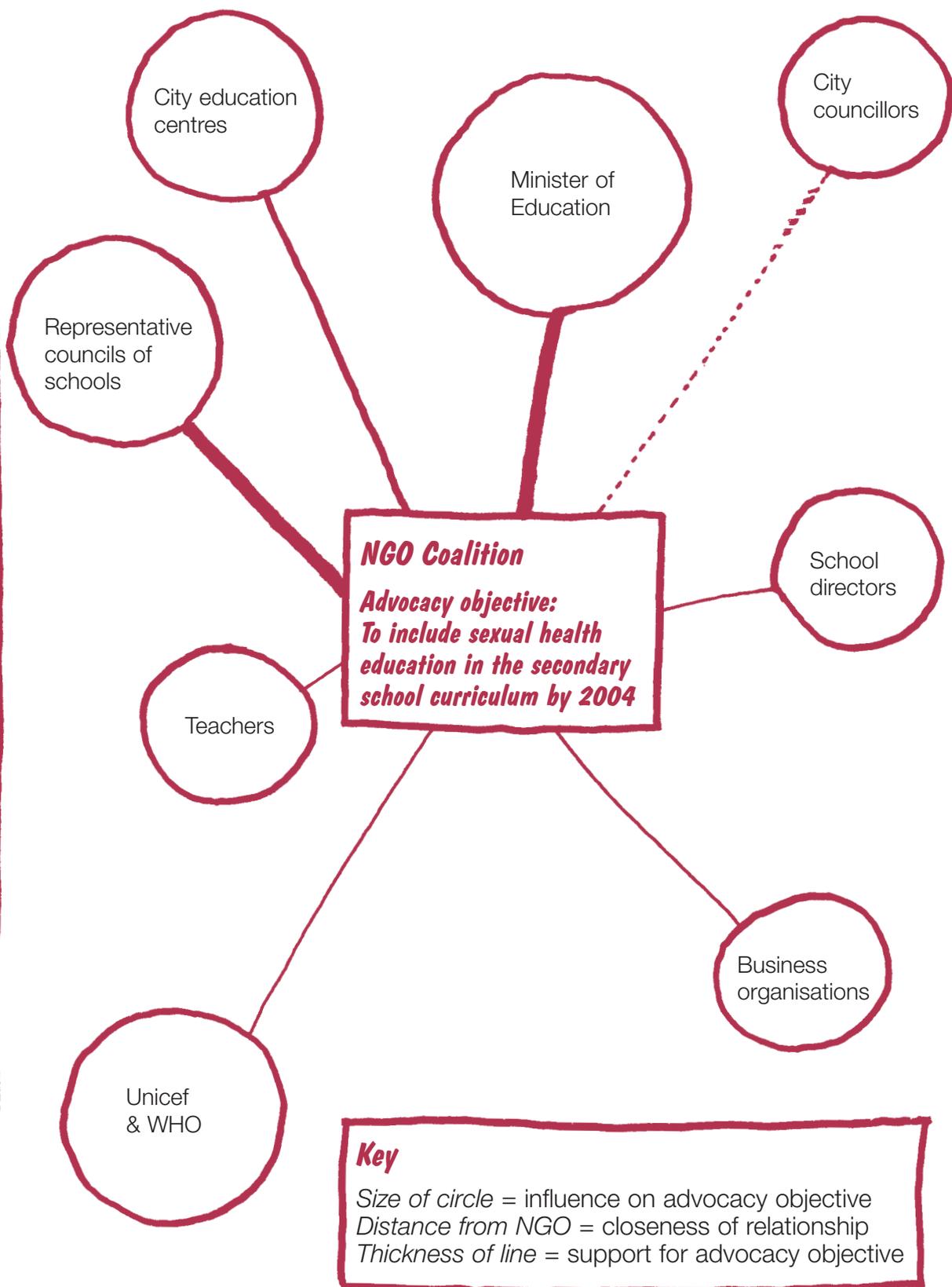
Target information table

Target	How to contact the target	Target's feelings about the advocacy issue	How to influence the target	Target's way of making decisions	Target listens to (possible indirect targets)...
<b>The President of the Republic of Zimbabwe</b>	With a letter  Through the President's office	Negative	Majority rule	Through Parliament  Unilaterally	Ministers  Governors
<b>Dr T. Stamp</b>	Through the Ministry of Health  Through letters, meetings and ceremonies	Supportive	NGOs  Argument of 'good health delivery system'	Consultation	NGOs  Ministry of Health personnel
<b>Governors Provincial AIDS Councils (PAC)</b>	Through direct approach  Through visits, phone calls, meetings, invitations to functions	Negative	NGO achievements  Stakeholders' feelings	Through PAC or District AIDS Councils (DAC) Committees	Local traditional leaders  NGOs
<b>P. Misihairambwi</b>	By phone, e-mail, through interviews	Very supportive	Experience as an NGO activist  Her post in Parliament	Through contacts with influential people	NGOs  Donors  Individual activists

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

## Example of Activity 2.4: By NGOs/CBOs based in Mongolia

### National level group work identifying targets for advocacy work



Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS/STI work, National AIDS Foundation and International HIV/AIDS Alliance, Mongolia, February 2002.

## 2.5 Objective: By the end of the session participants will be able to identify individuals, groups or institutions that can assist in achieving their advocacy objectives

### Introduction

- In the previous step we identified our targets: who we advocate *to*. Now we will identify our allies: who we advocate *with*.
- In **some** cases a coalition of people or organisations doing advocacy work can achieve more together than individually.
- However, coalitions take time and energy to develop and maintain because they involve building trusting relationships with other people and keeping people constantly informed and involved. Many advocates find this part of their work the most difficult and yet the most rewarding, both professionally and personally.
- Coalitions can be short term or long term, and formal or informal. For example, in the short term they can take advantage of gatherings such as meetings, conferences and workshops to promote an issue and gather signatures for petitions. Alternatively campaigns and actions can be undertaken over several years.
- Forming a coalition with allies to undertake advocacy work is not the same as being part of a network, but networks can also be useful to share information between organisations.
- Examples of possible allies to form coalitions include:
  - ✦ Other people directly affected by the issue or problem, such as people living with HIV/AIDS, orphan groups, etc.
  - ✦ Other AIDS service organisations (ASOs), community-based organisations (CBOs), non-governmental organisations (NGOs), including human rights and health organisations
  - ✦ Other components of civil society (supportive unions, religious institutions or leaders, community leaders)
  - ✦ Business people
  - ✦ Supportive or sympathetic journalists
  - ✦ Supportive local/national government officials who can lobby from inside
  - ✦ Allies in other parts of the country, or other countries – counterpart organisations who could push from outside
- There is sometimes overlap between allies and ‘indirect targets’, i.e., indirect targets may be sympathetic to your advocacy objective and may also have influence over influential people, but need some initial influencing to persuade them to support change that needs to be made.

### Instructions

**Timing: 1 hour 30 minutes**

- 1** Explain the objective of this step, introduce the topic and the activity.
- 2** Working with the whole group, clarify the difference between a target and an ally, and how some allies can also be indirect targets.
- 3** Facilitate a discussion with the participants to share their experiences of working in non-advocacy-related partnerships or coalitions for their work.
- 4** Focus the discussion on working in partnerships specifically for advocacy. Questions might include:
  - ? What are your experiences of advocacy work with others?
  - ? What were the main advantages and disadvantages you identified in working with others to undertake advocacy?
  - ? What are the differences and similarities between partnerships for advocacy and partnerships for other activities?

- 5 Ask the participants to return to their groups, and draw their potential allies on the same Venn diagram they used for Step 4. Give them the following guideline questions:
  - ? Who else could have a positive impact on the issue that has been chosen? Who else is already working on this issue?
  - ? Who are usually your 'natural' allies? Are they true allies for this issue?
  - ? Are they happy to work in a coalition?
- 6 Ask the participants to include in their diagram, for each ally:
  - What they will gain by joining your alliance
  - What they can offer to the advocacy work
  - What are their limitations.

### Facilitators' notes

- ! Encourage participants to use their work from Steps 1-4.
- ! Ensure that the participants do not feel that they should always work in coalitions with others as a result of this activity.
- ! Networks and coalitions can be used to build consensus among a group of people with different vested interests. Working together can also increase legitimacy and accessibility in relation to addressing the issue or problem. However, partnerships do not always work based on complete agreement. Where people have different views, it can mean agreeing to speak with a majority voice.
- ! Natural allies are those working on the same issue who have mutual respect for the role each other has in addressing the issue or problem.
- ! Participants may become confused about the difference between indirect targets and allies. This is because those identified as indirect targets may become allies in the future.
- ! The completed example of advantages and disadvantages of working in coalitions, and the Handout 5, 'How HIV/AIDS can affect partnerships', at the end of Section 2, may be useful for participants in this session.

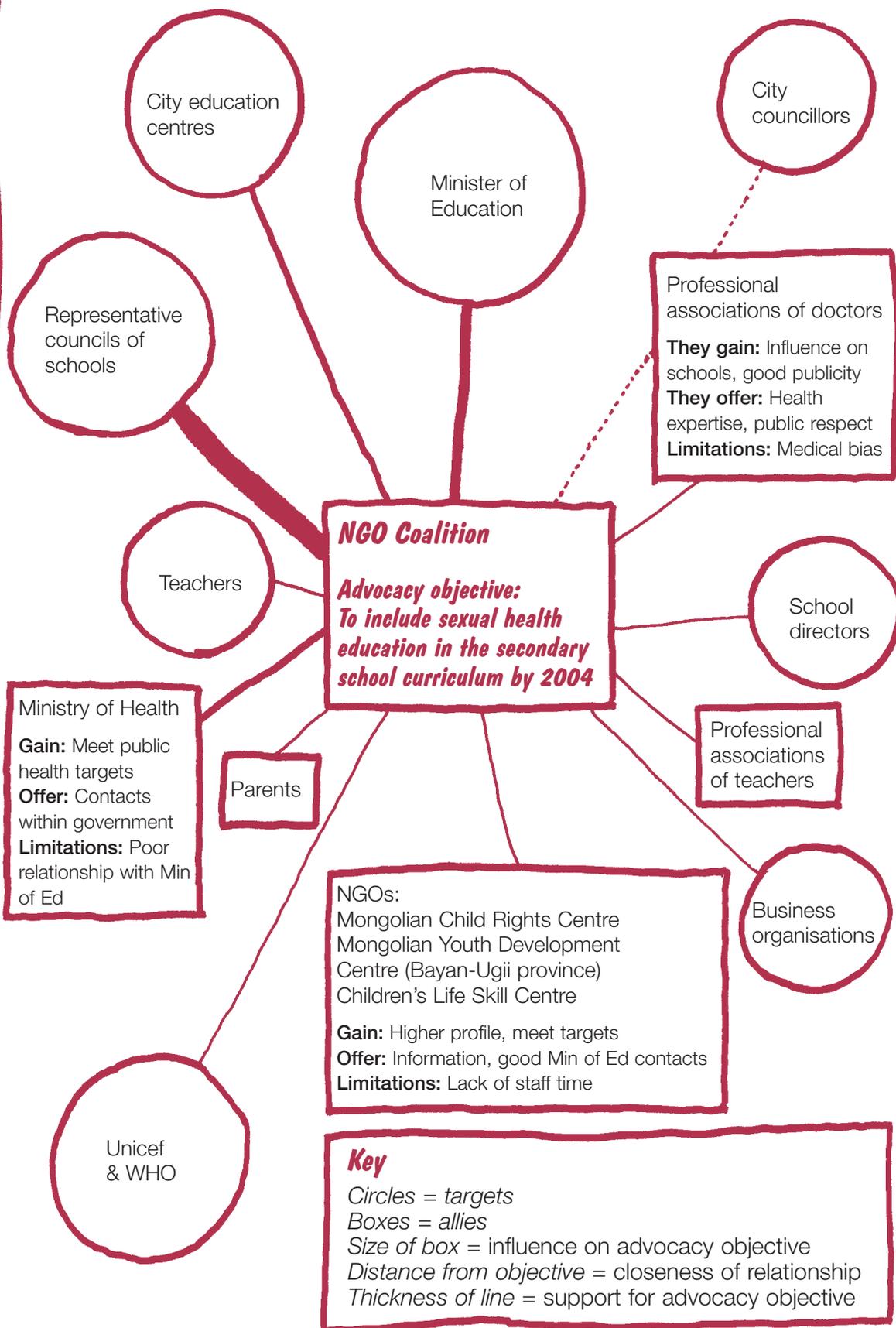
### Example of Activity 2.5: By NGOs/CBOs based in Zimbabwe

Advantages of working in coalitions	Disadvantages of working in coalitions
<ul style="list-style-type: none"> <li>✓ It adds weight to your issue</li> <li>✓ You speak with a louder voice</li> <li>✓ You can share resources, skills and technology</li> <li>✓ It gives your organisation recognition</li> <li>✓ It gives your organisation a higher profile</li> </ul>	<ul style="list-style-type: none"> <li>✗ Difficulty in co-ordinating</li> <li>✗ Competition over leadership and representation</li> <li>✗ Issue of ownership of programmes and results</li> <li>✗ Your organisation's agenda may be different from others</li> <li>✗ Increase in workload</li> </ul>

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

## Example of Activity 2.5: By NGOs/CBOs based in Mongolia

The targets diagram from Step 4, with allies added in boxes and with specific pieces of information for developing a collaboration



Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS/STI work, National AIDS Foundation and International HIV/AIDS Alliance, Mongolia, February 2002.

## Whole group discussion: Review of Steps 3-5

### Objective:

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

- 1 Give feedback on the work of the other groups working at different levels.
- 2 Identify advice for any NGO/CBO using the planning steps which will help them strengthen their own future planning.

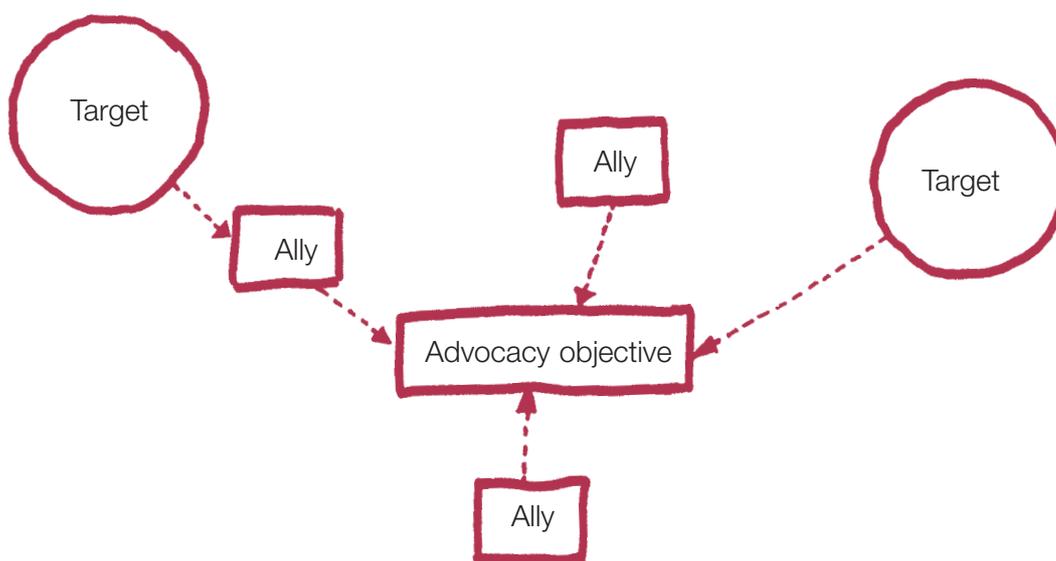
### Instructions

**Timing: 45 minutes**

- 1 Give ten minutes for the groups to look at the work of the other two groups, using this guide question:
  - ? How can the other groups improve their aim and objectives and their selection and analysis of targets and allies?

Ask the participants to provide constructive (helpful) feedback to each other about the work so far.
- 2 Ask participants to go back into their own groups and agree on one piece of advice for any NGO or CBO planning Steps 3, 4 and 5 of their advocacy work.
- 3 Let each group present their advice to the whole group.
- 4 Allow time for any final comments or questions. Lead a short discussion on real-life experiences of these steps, using questions such as:
  - ? What can we learn from our real-life experiences of developing advocacy aims and objectives, identifying targets and allies?

Make sure that participants understand how their diagram should change during the process of advocacy. They will be persuading some targets to become allies, and they will be bringing targets and allies inwards towards the advocacy objective. For example:



## 2.6 Objective: By the end of the session participants will be able to identify existing resources available to address the selected advocacy problem or issue

### Introduction

- Successful advocacy work requires resources such as people (human resources), money, skills and information. Human resources can include both staff and volunteers. Other resources can include access to media and to distribution networks – for example, newsletters, e-mail.
- In Step 5 we saw some advantages of working in coalition with allies – one major advantage is the possibility of sharing resources.
- When we have identified resources now available, we can go on to Step 7, developing an action plan. It is best to plan only for activities that are possible with resources we have.
- However, it is sometimes possible to fundraise for advocacy work – although this can be very difficult in some countries and for some issues (see *Raising Funds and Mobilising Resources for HIV/AIDS Work – A Toolkit to Support NGOs and CBOs*, International HIV/AIDS Alliance, for more information).

### Instructions

**Timing: 40 minutes**

- 1** Ask the whole group to brainstorm what kinds of resources are useful for advocacy work. The following list can be provided if necessary: **People, Contacts, Information, Skills, Money, Equipment.**
- 2** Ask the three small groups to identify all the resources that each of their organisations have available to address the advocacy aim and objectives selected in Step 3.

### Facilitators' notes

- ! Encourage participants to use their work from Steps 1-5.
- ! Make sure that the groups differentiate between resources they *already have*, and resources they plan to mobilise in the future.
- ! Resources might include people with specific advocacy skills, such as negotiation experience, understanding of decision-making structure, leadership and diplomacy.
- ! There is no need for groups to present their work at this point. Presentations can be made after Step 8.

### Example of Activity 2.6: By NGOs/CBOs based in Burkina Faso

Resources available for advocacy for the Ministry of Health to integrate voluntary counselling and testing into sentinel surveillance sites:

#### Resources currently available

Financial resources	Human resources	Other resources
Small amount of money from care budget, now available due to extra donation of medicines	<ul style="list-style-type: none"> <li>• Members of the association</li> <li>• Support of the organisation's secretariat – Initiative Privée et Communautaire Contre le Sida au Burkina Faso (IPC)</li> <li>• Team leaders skilled in advocacy and networking</li> <li>• Good relationships</li> </ul>	<ul style="list-style-type: none"> <li>• Space in the association's office</li> <li>• Source documents</li> <li>• Means of transport</li> </ul>

Reference: Adapted from an advocacy workshop, International HIV/AIDS Alliance/ICASO, Burkina Faso, October 1999.



Participants and facilitators discussing what kind of resources are need for advocacy work.

Reference: Photo taken at an advocacy skills-building workshop for HIV/AIDS work, India HIV/AIDS Alliance and International HIV/AIDS Alliance, India, November 2001.

## 2.7 Objective: By the end of this session participants will be able to write an action plan of activities to achieve their advocacy aim and objectives

### Introduction

- There are two parts to this step: selecting appropriate advocacy activities, and making a detailed plan for those activities.
- The work done in Steps 1 to 6 will help greatly in choosing appropriate advocacy activities to achieve your aim. By now, you know what you are trying to achieve, who your targets are, who your allies are, and the resources available.
- The 'Advocacy in Action' Cards will also help in selecting activities.
- When identifying activities it is important to consider who will be the beneficiary of the actions and involve to them, if possible. For example, it is preferable for a group of street children to be supported to meet a senior police officer, rather than an NGO representative attending the meeting on their behalf.
- An action plan consists of a specific set of activities with a timeline and shows who is responsible for implementing each activity. The activities are those that are necessary to address the aims and objectives that have been agreed.
- Thinking strategically is very important at this planning stage. Advocacy activities can often have a greater impact if they are timed to coincide with other actions or events that will help your advocacy work. For example, politicians may or may not be more willing to make bold statements during election times. Consider these factors when deciding on the timing of your activities.

### Instructions

**Timing: 1 hour 30 minutes**

- 1 Explain the objective of the step; introduce the topic and the activity.
- 2 Lead a plenary discussion on action planning for advocacy, with questions like:
  - ? Who should be involved in developing action plans?
  - ? How do you decide which advocacy methods to use?
- 3 Ask the groups to decide which advocacy methods to use. To help them, they should look at the:
  - Venn diagram of advocacy targets they identified (Step 4)
  - information they gathered or identified in Step 2
  - list of advocacy methods from the 'How do we advocate?' session
  - resources available.
 Give them these guideline questions:
  - Why does each target support or oppose the advocacy solution?
  - How can each target be moved towards supporting the advocacy solution?
 All these things can guide them in choosing possible advocacy activities for one or more of their advocacy objectives. Divide them into their groups.
- 4 After they have decided on advocacy methods (activities), provide the participants with a choice:
  - to design their own action plan format that can be used to plan advocacy
  - to use the format suggested in the completed example.
- 5 Ask the participants to practise developing an action plan, so that they are familiar with the process. They can plan the activities they listed in Instruction 3.
- 6 After they have practised action planning, go straight to a discussion with the whole group, without presentations:
  - ? What factors did you consider in planning advocacy work?
  - ? Outside this workshop, what needs to be done before writing an action plan?
  - ? What factors might require you to change your action plan?

## Facilitators' notes

- ! Encourage participants to use their work from Steps 1-6.
- ! Encourage participants to co-ordinate their advocacy activities.
- ! Make sure activities are linked very closely to the objectives.
- ! Encourage the groups to be realistic when they estimate the time and resources needed.
- ! If a group finds action planning difficult, consider offering the example below as a guide or developing an example action plan together as a whole group.
- ! Do not worry if participants do not finish planning – it is more important for them to participate in the plenary discussion.
- ! Make sure that participants understand that action planning requires more time than they have been allowed in the workshop. Give the Handout 6, 'How to choose appropriate advocacy methods', from the end of this section.
- ! Make sure they include informal as well as formal activities – for example, taking opportunities to speak to targets and allies at meetings and receptions.

### Example of Activity 2.7: By NGOs/CBOs based in Zimbabwe

**Coalition:** Family AIDS Caring Trust, Dananayi NGO, individual PLHAs, and Murambinda hospital

**Advocacy aim:** Encourage the community leaders in Gombahari to publicly support people with HIV/AIDS

Objectives	Targets	Activities	Resources required	Persons or organisations responsible	Timeframe	Expected outcome
<b>Objective 1</b> By July 2002, three influential community leaders will make positive public statements defending people living with HIV/AIDS	All community leaders	Meeting with all community leaders of Gombahari on stigmatisation of PLHAs	Manpower: Team leader, community leaders  Stationery: books, pens etc. for record-keeping  Vehicle Food Money	Team leader of organisation	September 2001	Come up with three most influential leaders
	Three most influential leaders	One-to-one meetings with the three leaders who were most influential during the meeting	Team leader, community leaders  Money Vehicle	Team leader	By early October 2001	Positive support from three community leaders willing to make public statements
	Community members	Meetings between three community leaders and their communities	Manpower: Team leader, three community leaders, PLHAs, community  Vehicle Food	Team leader, community leaders	April 2002	Public statements defending PLHAs

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

## 2.8 Objective: By the end of this session participants will be able to decide how to monitor and evaluate their advocacy work during and after its implementation

### Introduction

- This is the step where the planning stops and the action begins – when we implement advocacy activities such as those we have practised during the skills sessions or other advocacy methods.
- Implementation is also a time of learning; when we can learn whether the methods selected are having their intended impact. We do this through:
  - ✦ monitoring of activities
  - ✦ evaluation of results.
- Monitoring and evaluation will be much easier if we have developed a clear aim and objectives in Step 3, stating clearly what we are trying to achieve.
- When evaluating, we need to agree on our definitions of success, i.e., agree on the signs that will show us whether the situation is improving or not – these signs are **indicators**.
- The people affected by the problem or issue are often the best people to choose indicators of success.
- Advocacy work can be difficult to monitor and evaluate:
  - ✦ Many organisations may be working to achieve similar aims or objectives via different means, so it is hard to determine the impact that your work has had
  - ✦ Organisations are often uncertain at which level to evaluate their advocacy work – at the level of the target (activities or objectives) or at the level of intended project impact (aim)?
  - ✦ Advocacy is a gradual process, and thus it can often be difficult to monitor the many small steps needed towards achievement of success.
- Nevertheless, monitoring and evaluation is critical for determining if your advocacy work has succeeded in removing barriers for change.
- Although there are many reasons for monitoring and evaluating advocacy work – like all monitoring and evaluation – the information is only useful if it is used. Many organisations spend a great deal of time and resources monitoring their work without actually carrying out any evaluation. Similarly, evaluations need to be studied to draw out conclusions and they need to be a valued part of the process to be worthwhile.

### Instructions Timing: 1 hour 30 minutes (plus one hour for whole group discussion)

- 1** Explain the objective of the step and the activity.
- 2** Working with all the participants, ask the following question:
  - ? Is it important to monitor and evaluate in advocacy work? If so, why?
- 3** Ask the groups to write some indicators (descriptions of the evidence required, or definitions of success) that would demonstrate whether their advocacy objective(s) were being met. This can be done by adding a column of indicators for each specific activity in their action plan from Step 7, as well as for the objective(s) as a whole. Before participants go to their groups, ask them:
  - ? How do objectives help us to write impact indicators?
 Distribute the Handout 7, 'Methods of monitoring and evaluating advocacy work', from the end of this section, to provide participants with further information.
- 4** Once this activity is completed, ask the groups to choose some methods for monitoring the indicators for their advocacy work, and write these below their indicators. Once again, the Handout 7 will be helpful in providing ideas.

- 5 Ask some of the groups to present their work and facilitate a discussion with the entire group of participants. As part of this discussion, ask the participants:
  - ? Thinking of the case studies, or your own advocacy experience, how do we decide whether our advocacy work has been successful? How do we evaluate it?
  - ? How can we use the information we collect from monitoring and evaluation?

### **Facilitators' notes**

- ! Make sure that participants refer back to their objective(s).
- ! Encourage participants to use the qualitative and quantitative indicators described in Handout 7.
- ! Remind participants that advocacy is about change – how can they show that the desired change has occurred?



Participants in the Philippines discussing the difficulties of developing indicators that demonstrate whether their planned advocacy objectives will be achieved.

*Reference: Photo taken at an advocacy workshop, International HIV/AIDS Alliance and International Council of AIDS Service Organizations (ICASO), Philippines, November 1998.*

## Example of Activity 2.8: By NGOs/CBOs based in Zimbabwe

**Coalition:** Family AIDS Caring Trust, Dananayi NGO, individual PLHAs, and Murambinda hospital

**Advocacy aim:** Encourage the community leaders in Gombahari to publicly support people with HIV/AIDS

Objectives	Targets	Activities	Resources required	Persons or organisations responsible	Timeframe	Expected outcome	Indicators
<b>Objective 1</b> By July 2002, three influential community leaders will make positive public statements defending people living with HIV/AIDS	All community leaders	Meeting with all community leaders of Gombahari on stigmatisation of PLHAs	Manpower: Team leader, community leaders Stationery: books, pens, etc. for record-keeping Vehicle, Food, Money	Team leader of organisation	September 2001	Come up with three most influential leaders	Leaders: – who are listened to by other leaders – from whom local people ask for advice most often – who have successfully led a change in policy or practice in the past <b>Monitoring methods:</b> informal survey, observation at meeting
	Three most influential leaders	One-to-one meetings with the three leaders who were most influential during the meeting	Team leader, community leaders Money Vehicle	Team leader	By early October 2001	Positive support from three community leaders willing to make public statements	Leaders: – show understanding of why stigma is a problem – show understanding of how public support for PLHAs can help – promise to make public statements in support of PLHAs <b>Monitoring methods:</b> NGO reps observe and discuss after meeting
<b>Objective 2</b>	Community members	Meetings between three community leaders and their communities	Manpower: Team leader, three community leaders, PLHAs, community Vehicle, Food	Team leader Community leaders	April 2002	Public statements defending PLHAs	Number of positive statements Number of people hearing statements <b>Monitoring methods:</b> NGO reps attend and observe meetings; informal surveys in community

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

## **Whole group discussion: Review of Steps 6-8 and review of advocacy planning framework**

### **Objective:**

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

- Give feedback on the work of the other groups working at different levels.
- Identify advice for any NGO/CBO using the planning steps, which will help them strengthen their own future planning.
- Review the advocacy framework and consider how it might be used in the future.

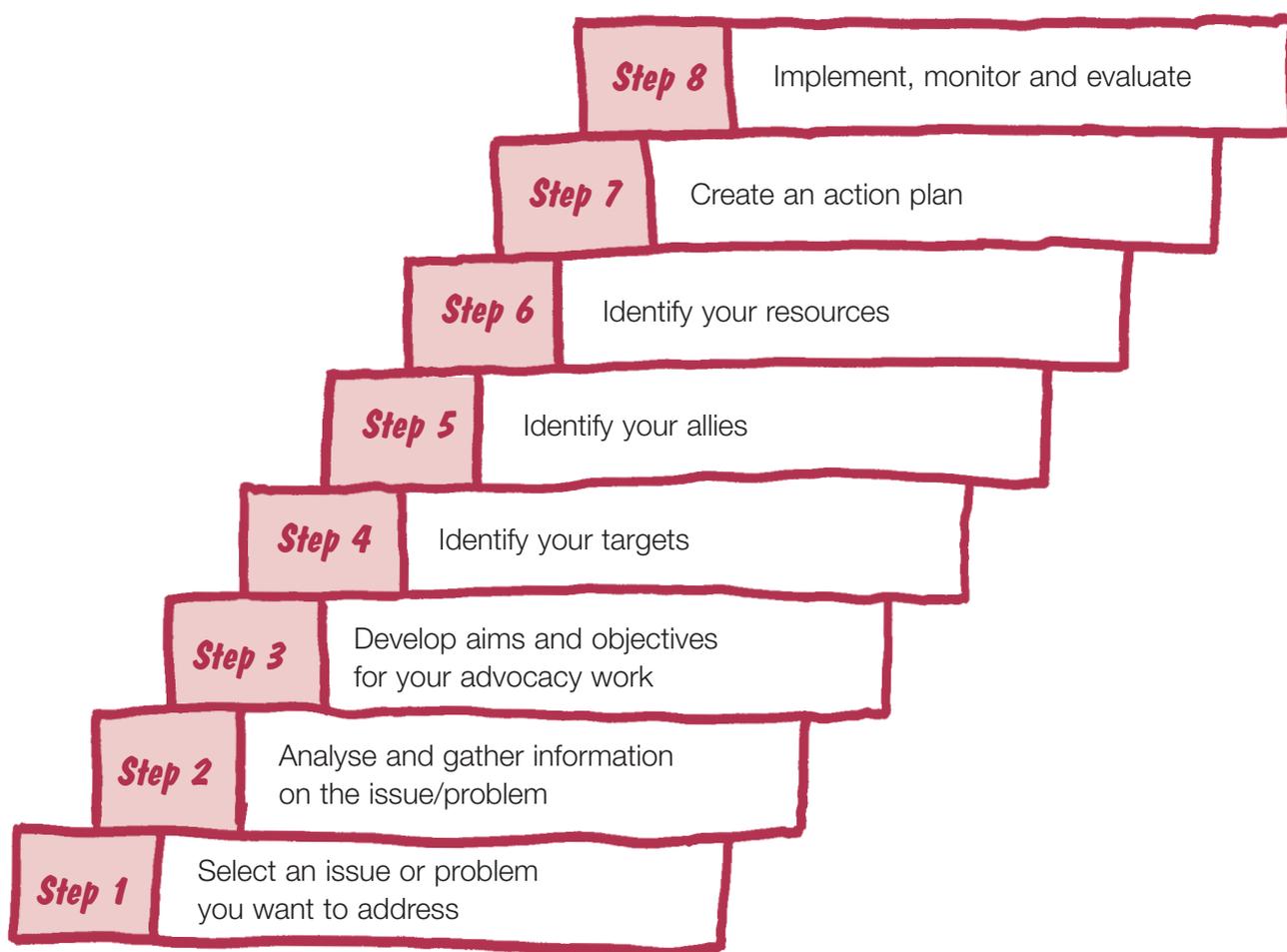
### **Instructions**

**Timing: 1 hour**

- 1** Give ten minutes for the groups to look at the work of the other two groups, using this guide question:
  - ? How can the other groups improve their action plan, including indicators and monitoring methods?Ask the participants to provide constructive (helpful) feedback to each other about the work so far.
- 2** Ask participants to go back into their own groups and agree on one piece of advice for **any** NGO or CBO planning Steps 6, 7 and 8 of their advocacy work.
- 3** Let each group present their advice to the whole group.
- 4** Allow time for any final comments or questions. Lead a short discussion on real-life experiences of these steps, using questions such as:
  - ? What can we learn from our real-life experiences of allocating resources and action planning, monitoring and evaluating advocacy work?
- 5** Review the advocacy framework with participants using questions such as:
  - ? What was useful about the framework?
  - ? Would you add any steps or take any out, or put them in a different order?
  - ? How does the framework compare to the way you have planned and implemented advocacy work 'in real life'?
  - ? Could you introduce this framework to your colleagues? How?

# Handout 1

## Advocacy framework



Reference: Adapted from an advocacy framework developed by the International Council of AIDS Service Organizations (ICASO).

# Handout 2

## Effective representation (legitimacy)



### Involving people directly affected by the advocacy issue or problem

Advocacy can be carried out by the people affected by an issue or problem, by other people representing them, or by both groups together. Advocacy is often more powerful if those affected by the problem or issue are involved with or lead the process.

If we advocate by representing others, we need to ensure that we represent their opinions and interests fairly. This means having a very close relationship with these affected by the problem or issue, a deep understanding of the issue, and **permission** from those affected by the problem or issue to advocate on their behalf. Having permission or the 'right' to advocate for other people is known as 'legitimacy'.

It is also important to ensure that advocacy work is supported by the mission or aims of our organisation, by senior managers, and by any external funders.

### Why it is important to involve those directly affected by the advocacy issue, from early in the planning process

- They will have expert knowledge of the issue or problem
- They can suggest workable solutions based on direct experience of the problem
- They can view a problem from a different perspective
- They are often highly motivated, because they are directly affected by the issue
- People living with or affected by HIV/AIDS have been centrally involved in most major improvements in the field of HIV/AIDS
- Affected individuals and groups will gain more skills and confidence
- It is a good opportunity to reduce stigma against people affected by HIV/AIDS.

### Problems caused by lack of legitimacy

Involving those affected by the problem or issue late, superficially ('tokenism') or not at all can result in:

- identifying irrelevant issues
- suggesting solutions which do not solve the problem, or make the problem worse
- public disagreement
- loss of credibility for the organisations and individuals involved in advocacy
- increased stigma and legitimised exclusion and non-involvement of those affected by the problem or issue
- disempowerment of those affected, so they are less in control of their own situations.

### Methods of involving those directly affected by the advocacy issue

Finding a way of genuinely involving those directly affected by the advocacy issue will greatly strengthen the advocacy work in the long term. But it may take more time in the short term, especially if they are very busy, frequently ill, do not trust you, are hard to identify and reach, or challenge your ways of working. People affected by the problem or issue can be involved at all stages of advocacy: defining the problem or issue, planning, implementation and evaluation – as advisers, implementers or managers.

***"It is important for any organisation working in the field of HIV/AIDS to include people living with the virus because it is we who have first hand experiences of the problems that we face."***

*Emily Chigidwe, Chairperson, Zimbabwe National Network of People Living with HIV/AIDS (ZNP+).*

# Handout 3

## Documentation and information-gathering skills

Documentation and information-gathering (research) are vital for nearly all kinds of advocacy work. Documentation and information-gathering are needed to help us develop our ideas and as well as then support our opinions so that they will be taken seriously by those in influence.

There are two basic kinds of information that can be used for advocacy work: primary and secondary information.

**Primary** documentation and research includes information and data collected by yourself. It may include narrative documentation, data that has been collected (both numerical and narrative), interview notes and quotes, focus group discussions, notes, surveys, participatory research (rapid appraisal), photographs, etc.

**Secondary** documentation and research includes information which has been sourced from elsewhere and which was gathered by others for reasons unrelated to your work. This includes surveys such as national demographic and health surveys, national censuses, HIV/AIDS facts and statistics, behaviour studies (for example, condom use), reproductive health reforms, sociological studies such as decision-making in the household, information from Internet research, websites, e-mail discussion lists, etc.

Secondary research can also include academic research and action/operations research and conference abstracts.

There are many advantages to using secondary information from a source you trust:

- ♦ inexpensive to obtain
- ♦ readily available
- ♦ valid and reliable
- ♦ current
- ♦ comprehensive
- ♦ credible to those you need to influence.

However, primary research also has its advantages:

- ♦ more trustworthy because you know how the information was collected
- ♦ more directly relevant and tailored
- ♦ demonstrates your experience of any issue directly.

Documenting primary information as you go along is vital and requires NGOs/CBOs to develop simple documentation systems within their organisations to collect and keep information. When the need and opportunity arises, this information can then be used to support ideas and arguments for advocacy work as well as a broad range of other uses within an organisation.

(For more information on developing documentation systems for organisations see ***Documenting and Communicating HIV/AIDS Work – A Toolkit to Support NGOs/CBOs***, International HIV/AIDS Alliance – see contact details on the back of this toolkit).



# Handout 5

## How HIV/AIDS can affect partnerships

Some of the issues involved in HIV/AIDS can create problems for NGOs as they build alliances. For example, a potential ally may be afraid of HIV/AIDS, or may be reluctant to be connected with the subjects of sexuality and sexual health. This can make it difficult to engage partners and get them involved.

HIV/AIDS issues to consider when building partnerships include:

- Personal attitudes and beliefs: allies may not feel able to talk openly about HIV/AIDS.
- Institutional practices, policies, or beliefs: partners will uphold institutional policies – unless they are convinced otherwise.
- The attitude to HIV/AIDS in a community: if it is not visible, partners may not believe that it exists. If it is visible, they may want to cover it up.
- Maintaining confidentiality: there may be a need to explain to partners who may want to know or tell others about the HIV status of particular people that this is breaching confidentiality unless they have permission.
- Language and jargon: partners may not be familiar with specialised words used to describe HIV/AIDS work.
- Scandals and scare stories: partners may not believe an NGO's accurate information about HIV/AIDS.
- Competing priorities: partners might be more interested in addressing other social issues, or responding to a recent crisis.
- Subject fatigue: partners might not want to hear any more about HIV/AIDS.

# Handout 6

## How to choose appropriate advocacy methods

There are no simple rules for choosing the best advocacy methods. Your choice will depend on many factors: a) the target person/group/institution; b) the advocacy issue; c) your advocacy objective; d) the evidence to support your objective; e) the skills and resources of your coalition; and f) timing – for example, external political events, when a law is still in draft form, immediately before a budgeting process, time of year, stage of advocacy process. Below is an example of the strengths and weaknesses of some methods for a particular advocacy objective and targets. Remember that every case is different.

<b>Advocacy objective:</b>	To persuade managers of the 10 largest companies in the Andhra Pradesh state to end compulsory testing of workers and dismissal of HIV+ workers.	
<b>Direct targets:</b>	General managers of companies.	
<b>Indirect targets:</b>	Labour unions, boards of directors, personnel managers.	
<b>Method</b>	<b>Strengths</b>	<b>Weaknesses</b>
<b>Analysing and influencing legislation and policies or their implementation</b>	If analysis shows that a company's current practices are costing them money, this can be powerful evidence Beneficiaries can provide expertise	Criticism of policies could anger managers Not useful for managers who dislike formal policies
<b>Position paper or briefing note</b>	Suitable for presenting to senior directors and managers Useful background briefing for journalists Ensures that public statements by allies always agree	Can easily be lost among other paperwork Some managers do not like reading papers Difficult to involve beneficiaries
<b>Working from inside</b>	Some managers will listen more closely to people they know Many opportunities within labour unions	Limited opportunities in companies – all policy is made by managers and directors
<b>Lobbying or face-to-face meetings</b>	Opportunity to present 'human face' of the issue and to build a personal relationship Beneficiaries can explain their case directly	Managers often too busy to attend Board members not interested in the issue, and afraid of HIV+ people
<b>Presentation</b>	Opportunity to present the issue in a controlled way, direct to decision-makers Beneficiaries can speak directly	Managers often too busy Difficult to gain permission for presentation to board of directors
<b>Drama</b>	Emotional appeal works with some managers Suitable for mass meetings of labour unions Beneficiaries can advise on story, or perform	Some decision-makers will feel that drama is only for the illiterate Difficult to find opportunity to perform to managers or directors
<b>Press release</b>	Useful for organisations needing public support Useful to launch a campaign or for quick reaction to opposition or new developments Inexpensive	No use for companies who do not need/want public support Difficult to involve beneficiaries
<b>Media interview</b>	Same as for press release Useful at times when advocacy issue needs 'a human face' Inexpensive	Can have negative impact if the interviewee is not prepared or does not deliver message well Can be manipulated by journalists
<b>Press conference</b>	Same as for press release Good for presenting evidence, esp. case studies/examples Useful to launch a major campaign or for reaction to serious opposition or major new developments Easy to involve beneficiaries and allies, and give them public recognition	As for press release Requires high level of organisation Expensive

# Handout 7

## Methods of monitoring and evaluating advocacy work

**Monitoring** is the measurement of progress towards achievement of objectives, and noting which activities are going well and which are not.

**Evaluation** is about making judgements about quality and impact. Evaluation asks why some activities went well and others did not. It also looks at the impact of activities, on the people affected by the problem or issue, on the organisation and anyone else.

There are numerous ways of monitoring and evaluating our advocacy work. The same methods can be used in advocacy as in monitoring and evaluating other activities. Methods can be:

- **qualitative** (for example, case studies, stories, opinions, feelings)
- **quantitative** (for example, statistics, numbers).

When monitoring and evaluating, we need to agree on our definitions of success, i.e., agree on the signs that will show us whether the situation is improving or not – these signs are **impact indicators**. Well-written aims and SMART objectives often make it obvious what kinds of evidence (indicators) are needed. For example:

*Advocacy objective:* To stop police harassment of sex workers (SWs) in Ulaan Baator by November 2003

*Quantitative indicators:* Reduction in violence, extortion and arrests

*Qualitative indicators:* SWs do not fear police, police attitudes more positive.

People affected by the problem or issue are often the best people to choose indicators of success and monitoring and evaluation methods, and undertake the monitoring and evaluation.

**Monitoring methods** can be simple or complex, depending on indicators and resources. For example, they may include:

- ✓ keeping records of anecdotes and conversations with target audiences
- ✓ tracking when others have used your arguments or wording in their literature or presentations
- ✓ keeping significant letters and e-mails that have been received
- ✓ documenting and filing the messages that you have put out, number of meetings held, and invitations to contribute to the issue from key external parties
- ✓ carrying out surveys and interviews to determine the impact that your actions have made
- ✓ monitoring the media for mentions of your work.

Whatever methods you choose, try to only collect information that will be useful in relation to your indicators.

**Evaluating** your work does not need to be a complex process. It can be simply analysing, discussing and making judgements from your monitoring information. Here are some examples of questions that may be useful:

- ? Have you achieved your aim and objectives?
- ? Is the situation better than before? By how much? If not, do you need to change your aim and objectives?
- ? If you did not achieve what you set out to do, why not? What will you do differently next time?
- ? Are the people involved in the advocacy work happy with the results? With the process?

# Including advocacy in an organisation's work

## Section 3

### Contents

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### Introduction

**Aim:** To analyse the relationships between organisations and advocacy work

- This section is designed to help organisations bring together what they have learnt about advocacy, and what they know about their own organisation.
- Advocacy work should be an integral part of an organisation's broader work. It is important for organisations to understand how advocacy fits in with their overall mission and goals and to consider the kind of advocacy activities that would support the broader work of their organisation. It is important that NGOs/CBOs have a clear sense of what they can achieve through advocacy work.
- Organisations should assess the impact that advocacy might have on their staff, volunteers, supporters and activities. This self-examination can ensure that any advocacy work strengthens the organisation rather than causing conflict or diverting energy away from other essential activities.
- As with Sections 1 and 4, it may not be necessary to carry out all the activities in this section. Some may be more relevant than others, and some can be combined if appropriate or necessary.
- Where possible this section should be used by participants working with colleagues from their own organisation. If this is not possible, the participants can form mixed groups for support but they should reflect on their own organisation's situation when carrying out the activities.

## 3.1 Objective: By the end of this session participants will be able to identify current and potential advocacy activities which support their organisation's mission

### Introduction

- Many organisations do advocacy work as a natural part of their activities without recognising it as advocacy.
- If an organisation can identify the advocacy work they are already doing, it is often possible to plan and co-ordinate this work more effectively.
- If an organisation is not already carrying out advocacy work, careful thought can help establish how advocacy might contribute to an organisation's broader work and mission.

### Instructions

**Timing: 1 hour**

- 1 Introduce the topic and explain the objective of the activity.
- 2 Explain that the participants will be asked to consider the advocacy work they do now and advocacy work they could possibly do in future.
- 3 Ask the participants to work with colleagues from their own organisation where possible. Ask them to write their organisation's mission or goals at the top of a piece of flip-chart paper. Ask participants to look at the workshop definition of advocacy and consider the following question:
  - ? Is HIV/AIDS advocacy, at any level, currently part of your organisation's activities? Ask participants to draw a picture or diagram of their organisation's activities, showing any current HIV/AIDS advocacy activities – including those that may not have previously been recognised as advocacy.
- 4 Next, ask participants to think about possible future advocacy work on HIV/AIDS issues. Ask them to consider these questions:
  - ? How could advocacy help your organisation achieve its mission or goals?
  - ? What activities could be included that would do this?
 (The list of questions used in Section 2.1 may be useful here.)
- 5 Ask them to add possible advocacy activities to their drawing or diagram, and mark these activities to show they are possible future advocacy activities.
- 6 Ask participants to display their drawings or diagrams where everyone can see them, and invite them to look at each other's work. Invite them to write constructive (helpful) comments on other people's work, or use Post-Its.
- 7 Invite any questions or comments about any of the diagrams or feedback comments.
- 8 Lead a discussion with the whole group based on the following kinds of questions:
  - ? How does advocacy contribute to your organisation's mission or goals?
  - ? Is your organisation already doing advocacy but not calling it advocacy?
  - ? How does your current advocacy work involve people affected by the problem or issue? If not, why not?
  - ? If your mission includes capacity building, how can you build the capacity of other organisations, to enable them to do advocacy work?

## Facilitators' notes

- ! Remind participants of the different levels of advocacy (see Handout 2, 'Levels of advocacy', at the end of Section 1).
- ! If organisations do not have written and approved missions or goals, ask them to write a paragraph or sentence describing what they do instead.
- ! Point out that advocacy can be informal – for example, the Executive Director of an NGO sitting next to a government minister at a dinner, or home-based care volunteers trying to change the way the priest at their church preaches about HIV/AIDS.
- ! Consider whether there is time and value in each organisation presenting their drawing or diagram to the whole group. How else can they receive feedback about their work?
- ! Encourage participants to question whether some of their activities are 'advocacy' and ask the participants to help each other.
- ! If organisations do not have examples of previous advocacy work they have done, reassure them that they do not need to complete that part of the activity. They should not force examples that are not really advocacy work.
- ! It may be appropriate to combine Section 3.3 after this activity as a discussion rather than as a separate activity.

### Example of Activity 3.1: By an NGO based in Mexico

**Vivir Con Dignidad A.C. (Living with Dignity AC), Mexico**

**Mission:** *to increase the quality of life of people living with HIV/AIDS in the State of Yucatán.*



Reference: Adapted from a workshop on advocacy, International HIV/AIDS Alliance, Mexico, October 2000.

## 3.2 Objective: By the end of this session participants will be able to identify benefits, risks and strategies to reduce the risks involved in advocacy work on HIV/AIDS

### Introduction

- It is important to be aware of the impact that advocacy might have on an organisation's staff, volunteers, supporters and activities.
- Advocacy work, especially relating to HIV/AIDS, can cause problems for an organisation. Some self-examination in advance can ensure that any advocacy work strengthens the organisation rather than causing conflict or diverting energy away from other essential activities.
- Unexpected effects can include:
  - ✦ increasing the work of an organisation, for example when advocacy work is going well and is therefore time-consuming. The unplanned work can affect the availability of human, material and financial resources for the broader work of the organisation.
  - ✦ increased public profile through advocacy work can also change the values of an organisation. For example, when an NGO/CBO receives more publicity, it may become more competitive and choose to concentrate on issues that are easy to 'sell' to the public. This can cause problems for less 'popular' issues, which might receive less support from the organisation.
- Maintaining close relationships with vulnerable groups and remaining true to organisational missions can reduce many of the potential problems caused by advocacy work.

### Instructions

**Timing: 1 hour 30 minutes**

- 1** Introduce the topic and explain the objective of the activity.
- 2** Ask participants to work in small groups, EITHER with colleagues from the same organisation OR with participants from similar organisations.
- 3** Ask the participants to divide a piece of flipchart paper into three columns and write:
  - 'Benefits to our organisation from doing HIV/AIDS advocacy work'
  - 'Risks to our organisation from doing HIV/AIDS advocacy work'
  - 'Strategies to reduce the impact of the risks'.
 Ask participants to brainstorm the possible benefits and possible risks to their organisation from doing advocacy work, and strategies to reduce the impact of the risks.
- 4** While the groups are working on the exercise, distribute the following questions to ensure that the groups are addressing critical issues.
  - ? Who does advocacy within your organisation? Or who would do advocacy work?
  - ? Whose support do you need to initiate advocacy activities? Consider board members, donors, stakeholders or people affected by the problem or issue.
  - ? What impact could advocacy work have on your organisation in terms of staffing, job descriptions, resources, planning, external relations?
- 5** When the groups are finished, have them hang their work on the walls for the others to review. Ask participants to consider the following question while they look at other groups' work:
  - ? What are some of the common risks of HIV-related advocacy work and what strategies have been identified to deal with them?
- 6** Now facilitate a plenary discussion about these questions and other issues that have emerged from the activity. Ask the participants:
  - ? Does anyone have experience of advocacy affecting their organisations? What can we learn from our shared experience?

**Facilitators' notes**

- ! Participants can use a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) if they prefer, instead of a risk-benefit analysis.
- ! Make sure that participants develop realistic, practical strategies.

**Example of Activity 3.2: By an NGO based in Mexico**

Benefits, Risks and Strategies for advocacy work carried out by Unidad de Atención Sicológica, Sexologica y Educativa Para el Crecimiento Personal, A.C. (UNASSE)

<b>Benefits to our organisation from doing advocacy work</b>	<b>Risks to our organisation from doing advocacy work</b>	<b>Strategies to reduce the impact of the risks</b>
<ul style="list-style-type: none"> <li>✓ Help us to achieve our overall mission</li> <li>✓ Personal and organisational growth</li> <li>✓ PLHA strengthening and empowerment</li> <li>✓ Proactive participation of people living with HIV/AIDS</li> <li>✓ Knowing the way the state operates can help us in our field of action</li> <li>✓ Increase visibility of NGO work</li> <li>✓ Links with other organisations/ NGOs/local, national and international delegations</li> <li>✓ Having a voice</li> <li>✓ Makes the environment more favourable to work on sexuality, HIV/AIDS, human rights</li> <li>✓ Establishes local capacities for multisectoral collaboration</li> <li>✓ Saves, systematises and disseminates experience</li> <li>✓ Policy change leads to improved programming and circumstance for ourselves and other organisations and people</li> </ul>	<ul style="list-style-type: none"> <li>✗ Extra unplanned workload</li> <li>✗ Generates demands and/or expectations that may exceed our capacity</li> <li>✗ Causes conflict/criticism</li> <li>✗ Uncertainty of the impact</li> <li>✗ Takes time and human resources away from the internal work of the NGO</li> <li>✗ Risk of suffering attacks against NGO members and property</li> <li>✗ Having to respond to unforeseen situations</li> <li>✗ Friction with the state and other actors</li> <li>✗ Loss of organisational focus</li> <li>✗ Alienation of existing support by becoming overtly political</li> <li>✗ Creation of an internal elite of advocates</li> </ul>	<ul style="list-style-type: none"> <li>• Devote human and economic resources to advocacy actions</li> <li>• To clearly identify the actions we can undertake and to recognise our limitations</li> <li>• Training to evaluate and research impact</li> <li>• Co-ordination with others</li> <li>• To choose and prioritise issues, alliances and partners in order to optimise time, resources and consultation</li> <li>• Generate funding that will enable security systems to be put in place</li> <li>• To clarify the organisation's mission and agree on how advocacy can contribute to achieving it</li> <li>• Consider the affect advocacy work might have on other aspect of the organisation such as fundraising, human resources, etc.</li> <li>• Don't get involved in every opportunity – be focused and judge according to impact</li> <li>• Access advocacy training and ensure that time is allocated for good planning to make advocacy worthwhile</li> </ul>

Reference: Adapted from a workshop on advocacy, International HIV/AIDS Alliance, Mexico, October 2000.

### 3.3 Objective: By the end of this session participants will be able to identify at least three actions they can take to ensure that advocacy is integrated into their organisation's work

#### Introduction

- Having ensured that advocacy work is appropriate to the organisation, and will contribute to the organisation's overall mission (Section 2), a final and vital step in planning advocacy work is ensuring that it is integrated into a NGO's/CBO's organisational plans.
- Integrating advocacy into the organisation's work means that it is included in the organisation's workplans, budgets, overall organisational monitoring and evaluation work, etc.
- Integration of advocacy work can ensure that it supports the other work of an NGO/CBO, and that it is accepted as an important function of the organisation.

#### Instructions

**Timing: 1 hour 30 minutes**

- 1 Explain the objective of the activity.
- 2 Begin with a whole group discussion based on these kinds of questions:
  - ? Should advocacy be an integrated part of an organisation's work, rather than being separate?
  - ? How can we ensure that advocacy is an integrated part of our work – not just in theory, but also *in practice*?
  - ? How can you advocate within your organisation for a particular issue to be addressed? Or how can you 'advocate for advocacy'?
  - ? Why might there be barriers to doing advocacy in your organisation? How can you overcome any barriers?
  - ? How should new advocacy work be included in an organisation's strategic or overall workplan? For example, can you do it now, or should you wait until the start of the next planning cycle?
- 3 Ask participants to work in small groups, EITHER with colleagues from the same organisation OR with participants from similar organisations. Invite participants to produce a plan for how they will integrate advocacy into their organisation. Suggest these guide questions:
  - ? Who in our organisation needs to be involved in planning advocacy work?
  - ? How will we 'advocate for advocacy'?
  - ? How does advocacy support our mission statement?
  - ? How can we include advocacy in our organisation's workplan, budget, evaluation plan, job descriptions, etc.?

## Facilitators' notes

- ! If time is short, this activity can be combined with Activity 3.1.
- ! Encourage participants to use their work from Activity 3.1, if they have done that activity.
- ! Support participants to think of creative ways to encourage ownership of their advocacy plans among colleagues. These might include creating systems for staff to contribute to decision-making processes in the organisation.
- ! Refer participants to the benefits of advocacy work they identified in Activity 1.2 ('Why do we advocate?') to assist them in advocating for advocacy in their organisations.
- ! Encourage participants to truly *integrate* their advocacy work into their organisational plan, rather than simply 'adding it on to the end'.
- ! Encourage participants to think of the easiest way to integrate their advocacy work – so that the process does not become too lengthy or complex.

### Example of Activity 3.3: By NGOs based in Zimbabwe

Example: Plan to increase integration of advocacy into Zimbabwe AIDS Network (ZAN) Secretariat's work

Timeframe	Activity	Persons responsible
July	Meeting of ZAN Secretariat to gain consensus on advocacy	Nadja and Zinzile
July	Write advocacy activities into next year's workplan	Kate, Nadja, Task Force
July	Include budget for advocacy in ZAN's funding proposal to AUSAID (donor)	Kate, Nadja, Task Force
August	Meeting between Secretariat and National Task Force to gain consensus on advocacy	Nadja and Eliot

Example: Plan to integrate advocacy into Matabeleland AIDS Council

Timeframe	Activity	Persons responsible
July	Workshop for staff and board, to mainstream advocacy work into MAC and share advocacy skills	Tshuma MAC director
September	Three-year strategic planning exercise: ensure advocacy is included in strategic plan	Tshuma
Jan	Include advocacy in MAC's capacity building with individual CBOs	

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

*Your Notes*

# ‘Advocacy in Action’ Cards – for developing practical advocacy skills

## Section 4

### Contents

- Card 1** Analysing and influencing legislation or policies
- Card 2** Preparing a briefing note or position paper
- Card 3** Working from inside the system
- Card 4** Lobbying or face-to-face meetings
- Card 5** Writing and delivering a presentation
- Card 6** Persuading through drama
- Card 7** Writing and using a press release
- Card 8** Carrying out a media interview
- Card 9** Preparing a press conference

### Introduction

**Aim:** To improve practical skills used to carry out advocacy work

- This section covers some of the most common and important methods and skills necessary for doing advocacy work. It is linked to Step 7 of the advocacy planning framework.
- The section is made up of a series of four-page ‘Advocacy in Action’ Cards. Each card addresses a different advocacy method and follows the same format:
  - Introduction
  - Advantages and Disadvantages of the method
  - Skills-building Activity which can be used to learn and practise the skill
  - ‘How to...’ guide
  - Advice (‘Try to...’ and ‘Try not to...’ tips).
- The Alliance toolkits **Pathways to Partnerships** and **Documenting and Communicating HIV/AIDS Work** also have skills-building activities on topics which can help advocacy work, particularly at the local level.
- The skills-building activities in this section can be mixed in with the activities in the planning section (Section 2) to give variety.
- The best way to learn skills is to practise them. So, if possible, plan these sessions to allow every participant to practise the skill.
- It is important to draw on the experience of the participants as much as possible so that they can share experiences. It will also ensure that the sessions are relevant to their situation and be a good balance to group work.
- Depending on the skills level of the participants, you could ask them to facilitate the skills-building sessions using these Advocacy in Action Cards.
- Alternatively, some may be able to give a short talk on what they found useful/difficult/challenging about a method they have used, and any advice they would like to share with the whole group. Find out before the workshop which participants would be willing to share their experiences and ask them to prepare a 10-minute talk to include the following information:
  - ? What was successful about using the advocacy method?
  - ? What did not go well?
  - ? What five pieces of advice would you like to share with the whole group?
- For the media work skills (interviews, press releases and press conferences) you could invite a journalist to come and talk to the group as well as carrying out skills-building activities.

***Your Notes***

# Other advocacy resources



**“A” Frame for Advocacy**, Population Communication Services, Johns Hopkins School of Public Health, USA. Available at: <http://www.jhuccp.org/pr/advocacy/index.stm>

**Advocacy and Activism, Sexual Health Exchange 2000/4**, Royal Tropical Institute (KIT), PO Box 95001, 1090 HA, Amsterdam, The Netherlands [www.kit.nl/ibd/html/exchange.htm](http://www.kit.nl/ibd/html/exchange.htm)

**Advocacy for Policy Change Versus Advocacy for Profile**, Atkins, A., paper for National Council of Voluntary Organisations, May 2000.

**Advocacy Manual** (draft), ActionAid, London, 2000. [www.actionaid.org](http://www.actionaid.org)

**Advocacy Sourcebook, Frameworks for Planning, Action and Reflection**, Miller, V. & Covey J.G., Institute for Development Research, 1997.

**Advocacy Study Pack**, Tearfund Case Study Series, 1999. [www.tearfund.org](http://www.tearfund.org)

**Advocacy Tools and Guidelines: Promoting Policy Change - A Resource Manual for CARE Program Managers**, Sprechmann, S. & Pelton, E., CARE, January 2001.

**Amnesty International Campaigning Manual**, Amnesty International Publications, London, 1997. [www.amnesty.org](http://www.amnesty.org)

**An Advocate’s Guide to the International Guidelines on HIV/AIDS and Human Rights**, International Council of AIDS Service Organizations (ICASO), 1997. [www.icaso.org](http://www.icaso.org)

**An Introduction to Advocacy: A Training Guide**, Sharma, Ritu, R., Support for Analysis and Research in Africa (SARA), Academy for Educational Development, Health and Human Resources Analysis for Africa (HHRAA) USAID Africa Bureau, Office for Sustainable Development. Also available at: [http://www.sit.edu/global\\_capacity/gpdocs/training/advocacy\\_sara.html](http://www.sit.edu/global_capacity/gpdocs/training/advocacy_sara.html)

**Atelier sur le Plaidoyer**, IPC/Burkina Faso, International HIV/AIDS Alliance & ICASO, October 1999. Workshop report.

**Campaigning...the A to Z of Public Advocacy**, Wilson, D., Hawksmere Ltd., 1994.

**Campaigns**, Resource Kit No.3, Disability Awareness in Action, 1993. Individual copies free from 11 Belgrave Road, London SW1V 1RB.

**Consultation and Influence**, Resource Kit No.2, Disability Awareness in Action, 1993. Individual copies free from 11 Belgrave Road, London SW1V 1RB.

**External relations and advocacy workshop report**, National AIDS/STD Prevention and Control Program (NASPCP) and the Philippine HIV/AIDS NGO Support Program (PHANSuP), International HIV/AIDS Alliance, 2000. [www.phansup.org](http://www.phansup.org)

**External Relations Training Programme 111**, An Advocacy Workshop, a process and output report, International HIV/AIDS Alliance, November 1998.

**HIV/AIDS NGO/CBO Support Toolkit**, International HIV/AIDS Alliance, 2002. Website and CD-ROM which can be accessed at [www.aidsalliance.org](http://www.aidsalliance.org)

**Making a Difference: NGOs and Development in a Changing World**, Edwards, M. & Hulme, D. (eds.). Earthscan, London, 1992.

**Making Prevention Work, Global Lessons Learned from the AIDS Control and Prevention (AIDSCAP) Project**, 1991-1997. Available at:  
<http://www.fhi.org/en/aids/aidsicap/aidspubs/special/lessons/chap4.html>

**Making the Connection: Legitimacy claims, legitimacy chains and Northern NGOs' International Advocacy**, Hudson, A., paper. [www.alanhudson.plus.com](http://www.alanhudson.plus.com)

**Managing Partnerships**, Ros Tennyson, PWBLF, 1998.

**Networking for Policy Change: An Advocacy Training Manual**, The POLICY Project. The Futures Group International, October 1999. [www.tfgi.com](http://www.tfgi.com)

**Pathways to Partnerships Toolkit**, International HIV/AIDS Alliance, 1999.  
[www.aidsalliance.org](http://www.aidsalliance.org)

**Positive Development**, Global Network of People Living with HIV and AIDS (GNP+)/Healthlink Worldwide, 1998 (single copies free). [www.gnpplus.net](http://www.gnpplus.net) and [www.healthlink.org.uk](http://www.healthlink.org.uk)

**Positive participation, consulting and involving young people in health-related work: a planning and training resource**, Cohen, J. & Emanuel, J., Health Development Agency, 1998.

**Training for Transformation, Book 4**, Hope, A. & Timmel, S., Mango Press, Zimbabwe, 2000.

# Additional websites with useful information on advocacy

## **Advocacy for people living with HIV/AIDS, by John Cebuhar, American Counseling Association**

[www.counseling.org/conference/advocacy4.htm](http://www.counseling.org/conference/advocacy4.htm)

## **AIDS vaccine advocacy coalition**

[www.avac.org](http://www.avac.org)

## **Alan C. Hudson, Faculty of Social Sciences, The Open University**

[www.alanhudson.plus.com](http://www.alanhudson.plus.com)

Useful material on NGOs and legitimacy concerns around advocacy work. Good bibliography and source list.

## **Canadian HIV/AIDS Legal Network**

[www.aidslaw.ca](http://www.aidslaw.ca)

Contains useful contacts on advocacy and resources globally.

## **Family Health International**

[www.fhi.org](http://www.fhi.org)

## **HIV/AIDS Advocacy Network**

[www.sfaf.org](http://www.sfaf.org)

Includes a Grassroots Advocacy and Community Organizing Manual for HIV/AIDS with sections on grassroots advocacy, elements of a successful grassroots campaign and a skills section with examples of possible meeting scenarios, samples of letters, press materials, etc.

## **International Council of AIDS Service Organizations, ICASO**

[www.icaso.org](http://www.icaso.org)

This includes:

- ♦ ICASO position statements,
- ♦ NGO Summary of the International Guidelines on HIV/AIDS and Human Rights
- ♦ An Advocate's Guide to the International Guidelines on HIV/AIDS and Human Rights
- ♦ Advocacy Guide to the Declaration of Commitment on HIV/AIDS
- ♦ HIV/AIDS and Human Rights – Stories from the Frontlines (June 1999)

## **National AIDS Treatment Advocacy Project (NATAP)**

[www.natap.org](http://www.natap.org)

Provides the latest in HIV and AIDS drug research and treatment information.

## **Project Inform**

[www.projinf.org](http://www.projinf.org)

Has a good advocacy page on HIV/AIDS issues.

# Advocacy in Action Card 1

## Analysing and influencing legislation or policies



### Introduction

The skill of understanding the effects of a policy or law, or their implementation, is essential for advocacy work. This skill can be used by advocates working both inside the decision-making system (for example, members of committees) as well as outside.

Analysis of legislation or policy that could affect you, your members or your beneficiaries is important so that you can advocate for its improvement or implementation. Legislation and policies might include:

- Draft or proposed policies
- New policies
- Long-established policies.

Of course, not all policies and legislation are written – for example, there are traditional laws and customs, or decisions made and communicated without being written down. If, however, their design and implementation is influenced by powerful individuals or groups, then like written policies and legislation, they can be challenged through advocacy. These kind of policies and practices also require analysis. However, it is harder to analyse unwritten policies or legislation because there may be disagreement about what the policy is.

Advocates should try to:

- 1** Agree on what the policy or law is, or on how it is implemented (necessary for unwritten policies and laws, and for analysis of implementation).
- 2** Analyse the policy or legislation, or its implementation.
- 3** Suggest how it can be improved.
- 4** Suggest how it can be implemented better.

Analysis usually involves obtaining and analysing draft policies, new policies or long-established policies, which can be long and boring documents! However, the skill of understanding such documents can be learned and improved with practice. It is essential to involve people affected by the policy or law or its implementation – they are the ‘experts’. Participatory methods such as drama or cause-and-effect flowcharts can assist in identifying negative impacts and suggesting solutions.

### Advantages

- ✓ It uses the expertise of NGOs /CBOs in understanding how the lives of ordinary people are affected.
- ✓ It can encourage decision-makers to work more closely with NGOs/CBOs in future.
- ✓ Changes brought about by advocacy can affect many people – therefore changing them for the better may have a relatively large impact compared to working with people in a more direct way.

### Disadvantages

- ✗ Technical jargon and official documents can frighten many people away from participating in this method.
- ✗ It can be difficult and time-consuming.
- ✗ Even constructive criticism can offend policy-makers if policies have taken a long time to develop or are politically sensitive; this can impact negatively on the organisation.

# Skills-building activity

**Objective:** By the end of this session participants will be able to identify at least three questions which are useful for analysing and influencing policy or legislation

**Preparation time:** 2 hours

**Resources:** example of policy or legislation (can be anything from one sentence to one page); 'How to...' Handout

## Instructions

**Timing: 1 hour**

- 1** Introduce the topic, and explain the objective of the activity.
- 2** Ask participants to give examples of policy and legislation at local, national and international level – written or unwritten.
- 3** Ask participants why analysing legislation or policy is a useful skill for advocacy.
- 4** Divide participants into groups of three or four people.
- 5** Give each pair a copy of a legislation or policy document.
- 6** Ask participants to read the document to each other, and use the 'Questions to ask when reading public policy or legislation' (on the back page of this card) to review its content. Encourage them to add any other questions they think are useful.
- 7** Ask participants to write down any questions or areas where more information is needed to help them understand the legislation or policy.
- 8** Bring participants together in the whole group. Use these questions for discussion:
  - ? How did you find the process of analysing the legislation or policy?
  - ? Which individuals, groups and institutions are affected by this policy/legislation? How can you involve them in analysing it, to increase your legitimacy?
  - ? What are the differences between analysing written and unwritten policies and decisions?
  - ? At what stage in the advocacy process is policy and legislation analysis a useful skill?
  - ? What advocacy methods can you use to influence the policy or legislation you have been analysing?

## Facilitators' notes

- !** The first four 'Questions to ask...' are the most important. Do not worry if there is no time to use all the other questions.
- !** If participants are analysing unwritten laws or policies, they will first need to agree on what the law/policy/tradition says.
- !** If participants are analysing the implementation or lack of implementation of a policy or law, you may need to rephrase the analysis questions for them.
- !** You may want to ask some pairs to do a different activity – preparing some advice (for example, 'Try to...' and 'Try not to...' tips) for analysing and influencing policy or legislation.

### **Example: Analysing legislation and policy**

Section 6.6 of the Zimbabwean National HIV/AIDS policy makes wilful transmission of HIV/AIDS a criminal offence.

#### **Who benefits from this legislation or policy?**

Negative partners of people living with HIV/AIDS who know their status  
Married people, women and children (vulnerable groups in general)

#### **Who loses?**

Infected people who know their status

#### **How does the legislation or policy affect marginalised groups?**

It is not protective of married women and children who are abused sexually  
It gives women the right to say NO!  
It can create methods of supporting victims – for example, raped children  
It puts infected people more outside society

#### **Is this something ordinary people will understand?**

It is difficult for people to understand because of myths and cultural issues  
NO. There was no education after the launch of the policy. Ordinary people do not have the skills to analyse policies.

*Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.*

### **Advice**

- ✓ **Try to** consult or involve people affected by the policy or legislation.
- ✓ **Try to** be positive about the good parts of the policy or legislation.
- ✓ **Try to** ask for a meeting with decision-makers to present and explain your analysis.
- ✓ **Try to** only respond to policies and legislation when you have something concrete to say – this will help maintain or gain credibility for your organisation.
- ✓ **Try to** use the decision/policy-makers' language when putting your points of view across, and support your statements with facts and evidence where appropriate.
- ✓ **Try to** offer solutions when analysing the policy or legislation.
- ✓ **Try to** develop contacts or allies who can show you draft policies and legislation.

- ✗ **Try not to** analyse a policy or legislation if you don't understand the issue.
- ✗ **Try not to** suggest that the decision/policy-makers may have any improper motives.
- ✗ **Try not to** criticise policies or legislation for individuals' personal reasons.

# How to...analyse legislation or policy

## **Introduction**

The first step in analysing and influencing a piece of legislation or policy is to understand what it is actually saying and consider whether it can be improved.

## **Questions to ask when reading public policy or legislation**

The following list of questions may help you analyse a policy or legislation:

- 1** Who benefits from this legislation or policy (if anyone)?
- 2** Who loses (if anyone)?
- 3** What will be the consequences five years from now of enforcing this?
- 4** How does the legislation or policy affect marginalised groups?
- 5** Is this something ordinary people can understand?
- 6** Who supports this law/policy, and why?
- 7** How did this issue first come to the notice of decision-makers?
- 8** What is the financial cost?
- 9** Can it be enforced? If so, by whom, and how?
- 10** What is the penalty if you don't obey this law/policy?
- 11** Does the law/policy violate the UN Declaration of Human Rights or any other convention signed by your country?
- 12** Is the law/policy consistent with your own country's Bill of Rights and/or Constitution?

*Reference: Adapted from **Training for Transformation, Book 4**, by Anne Hope and Sally Timmel, Mango Press, Zimbabwe, 2000.*

**NOTE:** When using these questions to analyse unwritten laws or policies, begin with this question:  
**? What does the unwritten law/policy/tradition say?**

## **How to use your analysis to influence legislation and policy**

Once the answers to these question have been agreed you need to act by writing a position paper to the policy-makers, sending a press release to the media, organising a meeting or giving a presentation, etc. All these forms of advocacy are covered by other Advocacy in Action Cards within the toolkit.

# Advocacy in Action Card 2

## Preparing a briefing note/ position paper



### Introduction

A briefing note and a position paper are both documents that clearly state the position or opinion of an organisation (or a coalition of organisations) about a particular issue. The message of these documents is: 'This is what we think about this topic, and this is what we recommend'. They are different from a press release, which is written specifically for a media audience.

There are different definitions, but this toolkit makes the following distinction between the two, based on who the audience is:

A **position paper** is written to be read by a target, not an ally. It is a formal written record of the position (opinion) of an organisation or coalition, for an external audience. Position papers can:

- Be left with an individual decision-maker at the end of a face-to-face meeting, to summarise the main points of your message
- Be sent to local and national governments during consultation exercises
- Be sent to people in influence, in response to a policy or action, to explain an alternative or supporting position
- Summarise the resolutions of a conference or workshop
- Show that a coalition of many different allies supports your advocacy objective
- Be given to delegates or members of a committee at the beginning of a meeting or conference – whether or not you are allowed to speak at the meeting.

A **briefing note** is written for an ally, not a target. It is similar to a speaker's notes, to help someone who is speaking publicly in support of your advocacy objective. Often a briefing note is a position paper with additional advice to the speaker – for example, how to answer questions, or key points to emphasise. A briefing note can:

- Be written by a programme officer involved in advocacy work, to assist the executive director in supporting the advocacy objective at a high-level meeting
- Summarise the agreed advocacy objectives and messages of a coalition, to ensure that all members of the coalition give a consistent message.

### Advantages

- ✓ Briefing notes and position papers are a good way to provide clear documentation of our points for external audiences.
- ✓ They reduce distortion or misinterpretation of our positions.
- ✓ They are a way of contributing to decision-making processes – for example, as a way of delivering your analysis of policies or legislation to people in positions of influence.
- ✓ They help to identify allies based on the reaction to your position paper/briefing note.
- ✓ They can build consensus on policies inside the organisation.

### Disadvantages

- ✗ Briefing notes and position papers commit the organisation to a certain position; an organisation can change its mind – but it cannot deny what its position was in the past.
- ✗ They are only as up-to-date as the last time they were edited/written, but they may still be in use long after you have changed your position.
- ✗ It is sometimes difficult and time-consuming to involve beneficiaries in writing position papers – but not doing so can make our work less representative.
- ✗ They can be misinterpreted if you are not there to explain them.
- ✗ They can be ignored.

# Skills-building activity

**Objective:** By the end of this session participants will be able to explain the purpose and format of a position paper and a briefing note

**Preparation time:** 2 hours

**Resources:** Copies of 'How to...' Handout

## Instructions

**Timing: 1 hour 30 minutes**

- 1 Introduce the topic and explain the objective of the activity to the participants.
- 2 Ask participants to explain what a briefing note and position paper are, and their purpose. Clarify if necessary.
- 3 Ask the participants to work in small groups (maximum five people).
  - Ask some groups to write a briefing note for the chair of their board or governing body, to assist them in speaking at an HIV/AIDS policy conference.
  - Ask other groups to write a position paper calling for the implementation of an existing policy which is related to HIV/AIDS work.

Make sure participants have a specific issue and target. Give the participants a copy of the 'How to...' section of the card to help them.

- 4 Ask the groups to write their documents by starting with brief bullet points for structure and filling in the details at a later stage.
- 5 Ask one group to present their position paper and one to present their briefing note.
- 6 Lead a discussion based on the following questions:
  - ? How could these documents be improved?
  - ? How clear is the difference between a briefing note and a position paper?
  - ? How can you involve the people affected by the issue in contributing to your briefing note or position paper?
  - ? What have you learned from this activity?

Encourage participants to discuss any experiences of writing and using briefing notes and position papers.

## Facilitators' notes

- ! Try to prevent the participants getting into a debate about the difference between a briefing note and a position paper. What they are called does not matter as much as participants being able to brief someone effectively and write their position clearly.
- ! You can save time by identifying in advance the advocacy issue for each group, and the target decision-maker – for example, promotion of voluntary counselling and testing, targeting the head of provincial health services.
- ! Instructions for the group writing a position paper are designed to show that we can advocate for the *implementation* of policies, as well as the introduction of policies and changes to policies. Ask the position paper group to pretend they agree with the policy, or find a policy you think they will support. If this is not appropriate, ask them to write a position paper challenging an existing policy.
- ! You may want to ask some pairs to do a different activity – preparing some advice (see 'Try to...' and 'Try not to...' tips) for writing a position paper or briefing note.
- ! Explain to the participants that the process of developing a briefing note or position paper can help an organisation to clarify its point of view on an issue internally. Briefing notes and position papers are also a good way of ensuring consistency on issues through the organisation and over time. They are a useful means of documentation and provide a historical record of an organisation's position on issues.

### Example: Preparing briefing note and position paper

#### Headings for a position paper on compulsory HIV testing of sex workers (SWs)

- 1 Statement of main recommendation:** Compulsory testing does not promote public health and violates human rights and civil liberties.
- 2 Background:** Explanation of why the position paper has been written. List of laws, international treaties, policies, etc., that support the recommendation.
- 3 Evidence supporting the recommendation:**
  - a) Quantitative evidence:** Facts and figures showing that compulsory testing:
    - does not reduce HIV transmission
    - can increase transmission through negative impact on health care and education of sex workers.
  - b) Qualitative evidence:** Case studies, personal testimonies, anecdotes or examples describing the negative impact of compulsory testing on individual SWs and clients.
- 4 Our position:** Logical explanation of how the evidence leads to the recommendations. Answers to possible questions or objections.
- 5 Recommendations:** Specific, realistic actions that the decision-maker can take, i.e., stop compulsory testing, increase education and access to health care.
- 6 Organisations and individuals supporting this position paper.**

Reference: Adapted from an advocacy workshop, the International HIV/AIDS Alliance, Philippines, November 1998.

### Example: Using position papers to influence government policy, Kenya

In Kenya, recommendations from position papers prepared by the Kenya AIDS NGO Consortium (KANCO) were incorporated into the government's 1997 Sessional Paper on AIDS, the country's first comprehensive national policy on HIV/AIDS.

KANCO's position papers made eight policy recommendations, based on issues, opinions and experiences developed in a national consultation exercise. NGO personnel, religious leaders, civil servants and policy-makers were all consulted.

The position papers were given to members of the government-appointed subcommittees who drafted the Sessional Paper. As a result of this collaboration between KANCO and the Ministry of Health, all eight priority issues were addressed in the final document.

Reference: *Making Prevention Work, Global Lessons Learned from the AIDS Control and Prevention (AIDSCAP) Project 1991-1997.*

### Advice

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>✓ <b>Try to</b> use appropriate language for your target audiences.</li> <li>✓ <b>Try to</b> tailor your position paper/briefing note to a particular audience for a particular reason.</li> <li>✓ <b>Try to</b> give full references of any research or information quoted.</li> <li>✓ <b>Try to</b> be brief and to the point.</li> <li>✓ <b>Try to</b> ask others for ideas before writing.</li> <li>✓ <b>Try to</b> make sure the appropriate people have been consulted.</li> <li>✓ <b>Try to</b> ensure that everyone in the organisation understands the position the organisation is taking.</li> <li>✓ <b>Try to</b> read it carefully for mistakes before sending or using it.</li> </ul> | <ul style="list-style-type: none"> <li>✗ <b>Try not to</b> distribute a position paper that contradicts what you have said.</li> <li>✗ <b>Try not to</b> include the words 'advocating' or 'advocacy'.</li> <li>✗ <b>Try not to</b> include irrelevant information.</li> <li>✗ <b>Try not to</b> waffle – make clear points and highlight them with bullet points.</li> <li>✗ <b>Try not to</b> quote people without their permission or break confidentiality in case studies.</li> <li>✗ <b>Try not to</b> use abbreviations unless necessary.</li> </ul> |
|--|---|

# How to...produce a briefing note/position paper

## *Position paper*

Ideally a position paper should be written in full sentences and typed neatly. Follow the format for policy documents used in the target organisation, if you know it. Otherwise, use the format below. It should include:

- 1 Statement of main recommendation:** One to two sentences.
- 2 Background:** Explanation of why the position paper has been written. List of laws, international treaties, decrees, policies, etc., which support the recommendation.
- 3 Evidence supporting the recommendation:** (see Step 2 of planning framework.)
- 4 Quantitative evidence:** Facts and figures.
- 5 Qualitative evidence:** Case studies, personal testimonies, anecdotes or examples supporting the recommendation. Ask for permission from individuals quoted, to protect confidentiality.
- 6 Our position:** Logical explanation of how the evidence leads to the recommendations. Answers to possible questions or objections.
- 7 Recommendations:** Specific, realistic actions that the decision-maker can take.
- 8 Organisations and individuals supporting this position paper.**
- 9** The name of your organisation or coalition, and logo if appropriate.
- 10** The date.
- 11** A contact name, address, telephone and fax number, and e-mail address, where available.
- 12** The mission/goals of your organisation or coalition.

## *Briefing note*

This document will only be seen by individuals within your organisation, or within your advocacy alliance, to assist them in delivering advocacy messages. Therefore it is acceptable to write notes instead of full sentences, and to use bullet points. Follow the same format as above, but also:

- Emphasise the most important points – for example, using bold type/underline or a coloured pen.
- Suggest possible strategies, tactics, minimum demands that cannot be compromised.
- Include possible questions that might be asked, and suggested answers.
- Include problematic issues that might arise, and suggest how to deal with them.

## *General advice*

- Briefing notes and position papers should be as short as possible. People are less likely to read them if they are too long.
- Do not assume that the reader knows the subject well – make sure that sufficient background information is included for the reader to understand the issue without needing to carry out additional research. Try to keep this information concise.
- Separate fact from opinion. Provide supporting evidence to back up facts, and write opinions as quotes where appropriate.

# Advocacy in Action Card 3

## Working from inside the system



### **Introduction**

One of the most effective steps for influencing change is to work from 'inside the system' – by participating in decision-making bodies. This can be very useful, but it is not easy. There is a danger of being used as a 'token' representative.

Decisions affecting your advocacy issue or problem are made in many different fora, i.e., local council committees, sub-committees and working groups, joint committees between different public services (for example, health and education, advisory committees to government ministries), trade associations, company boardrooms, trade unions, committees of religious leaders, school boards of governors, district health committees, employment tribunals, social welfare committees – and many more.

It is important to know how and where the decisions are made. The next step is to learn how people can take a seat at the table in these meetings and to influence their decisions. Are representatives elected, selected or co-opted?

It is also important to take full advantage of any official positions already enjoyed by members of your organisation or coalition.

A representative needs to be well prepared, focused and supported by those who you represent and are accountable to.

#### **Advantages**

- ✓ You can influence decisions in a sustained, long-term way.
- ✓ It is often easier to have an influence 'inside the system' than outside it.
- ✓ You can gain access to more information, to see realistic ways to influence change.
- ✓ It is a great opportunity to build relationships with decision-makers
- ✓ Your organisation can gain more respect and credibility.

#### **Disadvantages**

- ✗ Some decision-making bodies are not open to change.
- ✗ You may feel isolated.
- ✗ You will be associated with decisions with which you may disagree.
- ✗ The decision-making body may have different values to the values of your organisation.
- ✗ You may be encouraged to identify more with the decision-makers than with the people you represent.

# Skills-building activity

**Objective:** By the end of this session participants will be able to identify key skills of effective representation for working from inside the system

**Preparation time:** 2 hours

**Resources:** 'How to...' Handout

## Instructions

**Timing:** 1 hour 30 minutes

- 1** Introduce the topic and explain the objective of the activity to the participants.
- 2** Invite participants to describe their experiences of participating in decision-making bodies – for example, committees, standing conferences, company boards of directors, committees of trade unions or professional associations, religious bodies, etc.
  - ? How easy is it to raise HIV/AIDS issues as a member of these bodies?
- 3** Explain that participants will be role-playing a committee meeting in which one person is representing an NGO or CBO involved in HIV/AIDS work. HIV/AIDS is not the main focus of the committee's work. The task for that representative is to persuade the committee to take action in support of an advocacy objective.
- 4** Ask participants to form small groups of five to seven people, to practise a five-minute role-play. Ask at least one group to show a bad example, and at least one group to show a good example, of advocating in a committee meeting. If appropriate, give the participants a copy of the 'How to...' part of this card to help them.
- 5** Ask one group to present their bad example, and one to present their good example.
- 6** After the presentations, lead a discussion on taking part in decision-making bodies, using the following kinds of questions:
  - ? What were the differences between the two meetings we saw?
  - ? What are the main barriers to raising an advocacy issue in a meeting of a decision-making body? What strategies can overcome those barriers?
  - ? What are the advantages of choosing a representative who is directly affected by the issue or problem?Invite any other comments or experiences of face-to-face advocacy.
- 7** If there is time, ask the group to make a list of advice for advocacy work from 'inside' the decision-making system.

### **Example: Working from inside the system**

#### **Seat on sub-committee helps Kenyan NGOs input into national policy**

The director of a Kenyan NGO coalition was given a seat on a Ministry of Health sub-committee during the development of the country's first comprehensive national policy on HIV/AIDS.

The Kenya AIDS NGO Consortium (KANCO) worked closely with the various Ministry of Health sub-committees to inform their members and to advocate for the consortium's recommendations. Allan Ragi, the Director of KANCO, even represented KANCO as a member of the sub-committee responsible for the strategies and interventions section of the national policy.

As a result of this collaboration between the consortium and the government, all of KANCO's eight priority issues were addressed in the final document, adopted in 1997.

*Reference: Making Prevention Work, Global Lessons Learned from the AIDS Control and Prevention (AIDSCAP) Project 1991-1997.*

### **Advice**

- ✓ **Try to** prepare before a meeting, by going through the agenda and planning what to say.
- ✓ **Try to** use facts and figures, personal testimony and other evidence to support your points.
- ✓ **Try to** report back to the people you represent, soon after the meeting.
- ✓ **Try to** get to know other committee members.
- ✓ **Try to** assist the committee in its work – they will be more likely to support your proposals.

- ✗ **Try not to** follow personal/political objectives at the expense of the people who you represent.
- ✗ **Try not to** keep your seat on a committee if you no longer have time to attend meetings – let someone else use that valuable opportunity.
- ✗ **Try not to** 'ambush' committee members with surprise controversial proposals unless you are sure it is the best tactic.

# How to...produce a briefing note/position paper

## ***Find out where and how decisions are made***

- Make a list of all the decision-making bodies you know that could possibly be relevant to your advocacy issue (this could be similar to a list of advocacy 'targets'). Include central and local government bodies, NGO sector, business, professional associations, religious organisations – don't rule anything out.
- Find out how to join each decision-making body – are members selected, elected or co-opted, or how many shares in a company do they need to buy?
- Nominate or suggest your representatives for relevant bodies.

## ***Make the most of opportunities***

List all decision-making bodies on which your organisation or coalition is represented. Ensure that these positions are being fully used for your advocacy objective.

## ***Choose good representatives***

Select representatives carefully. If possible, they should have direct experience of the advocacy issue or problem, and should be reliable and confident.

## ***Support the representative***

- Support the representative to speak for the best interests of other people affected by the issue or problem. This will put them in a stronger position in meetings, when they can confidently speak on behalf of ten, one hundred or thousands of people affected by the same issue, rather than speaking only as an individual.
- Hold support meetings before the committee, agreeing key points for your representative to make and gathering supporting information.
- Hold debriefing sessions after meetings.
- Representatives should report back regularly to the people who chose them.
- Ensure that representatives on committees, boards, etc., are treated in the same way as other members – for example, financially or in terms of decision-making powers.
- Provide training in assertiveness, negotiation and the issues of the committee.

## ***Using your role on decision-making bodies***

- Being a member of a committee or other decision-making body is a long-term form of advocacy. It takes time to understand how the body works, to build relationships with members and to inform and persuade them about your advocacy objective.
- The decision-making body is an advocacy target, and therefore needs to be researched. What is its mission? Who are the other members? How does it function? How is it influenced? What are its limitations?
- Learn what are the primary issues for the other members of this group. Offer to assist them with their issues. Find areas of agreement, on which to build trust.
- Get to know the other members. Each person is an advocacy 'target' who needs to be persuaded. You will also feel more confident if you know the other people.
- Avoid areas of disagreement or conflict among group members if possible. Try not to be seen as supporting one side or another.
- Represent fairly the people who chose you.
- Often it is necessary to compromise to reach a decision. Compromise is different from betrayal. Compromise means that each person gives and takes to move beyond the differences that are stopping progress. It is important to be seen as a person who can negotiate and compromise when necessary.
- Persevere!

# Advocacy in Action Card 4

## Lobbying or face-to-face meetings



### **Introduction**

A face-to-face meeting with a targeted decision-maker (also known as 'lobbying') is one of the most frequently used advocacy methodologies and is often the starting point in a series of activities.

Personal contact provides the opportunity to build relationships with decision-makers, which could prove very useful in future. Try to set up a channel for regular contacts.

It is important to choose the right time for meeting decision-makers, when your issue or problem is already on their agenda or most likely to be taken up – for example, before an important vote – or when they are able to take action in support of your advocacy – for example, during the budget-setting process, or at the time of an annual meeting.

Try to imagine how the issue or problem looks from the decision-maker's point of view. Why should they support your advocacy objective? How can they benefit from taking the action you are requesting? This can be answered more easily if you have fully researched the 'target person' you are meeting.

Make realistic requests. Show the decision-maker that there is widespread support for your advocacy objective. Encourage allies to also lobby the same decision-maker, giving the same message (use briefing notes to ensure the message is the same – see Advocacy in Action Card 2). It is difficult for officials to ignore large numbers of advocates.

Do not be satisfied with vague expressions of support. Return to two basic questions:

- Does the decision-maker agree that things need to change?
- What are they willing to do to make change happen?

### **Advantages**

- ✓ It shows the human face of the issue or problem to decision-makers, especially if people directly affected by the issue are involved.
- ✓ No need for literacy.
- ✓ Good for involving people at community level.
- ✓ It an opportunity to express emotions and share personal experiences.
- ✓ It allows you to discuss the issue rather than just present you position.
- ✓ Creates a personal connection which is more likely to lead to things being done.

### **Disadvantages**

- ✗ The message could fail to make an impact if the decision-maker takes a personal dislike to the messenger(s).
- ✗ A decision-maker with greater negotiating skills could make the meeting a waste of time, or could persuade you to agree to actions you later regret.

# Skills-building activity

**Objective:** By the end of this session participants will be able to lobby a decision-maker in a face-to-face meeting

**Preparation time:** 30 minutes

**Resources:** 'How to...' Handout

## Instructions

**Timing:** 1 hour 30 minutes

- 1** Introduce the topic and explain the objective of the activity to the participants.
- 2** In plenary ask the participants:
  - ?** What are the advantages and disadvantages of holding face-to-face meetings for advocacy work?
- 3** Divide the participants up into small groups of four to six people. Assign to the groups different topical issues that they might advocate about – for example, provision of treatment for people living with HIV/AIDS at a local hospital; face-to-face meeting with the hospital managers to overcome this discrimination.
- 4** Ask at least one group to role-play a meeting in which the decision-maker opposes the advocacy objective. Ask at least one other group to role-play a meeting in which the decision-maker is neutral or uninterested in the advocacy objective.
- 5** Ask participants to practise preparing to hold a face-to-face meeting with an influential person. They should identify two or more people to act as the 'advocate(s)' and two or more people to act as the influential people. Give each group these guidelines:
  - prepare your case with facts and evidence to support what you will say
  - identify what the decision-maker might argue their case, and plan your replies
  - consider how you want to behave during the meeting and why
  - decide what, if anything, you should take to the meeting.
- 6** Depending on the number of participants and time available, either ask:
  - a)** some, or all, of the groups to perform a 10 minute role-play of the face-to-face meeting they have prepared for the whole group, or
  - b)** each group to role-play their meetings without an audience.
- 7** Lead a plenary discussion about face-to-face meetings for advocacy work, based on the following kinds of questions:
  - ?** Who was more persuasive and why?
  - ?** How could the advocates have improved their lobbying?
  - ?** How might you follow-up a face-to-face meeting?
  - ?** What did you learn about face-to-face meetings from the role-plays?
  - ?** What are the advantages of having people directly affected by the issue or problem at such a meeting?
- 8** Invite any other comments or experiences of face-to-face advocacy.

## Facilitators' notes

- !** If time allows, ask each group or pair to list some advice ('Try to...' and 'Try not to...' points) for face-to-face advocacy.
- !** If the skills session on position papers and briefing notes is not part of the workshop, some participants can prepare a position paper for this activity.
- !** In some circumstances it may be possible to do some real advocacy work in the form of a face-to-face meeting. However, this will only be possible if the beneficiaries have been involved in the planning of the action, and if some or all of the participants can carefully plan and agree a course of action with legitimacy from their organisations and within the time available.

## **Example: Lobbying or face-to-face meetings**

### **Workshop participants meet city administrator to oppose mandatory testing**

During an advocacy workshop held in the Philippines in 1998, participants read in the local press that the Mayor of Davao City planned to introduce mandatory HIV testing of 'Guest Relations Officers' (sex workers). This contradicted the Philippine AIDS Law that was passed in February 1998.

A request was made for an audience with the mayor, to explain the harmful effects of mandatory testing and highlight that this acted against the recently passed AIDS Law. Iwag Dabaw, one of the NGOs at the workshop, had built good relations with city officials through its previous external relations work and was able to arrange a meeting with the city administrator.

In preparation for the meeting, the participants with experience of working with sex workers and of gender and power relations drafted a position paper on mandatory HIV testing and a covering letter. The group presented their draft to all the participants at the workshop, and made revisions after comments from other participants and resource persons. The whole group worked together to improve the documents and everyone signed the letter. The group prepared for the meeting with discussion, identification of a lead spokesperson and support team, sequencing and logistical arrangements.

Along with a local sex worker group, Lawig Bubai, the group met the city administrator at City Hall to explain the content of their position paper, and requested that he pass the paper to the mayor. Two local journalists attended the meeting.

The mayor was persuaded and did not impose the mandatory HIV testing. The meeting also received coverage in two local newspapers.

After the meeting, the group reviewed and analysed how the meeting had gone.

The exercise illustrated several points to the participants:

- Preparation for a meeting is as important as the meeting itself
- Opportunities for advocacy are often unplanned, so be prepared for unforeseen events
- Advocacy work is often done under time pressures and as reactions to events.

*Reference: Adapted from an advocacy workshop, **International HIV/AIDS Alliance and International Council of AIDS Service Organizations (ICASO)**, Philippines, November 1998.*

## **Advice**

- ✓ **Try to** begin by praising the decision-maker for any past support on your issue.
- ✓ **Try to** begin by pointing out areas of agreement and mutual interest with the decision-maker.
- ✓ **Try to** listen, as well as talk – you need to hear what your target thinks.
- ✓ **Try to** link your objective to an issue the decision-maker cares about.
- ✓ **Try to** know more about the issue than the decision-maker! Gain a reputation for being knowledgeable.
- ✓ **Try to** be willing to negotiate, but be clear about how far you will compromise.
- ✓ **Try to** decide who will say what, if there is more than one of you.
- ✓ **Try to** end by summarising what the decision-maker has said or promised.

- ✗ **Try not to** ask the decision-maker to do more than one thing at a time, unless he or she seems very eager to help you.
- ✗ **Try not to** confuse the decision-maker with too many messages.
- ✗ **Try not to** give too much information – for example, graphs, statistics.
- ✗ **Try not to** use technical terms or jargon.
- ✗ **Try not to** give false or misleading information – it can cause you problems in future.

# How to...lobby/hold a face-to-face meeting

## ***Establish 'points of entry'***

Think creatively about how you can get a meeting with the target person. Is there something you have in common? For example, if a friend of yours attends the same mosque as the decision-maker, ask your friend to introduce you to them so that you can negotiate a time to meet, or alternatively use the opportunity as a face-to-face meeting in itself.

## ***Ask for a meeting***

Send a letter explaining what your advocacy goal is and why you would like a meeting. Follow up with a phone call. Often you will not get a meeting with the 'direct target' but with one of their staff (an 'indirect target'). Always meet with the staff, and treat them in the same way you would treat the decision-maker.

## ***Invite them to see the issue or problem themselves***

Invite them out of their office to see the issue or problem first-hand and to show them why you need their support. If the decision-maker cannot leave their office, try taking your issue to them – bring people directly affected by the issue to your meeting, show a short video addressing the issue or take a few photographs with you. If you have a friend who knows the decision-maker or someone on their staff, ask your friend to send the letter or make the phone call to support your views.

## ***Preparing for meetings***

### **Step 1: Know your target**

Analyse your target, using the questions/table headings in Step 4 of the advocacy framework (Section 2).

### **Step 2: Focus on your message**

Choose your main objective and develop a simple message from it:

- **What** you want to achieve
- **Why** you want to achieve it (the benefits of taking action, and/or the negative effects of doing nothing; evidence for the problem – statistics and anecdotes)
- **How** you propose to achieve it
- **What** action you want the target person to take.

Write a short position paper (see Advocacy in Action Card 2) to give to the decision-maker, to remind them of your points.

### **Step 3: Choose the right messenger**

Often the messenger is as important as the message. If a friend arranged the meeting, ask them to come to the meeting with you. Or someone directly affected by the issue or problem may be able to 'personalise' the issue and get the decision-maker's attention. Make sure the messenger has appropriate negotiation skills and appropriate attitude to result in a positive outcome.

### **Step 4: Practise!**

Rehearse your message with colleagues or friends. Ask someone to role-play the meeting, pretending to be the decision-maker, asking difficult questions.

## ***After the meeting***

Write to the person who you met, thanking them for the meeting (even if the person was not helpful), briefly repeating your key points and any supporting comments made by the target person, especially any promises to take action. Tell the target person what you plan to do next, promise to keep them informed, and express the hope that you will be able to work together on the issue in future.

*Reference: Adapted from **An Introduction to Advocacy** by Ritu Sharma (SARA Project).*

# Advocacy in Action Card 5

## Writing and delivering a presentation



### Introduction

A presentation is a formal way of delivering a message face-to-face to an audience. It can vary from a brief talk to a small group, to a formal presentation to hundreds of people at an international conference. Giving a presentation can be a nerve-wracking ordeal, but this can be lessened by good preparation and practice. The stages in developing a presentation include planning, writing and delivering.

#### Advantages

- ✓ You can offer *your* selection of facts and opinions.
- ✓ You can speak directly to an audience.
- ✓ You can show visuals to illustrate your message.
- ✓ A presentation is easy and cheap to organise and can have a powerful impact if planned well.
- ✓ You can give out copies of your presentation as a written record (unless you need to change the focus during the event).

#### Disadvantages

- ✗ It is not easy to make an interesting, lively presentation.
- ✗ A bad environment could spoil your presentation – noise, distractions, bad lighting, etc.
- ✗ You could be open to difficult questions from an unpredictable audience.
- ✗ Some people are not good at giving presentations (but it is a skill that can be learnt).

For more information about delivering effective presentations see **Documenting and Communicating HIV/AIDS Work – A Toolkit to Support NGOs and CBOs**, International HIV/AIDS Alliance.

# Skills-building activity – option 1

**Objective:** By the end of the session participants will be able to prepare and deliver a simple presentation

**Preparation time:** 2 hours

**Resources:** ‘How to...’ Handout

## Instructions

**Timing: 2 hours**

- 1** Introduce the topic and explain the objective of the activity to the participants.
- 2** Ask participants to explain what a presentation is and its purpose.
- 3** Ask participants to divide into groups and prepare a five to ten-minute presentation on an advocacy issue (possibly an issue already discussed in the workshop) for the whole group. Each group should decide which member of the group will make the presentation.
- 4** Presentations often include:
  - a clear message with two to three key points each
  - use of visual aids
  - clear instructions to the audience on when to ask questions.
- 5** Ask a number of groups to deliver their presentations to the whole group and invite feedback on each, based on the following kinds of questions:
  - ? How clear were the messages?
  - ? How persuasive were the arguments?
  - ? How useful and clear were the visual aids?
  - ? How clear and useful were the answers to the questions?
  - ? What could be improved?
- 6** Discuss which presentations worked best, and what made them more successful than others.
- 7** Invite participants to discuss their experiences of delivering presentations, especially as part of advocacy work.

## Facilitators' notes

- !** You may want to ask some pairs to do a different activity – preparing some advice (for example, ‘Try to...’ and Try not to...’ tips) for planning and delivering a presentation.
- !** Encourage the use of visual aids but emphasise that too many can be distracting.
- !** Encourage positive feedback as well as suggestions for improvement.

## Skills-building activity – option 2

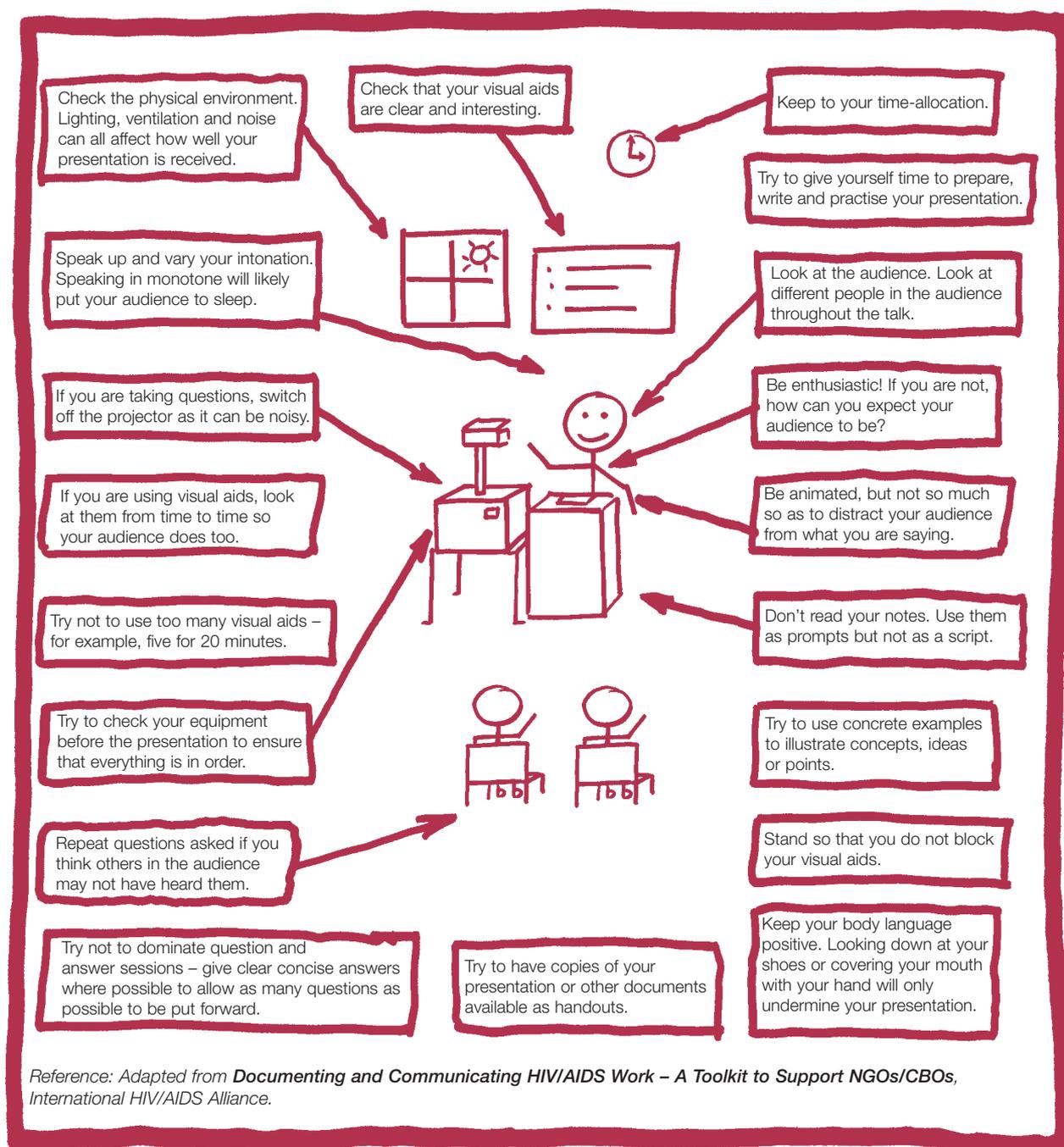
**Objective:** By the end of the session participants will be able to identify common mistakes in delivering presentations and know how to avoid them

### Instructions

**Timing: 45 minutes**

- 1 Ask participants to brainstorm the various mistakes (for example, forgetting to turn on the microphone, fidgeting, slides in the wrong order, speaking too quickly, etc.) they have seen people make during a presentation. Make a note of key mistakes.
- 2 Facilitate a discussion around how to avoid each mistake. Encourage practical solutions to the mistakes.

### Advice on writing and delivering a presentation



Reference: Adapted from *Documenting and Communicating HIV/AIDS Work – A Toolkit to Support NGOs/CBOs*, International HIV/AIDS Alliance.

# How to...write and deliver a presentation

## ***Planning a presentation***

- Review the key factors that will affect your presentation, i.e.: Who is the audience? What are their interests and level of knowledge about the topic? How much time has been given for the presentation? Does this include time for questions? Where will it take place? What equipment will be available? How formal will it be? What is the broader context of the event – is the presentation the main event or part of something else? How will the presentation fit?
- Gather the information and materials that will inform the presentation.

## ***Writing a presentation***

- Some people just use bullet points as the basis for their talks, while others prefer to have the text written out in full.
- Make sure the presentation has a beginning which introduces the topic, a middle which contains the bulk of the talk, and a summary or conclusion.
- Catch the audience's attention at the start with a quote/anecdote to make the situation human and real for them.
- Identify and list the key points and ensure that each has supporting facts and references. Place these key points in a logical order. Persuade the audience by supporting each statement with quotes, comparisons and examples.
- Make or select visual aids that support your presentation but also add some value – for example, added interest or a 'human angle'.

## ***Delivering the presentation***

- Try not to read your written text aloud – try to either learn the text or just use bullet points as a reminder of each point.
- Keep to within the required timeframe.
- Speak loudly, clearly and slowly, and pause to allow people to consider key points.
- Use good visual aids to make the presentation more interesting and easier to understand.
- Make eye contact with the audience – don't look at the floor or at one person in the audience.
- Make the presentation like a conversation – don't talk at people, talk to them.

## ***Dealing with questions***

- If the question is complex, repeat and rephrase it so that it is clearly understood.
- Reply to the whole audience, not just the individual who asked the question.
- Think before responding to a question.
- Take a light-hearted approach to sarcastic questions – don't get flustered by them.
- Don't bluff if you don't know the answer. Better to admit you do not know, throw it back to the audience or say you will find out the answer.

# Advocacy in Action Card 6

## Persuading through drama



### Introduction

Drama is usually associated with information, education and communication (IEC) more than advocacy. It becomes an advocacy method when:

- The general public has been identified as an 'indirect target' who will go on to influence a direct target – for example, subjects of a chief who will influence the chief
- Influential people are in the audience – for example, ministers watching a young people's performance.

Drama can also be used in *planning* advocacy work, especially to involve beneficiaries (the people affected by the advocacy issue). Drama is useful in identifying and analysing issues, developing solutions and identifying targets and allies.

Drama is an effective advocacy method because it can bring a theoretical issue to life, making it emotionally powerful, more interesting, easy to understand and relevant to people's lives. In some situations, a play is more likely to be noticed and memorable than a written report. It can be a useful way to involve a wide range of people with very different levels of analytical skills and experience at local, national and international level.

Drama by itself can be a powerful way to convey messages and persuade people of our points of view. Its impact can be increased by adding activities that involve the audience. For example, discussions can be held after the performance, or 'forum theatre' can be used, in which the audience is invited to explore possible courses of action for the characters.

Drama can address sensitive issues that are difficult to talk about. It can also be used as evidence to support an issue. Performances can be video-taped to share with people in positions of influence who cannot attend a live performance.

### Note:

All of the above can also apply to other art forms – for example, songs and story-telling.

#### Advantages

- ✓ Drama is an easily understood and commonly used means of communication.
- ✓ No need for literacy.
- ✓ Good for involving people at community level.
- ✓ Can be more powerful than written advocacy at any level.
- ✓ It captures emotions, personal experiences and other people's points of view which are difficult to convey by using other advocacy methods.
- ✓ It creates an environment where controversial issues can be discussed.
- ✓ Drama often attracts media coverage which increases its impact.

#### Disadvantages

- ✗ It may be difficult to put new messages calling for change into traditional drama which often supports the status quo.
- ✗ It can be dominated by people who enjoy performing.
- ✗ Issues can be lost in the entertainment especially when professional actors are involved.
- ✗ It is more commonly used for IEC, and therefore the targets may miss the advocacy messages or not take them seriously.

# Skills-building activity

**Objective:** By the end of the session participants will be able to plan and perform a simple drama for HIV-related advocacy work

**Preparation time:** 2 hours

**Resources:** 'How to...' Handout

## Instructions

**Timing: 2 hours**

- 1 Introduce the topic and explain the objective of the activity to the participants.
- 2 Ask participants:
  - ? How can we use drama in our advocacy work?
  - ? What is the difference between drama for IEC, for community mobilisation and for advocacy?
- 3 Divide participants into groups of four or five people.
- 4 Give participants 20 minutes to plan a five-minute drama. Make sure they identify:
  - An advocacy issue or problem
  - An advocacy objective
  - A target audience of influential people.
- 5 Ask them to plan a discussion by writing down possible discussion questions and choosing a facilitator.
- 6 Let each group perform their play and lead a discussion.
- 7 After the performances and discussion, lead a whole group discussion based on the following kind of questions:
  - ? What did you like about the dramas?
  - ? What could be improved?
  - ? What do you think the reaction would be from the real target audiences of these dramas?
  - ? Why is it important to have a discussion after a performance?
  - ? What is different about drama, compared to other advocacy methods?
- 8 Invite any other comments or experiences of using drama for advocacy.

## Facilitators' notes

- ! Make sure that participants understand how drama can be used during planning of advocacy work, as well as for implementation.
- ! Participants can save time by using issues, objectives and target audiences identified during Section 2 in previous workshop sessions.
- ! Make sure the groups do dramas about an advocacy issue, not about the process of advocacy.
- ! Encourage participants to think of a powerful story to portray the issue – it could even be based on a true story (although they should be careful about confidentiality).
- ! If there is not enough time for all groups to perform to the whole group, two groups can perform to two other groups simultaneously.
- ! After the presentations, focus on discussing drama as an advocacy method, rather than discussing the specific issues highlighted in the dramas.
- ! Sometimes drama for advocacy will overlap with drama for education or awareness-raising, etc. But make sure that there is also an advocacy issue or message and influential target – refer to the definition.
- ! You may want to ask some pairs to do a different activity – preparing some advice (for example, 'Try to...' and 'Try not to...' tips) for using drama in advocacy work.



Reference: Photo taken at an advocacy skills-building workshop for HIV/AIDS Work, India HIV/AIDS Alliance and International HIV/AIDS Alliance, India, November 2001.

Participants at an advocacy workshop held in India role-play a drama to convey an advocacy message to an audience of influential people. Participants noted that they could convey very strong messages through drama which they would not be able to through a conversation or document.

### Example: Persuading through drama

**Advocacy issue:** A shelter is required for the street children.

**Advocacy objective:** To provide a safe shelter for street children in Ulaan Baator by March 2003.

**Target audience:** Members of the city council.

A father with a drink problem spends all the family's money on alcohol, so they go hungry. He beats his wife and daughter.

The daughter runs away to live on the street. She is victimised by other street children, and is forced to sell sex.

Eventually she goes to an uncle for help. He helps her, but says he cannot help her again.

The girl discusses her situation with other street children. They say they prefer to be on the street than with their violent families – but they want somewhere safe to sleep, where they will not be sexually abused.

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS/STI work, National AIDS Foundation and International HIV/AIDS Alliance, Mongolia, February 2002.

### Advice

- ✓ **Try to** choose a clear advocacy objective.
- ✓ **Try to** know your target audience.
- ✓ **Try to** choose the topic of the drama carefully.
- ✓ **Try to** make sure that all information contained in the drama is accurate.
- ✓ **Try to** allow enough time for discussion.
- ✓ **Try to** prepare the after-show discussion as much as the show itself.
- ✓ **Try to** choose discussion questions to bring out the advocacy issue.
- ✓ **Try to** adapt the performance to different audiences.
- ✓ **Try to** video the performance and discussion, if possible, to share with others.

- ✗ **Try not to** let the drama be only education or awareness-raising – make sure it has a strong advocacy issue or message.
- ✗ **Try not to** confuse the audience with too many themes and messages.
- ✗ **Try not to** make the drama too long. If it is longer than 10 minutes the audience will be bored, or there will not be enough time for them to discuss afterwards.
- ✗ **Try not to** worry about how good the acting is, the costumes, or props; the topic or message of the play is the most important thing.

# How to...persuade through drama

## ***Introduction***

It is important to be clear about the objective of any drama for advocacy, and to choose a limited number of messages or themes so that the audience clearly understands which problem or issue is being highlighted and what the suggested solution is.

Drama should highlight typical examples of the issue or problem, rather than extreme cases. The involvement of people directly affected can make the drama much more powerful, if they are happy to do this.

It is usually best to use a style of drama that is popular and familiar. A standard drama, with an obvious ending, is best if the target audience are decision-makers.

Sometimes the target audience is the public, or a community, with the objective that they will put pressure on decision-makers. In this case, it is useful to involve the audience so that they can fully understand the issues and even debate possible solutions. Two key ways to involve an audience are 'unfinished stories' and 'forum theatre'.

## ***Unfinished stories***

A good way to get an audience talking is to stop the drama before the story ends, leaving the audience in suspense. Then ask the following kinds of questions:

- What happened to the person in the story?
- How do you want the story to end?
- How do you think the story will end, in reality?
- Why did this situation happen?
- How can this situation be changed? How can we prevent this happening in the future?

## ***Forum theatre***

The aim is to make the audience aware of their power to change their situation, and for them to explore possible courses of action.

In the simplest form of forum theatre, a small group makes a short drama about a central character facing an urgent issue or problem. The drama shows the central character facing choices, and the possibility of changing the situation. They perform to the rest of the group, and then start the performance a second time. This time the audience is invited to stop the action at any time and suggest alternative actions for the central character. Next, members of the audience are invited to act as the central character and try out alternative actions. They can do this a number of times, until the audience agrees that a satisfactory solution to the issue or problem has been found.

# Advocacy in Action Card 7

## Writing and using a press release



### Introduction

**NOTE:** In some countries a 'press release' is a paid advertisement. This Advocacy in Action Card refers to press releases that are not paid for and that are sent to journalists on newspapers, magazines, radio and TV, to assist them in producing stories.

A press release (or news release) is the standard method of distributing a story to the media (it is also possible to telephone a journalist to suggest a story, if you are sure that it is an interesting story and that it cannot easily be distorted).

Using the mass media is also an information, education and communication (IEC) method. It only becomes an advocacy method when:

- The general public has been identified as an 'indirect target' who will go on to influence a direct target – for example, voters who will influence a minister
- Influential people are the targets of the article or broadcast item – for example ministers reading a newspaper.

The aim of a press release is usually to do one or more of the following:

- Outline an organisation's response to an event/action
- Draw attention to an issue
- Provide background information on an issue/event or action
- Give advance notice of an event
- Announce new campaigns and provide progress reports
- Provide a report of a meeting
- Report decisions taken by organisations/groups
- Circulate speeches in advance.

Media organisations receive hundreds of press releases each day, most of which are never used. In order to get the attention of the media, a press release needs to be well written and interesting.

### Advantages

- ✓ It is a very public form of advocacy which can increase pressure on decision-makers to take action.
- ✓ You can offer *your* selection of facts and opinions.
- ✓ You can decide *when* to give the information.
- ✓ A press release is more permanent than an interview – you have a permanent record of what you said.
- ✓ You have time to think before giving your message to a journalist.
- ✓ It makes the job of the journalist easier, therefore your views are more likely to be covered by the media.

### Disadvantages

- ✗ Journalists receive too many press releases, so yours will be thrown away if it is not interesting or if a big news story 'breaks'.
- ✗ Journalists can still distort your story, even if it is clear in a press release.
- ✗ A good press release requires a good level of literacy, and some understanding of how journalists work.
- ✗ It is difficult to involve many people in writing a press release.

# Skills-building activity

**Objective:** By the end of the session participants will be able to explain the purpose of a press release and write a simple press release

**Preparation time:** 2 hours

**Resources:** 'How to...' Handout

## Instructions

**Timing: 2 hours**

- 1** Introduce the topic and explain the objective of the activity to the participants.
- 2** On flip-chart paper, draw two columns with the following titles:
  - When to involve the media in advocacy work
  - When not to involve the media in advocacy work
- 3** Working as a whole group, ask the participants to identify when an issue is appropriate to be addressed by the media, and when it will not help.
- 4** Ask participants to explain what a press release is, its purpose, and how it is different from a position paper or briefing note.
- 5** Divide the participants into groups combining those from different organisations. Ask the groups to choose an issue that would be appropriate to address to the media (possibly an issue they have worked on during the workshop).
- 6** Ask the small groups to write a headline and opening sentence for a press release.
- 7** Next, ask them to write the remainder of the press release, taking care to explain in detail the five 'W's (Who, What, Where, When and Why).
- 8** Ask the participants to describe the kind of journalists or media to whom they would send the press release.
- 9** Ask each group to exchange their press release with another group.
- 10** Each group should analyse the other group's release by making sure it is interesting and that it answers all the five 'W's. Ask each group to give some constructive feedback to the other group on how the release can be improved.
- 11** Invite the participants to share any comments or experiences from analysing and using press releases.
- 12** Bring the groups together again. Discuss with the participants what they have learned from the activity.

## Facilitators' notes

- !** The main purpose of the groups analysing each other's press release is to improve analytical skills. The analyser will benefit more than the person whose press release is being analysed, so do not worry if good advice is not accepted.
- !** You may want to ask some pairs to do a different activity – preparing some advice (for example, 'Try to...' and 'Try not to...' tips) for writing and using a press release.

## Example: Writing and using a press release

### When to involve the media in advocacy work

- When you are making gains on your issue.
- When there is a burning issue.
- When other methods are not working.
- When looking for allies.
- When you have begun your advocacy work.

### When not to involve the media in advocacy work

- When you do not know how the media works.
- When there are disagreements within the organisation on the issue.
- When the timing is not right – for example, due to political circumstances.
- When bigger issues are dominating the media, preventing your issue from getting the attention you think it deserves.

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

## Advice for writing a press release

- ✓ **Try to** be clear about what you are trying to achieve when using the media in your advocacy work.
- ✓ **Try to** research the most relevant journalist(s) and send the release directly to them, using the correct contact details.
- ✓ **Try to** co-ordinate all your media work through one person so that there is one person for journalists to contact.
- ✓ **Try to** provide a 24-hour contact phone number on the press release if possible, so that you are contactable at all hours.
- ✓ **Try to** consult people directly affected by the issue or problem.

- ✗ **Try not to** hand write a press release.
- ✗ **Try not to** include jargon – if in doubt, explain technical words, abbreviations, initials.
- ✗ **Try not to** assume that the journalist knows about your issue – explain the key concepts or attach additional notes.
- ✗ **Try not to** quote someone without their permission.

## Advice for working with journalists

- ✓ **Try to** provide the media with information they need in forms that they can use.
- ✓ **Try to** develop good relationships with journalist and be as helpful as possible.
- ✓ **Try to** understand the pressures and limitations under which journalists work – and respect their deadlines.
- ✓ **Try to** work with, rather than against, journalists whenever possible.

- ✗ **Try not to** dictate terms – any good journalist will resent being told what to think or write.
- ✗ **Try not to** be defensive, even if challenged, just state your position clearly.

# How to...write and use a press release

## **Content of the press release**

Write a simple and interesting headline – this helps the journalist understand the story immediately.

The first sentence should summarise the most important facts of the story, i.e.:

- ? **Who** is involved?
- ? **What** is happening?
- ? **Where** is it happening?
- ? **When** is it happening?
- ? **Why** is this happening?

The main part of the press release should then explain these points in further detail. This information helps to persuade the journalist of the facts and importance of the subject, and why it is of interest.

Quotes can often make a press release more interesting and appealing to the journalist, because they may not have access to the relevant people or perhaps because the event has passed. Direct speech quotations from people involved in the issue or activity:

- should express an opinion, fact, or be able to support the view you have expressed in your press release
- allow you to give strong opinions that would look wrong in ordinary text
- give a human dimension to the story
- are better than indirect quotations.

Gain permission from a person affected by the issue, if you are quoting them.

## **Style**

- Short sentences, maximum 20 words.
- Short paragraphs, maximum two to three sentences.
- Copy the format and story structure from a newspaper article.
- Use a good case study or anecdote as evidence to support your point of view.

## **Presentation**

- Use headed paper so that it looks official and professional.
- Make sure that it is well laid out and easy to read.
- Type it, using double spacing, on one side of the paper only.
- Include the date and the name of the organisation.
- Provide a contact name, telephone and fax number, and e-mail address as available.
- Give an embargo time (the day/time when the journalists are allowed to use the information). This should include the day, date and time.

## **Photographs**

- Include photographs of key people, places or action mentioned in the press release if you have them.

**NOTE:** Once a press release has been written it should be distributed to selected journalists and press associations by fax or e-mail – you can telephone them to ask for these numbers/addresses. Once the journalists receive the press release they will consider whether to include the story in their media work. They may also contact you for further information.

# Advocacy in Action Card 8

## Carrying out a media interview



### **Introduction**

A media interview is a conversation between a reporter and a person who has an interesting story that can be used as the basis for publication or broadcast. Although interviews are usually used by NGOs/CBOs for education and awareness-raising work, media interviews can be used for advocacy work too.

Media interviews are an advocacy method when:

- The general public has been identified as an ‘indirect target’ who will go on to influence a direct target – for example, voters who will influence a minister
- Influential people are the targets of the article or broadcast item – for example, ministers reading a newspaper.

In this way, the journalists are merely a means to an end. They will usually ask the questions that they think their audience might want them to ask.

Interviews may be reactive or proactive. A reactive interview is when a reporter approaches a person for an interview, particularly if there is large public interest in an issue they are involved with. This kind of interview often takes place when an issue arises which is related to your work or the work of your organisation. A proactive interview is one in which a person or organisation approaches a journalist directly about an issue that they think is important and would be of interest to the media. A proactive interview requires greater preparation. However, it is an important method for doing advocacy work.

The key to giving a good interview is knowing your subject well and preparing carefully for the questions that you may be asked.

### **Advantages**

- ✓ It can help you get your information to the public, which will help you address the issue.
- ✓ It can provide profile for yourself and/or your organisation.
- ✓ You can reach a wide audience with relatively little effort with your key messages.

### **Disadvantages**

- ✗ All exposure can potentially go wrong and expose the person or organisation to problems.
- ✗ It is important that the person being interviewed knows and uses the organisation’s point of view as the basis of their answers – otherwise the organisation may be discredited.
- ✗ Those inexperienced at being interviewed or badly prepared can be caught out by being asked difficult or unrelated questions; this can lose support for our organisations and our advocacy work.

# Skills-building activity

**Objective:** By the end of the session participants will be able to explain the key factors in successful media interviews for advocacy work

**Preparation time:** 2 hours

**Resources:** 'How to...' Handout

## Instructions

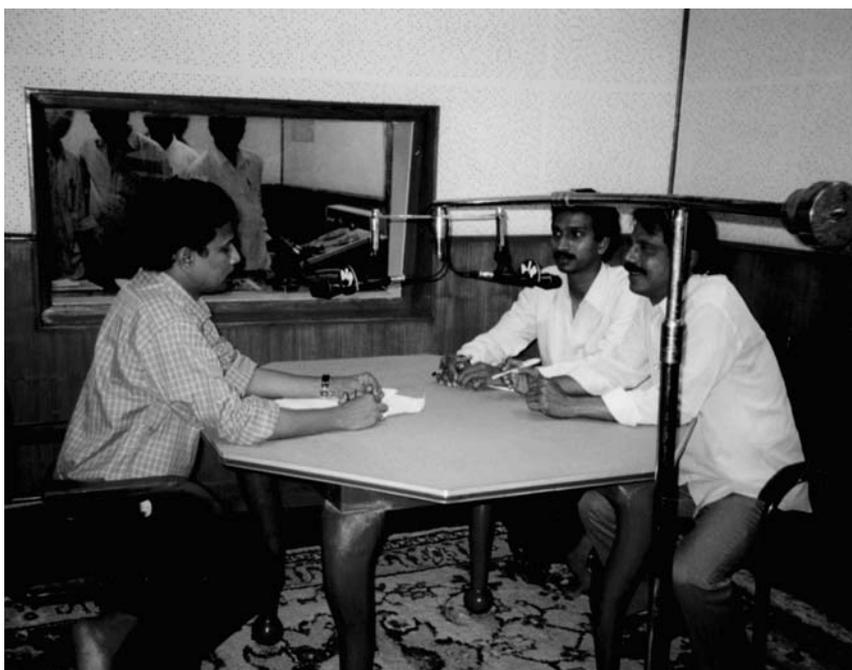
**Timing: 2 hours**

- 1 Explain the objective of the activity to the participants.
- 2 Invite participants to describe any experiences of being interviewed by journalists, especially as part of advocacy work.
- 3 Explain to the group that they are going to practise media interviews. Ask the whole group to agree on an HIV/AIDS advocacy issue, an advocacy objective and a target audience of influential people.
- 4 Divide the group into pairs; one person will practise being an advocate, the other person will practise being a TV journalist.
- 5 Ask the interviewees to prepare responses to possible questions on the issue and journalists to develop a series of questions for them.
- 6 Ask the pairs to practise doing a TV interview. Pay attention to:
  - Delivering key messages
  - Answering questions clearly
  - Appearance.
- 7 Go around the room and listen to the pairs. Offer feedback and advice on how the interview could be improved.
- 8 Select random pairs to perform an interview for the group.
- 9 Help the whole group to discuss the interviews in relation to key messages, questions and appearance. Include this question:
  - ? What are the differences between interviews for TV, radio and newspapers?

## Facilitators' notes

- ! Make sure that any feedback is constructive (helpful), particularly concerning other people's appearance. Make sure positive feedback is also provided!
- ! If this is the first media skills activity of the workshop, ask participants to do Instructions 2 and 3 from the activity in the Advocacy in Action Card 7.
- ! If there is time, you could arrange for two people to role-play a very bad media interview at the start of the session, followed by a discussion of what the advocate did wrong.
- ! You may want to ask some pairs to do a different activity – preparing some advice (for example, 'Try to...' and 'Try not to...' tips) for being interviewed by the media.
- ! This skills-building activity is most effective if it can take place with real journalists at a radio or television station. Usually the interviews would not be live, as inadequate preparation and planning will have been carried out. However, some 'friendly' journalists can provide technology to record interviews. This allows the participants to see or hear themselves being interviewed, to have the feeling of being interviewed by a real journalist and to visit a media station.

### Example: Carrying out a media interview



Participants attending an advocacy workshop held in India practise giving advocacy radio interviews at a local radio station. The interviews were recorded and played back to the other participants and facilitators who provided feedback.

Reference: Photo taken at an advocacy skills-building workshop for HIV/AIDS Work, India HIV/AIDS Alliance and International HIV/AIDS Alliance, India, November 2001.

### Advice

- ✓ **Try to** practise responding to questions; role-play with your colleagues!
- ✓ **Try to** show some emotion for radio – it shows you care – but keep it under control!
- ✓ **Try to** sit upright with your hands on your lap for a TV interview.
- ✓ **Try to** sit still and make sure you do not fidget or swing in your chair.
- ✓ **Try to** look happy to be there, and try not to look nervous.
- ✓ **Try to** answer the interviewer's questions wherever possible – it is their interview.
- ✓ **Try to** be respectful and patient with the interviewer; they will not necessarily know the subject well – but then neither, perhaps, will the audience.
- ✓ **Try to** make sure you get your key messages across; if you are not asked relevant questions, add your key messages to the end of one of your most relevant replies.

- ✗ **Try not to** bluff! If you don't know the answer to a question – say so or avoid it.
- ✗ **Try not to** agree to interviews that could stray off topic that might lead you to make statements about issues you do not know about.
- ✗ **Try not to** get angry if a journalist tries to unnerve you – your message will become unclear and the audience will assume you are in the wrong!
- ✗ **Try not to** let a journalist 'put words in your mouth' – say firmly, "That is not what I am saying..."
- ✗ **Try not to** look at the camera during a TV interview – look at the interviewer.
- ✗ **Try not to** use extreme facial expressions during a TV interview.
- ✗ **Try not to** wear jewellery or glasses if possible as these can distract the audience from what you are saying.
- ✗ **Try not to** try to cover too many points or give too much new information.
- ✗ **Try not to** wear patterned clothes on TV.

# How to...carry out a media interview

## *Preparing for the interview*

- Find out the answers to the following kinds of questions before any interview:
  - ✓ Where and when will the interview take place?
  - ✓ How long will the interview be?
  - ✓ Who else, if anyone, is being interviewed?
  - ✓ Will the discussion or interview follow a film or be linked to another story?
  - ✓ Why have they chosen the subject to address and selected you for the interview?
  - ✓ Will the interview be broadcast live?
- Find out about the journalist who will be interviewing you and:
  - ♦ Investigate their audience – who are the targets amongst their audience and what kind of information do you need to get across?
  - ♦ Contact them and agree the subject to be discussed. Remember that the interview starts as soon as you begin talking to a journalist. There is no such thing as ‘off the record’. Define the issues clearly. Ask the journalist what kind of questions they will ask and whether they will be supportive or argumentative. Prepare appropriate information beforehand – for example, statistics, facts, a personal story, etc.
  - ♦ Make a list of key messages you want to get across with three or four key points for each.
  - ♦ Prepare catchy sentences (‘sound-bites’) that summarise your message.
  - ♦ Check that you have up-to-date information on your issue.
  - ♦ Work closely with your colleagues to develop a draft list of possible questions. Prepare answers to these and practise developing responses to them.

## *What to do during the interview*

- Try and keep calm and composed.
- Remember that the journalist is not your advocacy target – the target will either be influential people listening or watching or the general public as indirect targets.
- Remember that you have the facts you need and that you know more than the journalist does about your area. Keep your answers concise and short, using simple language, without jargon or acronyms. Do not get side-tracked – keep to your key points. If a question strays from your topic, try to move back to the area you want to talk about – for example, “I think what you are asking about is important but the main issue is...”
- If you need time to think about a response, repeat the question before responding.
- Always bring the journalist back to your key messages/points, repetition is a way of getting your message across.

## *Differences between media*

**Press interviews** tend to be more relaxed than radio or TV interviews. If you make a mistake, say so and answer again.

**Radio interviews:** In a studio, the studio manager will give you specific instructions about where to sit, how to use the microphone, etc. Sometimes this is done with little time to spare. However, take your time and be sure you understand the instructions. Ask what the first question will be to help you concentrate. You can take notes with you – but try not to rustle the pages. (Brief notes on postcards are often more helpful.) If you make a mistake during a recorded interview, you can ask to try the answer again. If it is live you can say, “Perhaps I might explain that answer”, and continue.

**TV interviews:** The same rules apply as for the radio interview but you can be seen! TV interviews are usually shorter than radio interviews. The interview may be pre-recorded or live.

# Advocacy in Action Card 9

## Preparing a press conference



### *Introduction*

The aim of a press conference is to gain media coverage for an issue. It is a meeting held by an organisation, or group of organisations, when journalists listen to speakers and ask questions. It usually includes statements by up to three speakers followed by questions from the journalists. So the format is similar to a panel discussion, although the purpose is not to discuss, but to gain publicity for the advocacy issue.

A press conference demands careful organisation. Press conferences are expensive and time-consuming to organise, therefore they should only be used if it is the best option. It is also necessary to think carefully about confidentiality, especially when discussing or involving people living with HIV/AIDS, as they may not wish their HIV status to be made public.

#### *Advantages*

- ✓ It brings many journalists together in one place at one time.
- ✓ It encourages all media to publicise a similar message.
- ✓ It is a chance to meet journalists face-to-face and learn about their opinions and attitudes to the issue.
- ✓ It makes the job of journalists easier therefore the issue is more likely to be covered by the media.
- ✓ It allows the journalists to ask questions from a panel of speakers.
- ✓ It provides an opportunity to correct misunderstanding before journalists write their articles.
- ✓ It can save the time of key people in the organisation who would otherwise have to talk to each journalist in turn.
- ✓ It can make the issue more important.

#### *Disadvantages*

- ✗ It requires a lot of logistical organisation.
- ✗ There is always the risk that a bigger story 'breaks', so the journalists do not attend.
- ✗ Journalists may turn against your campaign if the press conference is badly focused or unconvincing.
- ✗ Time is needed to prepare speakers for a press conference to make sure that everyone agrees and reinforces the key messages and yet everyone contributes something different.
- ✗ You cannot predict the questions that the journalists will ask or how your issue will be presented positively by the media.

# Skills-building activity

**Objective:** By the end of the session participants will be able to explain the purpose and format of a press conference

**Preparation time:** 2 hours

**Resources:** 'How to...' Handout

## Instructions

**Timing: 1 hour 30 minutes**

- 1** Introduce the topic and explain the aim of the activity to the participants.
- 2** Ask participants to explain what a press conference is, and its purpose.
- 3** Ask the participants to prepare and role-play a press conference. To save time, one of the advocacy issues already identified during the workshop can be used.
- 4** They should choose roles:
  - ♦ Writers of announcement of press conference (two people)
  - ♦ Writers of press pack (two people)
  - ♦ Chair of press conference
  - ♦ First speaker
  - ♦ Second speaker, etc.
  - ♦ Journalists supporting the advocates
  - ♦ Journalists opposing the advocates (who ask difficult questions).
- 5** The group should quickly agree on:
  - ♦ The subject of the press conference
  - ♦ The identities of the speakers.
- 6** Allow 20 minutes for them to prepare. There may not be time to write a complete press pack, but at least it should have key headings, with ideas of where to find the information, key issue, etc.
- 7** Let the participants take their roles and stage the press conference.
- 8** After the press conference discuss strengths and suggestions for improvement.
- 9** Invite any other comments or experiences of using press conferences for advocacy work.

## Facilitators' notes

- !** If this is the first media skills activity of the workshop, ask participants to do Instructions 2 and 3 from the activity in Advocacy in Action Card 7.
- !** The subject of the workshop need not be a current or even hugely important issue. Suggest ideas if the group is taking long to decide on a subject and speakers.
- !** You may want to ask some pairs to do a different activity – preparing some advice (for example, 'Try to...' and 'Try not to...' tips) for organising a press conference.

### Example: Preparing a press conference



Participants practising holding a press conference during an advocacy workshop held in Mongolia.

Reference: Photo taken at an advocacy skills-building workshop for HIV/AIDS/STI work, National AIDS Foundation and International HIV/AIDS Alliance, Mongolia, February 2002.

### Advice

- ✓ **Try to** make sure that your press conference does not coincide with an important event that will prevent the journalists or speakers from attending.
- ✓ **Try to** call to check whether the announcement has been received – use this as an opportunity to encourage journalists to attend.
- ✓ **Try to** choose speakers carefully – they should be interesting, confident speakers and show the human face of the issue/problem.
- ✓ **Try to** ensure that each speaker knows your key messages and co-ordinate each speaker to say something different.
- ✓ **Try to** capture attention with quotes, comparisons, examples or visual aids such as photographs or graphs.
- ✓ **Try to** respond to questions clearly and simply.
- ✓ **Try to** make sure that the person chosen to deal with the media is clearly identifiable.
- ✓ **Try to** make clear why the different organisations or people are involved if this is a joint press conference.
- ✓ **Try to** involve a journalist in advising you on how to organise and plan the press conference.
- ✗ **Try not to** have too many speakers – the message can get confused!
- ✗ **Try not to** allow speakers to talk for more than 10 minutes.
- ✗ **Try not to** start late – journalists have deadlines!
- ✗ **Try not to** allow the speakers to answer the questions at great length – warn the chair of this as appropriate.
- ✗ **Try not to** let the press conference overrun in time.
- ✗ **Try not to** allow the speakers to make conflicting statements – try to rehearse the key points with the speakers before the conference.
- ✗ **Try not to** organise a press conference if there is a cheaper, more effective way to publicise the issue.
- ✗ **Try not to** hold a press conference if you predict the majority of the journalists will disagree with you or present negative coverage.

# How to...organise a press conference

## *Preparing for the press conference*

- Give two to seven days' notice of the conference to relevant journalists (consider reporters, columnists, newscasters, editors) and send them an announcement including:
  - ♦ The purpose of the press conference
  - ♦ Date, time and where it will be held
  - ♦ Who will speak at/present/chair it.
- Choose a suitable venue including the following as required:
  - ♦ Easy location, access and adequate parking space
  - ♦ Low noise levels
  - ♦ Enough capacity – power points for TV lights, space, layout
  - ♦ Audio/audio visual equipment
  - ♦ Room for individual interviews
  - ♦ Helpful staff with experience of hosting press conferences and with technological expertise.
- Choose an appropriate time of day for the majority of media, i.e., so that they can write the story before their deadlines (but you will not be able to fit in with everyone's deadlines).
- Select and brief a chairperson and appropriate speakers. Work with them to identify and practise answering questions from the journalists – especially the difficult ones!
- Select a press officer/key contact person for the press to deal with.
- Prepare a press pack for journalists, including:
  - ♦ Press release (see Press Release Advocacy in Action Card 7)
  - ♦ Background on your organisation/coalition
  - ♦ A list of the key points you are making and sample quotes
  - ♦ Recommendations for future action
  - ♦ A list of contacts whom journalists can contact to discuss the issue
  - ♦ Any relevant photographs, statistics, graphs, etc. Take special care concerning confidentiality, and brief the chairperson and speakers about these issues where necessary.

## *Format of a press conference*

- 1** Welcome, refreshments and distribution of the press pack.
- 2** Chairperson:
  - ♦ Introduces the speaker/s
  - ♦ Explains arrangements and proceedings
  - ♦ Points out the press officer/key contact person for all enquiries
  - ♦ States whether interviews are available afterwards
  - ♦ Stresses confidentiality issues where appropriate.
- 3** First speaker.
- 4** Second speaker, etc.
- 5** Chairperson takes questions from journalists who then gives them to one of the speakers to answer; other speakers may also add remarks.
- 6** Chair thanks the press for attending and closes the press conference.
- 7** Individual interviews with speakers.

## *After the press conference*

- Send the press pack to the journalists who did not attend.
- Make a list of attendees and update your database where appropriate.
- Note down the names of journalists who asked particularly important questions/appeared sympathetic to your cause.

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