

# Advocacy Action Guide

## A Toolkit for Strategic Policy Advocacy Campaigns

Elements of a Policy  
Advocacy Campaign

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### About the Guide

Changing public health policy is one of the most effective ways to improve public health on a population-wide scale. Moving a public health issue onto the policy agenda and through the policy making process requires a well-planned strategic advocacy campaign. The components of an advocacy campaign are the same regardless of the advocacy goals. This guide is designed to help civil society organizations plan and conduct effective advocacy campaigns that will result in the adoption and implementation of strong effective public health policies.

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### How to Use the Guide

The guide has been designed to provide an overview of key components of a successful policy advocacy campaign. Depending on your needs and resources, you may only use some of the tools and suggestions as part of your advocacy campaign.

We hope this guide will provide you and your partners a roadmap to achieving your policy objectives.

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### Brief Description of the Authoring Organization

The Global Health Advocacy Incubator advances public health policies to build a healthier and safer world. Drawing on our extensive global experience, we offer strategic support to develop and execute advocacy campaigns to pass laws and policies that save lives. GHAI supports civil society organizations in advocating for evidence-based policies to improve public health and decrease death and disease.

This mission is accomplished by providing training and technical assistance for organizations working on public health policy, identifying new partners where needed, and assisting in the development and implementation of strategic advocacy campaigns to promote the adoption and implementation of public health policies.

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## Elements of a Policy Advocacy Campaign: At a Glance

To move a public health issue onto the policy agenda and through the policy-making process you will need to develop and implement a strategic advocacy campaign. This is your quick guide to developing an effective advocacy campaign to achieve public health policy change.

1

### Gather background information

Before you begin an advocacy campaign, do your research. You need to be certain that policy change is the best way to solve the problem. You'll also need to know the latest science and evidence in support of your public health issue, the current laws and regulations, and what gaps may exist. Research any past advocacy efforts on the same issue, so you know what worked... and what didn't.

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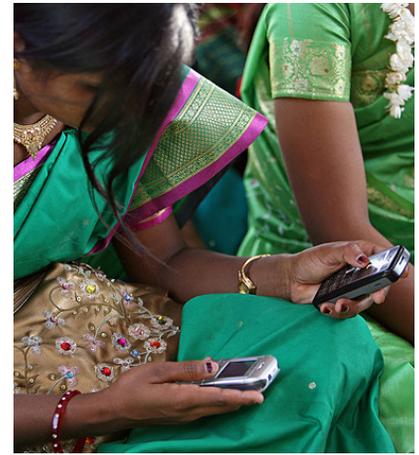
### Set clear policy objectives

A successful campaign starts with clear objectives that are specific, measurable, achievable, relevant, and time-bound. Make sure your objectives are linked to policy change and existing evidence, and that they include the following: a policy actor(s) or decision-maker(s), the action or decision you want them to take, and a timeline by which you want them to act or decide.

3

### Build strong partnerships

Working in coalition or partnership with others is the best way to demonstrate support for your issue. Identify a core group of organizations that will work together to drive the campaign forward on a day-to-day basis. Next, identify a range of old and new allies willing to speak out in favor of your objectives. To identify those allies, look to civil society and professional or business groups from the health, education, and economic and scientific sectors.



## 4

### Know the political landscape

Understanding the policy-making process and which decision-makers and influencers to target is key to achieving your objectives. Once you understand the political landscape, strategize about when during the process you can successfully engage, intervene, and influence your targets. You will also need to know decision-makers' positions on your policy change objectives and identify any opposition you will encounter.

## 5

### Help develop legislation or regulations

Early on in the process, you'll want to prioritize drafting of the actual policy, using the strongest wording possible. As an advocate, the role that you will play during this phase is likely to vary. Having a lawyer or policy expert as a resource is very important. At a minimum, they can help you analyze the strengths and weaknesses of existing or emerging policies in accordance with evidence-based best practices.

## 6

### Determine what is non-negotiable

Compromise is sometimes necessary in advocacy. However, it is important to know your limits. You won't necessarily help your cause if you support the passage of weak policies. You and your core partners will need to determine together what is non-negotiable, ideally early in the advocacy process.

## 7

### Identify legislative sponsors and policy champions

Strong sponsors willing to champion a policy throughout the process are valuable assets for any campaign. Seek out influential and respected policymakers on relevant committees or in key positions who you can trust to act as loyal partners and effective champions. Remember that it takes time to cultivate such champions. Meet with them regularly to understand their concerns and needs, agree on how best to work together, and share information. Always be available to act as a resource for your champion.

## 8

### Develop your key strategies

Persuading decision-makers to take action is essential for affecting changes in policy. There are many ways this can be done, but most successful campaigns employ some combination of the following three strategies: 1) direct interaction with decision-makers and influencers, 2) using media and social media to influence decision-makers and the public, and 3) grassroots mobilization to engage a strong base of supporters and organizational allies to encourage change and counter opposition or indifference.



## 9

### Prepare to communicate effectively

Effective communication underpins every successful advocacy campaign. First, define your different audiences and work to understand their information needs, interests, concerns, and the best communication channels to reach them. Using this information, you can then design targeted, persuasive messages and identify the most compelling messengers and spokespeople. Make sure you have collected the most up-to-date and accurate information to use in your communication activities, and consider commissioning your own reports if you lack credible information supporting your argument. Message research such as focus groups or polling can help you ensure you have chosen the most compelling messages. Finally, it's important to monitor media and social media engagement on your issue so you know what is being said about your campaign and can respond quickly.

## 10

### Formulate your campaign action plan

The campaign action plan is your roadmap for the campaign, leading from objectives to strategies and then to messages. Carefully consider all the elements of your plan in collaboration with your core group of partners. In addition to key activities, the action plan should also outline the necessary resources, responsible persons, and timeline. Remember that your plan is a living document that should be reviewed regularly and updated as the political landscape changes.

## 11

### Run your campaign

With a detailed plan in place, it's time to implement. Keep in mind that a successful campaign requires strategic planning alongside strategic implementation. The campaign process is dynamic and ever changing, and every campaign will require you to respond to unanticipated events, disagreements within your network, changing decision-makers and new opposition. Don't be afraid to be flexible, revisit your plan and update it as needed.

## 12

### Monitor and evaluate progress

Monitoring and evaluating implementation of your advocacy plan will be one of the most critical activities of your campaign, but is often overlooked. Reviewing your progress at regular points will not only help to hold you and your partners accountable for planned actions, but will also reveal whether or not your actions are accomplishing your goals. If your campaign is not making progress, you'll need to reassess and adjust your plan.

## 13

### Celebrate success and remain engaged

Successful advocacy campaigns take time. Even if you don't secure your policy change right away, you will have made progress in educating decision-makers, the media, and the public on your issue. Celebrate milestones both big and small, and make sure you thank supporters for their ongoing commitment. Once you have achieved your policy change, ensuring successful implementation is the next objective. A campaign doesn't end with the change in law or policy change: Now it's time to push for implementation.



## Gather background information: What you need to know

### WHY IS IT IMPORTANT?

Before you start your advocacy campaign, you'll need to gather background information, which will create a strong foundation for developing your campaign objectives, strategies and communications. Without a solid understanding of the nature of the problem you are trying to address, you'll find designing an effective campaign difficult, if not impossible. The most effective campaigns tend to be based on accepted facts and figures about public health impact and lives saved, the costs of inaction, and proven solutions. As you learn more about the issue, be certain that policy change will help to solve the problem. If not, you will most likely want to focus your efforts on other types of interventions.

### WHAT NEEDS TO BE DONE?

The focus of your campaign will help determine what information you need to gather. However, the following types of information are generally useful for an effective campaign and provide a good place to start:

- Up-to-date and credible data about the public health problem you want to address, as well as any evidence-based solutions.  
Potential Sources: respected bodies such as the World Health Organization (WHO), Demographic Health Survey (DHS) or Health Management Information System (HMIS) data, ministries or agencies overseeing the issue.
- Existing laws and regulations related to your public health issue.  
Potential Sources: online data sources, parliamentary or legal libraries, and connections with decision-makers, technical leaders, and legal experts.
- Background on previous, related campaigns—both successful and unsuccessful—including what works, what didn't, and the opposition.  
Potential Sources: key informant interviews with campaign leaders and participants; media reports.



### HELPFUL HINT:

Consider working with a legal or issue expert to support you in gathering information, obtaining copies of existing policies, and connecting with individuals responsible for implementation of current policies. Doing your "homework" early will help familiarize you with gaps and policy areas that need to be strengthened.

## Set clear policy objectives: What you need to know

### WHY IS IT IMPORTANT?

Developing a policy objective may be the most essential step of your campaign plan. Your objective describes the change you want to see happen and helps to identify the actions needed in order to achieve that change. You'll only want to choose actions that you're sure will advance you towards that goal.

Since your policy objective serves as a guide for your overall campaign plan, the clearer your policy objective is, the stronger your campaign will be. Clear objectives help you to develop targeted strategies and communications. Without a clear objective, it will be impossible to determine whether your efforts have been successful.

### WHAT NEEDS TO BE DONE?

Analyzing the background information you have gathered will help you identify the best policy objective(s). Ideally, your policy objective will address a gap or weakness in the existing policy environment and provide an evidence-based solution.

Here is a generic example of a policy objective: By December 2016, Parliament will approve a ten percent increase in the national health budget. Are you able to identify the actor, action and timeline for change in this example?

As a guiding framework, check to make sure your objectives are all SMART, or Specific, Measurable, Achievable, Relevant, and Time-bound. Policy objectives should also always contain three key items:

- A policy "actor" or decision-maker – the person(s) or decision-making body with the power to make your desired change a reality  
Examples: Member of Parliament, minister, relevant parliamentary committee, sub-national legislature, or ministerial office.
- A policy "action" or decision – the specific action you want them to take or decision you want them to make  
Examples: enact, amend or repeal a policy, allocate funds, or issue a mandate to affect change
- Timeline for change – The date by when you want them to act or decide.  
Examples: the day, month, project quarter, or year



#### HELPFUL HINT:

If your policy objective contains these three items and is based on your background information, it will almost always be SMART



## Build strong partnerships: What you need to know

### WHY IS IT IMPORTANT?

Successful campaigns are most often the result of groups of people or organizations effectively working together towards a common goal. By bringing together partners with different expertise and influence, campaigns are better able to carry out a range of coordinated advocacy actions and reach a broader set of decision-makers. Working in partnership also helps to demonstrate broad-based support for your policy objective, which is more likely to inspire decision-makers to act.

Effective public health advocacy campaigns can involve many types of organizations – civil society, business and professional groups are some examples – and may represent the health, education, economic, legal and scientific sectors. Human rights groups, as well as community leaders and individuals directly impacted by the public health issue, may also be powerful allies. As you think about how to engage partners, consider how to best leverage each one based on their individual level of commitment and engagement.



### HELPFUL HINT:

Before recruiting new partners, the leadership group should have a draft campaign plan in place and know what each current member brings to the campaign. This strategy will provide insight into the types of organizations you will want to recruit to your network. Ideally, new organizations can help to fill existing gaps. On occasion, they may also bring new ideas and activities to the campaign.

### WHAT NEEDS TO BE DONE?

You will want to form a core group of partners that will act as the leadership group for the campaign. This should be a small number of select allies; otherwise, it will be challenging to make decisions and get things done quickly. To be most effective, the leadership group should:

- Agree to support a common policy objective and commit to being engaged in the campaign on a day-to-day basis.
- Have contacts with key decision-makers and strong knowledge of the policy environment and the policy issue.

In addition to the core leadership group you will likely want to build a broader network of advocates and active supporters. While these partners may not be engaged in day-to-day decision-making, they can play vital roles at strategic moments of a campaign. These additional organizations often:

- Represent a mix of traditional allies and more 'unusual' allies that help to demonstrate wide and diverse support for your issue.
- Are mobilized by the core group to raise their voices at opportune moments, reach select decision-makers, or carry out specific activities or strategies.



## Know the political landscape: What you need to know

### WHY IS IT IMPORTANT?

An in-depth understanding of how the policy-making process works is critical no matter whether your campaign is trying to help pass legislation, reform a regulation, issue an executive order, or push for improved implementation. Analyzing the political environment to understand all the important decision-makers, policy processes and opposition viewpoints relevant to your issue is called “political mapping.”

### WHAT NEEDS TO BE DONE?

Political mapping takes time and resources, but the more comprehensive the mapping, the better prepared you will be to carry out a strong campaign. Mapping may vary depending on your country’s political system, the kind of change you are seeking, and the type of information that is openly available to the public. But no matter the format you use, always try to include:

- The steps a proposed policy must pass through in order to be approved and implemented. These steps may vary depending on the type of policy.
- The decision-makers that matter in each step of the process, their interests and concerns, and their position on your issue: Are they supportive, opposed or neutral?
- The individuals — like government staff, political party leaders, and quasi-state or select non-governmental representatives — who advise or are well positioned to persuade decision-makers throughout the process. These individuals are often called “influencers.”

Your political mapping should also review any opposition you might face. You will want to consider:

- Individuals and groups that might oppose you and their reasons for doing so.
- Your opponents’ messages, tactics, and connections with key decision-makers, which can help you to develop powerful counter messages and think of ways to lessen their influence.



### HELPFUL HINT:

Monitor your target decision-makers’ position on your issue, as it may change over time. Also, continue to monitor your opposition for new messages and activities. Establish strong working relationships with decision-makers’ staff, as they can provide useful information about your key targets, including useful information about the opposition’s influence on decision-makers.

Regularly update your mapping as you receive new information. Consider working with a legal expert or political “insider” to ensure this document is up-to-date.



## Help develop legislation or regulations: What you need to know



### HELPFUL HINT:

Use your political mapping to help identify openings within the policy-making process for you to provide input on laws and regulations. Try to monitor the draft policy at each and every step of the process so you can ensure the final version contains your desired language. The actual text in a draft policy often becomes weaker as it proceeds through the process, and you will want to continue to advocate for the strongest, most effective language possible.

### WHY IS IT IMPORTANT?

Making a change in policy is most likely the primary objective of your policy advocacy campaign. Creating or supporting meaningful legislation or regulations requires a great deal of thought and, usually, significant expertise. Identify your role in the actual development of policies early on in your campaign process.

### WHAT NEEDS TO BE DONE?

Your role in the development of legislation and regulations depends on your country context. In many countries, civil society has the opportunity to formally assist the government with:

- Drafting policies
- Reviewing or providing comments on policies
- Monitoring policies

In places where only members of government can participate in the policy process, consider working with supportive decision-makers or friendly staff that you have identified through political mapping to share drafts and provide unofficial or informal feedback.

Whatever your role, you need to be very clear on the provisions you want to see included in laws and regulations. Each provision you suggest should be supported by evidence and best practice legislation from other jurisdictions. Knowledgeable lawyers or supportive legal experts can help you gather and frame evidence, as well as help you analyze text and ensure that policies contain strong language to achieve the change you want. Remember that even very minor changes in wording can significantly affect a policy's impact.



## Determine what is non-negotiable: What you need to know

### WHY IS IT IMPORTANT?

As an advocate, your goal is to ensure the passage of laws and regulations that will save lives. While the policy-making process can require compromise, the creation of weak or ineffectual policy may not help your cause and could even hurt it over the long term. Agree with your partners early on about what provisions you are unwilling to sacrifice in your quest to pass a policy. If you don't determine this ahead of time, opponents may be able to take advantage of any divide between you and your allies at the negotiating table.



### HELPFUL HINT:

Once your campaign's leadership group has determined your non-negotiable issues, keep this information strictly confidential. Wide distribution could give the opposition an advantage and weaken your chances of achieving the strongest possible policy.

### WHAT NEEDS TO BE DONE?

During the policy-making process, your campaign's leadership group will often be required to make quick decisions about whether to support a proposed compromise. Anticipating possible compromises and agreeing in advance on how best to address them will reduce the risk of disagreement among your core partners at key moments. Conflict within your group – even when temporary – can weaken your group's overall negotiating position and the policy you are trying to promote.

Ask yourselves the following questions to help decide if you want to support a potential compromise:

- Does the compromise undermine meaningful progress on our issue?
- Does the compromise set a harmful precedent for the region?
- Does the compromise make it difficult to come back later and revise or strengthen the policy?

If you answer yes to any of these questions about the proposed compromise, it is likely a non-negotiable for your campaign's leadership group. You and your core partners may choose not to support and even oppose the potential law or regulation.



**HELPFUL HINT:**

Developing a sponsor or policy champion takes time and usually requires multiple meetings. Consider designating 1-2 liaisons from your organization that can commit to building trust by communicating regularly with your target sponsor's office. (Two focal points are useful in case one person is unavailable or leaves the organization.)

That way, you will not have to start completely over building your organization's relationship with your sponsor.

## Identify legislative sponsors and policy champions: What you need to know

### WHY IS IT IMPORTANT?

To move a law or regulation from an initial idea through to approval, you will need strong government sponsors to champion its passage during each step of the policy-making process. Your campaign leadership group should seek out influential and respected decision-makers who hold key positions or sit on relevant committees that you can trust to serve as committed champions and partners.

### WHAT NEEDS TO BE DONE?

Your political mapping can help you identify sponsors for your law or regulation. A thorough political mapping will indicate decision-makers that are supportive of your campaign's policy objective and who may become active champions. Take time to meet with your potential sponsor(s) in order to better understand:

- Their interests in, and reasons for, supporting your policy objective.
- The provisions they would like to see included in the policy and how they might differ from yours.
- Their suggested strategic approach to passing the policy.
- Their ideas about how best to work together.
- How to keep each other informed throughout the campaign.

In order to have a positive and trusting relationship with your sponsor(s), you need to serve as a resource for them throughout the policy-making process and should communicate that clearly. You can act as a resource to your champions by doing the following:

- Providing or securing issue expertise to inform policy development
- Providing background research, fact sheets, or policy briefs on the issue
- Drafting policy language and/or reviewing drafts and providing comments
- Building public support for the policy objective
- Educating other decision-makers on the issue
- Engaging the media to cover the issue
- Mobilizing audiences for legislative hearings and providing public testimony
- Engaging in joint strategizing to advance the policy throughout each step of the process



## Develop your key strategies: What you need to know

### WHY IS IT IMPORTANT?

In addition to securing policy champions, you will likely need to persuade a broader set of decision-makers to support your issue. The strategies you choose to reach these target decision-makers are critical because they can make or break your campaign. Common strategies include 1) direct interaction with decision-makers and influencers, 2) using media and social media to influence decision-makers and the public, and 3) grassroots mobilization to engage a strong base of supporters and organizational allies to encourage change and counter opposition or indifference. To determine the best strategies to influence them, you will need to consider their interests and concerns, as well as any cultural and political factors that affect how advocacy takes place in your country.

### WHAT NEEDS TO BE DONE?

#### Direct Interaction with Decision-makers

In countries where personal interaction with decision makers is customary, direct communication can be a powerful outreach strategy and might include the following activities:

- Letter writing
- In-person meetings or phone calls
- Briefings, workshops, and conferences
- Providing testimony at hearings
- Attending receptions or other events where decision-makers are present
- Providing position papers and other forms of information and data.





### HELPFUL HINT:

Policy advocacy is considered lobbying when you attempt to influence political officials regarding a specific piece of legislation. Many donors restrict lobbying with their funds, while many countries have specific rules governing lobbying activities of NGOs.

Be sure you understand your donor and government rules before pursuing any lobbying.

Direct in-person meetings with decision-makers are often the quickest and most persuasive tactic. For a successful meeting, it is important to be well prepared.

### Before the meeting, do the following:

- Invite attendees known to and influential with the decision-maker.
- Develop an agenda.
- Identify a meeting leader and assign talking points to other representatives.
- Familiarize yourself with your decision-maker's history on the issue and prepare responses for likely concerns or questions.
- Prepare an information packet with proposed policy language and select background materials (e.g. fact sheet, news article, and polling data).
- Assign a note-taker to track issues raised and commitments made by the decision-maker.

### During the meeting, be sure to:

- Ask if you can count on their support. If a decision-maker is not able to commit, ask what it would take to gain their support.
- Avoid confrontation and remain positive, even when interacting with decision-makers supporting the opposition. Follow-up with authoritative information to correct misperceptions. If you come up against truly committed opponents, you should consider whether it is worth the effort to try and persuade them to your point of view.
- Ask decision-makers that are friendly to your issue if they can suggest other potential supporters.
- Ask how you can be helpful to them in the future and ensure you know how to remain in contact.
- Thank decision-makers for their time and consideration.
- Send a follow-up letter summarizing the meeting and include relevant materials to address outstanding concerns.



Remember that it will usually take more than one meeting to establish credibility and gain a decision-maker's support. Until that time, be sure to maintain regular communication and provide helpful data and information. If you are not able to directly access a target decision-maker, consider how you might be able to reach them through an influencer or partner.



**HELPFUL HINT:**

A multi-strategy approach is usually the most effective to reach a variety of decision-makers. Remember to keep track of your decision makers' positions as you engage in your persuasion efforts so you'll be certain how many supporters you have when it's time to make key decisions.



### Media Engagement

Using media is an advocacy strategy that can help to raise visibility, get people talking, and place your issue on a decision-maker's agenda. Media advocacy includes the following types of coverage:

- Earned media, which means convincing a media outlet to cover your issue
- Paid media, which entails paying for a media outlet to present your issue
- Owned media, which requires that you create and disseminate content over your own website, blog or other channels you control
- Social media, which includes using Facebook, Twitter, YouTube and other interactive platforms to create attention and generate dialogue

To gain earned media, you must think like a journalist and pitch compelling stories. Creative story elements might include:

- An event, data, report, etc. that provides new information to a reporter and the outlet's audience
- Compelling visuals (for print media)
- Sharp sound bites (or succinct quotes that convey your main messages)
- Easy-to-understand statistics on an issue people care about
- Authentic voices of real people who have been impacted by your issue

### Grassroots Mobilization

In addition – or as an alternative – to reaching decision makers and the public through media, grassroots mobilization can be an effective strategy in places where decision-makers are responsive to voters or public opinion. To find out whether this strategy makes sense for your campaign, first consider the types of individuals and organizations your target decision-makers care about most. Membership groups and interest groups can be extremely powerful and influential, particularly if you can mobilize them to advocate to your target decision-makers during critical campaign moments. Sending action alerts to supporters through social media is a great way to engage them in meaningful action and keep them up to date throughout the policy process. To further spread your message, ask your partners to disseminate action alerts to their networks and write to policy makers on their letterhead.

## Prepare to Communicate Effectively: What you need to know

### WHY IS IT IMPORTANT?

In order for your advocacy strategies to prove successful – whether direct interaction with decision-makers, media outreach, grassroots mobilization, or all of the above – they must be grounded in effective communication. To ensure your communications are as persuasive as possible, you will need to plan them in advance of your campaign.

### WHAT NEEDS TO BE DONE?

The most important principle of effective communication is to know your audience. Depending on your chosen strategies, your audiences may range from decision-makers to journalists and community members. These groups each have different communication needs; the materials and messages that work for one group won't necessarily work for another. The more you know about your audience, the more targeted and effective your advocacy outreach will be.



Once you have determined your audiences, gather the following information:

- How best to reach them (e.g. TV, radio, print media, social media, SMS)
- The questions, concerns or attitudes they have about your issue and the specific information they will need in order to take action

Your target audience members are likely busy people. This means you need to develop short, simple messages to inspire them to learn more or take action. Though the specific content of your message will vary for each audience, your messages should generally contain the following:

- A short problem statement about what you want to change and why
- A few key attention-grabbing facts that illustrate the problem or potential solution
- A specific action that the audience can take to help
- A human story that highlights how the issue has impacted individuals. (This is optional but can be quite effective.)

Your messengers are equally as important as your messages. To most effectively reach your target audience, identify and deploy individuals or groups that they will listen to and believe.



#### HELPFUL HINT:

After you develop your best messages, share them with partners and emphasize the importance of a unified, limited set of messages. Delivering one strong message many times is more effective than sending a multitude of messages. Use focus groups or polling to help identify your most effective messages and instill message discipline.



## Formulate your campaign plan: What you need to know

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### WHY IS IT IMPORTANT?

Now it's time to combine all the various planning elements of your campaign — defining your policy objective, choosing your campaign strategies, and identifying your target audiences — into one comprehensive action plan. This plan will give you and your partners a roadmap to achieving your policy objective. It will also help ensure accountability among partners and that everyone remains on track as the campaign is executed.

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### WHAT NEEDS TO BE DONE?

Campaign action plans can differ in format and level of detail, but at the minimum your plan should include the following:

- Your policy objective
- Your target decision-makers and influencers
- Your opponents and their planned tactics
- The timeline for relevant policy process
- Your core partners and your agreed process for communicating and decision-making

An action plan should also include a detailed work plan that is based on your selected advocacy strategies and anticipated communications. It should highlight:

- Planned activities and their timelines
- Persons/partners responsible for carrying out the activities
- Required resources for the activities and who is providing them
- Indicators for monitoring activities and tracking progress

Make sure that your plan also includes a risk assessment and crisis management plan. This should highlight any major dangers to your campaign and what actions you will take to mitigate them.

It should also outline how you and your partners will respond — including specific roles and responsibilities — if a crisis arises. By anticipating risks and having a mitigation and response plan in place, your campaign leadership team will be more likely to minimize any impacts.



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#### HELPFUL HINT:

The campaign process is dynamic and ever changing, and your leadership team should regularly revisit your shared action plan and adjust it based on current circumstances.



## Run your campaign: What you need to know

### WHY IS IT IMPORTANT?

Now that you have a strategic and well-documented campaign action plan in place, it's time to carry it out. Your plan is important, but remember that there will be times when you will need to deviate from it. Naturally, unanticipated opportunities and setbacks may arise to which your leadership team will need to rapidly respond.

### WHAT NEEDS TO BE DONE?

Common situations often arise during a campaign that can require you and your partners to make quick, strategic decisions. They might include:

- **Timing:** Your core partners may be pressured by members of your advocacy network, your target decision-makers, and your policy champions to move forward despite lacking the necessary votes or support.
- **Policy content:** You may face pressure to significantly weaken the proposed policy in order to ensure passage. Similarly, you may be asked to consider changes to your policy to secure a vote or support from a decision-maker.

Now is the time to refer back to what items your core group decided were non-negotiable. If a proposed change appears to be minor or consistent with the compromises your network has previously agreed upon, arrange a meeting with your sponsor to discuss your options.

- **Opposition:** You might face opposition tactics that could jeopardize your efforts. Respond immediately and proactively, and maintain regular contact with supportive policymakers and key "influentials" that may know about opposition maneuvers designed to disrupt your efforts.

Be prepared to help your sponsors troubleshoot these and other types of unanticipated events as your policy moves through the process.



#### HELPFUL HINT:

Carefully track and monitor the policy process in collaboration with your sponsor's office. Get on the distribution lists for the committees and other bodies that will consider your proposed legislation or regulation and check their websites regularly.

Watch for new draft policies that appear and are related to your issue, as they may be designed to undermine your legislation or regulation.



HELPFUL HINT:

Sometimes even when you and your partners have done everything “right,” your desired law or regulation will not pass at the preferred moment. Don’t give up.

As a result of your efforts, many stakeholders will now believe in your cause. In addition, the media, public and decision-makers will be more educated on your issue, which will put you in a better position when the next opportunity arises. Most campaigns responsible for landmark public health policies experienced defeat before achieving their ultimate objective.



## Monitor and evaluate progress: What you need to know

### WHY IS IT IMPORTANT?

Monitoring and evaluating your progress is an essential part of any policy advocacy campaign and ensures that planned actions are taking place at the correct time. It also helps you know whether you are gaining support over the course of your campaign. A good monitoring plan can tell you which of your strategies are working best and which may need to be adjusted.

### WHAT NEEDS TO BE DONE?

There are many ways to monitor and evaluate progress. At a minimum, your core group of partners should conduct:

- Regular collection of information to measure progress according to indicators in your campaign action plan.
- After-action debriefs following big campaign moments, such as the launch of a report or event with parliamentarians, to discuss what went well, what should be improved and any important outcomes.
- Periodic, routine check-ins to make sure your campaign activities are progressing according to plan and resulting in the desired outcomes.

If these actions reveal that your campaign is not making steady progress, take the time to ask why and be prepared to make changes. This may include shifting strategies, updating your messages and messengers, or planning new actions to counter emerging opposition. It may also involve adjusting timelines or responsibilities. If a partner is not able to carry out their assigned roles or planned actions, you may need to shift responsibility to keep moving forward. This is a decision best discussed and determined by a core group.



## Celebrate success and remain engaged: What you need to know



### HELPFUL HINT:

Sometimes even when you and your partners have done everything “right,” your desired law or regulation will not pass at the preferred moment. Don’t give up. As a result of your efforts, many stakeholders will now believe in your cause.

In addition, the media, public and decision-makers will be more educated on your issue, which will put you in a better position when the next opportunity arises. Most campaigns responsible for landmark public health policies experienced defeat before achieving their ultimate objective.

### WHY IS IT IMPORTANT?

Successful advocacy campaigns take time. Make sure that you celebrate successes — both big and small — when they happen. This helps keep you and your supporters energized, inspired and engaged with your issue over the course of your campaign and beyond.

### WHAT NEEDS TO BE DONE?

Make sure to acknowledge and thank your supporters along the way. Your aim is to keep people motivated. Activities may include:

- A formal thank you letter to a decision-maker
- Using social media to congratulate grassroots supporters
- An award and ceremony for supporters who have supported your campaign in some special way
- An event to celebrate achievement of the campaign’s policy objective

Remember that when the policy objective is achieved, your work as an advocate is not over. In fact, that moment is likely to usher in an entirely new campaign to ensure successful implementation. As an advocate your role in successful implementation might include:

- Ensuring that additional laws or regulations are drafted, approved and released at various levels of governance
- Countering any actions to repeal or amend the policy in order to lessen its impact
- Encouraging the agency responsible for implementation to both educate stakeholders about the new policy and provide training to those who will carry it out or enforce it
- Monitoring implementation of the law and reporting violations
- Documenting any industry or opposition attempts to circumvent the policy
- Working with the media to publicize implementation activity, or lack thereof
- Filing complaints or bringing legal action, if necessary, when the government fails to enforce the law