Foreword

Dear partners in development,

It is my pleasure on behalf of Restless Development to present to you this training manual on evidence-informed advocacy. As Civil Society Organisations (CSOs), society has tasked us with the responsibility of helping bring about solutions to many issues of concern. The question of using resources judiciously is one of society’s key concerns and its attainment, one of the main tasks that has been requested of CSOs. As such advocacy around and related to governance, transparency and accountability have become paramount on the CSO work agenda.

At Restless Development, we are determined to increase the positive impact of CSOs in development. A major component of our work is capacity building targeting like-minded CSOs. With many years of experience championing evidence informed advocacy, we have significantly expanded the reach and results of our work with and for young people and have influenced and aided government’s agenda setting, policy formulation, decision making, policy implementation and monitoring and evaluation. This has further widened our experience and given us the credibility needed to effectively build and promote a professional youth-led development sector.

We know there are many organisations out there that share our views on the important role that advocacy plays in development. We believe that if we work together and co-ordinate our efforts, we can have an exponential impact. We recognize that sharing knowledge and experiences, our track record and proven methods together with local knowledge are key to achieving this. As such we provide technical training and ongoing support to youth-led and youth-serving civil society organisations. These efforts are meant to result in both an increase and improvement of their work. Through this training manual, we hope to share our knowledge, experiences and best practices gained in the area of evidence informed advocacy. Through it we are aiming to:

- Create an environment where CSOs can undertake advocacy and therefore meaningfully engage government and policy-makers in the area of policy formulation, decision making and implementation.
- Create an environment where government and policy-makers consider evidence shared by CSOs to influence policy processes reliable, consistent, timely and realistic.

This manual is dedicated to all our partners in particular the CSOs who are part of the national alliance tracking the implementation of the ESA Commitment. Recognition is extended in particular to AmplifyChange for their support regarding this work.

Please enjoy your reading and facilitation,

Harriet Mwiinga (Mrs)
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1.0 Introduction to the CSO Advocacy Manual

1.1 Background
This Advocacy Manual is based on experiences and best practices noted in the capacity building work targeting like-minded Civil Society Organisations (CSOs). Further, some of the ideas and content shared in this manual are drawn from best practices, case studies and evidence shared by United Nations Educational, Scientific and Cultural Organisation (UNESCO), United Nations Children’s Fund (UNICEF) and the Zambia National Education Coalition (ZANEC).

1.2 The overall purpose of the Manual
Restless Development recognizes that evidence based advocacy work should be an integral part of an organisations’ broader work. This advocacy manual is therefore not only intended to help CSOs understand how evidence-based advocacy fits in their overall mission and goals but also to engage them on practicing advocacy skills. It is set to build advocacy-planning skills among participants in a practical manner and enlighten CSOs on what they can achieve through the use of evidence in advocacy work.

1.3 Target users
The targeted users of this Manual are CSOs that are wanting to start to engage in advocacy work and that are working as part of a wider network or in coalitions.

1.4 Manual layout
The manual has within it a total of seven sessions all arranged in a successive manner and all inter-linked. The sessions and appendices are as follows:

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<th>Contents</th>
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<td>An introduction to social accountability</td>
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<td>Appendices</td>
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<td>Tool 1: Setting Advocacy Priorities</td>
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<td>Tool 5: Mapping an Advocacy Strategy</td>
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</table>
1.5 Layout of each session
Each training session has a detailed plan that will allow the facilitator to understand:

1. The overall objectives of the planned sessions.
2. The timing of the session: This is given in terms of minutes that it will take to run through the session. The timings can be adapted by the facilitator.
3. What is needed to run the session and how to run it: This includes an outline of the presentations to be made during the training and the activities that the participants will undertake as a way of enhancing their learning.

Although the sample sessions used in this manual are lifted from the CSO Advocacy Training which was inclined towards using evidence in tracking the implementation of the Eastern and Southern African (ESA) Commitment on Sexual and Reproductive Health, they can still be adapted fit other evidence informed advocacy trainings targeting CSOs.

1.6 Training approach and methodology
As much as possible, the sessions should be kept practical and interactive. The activities are meant to get the participants to practice the key learnings that they will gain throughout the training. Any group work will be specified in the instructions as a guide for the facilitator. The sessions have been planned to be:

- **INFORMATIVE:** they contain information that will be presented by the facilitators.
- **PRACTICAL:** Sessions have proposed activities that will be completed by the participants.
- **INTERACTIVE:** As much as possible, the facilitator is expected to ensure there is interaction between the participants with adequate time allowed for sharing of experiences.

Kindly note that the user of this manual is also expected to make an effort to read additional materials that will help them deliver the sessions well.
SESSION 1: An introduction to social accountability

Facilitators session notes
The most important feature of democracy is the accountability that elected public officials owe to the citizens. Social accountability is a useful concept that refers to the various actions, tools and mechanisms that can be used by civil society organisations (CSOs), the media, citizens and communities to hold elected public officials and non-elected public servants accountable. As a facilitator, remember that a lot of the CSOs will have done some social accountability work, and it is important that they share their experiences as the session in being run.

Objectives of the session
By the end of the training, participants will:
  a) Define good governance;
  b) Discuss the fundamental principles, indicators, and characteristics of good governance
  c) Have a clearer understanding on social accountability and how it can be applied
  d) Have a clearer understanding of the Zambian policy process
  e) Describe opportunities for influencing policies and legislation especially that connected to the provision of ESA/ Comprehensive Sexuality Education (CSE)

Session Timing
This session is planned to run for a total of five hours

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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</thead>
<tbody>
<tr>
<td>10 minutes</td>
<td>Introduction to the session, key objectives and approach</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Discussion in two groups on what governance and the term good governance mean</td>
</tr>
<tr>
<td>15 minutes</td>
<td>Report back by each of the groups.</td>
</tr>
<tr>
<td>75 minutes</td>
<td>Presentation on what governance and what good governance are.</td>
</tr>
<tr>
<td>30 minutes</td>
<td>What is a policy and what is the policy cycle</td>
</tr>
<tr>
<td>60 minutes</td>
<td>Presentation: What is a policy and what is the policy cycle</td>
</tr>
<tr>
<td>15 minutes</td>
<td>Discussion: What is accountability and what is social accountability?</td>
</tr>
<tr>
<td>30 minutes</td>
<td>Presentation: Accountability and social accountability</td>
</tr>
<tr>
<td>15 minutes</td>
<td>Discussion: Why is social accountability important and some tools used</td>
</tr>
<tr>
<td>30 minutes</td>
<td>Learning and sharing on social accountability tools</td>
</tr>
</tbody>
</table>

Things to remember
What will you need?
  o PPT 1 (included in the facilitator’s pack)
  o Laptop and projector
  o Flipchart paper, stand and markers

How to facilitate the session?
  o Make sure you have reviewed the information provided on what social accountability is and have also got some copies of legislation and policy documents that you can use to show the participants what some government commitments are.
Have available a print out of the brief on the legislation that supports citizens engagement. This is part of the notes below.

Discussion: What is governance and what is good governance? (60 minutes)
- Divide the participants into three or two groups and ask them to discuss what governance is and what good governance looks like. (20 minutes)
- Get each of the groups to present in plenary that they have discussed. (15 minutes)
- Explain what governance and good governance are and particularly point out the fact that they have rights to participate in the governance processes in Zambia. (10 minutes)
- Hand out the sheet describing the different policies and legislation in place that support citizen’s participation and discuss the different highlighted policies one at a time allowing for questions to be asked. (30 minutes)

Discussion: What is a policy and what is the policy cycle (30 minutes)
- Have the participants explain what they understand to be a policy and also give examples of any policies that they know. This would take at least 15 minutes.
- Show the participants copies of different policies and legislation, strategy papers by Government as well as Programme documents.

Presentation: Policies and the policy cycle (60 minutes)
- Present on what a policy is, remember to differentiate between a policy and a piece of legislation.
- Use a flip chart paper to draw the policy cycle and open a discussion about what each stage of the policy cycle is and how they can participate in the stages.
- Keep the session interactive by allowing the participants to share experiences of any work they have done along the policy cycle.

Discussion: What is accountability and what is social accountability? (10 min)
- Ask the participants to work in threes to define accountability and social accountability.
- In a plenary session let each trio describe what they have discussed and how they have defined the concepts.

Presentation: Accountability and social accountability (30 minutes)
- Take 15 minutes to present on what the two concepts mean
- Leave 10 minutes for Q&A.

Discussion: Why is social accountability important and some tools used (15 minutes)
- Explain to the participants why social accountability is important and relate it to the discussion on good governance.
- Explain some of the different tools used in social accountability.

Learning and sharing on social accountability tools (30 minutes)
- Ask representatives from any of the invited CSOs to share what social accountability tools they have used in their work.

Conclusion: Remind the participants of the fact that they have already been doing some social
accountability work and that because there are some CSOs that have already developed some tools, they should always try not to reinvent the wheel but instead learn of what others have done and if appropriate adapt tools already developed thus save on time and funds.

Notes to read
Key concepts you need to understand: Governance, good governance, accountability, social accountability, policy cycle, stages of the policy cycle

What is good governance?

Good governance refers to the sound and competent management of a country’s resources and affairs. It is a prerequisite to a society where people’s basic needs are met sufficiently, where caring communities are nurtured, and where relationships between its members are anchored on justice and equality. The three fundamental principles of good governance are transparency, participation, and accountability. Transparency means information on government programmes and transactions are readily available, accessible, and understandable to the public. Participation entails active involvement of citizens in government processes and decision-making. The two key agents of good governance are the government and citizens.

What is accountability?

Accountability is most commonly understood as the requirement of those in power to explain and take responsibility for their choices and actions. This often refers to officials in government who are seen as custodians of public resources. Ackerman (in a book entitled Social Accountability in Africa – Practitioners Experiences and Lessons) defines Government Accountability as a ‘pro-active process by which public officials inform about and justify their plans of action, their behaviour and results and are sanctioned accordingly’. Accountability means that government representatives and bodies are responsive and answerable to the public from which their authority is derived.

In this definition, emphasis is put on the fact that accountability is a pro-active process where government officials do not sit and wait for citizens to request for information and accountability but actively and voluntarily disseminate information, convene forums of public participation and give account. Accountability is not merely a one off activity but a continual process between public officials (the supply side of accountability) and citizens (the demand side of accountability).

Accountability refers to the process of holding actors responsible for their actions. More specifically, it is the concept that individuals, agencies and organisations (public, private and civil society) are held responsible for executing their powers according to a certain standard (whether set mutually or not).

This definition focuses on the process through which power-holders are held to account and is commonly divided into the notions of answerability and enforceability: the former a process of requiring a justification for the use of power and the latter a process of enforcing sanctions in the event that power is considered misused.
### Different types of accountability

Accountability can take different forms:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Horizontal accountability</td>
<td>The capacity of state institutions to hold other public agencies and branches of government to account e.g. through parliamentary inquiries. Citizen voice is mostly absent in these processes.</td>
</tr>
<tr>
<td>Vertical accountability</td>
<td>The means through which citizens, mass media and civil society seek to enforce standards of good performance on officials e.g. through elections and formalised advocacy and lobbying efforts.</td>
</tr>
<tr>
<td>Diagonal or social accountability Mechanisms</td>
<td>whereby ordinary citizens and/or civil society organisations participate directly or indirectly in demanding accountability</td>
</tr>
<tr>
<td>Youth-led accountability</td>
<td>The enabling of young people to hold decision-makers accountable for the commitments they have made toward sustainable development, through increased capacity, access and agency</td>
</tr>
<tr>
<td>Mutual accountability</td>
<td>A mechanism comprising social accountability mechanisms led by citizens and formal or institutional accountability processes, where all stakeholders share responsibility for achieving shared aims.</td>
</tr>
</tbody>
</table>

Source: Restless Development, Accountability in Action A PRACTICAL GUIDE FOR YOUNG PEOPLE TRACKING THE SUSTAINABLE DEVELOPMENT GOALS

### Democratic accountability

This is holding of political representatives to account for their performance in office. It is generally tied to the electoral cycle and operates through citizens bestowing electoral mandate on individuals and/or political parties. It requires constitutional and legislative framework that confers on citizens the right to elect representatives and requires a constitutional separation of executive, legislature, and judiciary. This is also known and described above as vertical accountability.

### Social accountability

Worldwide there is increasing recognition that citizen involvement is critical for enhancing democratic governance, improving service delivery, and fostering empowerment. Social accountability refers to the extent and capacity of citizens to hold the state and service providers accountable and make them responsive to needs of citizens and beneficiaries.

It can be understood as a process by which ordinary citizens, who are the users of public services, voice their needs, preferences and demands regarding public services, and are able to hold policy-makers and service providers accountable for their performance and commitments via service delivery.

Social accountability encompasses initiatives that focus on citizens as the ultimate stakeholders and is based on the principles of transparency, accountability, and participation. Social Accountability relies on citizens and citizen groups to ensure accountability. Citizens, civil society organisations, media and communities monitor behaviour and decisions of duty bearers. It depends on multiple citizen actions to
monitor government actions. Social accountability is about citizens exacting accountability from duty bearers on various issues that affect their lives.

For details on the policy and policy cycle, see the ZGF policy influencing the training Toolkit

What is public policy

“Public policy is understood as a course of action, authorised by government, to achieve certain goals. Such a course of action may take many forms. It could, for example, take the form of a law, a strategy or a programme. Even a speech made by a president or a minister could outline a government’s planned course of action.”CAFOD, Christian Aid, Trocaire (2007).

Public policy reflects the priorities of government. Ideally, it should also reflect the priorities of citizens.

The policy cycle

The policy cycle is said to be made up of five distinct stages:

1. **Agenda setting, problem definition and articulation**: this involves recognising a problem or gap which would benefit from the creation of a new public policy, or the change of an existing policy. Then expressing clearly the practical and political reasons and evidence as to why the state should prioritise work for state intervention. The issue is then put on the government’s (formal or informal) agenda for;

2. **Policy formulation**: this involves discussion and debate between governmental officials, interest groups, and individual citizens over how best to address the issue. Setting clear goals and listing the steps to achieve them. Discussion of alternative solutions, potential obstacles, and identifying how to measure the effects of the policy change. It is at this stage that proposals and demands are transformed into government policy documents, actions or programmes as well as laws and regulations;

3. **Decision-making: Acceptable formulation** means that the proposed course of action is likely to be authorized by the legitimate decision makers, usually through majority-building in a bargaining process. That is, it must be politically feasible. If the policy is likely to be rejected by the decision making body, it may be impractical to suggest it. This is the political phase of policy formulation. This is the stage in the policy cycle where options have been evaluated, choices made between options and decision taken to bring onboard i.e. follow through with chosen option/s. This then ushers in a range of activities designed to provide resources for the successful accomplishment of the option/s. This stage includes the definition of policy objectives and consideration of alternative approaches responding to the identified gap or problem, looking at the expected outcomes, effects and impacts of each alternative approach, its strengths and weaknesses, worst and best case scenarios, etc. Decisions are made on what criteria is to be used to decide: e.g. cost-benefit analysis, environment impact assessment, risk analysis, political considerations;

4. **Policy implementation**: This represents the stage where government executes an adopted policy as specified by the legislation or policy action. At this stage, various government agencies and
departments responsible for the respective area of policy, are formally made responsible for implementation.

5. **Policy monitoring and evaluation**: this can involve monitoring the actual implementation of the policy as well as evaluation of the policy at the end of the planned implementation. Both processes assess how effective the new policy has been in addressing the original problem. This often leads to additional public policy changes. It also includes reviewing funds, and skills and commitment of implementing agencies, to ensure that the policy can be maintained. At the stage where the policy is being evaluated, there is a possibility of looping back to stage one.

**Why is social accountability important?**

Social accountability is the constructive engagement between citizen groups and the government for the purpose of checking and monitoring the conduct and performance of public officials and service providers in their use or allocation of public resources.

Social accountability strengthens links between governments and citizens to:

1. Improve the efficiency of public service delivery and increase the responsiveness of services to a range of users;
2. Improve budget utilization;
3. Emphasize the needs of vulnerable, marginalized and traditionally excluded groups in policy formulation and implementation;
4. Tackle gender-based imbalances;
5. Demand transparency and expose government failure and corruption;
6. Facilitate links between citizens and local governments in the context of decentralization;
7. Construct new democratic spaces for political engagement and ensure that existing spaces are used to the best possible effect.

To effectively address governance issues, initiatives to strengthen public accountability must be a joint effort of the government and citizens. Hence, a constructive civic engagement with the government can result in a more capable, responsive, and accountable system of governance.

**Different mechanisms/tools that can be used in undertaking social accountability**

The tools and methods of social accountability are diverse and varied but there are certain basic similarities. The key common components include collection, analysis and dissemination of information, mobilization of public support, advocacy and negotiation for change. Social accountability practices may also include enhancing citizen knowledge regarding the conventional mechanisms of accountability and efforts to enhance citizen/ CSO participation in the ‘internal’ mechanisms of accountability (e.g., citizen involvement in public hearing and commissions). Social accountability can be done in different ways. Specific tools can include:

1. Social audits
2. Participatory budgeting,
3. Public expenditure tracking,
4. Community monitoring of public service delivery;
5. Citizen report cards and community score cards;
6. Investigative journalism,
7. Public commissions

Legal Framework for citizen participation in governance

Public participation in decision making is a key principle of a human rights framework and is mandated by the Constitution and various other pieces of legislation in Zambia. The starting point for any participatory process is the legal framework within which it is situated. Provisions on participation of citizens including the youth in developmental processes is highlighted in the legislation below: The Constitution Amendment of 2016.

<table>
<thead>
<tr>
<th>Part Section</th>
<th>What the provision covers or provides for</th>
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<tbody>
<tr>
<td>Part V 88</td>
<td>Provides for the right of any citizen to petition the National Assembly to initiate the enactment, amendment or repeal of legislation</td>
</tr>
<tr>
<td>Part V 89</td>
<td>Provides for public access and participation in the legislative process</td>
</tr>
<tr>
<td>Part IX 147</td>
<td>This covers the general principles of devolved governance and specifically recognizes the sub-structures through which local Governance shall be undertaken</td>
</tr>
<tr>
<td>Part XI 151</td>
<td>Describes the system of local government which it stipulates must promote peoples participation in democratic governance, speaks to the accountability of local authorities and more importantly encourages the involvement of communities and community organisations in matters of local Government.</td>
</tr>
<tr>
<td>Part XI 153</td>
<td>Notes that a Council can invite a person whose presence is in its opinion desirable to attend and participate in the deliberations of the Council.</td>
</tr>
<tr>
<td>Part XVI 205</td>
<td>This covers public finance and budget and under the said section, the Amendment has provided for public participation at all levels of Government, in the formulation of financing frameworks, development plans and preparation of annual budgets.</td>
</tr>
</tbody>
</table>

The Local Government Act of 1991

Under the functions of the Councils, its states: (20) To prepare and administer schemes for the encouragement of and participation in, community development,

29. (1) Subject to the provisions of subsection (2), all meetings of a council shall be open to the public. (2) A council may, by resolution, exclude the public from a meeting (whether during the whole or any part of the proceedings) whenever publicity would be prejudicial to the public interest by reason of the confidential nature of the business to be transacted or for other special reasons stated in the resolution and arising from the nature of that business or of the proceedings.
The Revised Decentralisation Policy

The objective of Decentralisation in Zambia stems from the need for the citizenry to exercise control over its local affairs and foster meaningful development which requires that some degree of authority. The Policy seeks to empower provinces and districts manage their own affairs for effective social economic development and further seeks to promote a decentralized and democratically elected system of governance which enhances community participation in decision-making.

This Policy includes specific policy measures to ensure that Sub-District structures are established for the effective and efficient delivery of services. In 2011, with the coming in of the new Government, the Residents and Area Development Committees (RDCs and ADCs) that had initially been the community development structures were abolished and replaced with Ward Development Committees (WDC) as prescribed in the revised Decentralisation Policy (2013).

The aims of the WDCs are to: (i.) Create a link between communities and the Council. (ii.) Ensure that the residents in the Ward have an input in decisions made by the Council. (iii.) Stimate and coordinate initiatives for the improvement of the environment and the livelihood of the residents. The functions of WDCs have been categorised as follows; (i.) Development planning and coordination (ii). Resource mobilisation (iii.) Monitoring and Evaluation.

One of the hallmarks of “good governance” is its inclusiveness and attention to equity and participation for all groups including the youth.

Cabinet Circular No. 10 of 2014

This Circular effects devolution in a phased manner of some Central Government functions and staff to all the Councils effective 1\textsuperscript{st} January 2015. The Circular in describing the institutional arrangements of the phased implementation of the Decentralisation Policy, recognises the national, provincial, District and sub-District levels as the institutional framework for the decentralised system of Government by devolution with the WDCs specifically recognised for their responsibility in promoting community participation in decision making and development planning and implementation. The other significant development, is the phased implementation of revised National Decentralisation policy of 2013 through Sector Devolution Plans which started in earnest in 2015. This is complemented by the implementation of the Planning and Budgeting Policy which strengthens the sub national structures\textsuperscript{1} from provincial to community level in planning and decision.

The National Planning and Budgeting Policy

The National Planning and Budgeting Policy is designed to guide the processes used to plan, implement, monitor and evaluate Development Plans, and Annual Budgets. The Policy provides statements of the principles, procedures, structures, timelines and responsibilities that are to be used in doing same. Within the six measures outlined within the Policy is a measure (c) calls for facilitating participatory

\textsuperscript{1} This is through the institutionalisation of the Provincial Development Coordinating Committees; District development Coordinating Committees, Ward Development Committees and the Area Development Coordinating Committees.
and/or decentralised development planning and budgeting processes and recognises the role of state
and non-state actors in the planning and budgeting processes. This commitment to a more participatory
way of budgeting and planning could allow for greater participation of non-state actors such as CSOs
SESSION 2: The Eastern and Southern African (ESA) Commitment

Facilitators session notes
This is both an informative and a practical session. Apart from just making a presentation, the participants will also undertake an activity that will enhance their understanding of what has been done to date.

Objectives of the session
By the end of the session, the participants will have:
1. Learnt of and discussed the ESA commitment.
2. Undertaken an activity to plot out what has been done in Zambia focusing on key milestones, successes and challenges.

Session Timing
This session is planned to run for a total of 2hrs 30 minutes

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 minutes</td>
<td>Welcome and introductions</td>
</tr>
<tr>
<td>30 minutes</td>
<td>Presentation: The Eastern and Southern African Commitment</td>
</tr>
<tr>
<td>10 minutes</td>
<td>Question and answer session</td>
</tr>
<tr>
<td>40 minutes</td>
<td>Activity: ESA Commitment Reflections; plotting what has been done so far</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Group presentation</td>
</tr>
<tr>
<td>10 minutes</td>
<td>Question and answer session</td>
</tr>
<tr>
<td>10 minutes</td>
<td>Conclusions</td>
</tr>
</tbody>
</table>

Things to remember

What will you need?
- PPT 2 (included in the facilitator’s pack)
- Laptop and a projector, colored flashcards, markers, flipcharts, and masking tape

What will participants need?
- Reference Material: ESA Commitment Overview

How to facilitate the session?
- Make sure you have reviewed the content of the reference material and the PPT.

Presentation: The Eastern and Southern African Commitment (30 minutes)
- Refer to the PPT 3: The ESA Commitment Overview
- Leave 10 minutes for Q&A.

Activity 1: ESA Commitment Reflections; plotting what has been done so far (40 minutes)
- Ask the participants to break into 4 groups.
- Provide each group with colored flashcards, markers, flipcharts, and masking tape.
- Based on the information presented in this session and information that they
themselves as participants have, including work that they may be involved in as organisations, ask each group to put together a list that reflects some of the milestones, challenges, and successes of the ESA Commitment after it was put in place. (20 minutes)
  o Once the groups have completed this task, ask them to come up with a statement indicating the relevance/importance of monitoring the ESA Commitment (10 minutes)
  o Then ask each group to briefly present their reflections on the ESA Commitment and their agree statement on the relevance of the project. (20 minutes, up to 5 minutes per group)
  o Leave 10 minutes for Q&A / Clarify all misunderstandings

Conclusion
Remind the participants that the training is meant to contribute towards the efforts that have been made in following up on the ESA Commitment and the wider work around the implementation of SRHR and HIV programming targeting young people in Zambia.

Notes to read
Key concepts you need to understand: Evidence gathering, communication, networking

In December 2013, ministers of education and health from twenty ESA countries affirmed and endorsed their joint commitment to deliver Comprehensive Sexuality Education (CSE) and Sexual and Reproductive Health (SRH) services for young people. Part of the work undertaken by Restless Development is meant to monitor or track progress and implementation of this commitment.

The ESA Commitment document was developed based on a Regional Report, (“Young People Today: Time to Act Now”) which reviewed the trends and status of sexual and reproductive health and HIV among adolescents and young people in the ESA Region including comprehensive sexuality education and service needs.

Some of the Report findings informing the Commitment include the following:

- Adolescents and young people (aged 10-24) make up an estimated 33% of the total population of the Eastern and Southern Africa (ESA) region.
- 430,000 young people are infected with HIV per year (50 per hour).
- Young women are still disproportionately affected compared to young men.
- 2.6 million young people aged 15-24 are living with HIV.
- HIV knowledge levels among young people remain below 40%.
- Teenage pregnancy rates still remain high; by age 17, at least 1 in 5 young women have started childbearing in 6 of the 20 countries.
- Maternal mortality is among the leading causes of death for adolescent girls.

Key recommendations were offered as guidance on how to move forward: There is need for:

- Bold leadership and strategic actions.
• Commitment from the education and health sector to scale up the core elements of regional conventions.
• Recognition of the changing realities in the lives of young people and work to eliminate future barriers to access sexual and reproductive health (SRH) and HIV services they need.
• Scaling-up comprehensive sexuality education (CSE) and youth SRH and HIV services.
• Early action to be taken through education. Early adolescence (age 10-14) is a key stage for education to make a difference to key health and social outcomes.
• Maximising the proactive effect of “Education for All”. It is a key determinant of a number of health and social outcomes, including reduced HIV risk, maternal mortality and improved gender equality.
• Making an AIDS free future a reality.
• Strengthening gender and rights within education and health services.
• Stakeholders to work together towards a common agenda for adolescents and young people.

The ESA Commitment Countries

| 5. Ethiopia | 10. Mauritius | 15. South Sudan |
| 16. Swaziland |
| 17. Tanzania |
| 18. Uganda |
| 19. Zambia |
| 20. Zimbabwe |

Overview of the commitment

• **Scale up access and quality of CSE:** Schools and other education institutions must deliver good quality sexuality education which is culturally appropriate, gender sensitive and evidence informed.

• **Increase access to YFSRH services:** Comprehensive sexuality education must be linked to accessible, affordable and effective health services and commodities for young people. This includes condoms, contraceptives, HCT, HIV/STI treatment, post abortion care, safe delivery, prevention of mother-to-child transmission and other related services.

• **Eliminate all HIV infections:** HIV remains a problem, with 430,000 new infections per year among young people aged 15-24; with young women still more heavily affected and with an increase of 50% in deaths amongst adolescents living with HIV globally.

• **Reduce early and unintended pregnancies:** Adolescent pregnancy often brings detrimental social and economic consequences for a girl, her family and the broader community especially if it leads to a girl dropping out of school. The health risks for adolescents are also greater, with higher risks of birth complications and maternal mortality.

• **Eliminate gender-based violence and child marriage:** It is critical for countries in the region to make gender and rights a non-negotiable component of any response to the needs of adolescents and young people and to enforce existing zero-tolerance policies and laws.
effectively. In addition, countries must identify child marriage ‘hot spots’ and use the laws and existing policies to protect the rights of girls and young women.

Regional Accountability Framework
The endorsed commitment has an accountability clause that binds the countries to deliver on certain targets in a given time period. An accountability framework linked to the ESA Commitment was developed, and will be the key tool used by the Eastern African Community (EAC) and the Southern African Development Community (SADC) to track progress. The framework monitors 20 key indicators with specific year-end targets for 2015, 2017 and 2020.

What is Happening Around the ESA

1. Coordination of a multi-sectoral response
A coordinated multi-sectoral response is critical for the achievement of the Eastern and Southern Africa (ESA) Commitment Targets. Working groups from education, health and other sectors within the ESA Countries have come together to develop joint work plans outlining their priority activities to achieve the targets. The working groups also include civil society, traditional and religious leaders, young people and the UN family.

2. Human and financial resources mobilised for implementation
Countries have allocated human and financial resources to support the implementation of the commitment.

3. Policies, strategies and legal frameworks
A number of policies, strategies and legal frameworks are in place to address young people’s access to ASRH information and services. The ESA Commitment has seen countries put a spotlight on the importance of having policies that support young people’s access to ASRH information and services.
SESSION 3: Tracking and Monitoring the ESA Commitment

Facilitators session notes
This session builds on what will have been introduced in the ESA Commitment session. It is important that before starting to run this session, you check that all the participants have clearly understood what the ESA commitment is and what has been done to date.

Objectives of the session
By the end of the session, the participants will:
1. Learn about the ESA targets that the National Alliance will be monitoring
2. Participate in developing the tracking work-plan that will operationalize the alliance’ advocacy strategy.

Session Timing
This session is planned to run for a total of 2hrs 35 minutes

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 min</td>
<td>Presentation: ESA Commitment with a focus on the 2015 targets</td>
</tr>
<tr>
<td>30 min</td>
<td>Activity 1: Getting familiar with the ESA targets</td>
</tr>
<tr>
<td>20 min</td>
<td>Group presentations and plenary</td>
</tr>
<tr>
<td>15 min</td>
<td>Activity 2: Where to get Evidence/Data</td>
</tr>
<tr>
<td>30 min</td>
<td>Presentation: How to get Evidence/Data – Looking through the accountability tools that are available - The HIV &amp; Life skills Monitoring Tool</td>
</tr>
<tr>
<td>20 min</td>
<td>Presentation on the Gender Score Card (Forum for African Women Educationalists, Zambia Chapter (FAWEZA))</td>
</tr>
<tr>
<td>30 min</td>
<td>Plenary brainstorming session and conclusion</td>
</tr>
</tbody>
</table>

Things to remember

What will you need?
- PPT Module 4 (included in the facilitator’s pack)
- Laptop, projector

What will participants need?
- Tikambe Alliance work-plan (1 copy per group)
- Pens or pencils

How to facilitate the session?
- Read through the reference material provided on the ESA commitment especially the section on the targets for 2015 and the PPT.

Presentation: ESA Commitment with a focus on the 2015 targets (30 minutes)
- Leave 10 minutes for Q&A and review learnings of the session

Activity 1: Getting familiar with the ESA targets (30 min)
• Ask participants to divide into groups of 5 people (maximum), depending on the size of the group.
• Hand one copy of the reference material on ESA per group and ask them to go over the list of targets for 2015
• Ask participants to discuss the targets for 2015 focusing on whether they are achievable, realistic, can they be tracked? They can also make general comments regarding their perceptions on absences, gaps and potential biases etc. and can include other areas if they see fit

Activity 2: Where to get Evidence/Data - (15 min)
• Hand one copy of the reference material on ESA to each group and ask them to go over the list of targets for 2015.
• In this activity, each group will be asked to identify and list down under each of the 4 targets, places where implementation data/evidence can be collected and who is best placed to collect this data/evidence.
• They will use the lists generated as reference material for the next activity (Activity 3).
• After the groups have completed generating their lists, proceed to next activity.

Presentation: How to get Evidence/Data – Looking through the accountability tools that are available – The HIV & Lifeskills Monitoring Tool (30 min)
• Hand one copy of the accountability tools, HIV & Lifeskills Monitoring Tool, and Gender Score Card to each of the participants
• Take participants through presentation on the social accountability tools currently being used by Restless Development including the HIV and Lifeskills Monitoring Tool; focusing on what they are for and how they are administered.
• End the presentation with ideas on how the accountability tools can be adapted to fit different settings

Presentation on the Gender Score Card (Faweza) (20 minutes)
• Make the presentation focusing on what it is for and how it is administered
• End the presentation with ideas on how the score card can be adapted to fit different settings?

Plenary brainstorming session (30 minutes)
After the two presentations, have a short brainstorm with the participants on how the tools can be adapted to fit their settings. To guide the session, ask the participants the following;
  o Is it possible to use any of the presented tools in their work?
  o Which tool/s can they use as individual organisations?
  o How can they adapt them?
  o Who, within their organisation would use them?
  o What support would they need to help build the capacity of their organisation’s regarding the use of the tools?
  o Do they know of any other tools perhaps being used by another organisation that can be adapted for use in the tracking of the ESA commitment?

If any new ones are suggested allow them to be shared/described and take note of the suggested ones
Notes to read

Key concepts you need to understand: The Eastern and Southern Africa (ESA) Commitment, comprehensive sexuality education (CSE) and sexual and reproductive health (SRH)

Commitment targets related to CSE for 2015:

1. Increase the number of schools that provide life skills-based HIV and sexuality education.
2. Increase the number of teachers who have received training and have taught lessons in HIV and sexuality education.
3. Ensure each country has a national CSE strategy for out of school youth.

Where we currently are regarding CSE

- The national CSE programme launched in April 2014, targets 1,750,000 young people, aged 10 to 24, with a new CSE curriculum. Currently, new teaching and learning materials are being developed and schools are being advised on policies and codes of conduct to reduce the high level of gender-based violence and HIV-related stigma and discrimination.
- Strategies to give young people easier access to HIV testing and other necessary medical services will also be implemented.
- The overall goal is for adolescents and young people in Zambia to receive better sexual and reproductive health services and education, with a focus on preventing new HIV infections and unintended pregnancies.
- The first year of the Eastern and Southern Africa Commitment saw an increase in the number of countries integrating CSE in the school curricula. In addition, CSE programmes have also been developed for out of school youth.
- Effective CSE requires highly skilled and motivated teachers. The International Technical Guidance on Sexuality Education argues that teachers need appropriate training, skills in the use of participatory methods, and ongoing support.
- The capacity and performance levels of teachers regarding the delivery of comprehensive sexuality curricula remains a significant implementation challenge.

Increasing access to youth friendly health services

- The health sector must work closely with the education sector to ensure that the comprehensive sexuality education provided in schools is complemented by the provision of youth friendly health services in order to achieve better sexual and reproductive health outcomes.
- Young people require safe, effective, affordable and quality access to sexual and reproductive health services (SRH). These services offer a range of health, social and economic benefits for young people, including modern contraception, abortion (where legal), pregnancy advice and safe delivery care, voluntary medical male circumcision and confidential testing and counseling for HIV.
- Huge strides have been made in Eastern and Southern Africa to expand young people’s access to HIV testing and counseling (HTC). This progress is in large part due to the fact that many countries have been investing in the expansion of HTC services.

Commitment targets related to SRH for 2015:

- Have sexual and reproductive health training for both pre- and in-service health professionals.
• Increase the number of countries with pre- and in-service training programmes on the delivery of youth friendly health services.
• Increase the number of health service delivery points offer standard, youth friendly services.

Where we currently are on ending GBV and child marriage

Continental Campaign to End Child Marriage in Africa: Efforts to address child marriage in the region have been bolstered by the African Union launch of a Continental Campaign to End Child Marriage in Africa. It was initially proposed that the campaign would run for a period of two years in 10 countries including Zambia. However, other countries have since joined the campaign, including South Africa.

Among the steps to be taken under the campaign, lobbying for the enactment of laws in all African countries that will require that those who wish to marry be at least 18 years of age. The campaign will also begin to work with communities and local stakeholders to build awareness and accept changes in their perception and behavior towards child marriage.

Reinforcing positive traditional rites of passage: Four countries including, Lesotho, Malawi, Swaziland and Zambia are undertaking specialized studies on rites of passage to reinforce positive traditional rights related to sexual and reproductive health of adolescents and young people. In addition, the focus of these studies will also emphasize approaches and frameworks to eliminate and prevent harmful practices, such as child marriage.
SESSION 4: CSOs engagement in the education sector in Zambia

Facilitators session notes
In this session the participants will be presented with a perspective on engagement of CSOs in the education sector in Zambia. This session is meant to help participants understand the current role of CSOs in the sector and the opportunities that exist for advocacy.

Objectives of the session
By the end of the session, the participants will have:
1. Explored the various types and characteristics of CSOs involved in advocacy in the sector.
2. Discussed various practical examples of policy formulation, analysis and influencing that have been employed/are being employed in the sector. This includes the various practical frameworks, tools and approaches to maximize policy impact, various communication tools and other key elements in these efforts.
3. Mapped the ESA CSE context and linked it to advocacy and policy influencing processes. This will include discussion around issues identified as impeding the smooth implementation of the ESA CSE.

Session Timing
This session is planned to run for a total 1 hr 10 minutes

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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</thead>
<tbody>
<tr>
<td>30 minutes</td>
<td>Presentation: CSO Engagement in the Zambian Education Sector</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Activity: Mapping out and linking the ESA CSE to advocacy and policy influencing processes</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Group feedback and presentation</td>
</tr>
</tbody>
</table>

Things to remember
What will you need?
- PPT 2 (included in the facilitator’s pack)
- Laptop and Projector, Flipchart and Markers
- Copies of key issues (1 for each group)

How to facilitate the session?
- Make sure you have reviewed the content of the session and the PPT.

Presentation: CSO Engagement in the Zambian Education Sector (30 min)
- Introduction (5 mins) Talk through the PPT
- The presentation will provide an exploration on the various types and characteristics of different CSOs involved in advocacy in the sector.
- Through it, you will share various practical examples on policy formulation, analysis and influencing that have been employed/are being employed in the sector. This includes the various practical frameworks, tools and approaches to maximize policy impact, various communication tools and other key elements in these efforts.

Activity: Mapping out and linking the ESA CSE to advocacy and policy influencing processes (20 mins)
Themes around the key issues listed will be identified, Participants will then be placed in thematic groups and tasked to identify a number of actions that need to be undertaken in order to address the identified issues. These will be incorporated in the thematic activities for the Alliance’s work-plan work-plan for 2016/17. Also expected from this session is the development of a key advocacy message for the alliance, overall goal for advocacy which will be the basis for developing the advocacy plan/strategy for the Tikambe Alliance.

- Divide the participants into four groups and refer them to the identified list of key issues.
- To each group, assign two of the issues identified as key in the impediment of the smooth implementation of the ESA CSE. They will small discussion around their assigned issues, through these discussions they should come up with one or two worded themes for each of their assigned issues.
- Having done this, they should then identify a number of actions that need to be undertaken in order to address the identified issues.

Group feedback and discussion (20 mins)

Conclusion
Inform the participants that the main purpose of this part of the session is to get them thinking towards advocacy and some of the activities that can be undertaken. Encourage them to note down the activities suggested as they will come in handy in sessions still to come.

Notes to read
Key concepts you need to understand: The Eastern and Southern Africa (ESA) Commitment, comprehensive sexuality education (CSE) and sexual and reproductive health (SRH)

Key Issues identified as impeding the successful implementation of the ESA Commitment

Some of the key issues in the implementation of the ESA CSE are identified as:

- Even though CSE has been integrated in the curriculum, there is still no plan on realistic implementation to achieve its core objectives.
- Evidence is limited on what CSE and wider SRHR provision (information and access to services) is available to young people. Available evidence indicates that few existing strategies are operational and budgeted for.
- Government strategies and services for primary SRH are more effective in urban areas, while inadequate access and referrals to youth-friendly services are characteristic of rural areas. The problem is compounded by low capacity to provide services, especially in rural areas, where 60.5% of Zambia’s population lives.
- Most young people are not aware of policies affecting them, limiting their potential to be effective accountability agents with regards to their implementation.
- Discussion of sexual health, sexuality and HIV is taboo in many areas of the country, especially in rural communities.
- Socio-cultural barriers prevent young Zambians from accessing guidance on avoiding pregnancy and making positive decisions about their sexual health. Teaching of sexuality
education is selective, with some topics excluded as teachers respond to cultural and religious norms.

• Young people in rural communities are not accessing information regarding their SRH. This results in under-age or un-planned pregnancy, high Sexually Transmitted Infections (STIs)/HIV prevalence rates, and a lack of opportunity for young people to claim their right to live full and productive lives in their communities.
SESSION 5: Strengthening the Foundation for Advocacy

Facilitators session notes
Building and maintaining a foundation for advocacy is a continuous process, it extends throughout the stages of creating and implementing an advocacy strategy. Even though the individual alliance members at all levels already have many of the foundation areas in place for undertaking advocacy, broad recognition and common understanding of these areas can cement their capacities for successful advocacy and enhance the alliance’s ability to respond to (sometimes sudden) changes that can occur during implementation of an advocacy plan. This session is an informative one. In this session participants will explore the concept of advocacy and will review eight foundation areas for stronger advocacy.

Objectives of the session
By the end of the session, the participants will:
1. Have discussed what advocacy is and the eight foundation areas.
2. Have undertaken an activity to consolidate their understanding of the elements involved in all eight foundation areas.

Session Timing
This session is planned to run for a total 1 hour, 20 minutes

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>30 min</td>
<td>Presentation: Strengthening the Foundation for Advocacy</td>
</tr>
<tr>
<td>20 min</td>
<td>Discussion: The 8 Foundation Areas</td>
</tr>
<tr>
<td>20 min</td>
<td>Group presentations and plenary discussion</td>
</tr>
<tr>
<td>10 min</td>
<td>Presentation (last slide) and conclusion</td>
</tr>
</tbody>
</table>

Things to remember

What will you need?
- PPT 2 (included in the facilitator’s pack)
- Laptop and Projector, Flipchart and Markers

How to facilitate the session?
- Make sure you have reviewed the content of the session and the PPT.

Presentation: Strengthening the Foundation for Advocacy (30 min) - Refer to the PPT 2
- Introduction (5 mins) - Ask the participants to define the word advocacy, pick out key concepts/words and write these on flip chart paper. Talk through the first three slides of the PPT

Discussing the 8 Foundation Areas (20 mins)
- Divide the participants into four groups
- To each group, assign two of the foundation areas with this instruction: Discuss the “elements to consider” surrounding each of your assigned foundation areas and
document your discussion on flipchart paper.

**Group presentations and plenary discussion (30 minutes)**
- Give each group at least 7 minutes to present what they have discussed

**Presentation – last slide**
- Go through the last slide of PPT 2: things to remember

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**Notes to read**

Key concepts you need to understand: Advocacy

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**Eight Foundation Areas**

Building and maintaining a foundation for advocacy should be a continuous process, extending throughout the stages of creating and implementing an advocacy strategy. Broad recognition and understanding of these Foundation Areas can buttress our capacities for successful advocacy and enhance our ability to respond to (sometimes sudden) changes that can occur during implementation of an advocacy plan. For each Foundation Area outlined in the following pages, ‘elements to consider’ offer specific guidelines that one might want to take into account.

The 8 foundation areas are
1. Credibility
2. Skills
3. Coordination and leadership
4. Capacity to generate and communicate relevant evidence
5. Ability to assess risks
6. Capacity to work with beneficiaries
7. Long-term partnerships that can form a broad base for advocacy
8. Sufficient resources

**Foundation Area 1 Credibility**

As an advocate, it is crucial that government institutions and the communities that you work with trust the organisation and value what you have to say. What makes you an effective advocate is your credibility. Expertise and trusting relationships, complemented by strong research and analysis, form the cornerstones of credibility.

**Elements to consider**
- Can you legitimately speak on behalf of those affected by the issues?
- Is your organisation known and respected by decision makers?
- Is your organisation perceived as objective and trustworthy, or politically partisan?
- Is your organisation fully compliant with ethical standards of engagement with partners you work with?
Foundation Area 2 Skills
Advocacy is a skill that combines knowledge, good judgement and creative problem solving. Building skills for advocacy requires organisational commitment to training, capacity building and promoting staff ability to engage with a wide range of people, both within the office and with partners.

Elements to consider
• Does the office have staff with strong core advocacy skills for analysis, research and communication? If not, can it draw on such people from partners or other parts of the organisation?
• Do staff members have adequate technical knowledge to develop an advocacy strategy and implement it?
• Is there someone who has the capacity and skills to effectively monitor and evaluate advocacy?

Foundation Area 3 Intra-office coordination and leadership
Because we are all working for the same goal – positive change for the young people – everyone in the organisation is an advocate, even if their job title doesn’t include ‘advocacy’. However, advocates engage in a variety of related activities; and so advocacy requires strong collaboration between staff members and strong leadership to pave the way forward.

Elements to consider
• Is there a strong degree of coordination and communication across sectors to work together on a coordinated advocacy strategy?
• Is there strong leadership in the office for advocacy, including support from senior management?
• Does everyone in the office understand their advocacy roles and responsibilities?
• Are mechanisms in place for all staff to be aware of advocacy priorities and messages.

Foundation Area 4 Capacity to generate and communicate evidence
Evidence for advocacy provides credibility and authority to the organisation, allowing you to convince decision makers to support an issue. Data collection, research, analysis, organisation and management provide the basis for solid evidence. This evidence, however, must also be interpreted and then communicated at the correct time, to the relevant audiences and in the appropriate manner. That means using the best format so that the knowledge is clearly communicated, can be absorbed and will have the desired impact. The evidence needs to highlight the issue, the causes of the issue and the solutions to the issue. Being transparent about methodology, and not overstating the findings, adds to credibility and helps the advocate gain advantages in public argument.

Elements to consider
• Are research priorities informed by advocacy strategies, and do they involve colleagues working in communications and other areas?
• Is there capacity for collecting and analysing data, and conducting research towards drawing conclusions that can be addressed by policy changes? If not, is there access to other forms of reliable data and evidence?
• Are processes in place to assess the potential risks of using different types of evidence? Are there processes to ensure data and evidence (particularly if gathered from a pilot project or another region/country) is applicable in the context in which you are conducting advocacy?
• Is there communications capacity to translate research into shorter, non-technical materials, and to develop multiple messages to reach diverse and pertinent audiences?
Foundation Area 5 Ability to assess risks
There are risks in conducting advocacy, as well as risks in choosing not to undertake advocacy. Either path can affect you or our partners’, credibility and authority. As an organisation, we need to evaluate the risks of conducting advocacy, and the potential gains, versus the risks of not conducting advocacy and the potential losses.

Elements to consider
- Are staff members willing, encouraged and supported in taking calculated risks in advocacy?
- Does the office have effective processes for risk mitigation and risk management?
- Does the office have strong, reliable evidence, internal coordination & leadership, and partnerships (see Foundation Areas 3, 4, 7), which can help minimize risk?
- Is careful consideration given to the long-term and short-term risks and gains, especially with regard to impact on children and women, staff, credibility, funding and strategic objectives?
- Has a vulnerability and capacity analysis been conducted?

Foundation Area 6 Capacity to work with targeted beneficiaries
Advocacy must ensure the concerns of children, as well as parents, caregivers, community members and marginalized groups, are reflected in policy dialogue and decision-making. When supporting children’s and young people’s participation in advocacy, it is important to work with them to understand the impact they want to achieve, and help them design the steps to get there, the methodologies to use and the roles of all the key actors involved — those they need as allies, those they need to convince and those they can counterbalance if necessary. Children’s involvement in advocacy must be based on their ethical and meaningful participation. This means that children’s participation in advocacy should be relevant to their particular social and cultural context, and based on their evolving maturity and abilities.

Elements to consider10
- Do staff and managers understand what meaningful, ethical and safe participation by children and young people entails?
- Are children and young people able to express any views or anxieties they may have, and have them constructively addressed?
- Are staff members provided with appropriate training, tools and other development opportunities to create and experience meaningful participation in advocacy?
- Are staff properly supported, supervised and evaluated in their children’s and young people’s participation practice?
- Is there support for staff when children’s and young people’s participation represents a significant personal or cultural change so that it does not become a barrier or an excuse to ignore this crucial participation?
- Do relations between individual staff, and between staff and management, model appropriate consultative and participatory behaviour, treating each other with respect and honesty?
- Are staff oriented, and do they know how to orient governments and partners, to use the Committee on the Rights of the Child’s General Comment no.12 – the right of the child to be heard – so that meaningful participation is promoted and advanced?
Foundation Area 7 Partners and networks that form a broad base for advocacy

The ability to build relationships – personal, public and institutional is very important for effective advocacy. Good relationships allow organisations to reach target audiences, or overcome gaps by connecting with influential ‘secondary’ audiences, as well as generating critical mass behind the causes and issues that advance the rights of children and women. Building such relationships requires understanding the dynamics of power and having the capacity to engage audiences through multiple platforms and forums. As a relationship is nurtured, people will respond and provide support to you, but you should also be prepared to respond in a timely and diligent way. Reciprocity, responsiveness and responsibility strengthens, builds and sustains partnerships.

Successful advocacy efforts do not just solve immediate problems, they can help transform the relationship between government and civil society from distrust and power struggle to partnership and cooperation. By making the voices of civil society heard in an open and transparent manner, advocacy can ensure that policy dialogue and decision making is informed by the perspectives, concerns and voices of children, women and men, including those who are often forgotten and marginalized.

Elements to consider

- How strong is engagement with ministries of social affairs, health and education?
- How strong is engagement with ministries of planning, finance and economic development?
- How strong is engagement with children’s and young people’s organisations?
- How strong is engagement with other local CSOs, think tanks and universities to generate evidence?
- How strong is engagement with the private sector?
- Is the office a member of any coalitions, alliances or networks? If so, does it engage in a leading role on issues that affect children or the young people?

Foundation Area 8 Sufficient resources

Advocacy is resource intensive. It requires investments of funds, staff time and materials over an extended period of time. Resource availability often changes the shape of an advocacy strategy and how it is planned. Therefore, it is essential to know the likelihood of what resources will be available for an advocacy issue at the outset.

Elements to consider

- Are there adequate resources – financial, time, skills, knowledge – for advocacy?
- Are efforts under way to mobilize additional resources, both financial and non-financial, through donors, individual supporters or the private sector?
- Are there efforts to show how resources for advocacy could yield substantially larger gains than the cost in money and time?
- Can advocacy objectives be integrated, for example, combining health, education and child protection?
SESSION 6: Developing an Advocacy Strategy

Facilitators session notes
This session is focused on getting the participants to create an advocacy plan. In this session, the first draft of what is going to be the Tikambe Alliances advocacy strategy will be developed. The development of the advocacy strategy will be participatory and whilst working in small groups, the participants will use three very interactive tools to develop it. The following are the three tools that will be used
1. TOOL 1: Setting Advocacy Priorities - this tool will help participants take the first and all important step in developing an advocacy initiative for the alliance — selecting an issue for advocacy.
2. TOOL 2: Assessing the Environment for Advocacy - will help the participants understand the environment the Tikambe Alliance is going to be working in and the key factors will need to be consider as you it develops/designs its advocacy work.
3. TOOL 3: Mapping an Advocacy Strategy - will help the participants plan a concrete strategy for achieving its advocacy goal, including determining specific activities.

Objectives of the session
By the end of the session, the participants will have:
1. Developed the first draft of what is going to be the Tikambe Alliances advocacy strategy.
2. Identified target audiences, the right messages, and the right messenger to deliver the message;
3. Identified processes, opportunities and entry points;
4. Recognized and identified capacities and gaps; and finally
5. Set impacts, interim outcomes and developed an action plan, that include how they will monitor and evaluate the plan

Session Timing
This session is planned to run for a total of 3hrs 40 minutes, it is best you plan for at least 4 hrs.

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<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>20 minutes</td>
<td>Presentation: Introduction to the session</td>
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<tr>
<td>10 minutes</td>
<td>Breaking into work groups</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Tool 1 Setting Advocacy Priorities</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Group presentations and feedback in plenary</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Tool 2 Assessing the Environment for Advocacy</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Group presentations and feedback in plenary</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Tool 3 Mapping an Advocacy Strategy</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Group presentations and feedback in plenary</td>
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<tr>
<td>20 minutes</td>
<td>Tool 4 Mapping out a common Advocacy Strategy for the Tikambe Alliance</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Group presentations and feedback in plenary</td>
</tr>
<tr>
<td>20 minutes</td>
<td>Presentation on things to remember</td>
</tr>
<tr>
<td>10 minutes</td>
<td>Questions and answers</td>
</tr>
</tbody>
</table>
**Things to remember**

**What will you need?**
- PPT 5 (included in the facilitator’s pack)
- Laptop and projector

**What will participants need?**
- Worksheet: Tool 1 Setting Advocacy Priorities (5 copies; 1 for facilitator, 4 for the participant groups)
- Worksheet: Tool 2 Assessing the Environment for Advocacy (5 copies; 1 for facilitator, 4 for the participant groups)
- Worksheet: Tool 3 Mapping an Advocacy Strategy (5 copies for distribution as described above; 21 to be filled in by each participant in Activity 4)
- Pens or pencils

**How to facilitate the session?**
- Make sure you have reviewed the content of the module and the PPT.
- Start with the presentation.
- Then explain Activity (completion of the tools) and guide the participants as they complete this exercise.
- Make sure you allow enough time to complete every step of the activity.

**Presentation: Introduction to the session (20 min)**
- Refer to the PPT for Module 3
- Take 15 minutes to introduce session.
- Leave 5 minutes for Q&A.
- Then continue with activity 1

**Ask the participants to break into 4 groups.**
Explain that each group will work on the three worksheets as they complete this activity.

**Activity 1: Tool 1 Setting Advocacy Priorities (20 minutes)**
- Each group will work through the worksheet as follows:
  - Section 1: Identifying Issues for Advocacy: The first section of this tool will help the participants brainstorm about the potential advocacy issues the alliance can to address.
  - Section 2: Evaluating Issues for Advocacy: This section will help participants prioritize the issues identified in the previous section.
- Make sure that the participants complete most of the sections of their worksheets. (20 min)
- Once the groups have completed this task, ask them to present the results of this exercise to the rest of the groups and encourage them to complement each other’s work if necessary (20 min).
- Move on to next activity
Activity 2: Tool 2 Assessing the Environment for Advocacy (20 minutes)

- Each group will work through the worksheet as follows:
  - Section 1: Legal Situation
  - Section 2: Public Opinion and the Media
  - Section 3: Forming Alliances
  - Section 4: Opposition
  - Section 5: Accessing Policymakers

- Remind the participants that for this tool they will need to be aware of the following:
  - Current legal situation as it relates to advocacy activities and laws concerning CSE
  - General public’s knowledge of and attitude toward CSE;
  - Policymakers’ knowledge of and attitude toward CSE;
  - Influential actors who have the potential to affect CSE (individuals, organisations, coalitions, policymakers, government offices, media sources, etc.);
  - Influential actors who oppose CSE;
  - Other organisations’ advocacy activities related to CSE;
  - Formal and informal channels for CSOs to access policymakers and/or participate in the policymaking process;
  - Types of information policymakers seek when forming or revising policies.

- Make sure that the participants complete most of the sections of their worksheets.

(20 min)

- Once the groups have completed this task, ask them to present the results of this exercise to the rest of the groups and encourage them to complement each other’s work if necessary (20 min).

- Move on to next activity

Activity 3: Tool 3 Mapping an Advocacy Strategy (20 minutes)

- Each group will work through the worksheet as follows:
  - Section 1: Issue, Goal, & Objectives
  - Section 2: Partners & Alliances
  - Section 3: Targets
  - Section 4: Approaches & Activities

- Remind the participants that for this tool they will need to be aware of the following:
  - What is the advocacy goal?
  - What are the specific objectives that will contribute to the achievement of the overall goal?
  - Who to partner or collaborate with? What are their contributions to the initiative?
  - Who are the targets (policymakers, government agencies, etc.) that need to be influenced in order for the goal to be achieved?
  - What are the key upcoming events that may provide opportunities for mobilization and advocacy?
  - What is the approach to advocacy (e.g., direct or indirect)?
  - What are the specific activities to be carried out?
  - When? How?

- Make sure that the participants complete most of the sections of their worksheets.
Once the groups have completed this task, ask them to present the results of this exercise to the rest of the groups and encourage them to complement each other’s work if necessary (20 min).

**Activity 4: Tool 4 Mapping out a common Advocacy Strategy for the Tikambe Alliance (20 minutes)**

- Collect all the presentations, paste them on one of the walls of the room, where everyone can see
- Together (the whole group) have a discussion around the presentations, picking out highlights and noting the commonalities.
- Using the information standing out as common in the presentations, complete the sections in Tool 3 for the Tikambe Alliance
- In case the presentations/information presented from the groups is very different, do your best to drive the group to agree on what is going to be the one issue that the alliance’s advocacy efforts are going to focus on then proceed in similar fashion for the other sections too

**Conclusion**

- Go through the last slide of PPT 3: things to remember
- Leave 10 minutes for Q&A/Clarify all misunderstandings

**Notes to read**

*Key concepts you need to understand: Advocacy, advocacy strategy,*

Creating an advocacy plan helps to understand the situation, stakeholders and their relative power, and how change happens; identify target audiences, the right messages, and the right messenger to deliver the message; identify processes, opportunities and entry points; recognise capacity and gaps; and finally set goals and interim outcomes, develop an action plan, and monitor and evaluate results.

**Why develop an advocacy strategy?**

Strategic advocacy is the backbone of effective advocacy. It is a disciplined effort to generate fundamental decisions and actions that guide and shape a course for a specific issue. Planning is indispensable and the following are some of the reasons why: Planning helps:

- Put resources (time, funds, and skills) to their most effective use.
- Minimize risks and maximize opportunities for advocacy.
- Advocates plan for and navigate through complex and different environments.
- Align advocacy with other areas of work and organisational goals, both long term and short term.
As CSOs we may want to work on numerous advocacy issues regarding CSE, but it is important to be very selective. Advocacy efforts often require a lot of time and resources. We are more likely to succeed if we focus on one issue at a time. It is natural to want to speak out about everything that matters to us as an alliance—and as individual organisations—but we also have to consider the resources available. Our advocacy issue should always be clearly linked to our mission, programmatic priorities, and strategic focus areas. If it is not, we will not have the authority we need to address it.

**Advocacy tools**

Taking into consideration implementers’ limited time and resources, the tools in Pathfinder International’s Straight to the Point Series provide clear, concise guidance on a variety of issues related to program design, implementation, and evaluation.

The *Straight to the Point* advocacy tools are intended for organisations that want to include in-country advocacy and public policy work among their programmatic strategies. The tools will lead you through the three essential steps to developing an advocacy initiative.

**Tool 1: Setting Advocacy Priorities**

*This tool will help you take the first step in developing an advocacy initiative—selecting an issue for advocacy. Your organisation may want to work on numerous advocacy issues, but it is important to be very selective. Advocacy efforts often require a lot of time and resources. You are more likely to succeed if you focus on one issue at a time. It is natural to want to speak out about everything that matters to you as an organisation—and as individuals—but you also have to consider the resources available to you. Your advocacy issue should always be clearly linked to your organisation’s mission, programmatic priorities, and strategic focus areas. If it is not, you will not have the authority you need to address it.*

Ideally, you should complete this tool in a small group or in a workshop setting because it is very important for advocacy priorities to be debated and discussed.

**Tool 2: Identifying Issues for Advocacy**

The first section of this tool will help you brainstorm about the advocacy issues your organisation is interested in addressing. No more than three issues are recommended. Note that choosing your issue does not just mean choosing the broad topic you want to address (e.g., family planning)—you have to think about specific problems, barriers, and policy-related solutions. To determine your issue, you can begin by identifying the problem you want to address.

*Example problem:* Lack of access to contraceptives

Next, think about what some of the barriers to solving the problem are. The barrier must be related to guidelines, policies, or laws.

*Example barrier:* Injectable contraceptives can only be distributed at health facilities.
Then ask yourself what policy change would help remove the barrier. The answer is your advocacy issue. Be as specific and concrete as possible. Ask yourself questions like: Should a new policy be created? Should a harmful policy be removed? Does an existing policy need to be reformed? Does an existing policy need to be fully implemented?

In this example, what policy change would help increase access to contraceptives? The answer is the advocacy issue.

*Example issue:* Community health workers (CHWs) are permitted to distribute injectable contraceptives.

One way to increase access to contraceptives might be to raise awareness among religious groups about family planning. This is a good idea, but it is not an issue for advocacy. Your issue should be directly linked to a policy change. In this example, CHWs are not currently permitted to distribute injectable contraceptives, so a policy change is needed. The next two tools in the series will help you determine exactly *how* the change will be made.

Sometimes advocacy will be an appropriate programmatic strategy, but often it will not. This depends on whether or not policies have the potential to help solve the problem.

**Tool 3: Evaluating Issues for Advocacy**

This section will help you prioritize the issues you identified in the previous section. The tool lists important criteria that you should consider when deciding which advocacy issue to pursue. The criteria take into account: your organisation’s potential impact on the issue; the effort required to impact the issue; and the importance of the issue to your work. Discuss and debate the criteria as they apply to each of the advocacy issues you identified. Additional sheets of paper, a flipchart, or a computer may be helpful for making notes and recording your answers.

**Tool 4: Assessing the Political Environment for Advocacy**

This tool will help you understand the environment you are working in and the key factors you need to consider as you develop your initiative. A critical element of any successful advocacy initiative is a comprehensive understanding of the opportunities that exist for influencing the policy process and the risks associated with them. After using the first tool to select your issue for advocacy, use this tool to help you determine who you are trying to influence, what their interests are, other key actors, and how best to exert influence.

To assess the political environment, you need the following information:

1. Current legal situation as it relates to advocacy activities and laws concerning your issue;
2. General public’s knowledge of and attitude toward your advocacy issue;
3. Policymakers’ knowledge of and attitude toward your issue;
4. Influential actors who have the potential to affect your advocacy issue (individuals, organisations, coalitions, policymakers, government offices, media sources, etc.);
5. Influential actors who oppose your advocacy issue;
6. Other organisations’ advocacy activities related to your issue;
7. Formal and informal channels for CSOs to access policymakers and/or participate in the policymaking process;
8. Types of information policymakers seek when forming or revising policies.
How to use this tool:

Conducting research and interviews is useful for learning about the political environment, but it is not necessary to complete this tool. Most often, the answers can be easily found using your experience and observations in the field, or through debate and discussion with your colleagues. The best way to complete this tool is in a small group or workshop setting.

If you find that you do not know the answers to many of the questions asked in this tool, you need to ask yourself if the advocacy issue you identified is really the right issue for you. You need to be realistic about your capacities and potential for success. If you do not know the answers, you can either identify a new issue or search for the missing information. You can find it by conducting a document review and/or interviewing representatives from governments, businesses, or other institutions to find out about programs, plans, and regulations. Sometimes the information you want is easily available, but if your issue is complex or unfamiliar, you should consider getting help from someone more familiar with the policymaking process.

**Tool 5: Mapping an advocacy strategy**

This tool will help you plan a concrete strategy for achieving your goal, including determining your specific activities.

After completing the tools you will be ready to launch your advocacy initiative.
SESSION 7: The Role of the Media in Advocacy

Facilitators session notes
Media advocacy is the use of any form of media to help promote an organisation's objectives or goals. The media are almost always forgotten when CSOs undertake advocacy campaigns. In this session, allow as much sharing as you can on how the CSOs present have themselves used the media during their advocacy campaigns and how this actually worked or did not.

Objectives of the session
By the end of this session, participants will be able to:

- Define media and identify what media are available for them to use.
- Define the term advocacy
- Describe why media is important to advocacy and it’s important to influencing decision makers.

Session Timing
This session is planned to run for a total of 2hrs 30 minutes

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>15 minutes</td>
<td>Introductions - What is media and what is advocacy</td>
</tr>
<tr>
<td>30 minutes</td>
<td>Activity - Defining media and advocacy</td>
</tr>
<tr>
<td>60 minutes</td>
<td>Why is Media &amp; Advocacy important</td>
</tr>
<tr>
<td>30 minutes</td>
<td>Media and advocacy activities overview</td>
</tr>
<tr>
<td>15 minutes</td>
<td>Conclusions</td>
</tr>
</tbody>
</table>

Things to remember

Preparations

- Pre-draw flip chart image of Circles of Influence
- Write Media & Advocacy Purpose on flip chart (Why is Media Advocacy Important)

What is media and what is advocacy? (15 minutes)

- As we shared earlier in the presentations; on the ESA Commitment, there is silence that surrounds issues of monitoring implementation of SRHR programming and the ESA – CSE. It is considered a responsibility of certain sectors of society, usually government, and as such others are not expected to participate
- The idea that monitoring implementation is a private matter is one example of a “community norm”. Community norms are sets of attitudes, values, rules and behaviors that are widely accepted. What we know about norms is that they can and do change—which means we can work to change them!
- In this session, we will discuss how we can use media and advocacy to create wide dialogue about norms surrounding ESA -CSE implementation monitoring meant to aid improvement of policies and practices.
- First, we are going to discuss the definitions of the words “Media” and “Advocacy” to be sure
we understand the power of this strategy

Activity: **Defining media and advocacy (30 minutes)**
- Split group into two.
- Give one group the task of brainstorming a definition of “Media” and the other the task of brainstorming a definition of “Advocacy”.
- Give each group a piece of flip chart paper and markers, and only 10 minutes to discuss a possible definition for their word.
- After 10 minutes, call “stop!” and invite 1 representative from each group that discussed the definition of “Media” to post their flip chart at the front, side by side with each other, and stay by their definitions.
- Invite each volunteer to read their group’s definition out loud.
- Invite the large group to comment, question, or amend the definitions and create one accepted group definition.
  
  *Note: The definition should be similar to the concept:*
  
  **Media:** Means of communication, entertainment or information sharing in a society. Examples include radio, television, newspaper, a local town crier, a webpage, etc.
  
  *If the group’s definition expresses the same concept or better articulates the concept, keep the group definition.*

- Repeat the process in No.’s 4-6 for “Advocacy” definitions.
  
  *Note: The definition should be similar to the concept:*
  
  **Advocacy:** The ongoing process of influencing decision-makers, systems and structures at different levels to change policies, laws, attitudes and power relations for the betterment of people affected by the issue.1
  
  *If the group’s definition expresses the same concept or better articulates the concept, keep the group definition.*

**Why is media and advocacy important? (1 hour)**

1. Explain: Now that we have discussed what media and advocacy are, we can talk about how this can help us to influence decision makers targeted by the project.
2. Post pre-written Media and Advocacy Purpose and invite volunteer to read aloud:

   The Media & Advocacy strategy under the Tikambe Project aims to influence decision makers into prioritizing improvement of ESA implementation using evidence collected from the ground, by making the provisions on CSE and wider SRHR services a popular media topic and a catalyst for new policies and practices.

3. Ask: **Thinking about the purpose of the Media & Advocacy strategy, why is this strategy important to creating influencing the change we want?**
4. Solicit responses, e.g.
   - To influence not only norms but also the policies and practices that enforce those norms.
   - To get the attention of the gatekeepers and opinion leaders guiding implementation (e.g., local government officials, cultural leaders, journalists, ministries, parliamentarians and donors).
   - To provoke wide dialogue among the general public with media features on what is being provided for young people regarding SRHR and how the provisions are being implemented.
   - To have this wide dialogue persuade gatekeepers and opinion leaders to take action.
5. Post flip chart of Circles of Influence.
Explain: it is important to engage every circle of influence in order to create a critical mass for influence and change—individual, relationship, community and society.

6. Ask: Thinking about the different strategies of the Tikambe Project – Capacity Building, Networking, Evidence Gathering and Communication, which ones would best impact which circle of influence?

7. Solicit responses, e.g.
   - Capacity Building and communication materials cut across all the levels.
   - Networking makes a lot of impact on the individual, relationship and community levels.
   - Evidence Gathering and Networking is important especially for societal level impact, as well as a tool to influence key community—and even relationship and individual level—opinion leaders.

8. Explain: Since the Media & Advocacy strategy’s main contribution is to creating change at community and societal levels of influence, in this next activity we are going to think concretely about how use of the media and strategic advocacy efforts might impact stakeholders at those levels.

9. Invite participants to look at the examples at community and societal levels of the circles of influence drawing. As a group, select two types of people—one to represent the community level and one to represent the societal level (e.g. Community: religious leader and Societal: Member of Parliament).

10. Write these names on the top of 2 separate flip chart papers.

11. Invite participants to first try to put themselves inside the life and mind of the community level representative the group has chosen and brainstorm the following questions:

    Thinking as ___________________ (e.g. a religious leader)
    - Who do you listen to? What influences you?
    - What media do you use (read, listen to, etc)?

12. Repeat the large group brainstorm, answering the same questions for the societal level representative the group has chosen.

**Media and advocacy activities overview (30 minutes)**

1. Explain:
   - There are many media and advocacy activities that can be used to influence change
   - You do not need to have a million U.S. dollars for a fancy television advertising campaign or to be an advocacy expert—you can create change with basic activities.

2. Paste 3 pieces flipchart paper. On each write as heading one of the following Media categories: Print, Radio, and TV. Ask: What are some of the media activities you may use in advocacy under each of the categories especially around the areas identified here (ESA-CSE, SRHR)

3. Solicit responses and note them down on the flip charts under the appropriate categories.

**Conclusion (15 minutes)**

Explain: As we have seen, the Media and Advocacy strategy is important to the planned work of the alliance because it helps us not only to influence social norms but also helps us to institutionalize the changes in norms we are achieving. Without media support, we will not achieve our objectives and our advocacy efforts cannot create the changes we desire.
Media

This is the plural form of 'medium', are the forms of communication – television and radio; newspapers, magazines, and written materials (or "print media"), and, more often now, the Internet – used to spread or transmit information from a source (which can be a person, an organisation, a business, an institution, a government agency, a policy maker, or another media outlet) to the general public.

Advocacy

This is active promotion of a cause or principle. It involves actions that lead to a selected goal and is one of many possible strategies, or ways to approach a problem. It can be used as part of a community initiative, nested in with other components and importantly does not necessarily involve confrontation or conflict. When you are advocating, you are working to persuade local, or national government or other entities to grant specific rights, make policy changes, provide money, or create new laws for the good of your cause.

Role of media in advocacy

Media advocacy is the strategic use of mass media to support community organizers efforts to advance social or public policies. The desired product is the ability of community members to be heard and to exercise influence over the policy environment. By gaining access to the news media and framing problems from a public policy perspective, community groups can apply pressure strategically to key decision makers. By using the media, you can:

- **Change** the way community members look at an issue.
- **Create** a reliable, consistent stream of publicity for your organisation’s issues and activities, including articles and news items about the issue and about what your organisation work entails; personal interest stories; success stories.
- **Motivate** community members and policy makers to get involved.

The media can help with all of these...if you know how to work with them. Media advocates, or the people who work to attract publicity for organisations and causes, know that the media can get a public or social policy message across to the largest audience possible in the least amount of time.

The importance of the media to the work of CSOs

Mass media are channels, such as newspapers, magazines, radio or television, used to communicate information to large groups of people. By regularly conveying information to important audiences, from the general public to government and international decision makers, the media plays a large role in shaping public debate. The media are among the most important allies to the CSO community.
Establishing good relationships with journalists is an integral part of any effective media outreach campaign. Some ways in which the media can be of importance to CSOs include writing articles that:

- create an environment of political pressure
- convey general information, serving as a public education tool
- counter popular misconceptions
- comment on an issue, providing an alternative viewpoint

How to establish media contacts

While journalists face tight deadlines each day, they will make time to talk to you if you can prove that you are a valuable source of information. In order to establish yourself as a valuable contact to a journalist, you must first do some work in preparation.

1. A good first step is to make a list of the newspaper, radio and/or television media outlets with which you would like to establish a relationship. These are your target media contacts.

2. Research what kind of stories your target media contacts cover. To do this, read, listen to or watch the reporting that your target media contacts produce. You can also use Internet search engines to review past coverage. Pay close attention and try to identify one or two journalists who regularly write stories relevant to the subject matter of your media outreach campaign.

3. Once you’ve done this basic homework, call your target media contacts. Be prepared to introduce yourself and your organisation, and to position yourself as a resource to that journalist. Be succinct; chances are you will only have one or two minutes of the journalist’s time.

4. Direct journalists to web sites and other resources that provide background information relevant to your issue. The CICC has an online press room at www.iccnow.org/pressroom.html with numerous fact sheets and press releases.

5. Keep a comprehensive database of journalist contacts once you’ve established them. Notes you’ll want to include are: full name, media outlet, journalist title, telephone and fax numbers, email address, city, country and any special information the journalist has provided you.

6. Respect that journalists are constantly bombarded with communications materials. Even if a news item seems important to you, it may not be considered newsworthy by your target media outlet. To avoid frustrating your journalist contacts, contact them only in regards to your most urgent communications.

7. Respect journalists’ deadlines. If your target journalist is working under deadline between 2 and 3 o’clock every day, try not to call during that time. And if a journalist has requested specific information by a set deadline, make sure you send the requested materials well in advance of that time.

8. Understand the responsibilities of journalism. Ethics, credibility and impartiality are the three keys to responsible journalism. Most journalists are obligated to include perspectives from varied credible sources for every story they produce. It is their job to search through opinions surrounding an issue to get to the facts. You can become an asset to journalists by supplying names and sources that can verify facts and provide credible testimony.
Checklist for Establishing Good Media Contacts

2. Research media outlets that cater to your audience. Make sure that the media outlet you want to contact is relevant to your target audience.
3. Research who the appropriate journalist contact(s) will be. Take a look on the web site of your target media outlet and find out if they have already written about your issue. If so, which journalist(s) have written the article(s)? Make a note of these individuals. If you cannot find any information about your issue, try to find the name of an editor who would be responsible for any reporting on your issue.
4. Contact the media outlet. Use public information to contact your target media outlet. Ask to speak either with any journalists you have identified who have already written on your issue, or ask to speak to an assignment editor who can help direct your call.
5. Be polite. Journalists may sound rushed on the phone; it is probably because they are on a tight deadline. Be courteous; ask if the journalist or editor has a couple of minutes to talk about your issue.
6. Explain the purpose of your call. You will only have one or two minutes to make your pitch, so be prepared to concisely state who you are, which organisation you work with and why you are interested in being in contact with the journalist at hand.
7. Take notes. Be prepared to jot down some notes on the basis of your phone conversation. Chances are, after a few of these calls you may forget who said what. Keep your notes organized in a file so that you can refer back to your new media contacts when you need them later.
8. Lay the foundations for future contact with the journalist. Ask if the journalist would be interested in receiving information from your organisation in the future. If so, do they have a preferred method of contact between email, telephone and fax? Is there any particular aspect of your organisation’s work that they are most interested in? And, if the journalist isn’t the right person to contact regarding your issues, is there someone else at that media outlet who you might contact?
9. Follow up. If the journalist has given you his/her email address, fax number or mailing address, send him/her a quick note of thanks. Use this information to include some basic information about your organisation to remind the journalist who you are.
Appendices
Tool 1: Setting Advocacy Priorities

This tool will help you take the first step in developing an advocacy initiative

Identifying Issues for Advocacy

The first section of this tool will help you brainstorm about the advocacy issues your organisation is interested in addressing. No more than three issues are recommended. Note that choosing your issue does not just mean choosing the broad topic you want to address (e.g., family planning)—you have to think about specific problems, barriers, and policy-related solutions. To determine your issue, you can begin by identifying the problem you want to address.

Example problem: Lack of access to contraceptives

Next, think about what some of the barriers to solving the problem are. The barrier must be related to guidelines, policies, or laws.

Example barrier: Injectable contraceptives can only be distributed at health facilities.

Then ask yourself what policy change would help remove the barrier. The answer is your advocacy issue. Be as specific and concrete as possible. Ask yourself questions like: Should a new policy be created? Should a harmful policy be removed? Does an existing policy need to be reformed? Does an existing policy need to be fully implemented?

In this example case, what policy change would help increase access to contraceptives? The answer is the advocacy issue.

Example issue: Community health workers (CHWs) are permitted to distribute injectable contraceptives.

One way to increase access to contraceptives might be to raise awareness among religious groups about family planning. This is a good idea, but it is not an issue for advocacy. Your issue should be directly linked to a policy change. In this example case, CHWs are not currently permitted to distribute injectable contraceptives, so a policy change is needed.

The next two tools in the series will help you determine exactly how the change will be made. Sometimes advocacy will be an appropriate programmatic strategy, but often it will not. This depends on whether or not policies have the potential to help solve the problem.

Evaluating Issues for Advocacy

This section will help you prioritize the issues you identified in the previous section. The tool lists important criteria that you should consider when deciding which advocacy issue to pursue. The criteria take into account: potential impact on the issue; the effort required to impact the issue; and the importance of the issue to your work. Discuss and debate the criteria as they apply to each of the advocacy issues you identified. Additional sheets of paper, a flipchart, or a computer may be helpful for making notes and recording your answers.
### Tool 2: Identifying Issues for Advocacy

Choose up to three problems and barriers. Then identify three issues associated with them. Note: You do not necessarily have to identify three problems/barriers. For example, you can choose just one problem/barrier and then decide on three potential issues related to it.

<table>
<thead>
<tr>
<th>Problem/Barrier</th>
<th>Issue</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
**Tool 3: Evaluating Issues for Advocacy**

The criteria below will help you select the best issue for your advocacy initiative. For each potential advocacy issue, consider the criteria and circle high, medium, or low. Make brief notes explaining your decision. For all of the criteria, high is the best rating and low is the worst rating. A good issue for advocacy will receive more highs than mediums and lows.

### Criteria

For each issue, circle High, Medium, or Low

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Issue 1</th>
<th>Issue 2</th>
<th>Issue 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 Policy change needed is clear</strong>*</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>For an initiative to succeed, you must know what kind of policy change is needed. If your advocacy issue is not very specific, it will be harder to design a strong strategy. clear (high) somewhat clear (medium) unclear (low)</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>low</td>
<td>low</td>
<td>low</td>
<td>low</td>
</tr>
<tr>
<td><strong>2 Number of your programmes that will be affected by your issue</strong>*</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>If you have a lot of programs (or a very large program) that will be affected, it is probably a better issue. 4+ (high) 2–3 (medium) 1 (low)</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>low</td>
<td>low</td>
<td>low</td>
<td>low</td>
</tr>
<tr>
<td><strong>3 Level of effort required</strong></td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>How much of your time, energy, and other resources will be needed?</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>very little (high) moderate effort (medium) a lot (low)</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td><strong>4 Potential for success</strong>*</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>How likely is it that you will succeed? If success is unlikely, this is not a good issue. very likely (high) possible/maybe (medium) unlikely (low)</td>
<td>Medium</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>low</td>
<td>low</td>
<td>low</td>
<td>low</td>
</tr>
<tr>
<td><strong>5 Estimated time required to succeed</strong></td>
<td>High</td>
<td>High</td>
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<tr>
<td>The shorter the amount of time needed, the better. less than 1 yr. (high)</td>
<td>Medium</td>
<td>Medium</td>
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<tr>
<td>1–2 yrs. (medium)</td>
<td>Low</td>
<td>Low</td>
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<tr>
<td>3+ yrs. (low)</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
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<tr>
<td></td>
<td>Level of public support for your issue</td>
<td></td>
<td>Level of policymakers’ support for your issue</td>
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<tr>
<td>6</td>
<td>If the public is supportive, your chances for success are higher. supportive (high) neutral (medium) opposed (low)</td>
<td>high</td>
<td>medium</td>
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<tr>
<td>7</td>
<td>If policymakers are supportive, your chances for success are higher. supportive (high) neutral (medium) opposed (low)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td>8</td>
<td>Will your activities hurt your reputation, decrease your potential for funding, put your staff in danger, etc.? unlikely (high) possible/maybe (medium) very likely (low)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td>9</td>
<td>Will your activities improve your reputation, help you get new funding, etc.? very likely (high) possible/maybe (medium) unlikely (low)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td>10</td>
<td>It is essential to be realistic about funding. Without the necessary financial resources, success is unlikely. funds exist now (high) new funds likely (medium) funds unlikely (low)</td>
<td>high</td>
<td>medium</td>
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<tr>
<td>11</td>
<td>Having strong partnerships is usually essential to success, especially for larger initiatives. 3+ (high) 1–2 (medium) 0 (low)</td>
<td>high</td>
<td>medium</td>
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<tr>
<td></td>
<td>Evidence that the issue is important and achievable</td>
<td>high</td>
<td>medium</td>
</tr>
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<tr>
<td></td>
<td>Do you have concrete experience and/or other reliable information sources indicating that this is a good issue for advocacy?</td>
<td>high</td>
<td>medium</td>
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<tr>
<td></td>
<td>strong (high)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td></td>
<td>some (medium)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td></td>
<td>none/weak (low)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td></td>
<td>Level of importance to your organisation as a matter of principle</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td></td>
<td>The issue you choose should be in line with your organisation’s mission and values.</td>
<td>high</td>
<td>medium</td>
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<tr>
<td></td>
<td>very important (high)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td></td>
<td>somewhat important (medium)</td>
<td>high</td>
<td>medium</td>
</tr>
<tr>
<td></td>
<td>not very important (low)</td>
<td>high</td>
<td>medium</td>
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</tbody>
</table>

Review the ratings (high, medium, or low) that you gave each issue. If you gave an issue a lot of lows and mediums, it is probably not a good issue for advocacy. If you gave an issue a lot of highs and mediums, it is probably a better issue for advocacy. Once you have selected an issue, you are ready to move on to the second tool—Assessing the Environment for Advocacy.

<table>
<thead>
<tr>
<th></th>
<th>What is your issue for advocacy?</th>
</tr>
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</table>

What is your issue for advocacy?
To assess the political environment, you need the following information:

- Current legal situation as it relates to advocacy activities and laws concerning your issue;
- General public’s knowledge of and attitude toward the advocacy issue;
- Policymakers’ knowledge of and attitude toward the issue;
- Influential actors who have the potential to affect the advocacy issue (individuals, organisations, coalitions, policymakers, government offices, media sources, etc.);
- Influential actors who oppose the advocacy issue;
- Other organisations’ advocacy activities related to the issue;
- Formal and informal channels for CSOs to access policymakers and/or participate in the policymaking process;
- Types of information policymakers seek when forming or revising policies.

How to use this tool:

Conducting research and interviews is useful for learning about the political environment, but it is not necessary to complete this tool. Most often, the answers can be easily found using your experience and observations in the field, or through debate and discussion with your colleagues.

If you find that you do not know the answers to many of the questions asked in this tool, you need to ask yourself if the advocacy issue we’ve identified is really the right issue for us. We need to be realistic about our capacities and potential for success.

As you answer the questions in this tool, check the appropriate box and make notes on the relevant information in the space provided. If you do not know the answer, check the “?” box and try to find the information elsewhere. Additional sheets of paper, a flipchart, or a computer may be helpful for making notes and recording your answers.

Note: Changes in the environment (e.g., new risks and opportunities and reactions from the individuals and institutions you are targeting) can affect an advocacy strategy and the range of activities to be conducted. Therefore, as an alliance, we will need to revisit the Assessing the Environment for Advocacy and Mapping an Advocacy Strategy tools periodically.
**Legal Situation**

<table>
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<th>CHECK ONE</th>
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Are there any legal limitations placed on the advocacy activities of CSOs, citizens, or the media?  
☐ Yes  ☐ No  ☐ ?

If yes, describe. Also describe what actually happens in reality:

Are there government policies, laws, or protocols addressing your issue?  
☐ Yes  ☐ No  ☐ ?

If yes, what are their major components?

Are there major policy/law/protocol reviews or initiatives planned or underway that are related to your issue?  
☐ Yes  ☐ No  ☐ ?

If yes, describe:
### Public Opinion and the Media

**Overall, how does the public view your issue?**
- □ SUPPORTIVE
- □ NEUTRAL
- □ OPPOSED

**Describe:**

**Overall, how much does the public know about your issue?**
- □ INFORMED
- □ UNINFORMED

**Describe:**

**Do you know who the most influential journalists and media sources are?**
- □ Yes
- □ No

**If yes, describe:**

**Has news about your issue been featured in the media in the last two years?**
- □ Yes
- □ No
- □ ?

**If yes, describe (media source, author, perspective):**
Forming Alliances

**CHECK ONE**

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<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Have successful advocacy efforts been conducted in recent years?</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>If yes, why did they succeed?</td>
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<tr>
<td>Have unsuccessful advocacy efforts been conducted in recent years?</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>If yes, why did they fail?</td>
<td></td>
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<tr>
<td>Are other organisations/interest groups currently conducting advocacy or</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>organizing in support of your issue?</td>
<td></td>
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<td></td>
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<tr>
<td>If yes, who are they? What are they doing?</td>
<td></td>
<td></td>
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<tr>
<td>Are there active alliances/coalitions that are currently addressing or</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>have the potential to address your issue?</td>
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<tr>
<td>If yes, describe (e.g., members, goals, activities):</td>
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<tr>
<td>Do you know which <em>specific</em> CSOs or civil society groups are most wide-</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>ly consulted or have the greatest influence with policymakers on your</td>
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<tr>
<td>issue?</td>
<td></td>
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<tr>
<td>If yes, who are they? What is their position on your issue?</td>
<td></td>
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</tbody>
</table>
## Opposition

**CHECK ONE**

<table>
<thead>
<tr>
<th>Are there influential actors <em>inside</em> the government who oppose your issue?</th>
<th>□ Yes</th>
<th>□ No</th>
<th>□ ?</th>
</tr>
</thead>
<tbody>
<tr>
<td>If yes, describe:</td>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Are there influential actors outside the government who have public stances opposing your issue (e.g., community leaders/groups, health/legal professional associations, CSOs, coalitions)?</th>
<th>□ Yes</th>
<th>□ No</th>
<th>□ ?</th>
</tr>
</thead>
<tbody>
<tr>
<td>If yes, describe (e.g., members, goals, activities):</td>
<td></td>
<td></td>
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</table>
### Accessing Policymakers

<table>
<thead>
<tr>
<th>Question</th>
<th>Check One</th>
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<tbody>
<tr>
<td>Overall, how does the government view your issue?</td>
<td>□ SUPPORTIVE □ NEUTRAL □ OPPOSED</td>
</tr>
<tr>
<td>Describe:</td>
<td></td>
</tr>
<tr>
<td>Overall, how much does the public know about your issue?</td>
<td>□ INFORMED □ UNINFORMED</td>
</tr>
<tr>
<td>Describe:</td>
<td></td>
</tr>
<tr>
<td>Do you know who the influential policymakers, agencies, committees, and/or institutions inside the government who can affect your issue are?</td>
<td>□ Yes □ No □ ?</td>
</tr>
<tr>
<td>If yes, describe:</td>
<td></td>
</tr>
<tr>
<td>Do you know about the formal mechanisms or channels for the public/CSOs to offer input or comment on laws and policies (e.g., hearings, briefings)?</td>
<td>□ Yes □ No □ ?</td>
</tr>
<tr>
<td>If yes, what are they? How can you participate?</td>
<td></td>
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<tr>
<td>Do you know about informal networks or ways of dealing with policymakers, including accepted forms of political dialogue and proper protocol for approaching them?</td>
<td>□ Yes □ No □ ?</td>
</tr>
<tr>
<td>If yes, describe (e.g., meetings between CSOs and policymakers, site/community visits):</td>
<td></td>
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</tbody>
</table>
Do you know what types of information or resources policymakers usually seek when formulating their policy decisions? □ Yes □ No □ ?

**Describe:**

<table>
<thead>
<tr>
<th>Are there any other major actors (individuals, groups, etc.) that have influence with policymakers on your issue?</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Yes</td>
</tr>
</tbody>
</table>

If yes, who are they? What is their position on your issue?

**Additional Comments**
Tool 5: Mapping an Advocacy Strategy

This tool will help you plan a concrete strategy for achieving your goal, including determining your specific activities.

In this tool you will take the information you gathered in the previous tools (e.g., potential partners and opponents, key people of influence inside and outside the government, public opinion) and use it to map out the specific steps you will take to accomplish your goal.

To develop your advocacy strategy, you need to answer questions including:

- What is your advocacy goal?
- What are your specific objectives that will contribute to the achievement of your overall goal?
- Who do you want to partner or collaborate with? What are their contributions to your initiative?
- Who are the targets (policymakers, government agencies, etc.) you need to influence to achieve your goal?
- What are the key upcoming events that may provide opportunities for mobilization and advocacy?
- What is your approach to advocacy (e.g., direct or indirect)?
- What are the specific activities you will carry out?
- When? How?

Although there are numerous questions to answer and tables to fill in, be aware that you do not need to write very much—you can just make notes on the essential information.

As you use this tool, it is important to remember that developing an advocacy strategy is not necessarily a linear/direct process. You need to be flexible and sometimes you will have to jump ahead or go back and repeat steps you have already taken. Additional sheets of paper, a flipchart, or a computer may be helpful for making notes and recording your answers.

**Issue, Goal, & Objectives**

**Issue**

Your advocacy issue should be specific and concrete. It should clearly reflect the policy change you want to achieve (i.e., the issue should be directly linked to your goal). The Setting Advocacy Priorities tool can assist you in identifying your issue.

Strong example issue: Community health workers (CHWs) are permitted to distribute injectable contraceptives.

Weak example issue: Family planning

What is your issue?

**Goal**
Your advocacy goal builds on your advocacy issue by adding who (e.g., person, institution, office) will make the policy change, how the policy change will be made (e.g., through a specific bill, guidance, regulation), and when it will be achieved. Set an attainable goal with a realistic timeframe.

Strong example goal: The Ministry of Health will issue new protocols/guidelines for the distribution of injectable contraceptives by CHWs by December 2025.

Weak example goal: The government will enable CHWs to distribute injectable contraceptives.

Objectives

Your goal should be broken down into a few short-term objectives that will directly contribute to achieving your goal. Objectives are the smaller steps you must complete in order to reach your overall goal. They should be clear and focused, and should include: the change you want to see, who (e.g., person, institution, office) will make the change, and when it will be achieved. They should be limited in number (no more than 3). Note: If your objective is likely to take longer to achieve than your goal, it is not a good objective.

Strong example objective: Five high-level champions in the Ministry of Health’s Reproductive Health Division will make public statements in support of CHWs distributing injectable contraceptives by June 2025.

Weak example objective: Build ministry support for CHWs to distribute injectable contraceptives.

What are your objectives?

Objective 1

Objective 2

Objective 3
**Partners & Alliances**

Forming strong partnerships with other groups/organisations is essential to a successful advocacy strategy. You need to identify partners who will bring helpful, unique skills and contributions to your effort. Make sure you and your potential partners are in agreement about the issue and its potential solutions. A stakeholder forum may be necessary to build consensus.

Identify 5–10 potential partners and what they can contribute to your advocacy initiative. Include your own organisation and its resources in the list.

<table>
<thead>
<tr>
<th>potential partner</th>
<th>Contributions (human resources; funding; political and media connections; advocacy, communications, and technical expertise, etc.)</th>
</tr>
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What resources are still needed?
**Targets**
Your primary targets are the policymakers/offices/etc. that have the power to make the change you are advocating for. When you cannot influence your primary targets, choose secondary targets. A secondary target is the person/group/etc. you can influence who can then, in turn, influence your primary target. The targets must be specific (e.g., a person, newspaper, department, and committee)

—“the public” or “the government” are too general and, therefore, are not good targets.

Identify 5 primary targets for each objective. Then fill in the target’s position on your issue based on 2 criteria: supportive/neutral/ opposed, and informed/uninformed. Next, note who in your organisation/partners has the connections needed to influence each primary target. If you do not have the connections you need to influence the primary target, choose a secondary target (who can influence the primary) and fill in the information in the Secondary Target table on the next page.

**Objective 1**

<table>
<thead>
<tr>
<th>Primary target name</th>
<th>Position on your issue</th>
<th>Partner with connections to influence target</th>
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**Objective 2**

<table>
<thead>
<tr>
<th>Primary target name</th>
<th>Position on your issue</th>
<th>Partner with connections to influence target</th>
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### Objective 3

<table>
<thead>
<tr>
<th>Primary target name</th>
<th>Position on your issue</th>
<th>Partner with connections to influence target</th>
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### Secondary Target

<table>
<thead>
<tr>
<th>Objective #</th>
<th>Name</th>
<th>Primary target it can influence</th>
<th>Position on your issue</th>
<th>Partner with connections to influence target</th>
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### Timing

Advocacy activities should be timed to occur just before key decisions are made or before an important event.

What upcoming events, significant dates, or government decisions might be important mobilization and communication opportunities?
Approaches & Activities

There are different ways of approaching advocacy. One way is a public approach, which generally means mobilizing broad support from the government and/or the public through highly visible activities. Compare this to a private approach, which involves working quietly with a few key partners to make changes behind the scenes.

You might also want to consider direct versus indirect approaches. Direct approaches involve directly asking policymakers to take action. Indirect approaches involve influencing opinion through a third party such as the media, public, or other actors.

Which approach (es) do you want to take?

☐ Public
☐ Private
☐ Direct
☐ Indirect

When selecting your advocacy approach (es) think about the best way to exert influence, given the information you gathered in the Assessing the Political Environment for Advocacy tool. The approach (es) you choose will inform your activities.

Activities

Your advocacy activities should be designed to help you achieve your individual objectives, moving you toward your goal. Below is a list of common advocacy activities. You should consider pursuing a combination of them for each objective.

Do not be afraid to use your imagination as well, but be selective. You cannot and should not do everything. Think about your expertise, capacity, what will have the greatest impact on your target, and your funds.

Examples of activities:

• Arrange site visits or study tours
• Hold educational briefings & events
• Conduct advocacy trainings
• Launch public awareness campaigns
• Hold policy dialogues & forums among key stakeholders
• Document problems for policymakers (e.g., commission a report)
• Engage the media to cover your issue
• Hold face-to-face meetings with policymakers
• Mobilize groups (community members, public interest groups, etc.) in support of policy change
• Provide technical information and recommendations to policymakers
• Utilize email, phone calls, letters, petitions, and social media to mobilize constituents to contact policymakers
Approaches & Activities *(continued)*

Fill out the chart below to help you decide which activities you will conduct to meet your objectives. For each activity, determine the approximate timing. Timing will depend on each activity’s priority. *Do not try to do everything at the same time.* Identify the cost of the activity and the person/organisation primarily responsible for leading it, along with partners who will support them. Be as detailed as possible regarding your specific plans and tactics, including how they will reach your targets. For example, do not just write “public awareness campaign”—include the topic of the campaign, who you will target, what forms of media you will use, etc. Decide on 5 activities for each objective.

**Objective 1**

<table>
<thead>
<tr>
<th>activity</th>
<th>lead person/organisation</th>
<th>partner(s)</th>
<th>timing</th>
<th>cost</th>
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**Objective 2**

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<thead>
<tr>
<th>activity</th>
<th>lead person/organisation</th>
<th>partner(s)</th>
<th>timing</th>
<th>cost</th>
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**Objective 3**

<table>
<thead>
<tr>
<th>activity</th>
<th>lead person/organisation</th>
<th>partner(s)</th>
<th>timing</th>
<th>cost</th>
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