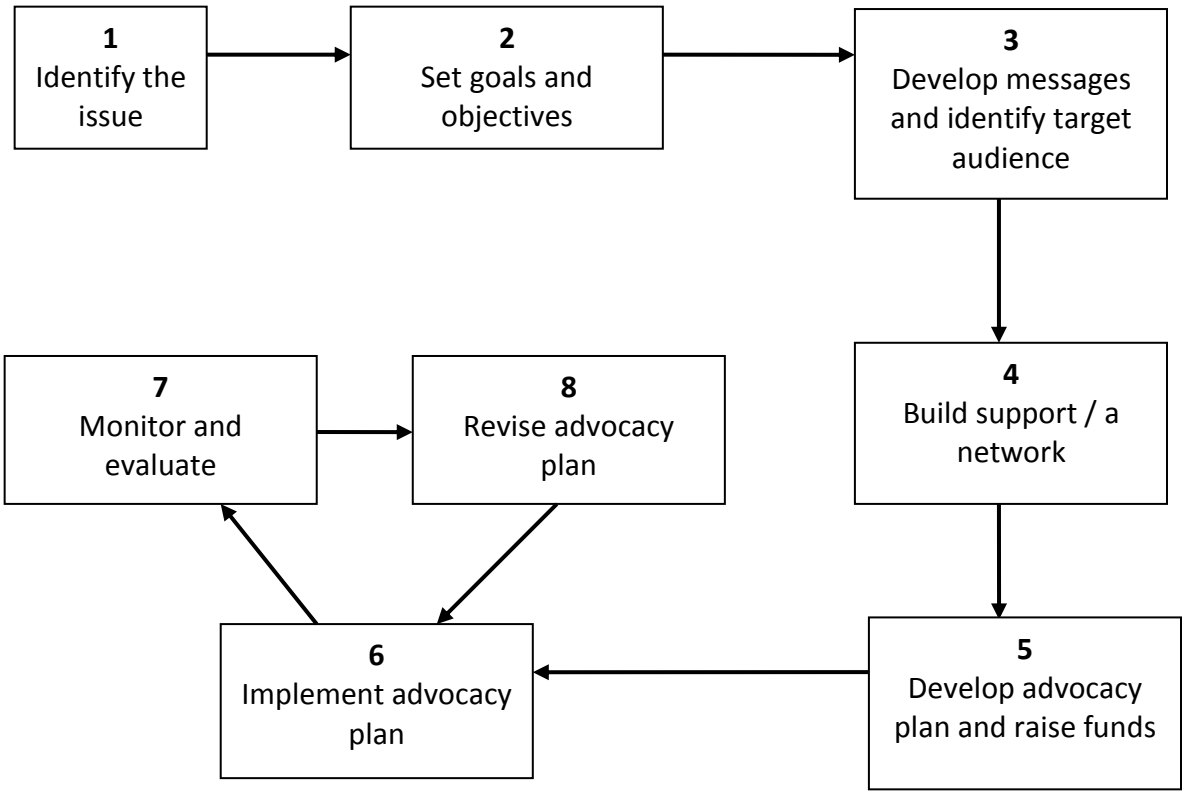
The Advocacy Process

Advocacy is an ongoing activity that takes place through the life of the program. There are a number of important steps that you need to take in your advocacy work. They are presented in sequential order below.



1. Identify the issue

Advocacy begins with an issue or problem that an organisation or network agrees to support in order to promote a policy change. The issue should support the organisation's mission and meet the criteria set for its advocacy campaigns. E.g. when deciding to establish a Vision Centre, a situational analysis of available refractive error services, estimated need and barriers to the delivery of services will assist to identify the issue and also in developing your plan.

2. Set goals and objectives

A goal (sometimes called a strategic objective) is a general statement of what the organisation hopes to achieve during the next 3 to 5 years. E.g. a goal that is aimed to be achieved when establishing a vision centre could be 'to make refractive error and low vision services accessible and affordable to the population'.

The advocacy objective describes the short-term, specific and measurable achievements that contribute to that goal. The situational analysis will provide direction in defining objectives, e.g. if affordable refractive error services are a barrier to uptake of services, then developing a Vision Centre will be an objective to address this. If availability of skilled personnel is also identified, then providing these skills in the form of a training program will be an objective.

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3. Develop the message and identify target audience

Advocacy messages are developed to frame the issue and persuade the receiver to support your organisation's position. There are three important questions to answer when preparing advocacy messages:

- What type of people is this message for and what do they already know?
- What do you want to achieve with the message?
- What do you want the recipient to do as a result of the message?

When using the information derived from the situational analysis and country or region specific blindness / visual impairment data, a powerful message needs to be developed e.g. the effects of uncorrected refractive error on the economy of developing nations. The message needs to further focus on the broader developmental impact of uncorrected refractive error and the linkage with poverty and the Millennium Development Goals.

The primary target audience includes the decision makers who have the authority to bring about the desired policy change. The secondary target audience includes persons who have access to and are able to influence the primary target audience – other policymakers, friends or relatives, the media, religious leaders, etc. The organisation must identify individuals in the target audience, their positions, and a relative power base and then determine whether the various individuals support, oppose or are neutral to the advocacy issue.

4. Build support / network

Building a constituency to support the organisation's advocacy issue is critical for success. The larger the support base, the greater the chance of success. Organisations must reach out to form alliances with other NGOs, networks, donors, civic groups, professional associations, women's groups, activists and individual who support the issue.

5. Develop implementation plan for your advocacy work

The organisation should develop an implementation plan with a budget, to guide its advocacy campaign. The plan should identify activities and tasks, responsible persons or committees, the desired time frame and needed resources. When you develop the plan you need to select appropriate channels of communication, depending on the target audience. Some of the more common channels include press kits and press releases, press conferences, fact sheets and a conference for policy makers.

You may also need to raise funds which can assist in the development and dissemination of materials, cover travel costs and cover costs for training.

6. Implement advocacy plan

The organisation should try to follow the plan and do what has been planned, on time and within budget frames in order to achieve the set objectives for the campaign.

7. Monitor and evaluate

Routine monitoring of pre-defined indicators will provide key information to check if your plan is delivering the anticipated results e.g. you could have developed a Vision Centre, but through monitoring you may identify that only 30% of community are actually accessing the service. You may then discover that the members of community are not aware of the service OR there are cultural factors that are preventing them from accessing your service.

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8. Revise advocacy plan

Based on information derived from the monitoring and evaluation process, appropriate corrective steps are implemented to improve realisation of your goal and objectives e.g. increasing the promotion of the services available and educational programs to address cultural barriers can be devised.

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ADVOCACY
- Tips and Guidelines -

Policymakers are generally very busy people who are bombarded with ideas, both good and bad, all the time. In order to make an impact, you need to be focused and well prepared, alert and ready to deliver your key messages whenever the opportunity arises, and determined to be heard and understood.

Be focused and well prepared.
Be ready to deliver your key messages whenever the opportunity arises.
Be determined to be heard and understood.

BEFORE YOU BEGIN

- It is important though that within the project team there are members that have good negotiation skills, financial and administration skills, good project management experience and skills and experience in and understanding of public health and eye care.

- This will ensure the team is well-equipped to handle all aspects of the project so that tasks and responsibilities can be designated to people with the capability to execute things as planned.

1. WHEN PREPARING YOUR ADVOCACY PLAN

- Build a strong case for proposed change that is based on solid well – researched evidence. Ensure you have a concise and well-thought-out proposal with practical solution(s) to the problem(s) you have identified.

- Contact like-minded organisations for potential joint lobbying meetings. Seek advice from influential people external to the organisation on how to influence your target. Locate any existing contacts at your target to assist with your advocacy plan. Identify other key targets.

- Create a contingency plan and maintain informal contact if your proposal is rejected.

Start early – even before the issue has come up on the agenda of the policy makers

2. FOLLOW THROUGH IF YOUR PROPOSAL IS ACCEPTED

- Suggest that a drafting committee or working group is established, with representatives from your organisation or coalition, to monitor the implementation of the proposed change.

- Offer your organisations services to assist the person responsible for implementing change.

Thank everyone who had anything to do with bringing about a positive change –
even those who were reluctant collaborators. You may need their assistance again.

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3. MEETINGS

Prepare before a meeting:

- Find out all you can about your target:
  - What is their role and what can they do?
  - What do they believe and what kind of personality do they have?
  - Check if they have made any speeches, written articles or documents on the issue.

- Be clear about what your position is and what your bottom line is. Decide what it is you want from this meeting. It is unlikely you will achieve all your goals in one meeting, so you need to establish ongoing dialogue.

- If it is to be a formal meeting, you need them to agree to meet you. This may mean a lengthy process of phone calls, letters, e-mails and meetings with subordinates. Once you have agreement, ensure both sides are clear about who will attend, how long it will last and what the expected agenda is.

At the meeting:

- Every meeting will be different, but bear in mind that the meeting is about dialogue. Listening will also enable you to learn valuable intelligence about their positions. Remember you are not trying to win an argument; you are trying to influence them and reach agreement.

- Arrive on time. Ensure everyone is introduced clearly and that it is clear which organisation they represent. If you can, take notes of everything that is said.

- Briefly present your case. Listen to their response, including non-verbal signals. Ask for more details if you do not understand their arguments.

- Try to answer their objections, but focus on your priorities and what you want them to do. Pick up on any openings or compromises they offer you.

- Make sure that something is agreed before the meeting ends, even if it is just to have another meeting. Sum up what has been agreed and what the next steps are at the end of the meeting. Thank them for agreeing to meet you.

Build a steady relationship with your target audience. Celebrate what you have achieved, even if it was only a small step on the way

Within a week of the meeting:

- Hold a debrief meeting with all members of your. Review what was said and discuss the potential for further movement. Plan your next steps.

- Write up your notes and circulate them to your partners as appropriate.

- Write to the people you met, thanking them for the meeting and confirming what was agreed, so that the agreement is on paper. This makes it official and harder for them to back out.

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If you agreed to do something at the meeting, do it promptly and do it well.
This will encourage others to do the same.

4. COMMUNICATING THE ADVOCACY MESSAGE

You need to communicate your advocacy message in an effective and efficient manner in order to obtain the best possible results. The message needs to make the target see how support for your campaign will assist in them achieving their own goals. Ask yourself the following basic questions before you start your advocacy work.

- **Why?**
  Take a moment to think about *why* it is you want to communicate as your approach would be dependent on this. Typically, a communicator has one or more of these five basic purposes: to inform, to persuade, to inspire and motivate, to instruct, or to entertain.

- **Who?**
  Think about *whom* it is you are targeting. How much do they know already? Policy makers have special interests and powers, and use this knowledge to present your case.

- **What?**
  Decide what it is you want to say, and then add supporting arguments, facts, quotes and pictures.

5. THE MESSAGE

A message consists of **five elements** as follows:

- **Content and Ideas**
  The content refers to the central idea of the message. What is the main point you want to communicate to your audience?

- **Language**
  Is the language appropriate for the target audience? Is word choice clear, or could it be interpreted differently by various audiences? Cultural factors and level of understanding of technical information must be considered.

- **Messenger**
  The messenger refers to a person or people delivering the message. Is the messenger credible to your target audience? Advocacy networks can send a powerful and more meaningful message to policy makers by letting the message come from a member of the affected population.

- **Format or medium**
  The format or medium is the communication channel you choose for delivering the message. Different channels are more effective for certain audiences.

- **Time and place**
  The time and place for delivering the message are of vital importance. E.g. are there other political events that you can link up with to draw more attention to the issue?

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Keep up-to-date with the political debates and news stories. If you can, tie your message to such current events. This will increase your impact and give your message greater attention.

6. THE EFFECTIVE MESSAGE

If you can make sure that your advocacy message is simple and concise, and delivered by a credible messenger using a tone and language that are consistent with the message, you stand a good chance of having a great impact on the target audience.

- **Message medium**
  It is vital that you choose the best possible medium to convey your advocacy message. The list below presents some of the more important ways of conveying a message. They all have their merits and shortcomings in terms of costs, time required, etc.

  - Face to face meetings
  - Public rallies
  - Fact sheets
  - Posters and flyers in public places
  - Public debates
  - Press release
  - Press conference
  - Contests to design posters, slogans, etc.
  - Websites
  - E-mails

- **The one-minute-message**
  It is important that your advocacy message is brief and to the point. People are flooded with information. Be aware of your target audiences' limited time and interest, and develop a "one-minute-message". The one-minute-message includes four components as follows:

  Statement
  The statement is the central idea of the message. The spokesperson should be able to present the essence of his or her message in a few strong sentences.

  Evidence
  The evidence supports the statement or central idea with facts and figures. The message should include limited data that the audience can easily understand.

  Example
  After providing the facts, the spokesperson should add a human face to the story. An anecdote based on a personal experience can personalise the facts and figures.

  Action desired
  The desired action is what you want the audience to do as a result of hearing the message.

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7. Oral Presentation Skills

- When you have been invited to do a presentation, prepare well. Know your stuff, your audience and what is expected from you.
- When developing your presentation, ensure that you include information that is new to your audience. Keep the presentation short. Your message must be as clear and concise as possible to minimise any language barriers.
- When presenting, make the audience engaged by inviting comments and encourage discussion. Use a logical sequence that makes it easier for your audience to follow your thoughts e.g. paint the broad picture first and then fill in the details.
- Try to make eye contact with everyone in the audience. Use audio-visual aids such as whiteboards and projectors.
- Summarise at the end of your presentation to give your audience an overview of your message and arguments.

Do not cover too much, do not rush and use simple language. Speak loudly and clearly. Remember that people can only concentrate on pure listening for 7 minutes at a time.

8. WRITING TO ELECTED OFFICIALS

Writing is one of the most effective means of getting your message across to your elected officials and you can do it in a few minutes. Your letter documents your views and it reminds the elected officials that their decisions have a direct impact on you and their other constituents.

- Use the correct address and salutations, e.g. Dear Representative Smith.
- Keep your letter focused on your message. Be brief, but include enough information to explain your reasons for writing. Acknowledge counter-arguments and evidence.
- Be specific and give examples of how the issue affects you and your organization.
- Be persistent – write back and ask for more information if you do not receive a response.
- Say thank you and do not use a negative, threatening or intimidating tone.

Know your facts. You can hurt credibility by giving inaccurate or misleading information.

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