



Practical tips: Steps for effective advocacy



Step 1: Identifying the issue

Conducting advocacy effectively requires you to identify an issue and understand it. Here are the steps that could help you do it.

1. **Monitoring**

The first thing you need to do is to follow and analyse the developments related to the issues relevant to your work.

Example: If your work focuses on human rights in country xxx you would likely follow political and human rights-related developments in that country.

2. **Issue identification**

During the monitoring process, you may notice developments related to your work. Let's use the following example:

When monitoring the political developments in xxx you observe that 12 journalists have just been jailed. In order to help you identify the issue you may ask yourself the following questions :

- What are the possible causes?
- What are the possible consequences?

Using the aforementioned example, the answers to those two questions may be as follows:

What are the possible causes to the journalists getting imprisoned in xxx?

- The journalists had spoken out against the government;
- There are restrictive and repressive laws/regulations to prevent reporting on sensitive issues;
- The xxx government dislikes criticism because it is authoritarian in nature.

What are the possible consequences?

- Journalists cannot do their job because they get blocked from reporting and are afraid of speaking up against the government;
- Journalists are sent to prison if they speak up against the government;
- Journalists are forced to leave the country;
- xxx citizens are misinformed about the situation in their country.

By answering those two questions you may come to the conclusion that the main issue here is that press freedom in xxx is being undermined by the government because of its authoritarian nature.

Two examples of tools to better identify an issue, its underlying causes and coming up with possible solutions.

1. **Useful questions to ask yourself**

- **Who is affected by the issue?**
 - o Who is affected the most?
 - o Who loses, and what do they lose?
 - o Who gains, and what do they gain?
- **What are the consequences of the issue?**
 - o For the individuals mostly affected?
 - o For their families?
 - o For civil society organisations?
 - o For society?

- **What are the barriers?**
 - o What are the barriers to addressing this issue?
 - o How can they be overcome?
- **What is the history of this issue?**
 - o What is the history of the issue?
 - o What past efforts have been made to address it?
 - o What have been the results?

2. *The 'but why?' technique*

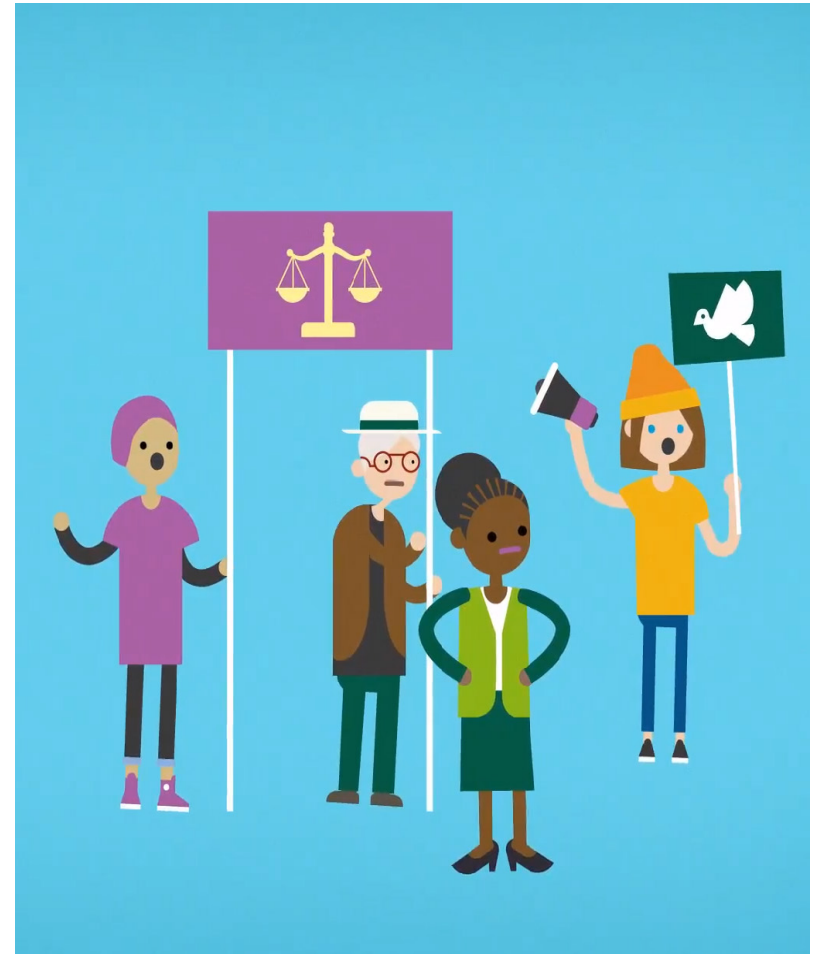
Try using the “but why?” technique: it is a method used to identify underlying reasons or root causes that affect an issue. It examines a problem by asking questions to find out what caused it. Each time you find a possible answer, ask yourself the follow-up “but why?” question.

Example:

- *Journalists in country xxx are imprisoned --But why?*
- *In almost every cases they got imprisoned because they had spoken out against the government --But why?*
- *They spoke out against the government because of the corruption and abuse of force by the government --But why?*
- *Because the government is autocratic in nature*

While this method seems too simple – because it may not capture all the complexities of an issue – it nevertheless encourages the reflection about your issue and its possible causes.

NB : This specific formulation should not be used during advocacy meetings because it could be perceived as too direct (for more information on conducting advocacy meetings, please refer to the infosheet: Preparing for and conducting advocacy meetings).



Step 2: Setting objectives

Once you have defined the main issue on which you want to advocate (see step 1), you need to set objectives.

A useful way to do so is to think about the following two elements:

1. What you want to achieve over the long term and the changes you wish to see happening – or **goal(s)**;
2. The intermediary steps that need to happen to contribute to the achievement of your goal(s)- or **objectives**.

Example: If your goal is to run a marathon, your objectives might be as follows: (1) exercise on a weekly basis; (2) eat healthier.

How to apply such a logic to advocacy?

When defining goal(s) and objectives for advocacy purposes, it may be useful to formulate your goals and objectives as a change in behaviour/actions of a social actor.

Example: The difficult situation of journalists in country xxx.

*The **goal** could be that the government (decision-maker) stops jailing journalists for speaking out and takes measures that would improve press freedom in the country.*

*The **objectives**: What are the intermediary steps that need to happen over the short, medium, and long term that could contribute to the achievement of the goal?*

- *Short term: EEAS raises the situation of journalists in xxx through a statement;*
- *Medium term: The xxx government frees key journalists from prison by the end of the year;*
- *Long term: The xxx government amends/implements policies and laws on press freedom by the end of the programme.*

Example of tool for setting an objective: Use the SMART methodology to guide your objective setting and fine-tune them. To make sure your objectives are clear and reachable, you should consider whether they are:

- *Specific (What? who?, where?, when? – target a specific area for improvement)*
- *Measurable (quantify or at least suggest an indicator of progress)*
- *Achievable (is it realistic given available resources and other constraints?)*
- *Relevant (Worthwhile?, right time?, aligned with the strategy?)*
- *Time bound (Is it timely aligned with the strategy? Set a deadline for the objective)*

To summarise, the formulation of your objectives might follow this simplified structure: (i) a social actor, (ii) takes a decision or changes their behaviour on an issue, (iii) at a certain moment.

Once you have defined the goal(s) and objectives, develop an action plan (see step 6) to make sure that you work towards your objectives and, therefore, your goal(s).

Step 3: Identifying targets

To conduct advocacy effectively, you need to identify the major actors who have a stake in the issue you want to work on. You usually need to answer the following three questions:

1. Who are the decision-makers (individuals/institutions) with the power to bring about the change you seek? (advocacy targets)
2. Who are the people, organisations or institutions (e.g. media, NGOs, think tanks, private sector companies, etc) who exert influence on the advocacy targets? (influentials)
3. Who supports the change you seek? Who opposes it? Who are the undecided?

How to identify them?

By following a three-step method:

1. Brainstorm about a list of actors who have a stake in the issue you want to work on.
2. Classify them by asking yourself the following questions:
 - a. Who are the decision-makers (individuals/institutions) that define the policies and practices you seek to influence? These are your advocacy targets. To further classify them, ask yourself:
Among them, which ones have a decisive influence/are the most powerful (have the power to propose or oppose, in other words, have the 'final say')? Which ones have a lesser degree of decisive influence/are less powerful?
Which ones are supportive of the changes you would like to see happening? Which ones are opposed to them? Which ones are 'swingers'

(undecided, may be persuaded to support the changes you would like to see)?

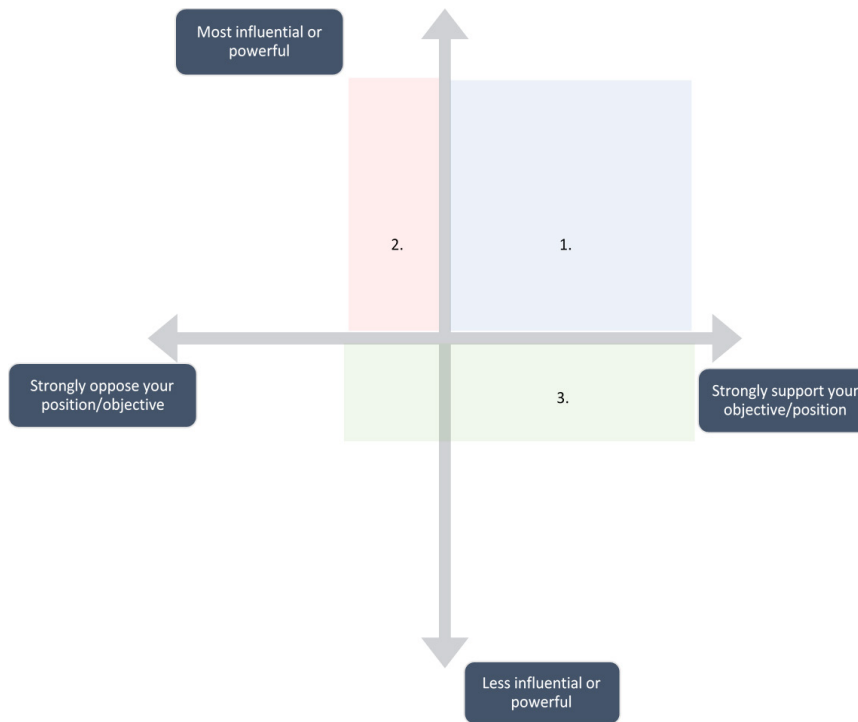
- b. Which ones exert influence on your advocacy targets? These are the influentials.

Among them, which ones have the most influence and which ones have the least influence?

You might not be able to identify all actors, their level of influence or power and to what degree they support or oppose your objectives. The purpose of this exercise is for you to see whom to target as clearly as possible and focus on them, as well as people, institutions or organisations who can influence them in order to maximise your impact and the likelihood of change.

3. Draw a graph with a double axis (see below):
 - a. Vertical: Degree of influence or power;
 - b. Horizontal: Support for your position/objective.

Place the different actors you have listed on the graph. Try to indicate for each actor whether they are advocacy targets ("T" for advocacy targets) or influentials ("I" for influentials).



The focus of your advocacy efforts should be put on the actors situated above the horizontal axis, notably those on the upper right quadrant (1) supporting your objective/position and having power/influence). However, you should also advocate towards the middle-ground targets (2 & 3) because some may be undecided and, therefore, be persuaded to either support the changes you propose or at least not to block or water them down.

Step 4: Key messages & recommendations

1. Key messages

Key messages are the most important things you want to say, applying the KISS principle (Keep It Simple and Short).

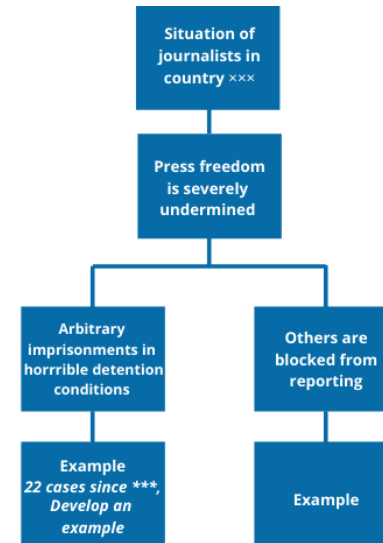
How to develop key messages?

1. Brainstorm and write down everything you want to say about your main issue (see step 1). You can use post-it notes, write bullet points on a whiteboard or a paper, etc.
2. Review these different elements and try to organise them:
 - Is there a common thread between some elements? Can you combine some of them?
 - Which ones are the most important?
 - Which ones are formulated as objectives, recommendations, examples or facts?
3. Since your key messages need to be short and simple, you can substantiate them with key points without being too specific. The key points can then be further illustrated through sub-points (data, facts, precise examples).

The purpose of this exercise is to help you identify the most important things you want to say, i.e. your key messages. It also helps you distinguish the key messages from pieces of information that are facts, examples or elements whose purpose is to elaborate on and illustrate your key messages.

Example: The situation of journalists in country xxx

1. Brainstorm: Journalists are imprisoned for criticising the government;
 - Some do not dare to speak out against the government;
 - Their right to freedom of expression is violated;
 - There are 12 imprisoned journalists;
 - Press freedom in country xxx is being undermined;
 - Their detention is arbitrary;
 - They should be released;
 - EU should raise the detention conditions;
 - Conditions in prison are horrendous;
 - No right to an appeal or fair trial;
 - Against the constitution and international human rights treaties signed by xxx
2. & 3. Review these different elements and try to organise them:



In the example above, the key message that we can identify is the fact that press freedom is undermined in country xxx. The rest may be used to further elaborate and give examples.

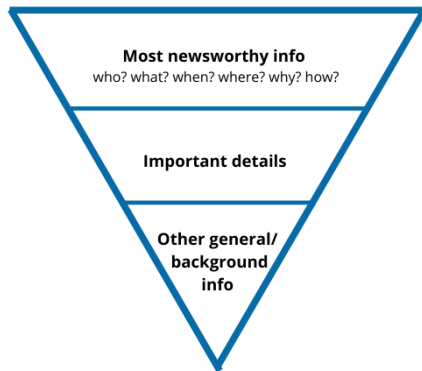
For other tools to help you develop key messages – see also “Preparing & conducting advocacy meetings”

Think of an elevator pitch

Imagine a situation where you coincidentally meet with a decision-maker when you step into an elevator. You have just one minute to talk to them and to convince them that they should take your position seriously enough to give it follow-up. What would you say? What are the most important things you would like that decision maker to know?

The inverted pyramid method

It is a metaphor used by journalists and other writers to illustrate how information could be prioritised and structured in a text to ensure that your message gets across succinctly.



Two days ago, 12 journalists were jailed for speaking out against the government in country xxx, in other words, for having exercised their right to freedom of expression. They are in prison, suffering from ill-treatments and, in some cases, torture.

This situation reflects the state of press freedom in country xxx: whenever journalists speak out against the government, they are either blocked from reporting or sent to jail where their detention conditions are horrendous.

2. Recommendations

A recommendation is what you suggest that your interlocutor should do to address the issue you are raising. It is a call for action.

A good recommendation will be concise, specific, can be acted upon and is relevant to your interlocutor. In other words, the interlocutor needs to know specifically what they could do with the authority, their responsibility or control over the issue you are raising. This implies that you need to understand what your interlocutor can do within their remit.

Example: The situation of journalists in country xxx.

If you are talking to the EU Delegation in country xxx you may, for instance, recommend the following actions:

- *Visit the journalists in prison to assess their detention conditions;*
- *Ask the xxx authorities to improve their detention conditions;*
- *Issue a public statement asking for their release or the improvement of their detention conditions.*

Step 5: Consider partnerships

Take into account the added value of forming coalitions with other local, regional or international civil society organisations to develop more effective advocacy calls.

1. Identify your partners

Depending on your organisation's strengths and shortcomings on a specific issue, reach out to other actors for partnerships. First, consider working with the organisations with whom you already have a strong relationship and have effectively cooperated with, which share common objectives and have complementary assets. In the partner identification phase, there should be tactical and strategic thinking on "who can bring what" to the table in order to build the strongest coalition possible.

However, there are risks and opportunities when considering working with other organisations, networks and forming coalitions.

2. Opportunities

It can work very well and add considerable value because it increases available resources for gaining influence on decision-makers. Indeed, decision-makers will be more prone to react when multiple organisations act together.

"If you want to go fast, go alone. If you want to go far, go together."

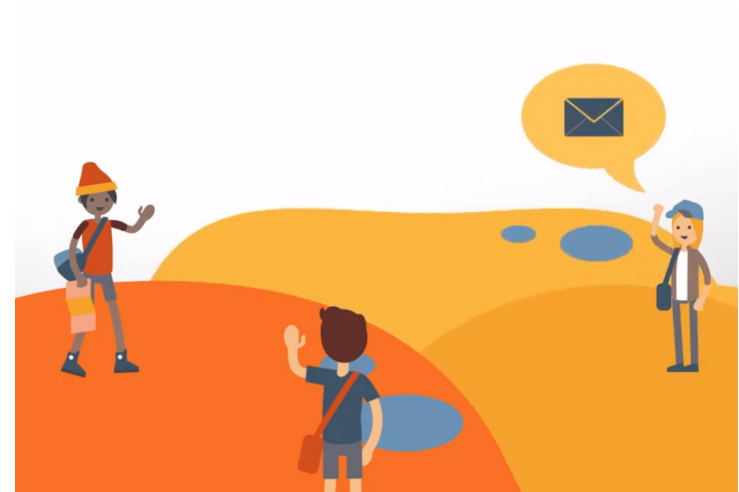
3. Risks

Working with other organisations means finding agreement and coordination. Both can be time-consuming and/or ineffective, which could make you miss a window of opportunity.

How to remedy that?

Considering the risks, here are some suggestions that could help you mitigate the risks when considering partnerships.

1. Ensure commitments from the partners;
2. Ensure overlapping interests and messages on the issue you are advocating for;
3. Be organised – this implies to agree on a clear division of tasks and a timetable with a flexible but robust decision-making process.



Step 6: Develop an action plan

An action plan contains the different steps and activities that will help you achieve your objectives. In advocacy, the objective is to instigate change by influencing decision-makers. Here are a few examples of activities that are usually carried out:

- Face-to-face meetings with decision-makers
- Letters
- Press releases
- Publications, e.g. reports
- Opinion article in newspaper
- Stunts, demonstrations
- Conferences, workshops

Example: The situation of journalists in country xxx.

- *Goal: The xxx government stops jailing journalists for speaking out against it and takes measures that would improve press freedom in the country.*
- *Objective: EU decision-makers' awareness of the situation of journalists in the country is increased.*
- *Action plan:*
 - *Meet with the EU Delegation in country xxx;*
 - *Meet with Members of the European Parliament (MEPs);*
 - *Write a briefing or press release on the situation of imprisoned journalists and communicate your key messages with the media, including social media.*

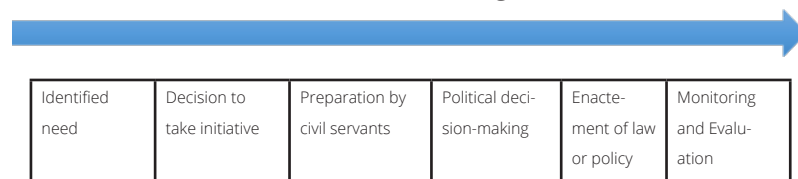
Plan your actions in a timely manner

In advocacy, timing is key. To identifying the best timing is right, focus on the following three steps:

1. Understand how and when decisions are made.

This means that you need to better understand and closely monitor the decision-making process and its cycle so as to adapt your activities to them. Bear in mind that, by and large, in the decision-making cycle of an institution, the earlier you are capable of influencing an issue, the better.

Decision-making



Effectiveness of advocacy (the earlier the better)

2. Link the issue you are advocating for with a topic that is already high on the advocacy target's agenda, or is receiving attention from the media or general public.
3. Create a timeline of potential actions using the template below:

Action	Target(s)	Resources	Timeframe
Meeting with the European Parliament's Delegation for relations with the xxx	MEP xxx, Chair of the interparliamentary meeting	Prepare outputs (e.g.: briefing) to hand over with recommendations	A week ahead of the delegation's visit to xxx (dd/mm/yyyy)
...

Preparing and conducting advocacy meetings

There are five crucial moments when preparing for and conducting advocacy meetings: (1) before the meeting, (2) when the meeting starts, (3) during the meeting, (4) when the meeting comes to an end, and (5) after the meeting.

1. *Before the meeting*

By failing to prepare, you are preparing to fail. How to get ready? By reflecting on and answering the following three questions:

- What is the objective of the meeting?
- What do you know about your interlocutor(s), notably their positions regarding your issue?
- What are you going to say (key messages, recommendations and questions)?

2. *When the meeting starts*

Introduction

Start with who you are, what organisation you work for and restate the purpose of the meeting in one sentence. Be concise!

Example: Thank you for meeting us today to talk about the difficult situation that journalists in xxx face. My name is xxx and I am the xxx for EuroMed Rights, which is a Euro-Mediterranean network of NGOs advocating for human rights and democracy in the region.

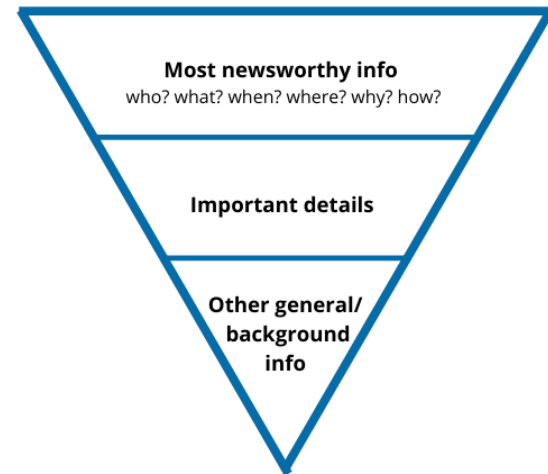
Continue with a short elevator pitch

Throughout the meeting, your interlocutors would wonder about three things:

1. Why should I listen to you?
2. What exactly are you saying?
3. What should I do with the information shared?

To provide answers to these questions, you can start by giving a short elevator pitch, which is a short description of an idea/issue explained in such a way that any listener can understand it quickly. Keep in mind that you should try to remain as concise as possible! It is a pitch, so it does not need to contain too much contextual information.

Example of short elevator pitch using the inverted pyramid method of communication



Two days ago, 12 journalists have been jailed for speaking out against the government in xxx, in other words, for having exercised their right to freedom of expression. They are in prison, suffering from ill-treatment, in some cases, torture.

This situation reflects the state of press freedom in xxx: whenever journalists speak out against the government, they are either blocked from reporting or sent to jail where their detention conditions are horrendous.

This is an important issue to raise with you not only because freedom of the press is a core element of any functioning democracy but also because if not addressed properly, it creates instability in xxx, which could have consequences for its neighbours, including Europe.

We would strongly recommend that the EEAS issue a statement on the issue of press freedom in xxx, referring to the situation of these imprisoned journalists.

3. During the meeting

Getting information from your interlocutors

Good questions to ask:

- How do you see the situation? (to get to know their thinking)
- What are the challenges you are facing? (to understand the challenges they have identified)
- How do you perceive our recommendations? (to get their reactions on what you are suggesting)
- What are the challenges that prevent you from implementing our recommendations? (to get them to elaborate on the reasons why they think they cannot do so)
- What do you think should be done instead? (to get them to suggest ways to move forward).

Responding to your interlocutors' comments

Instead of reacting straight away with counter-arguments or rebukes to your interlocutors' comments, start by "empathising" with them. In other words, show "understanding" of your interlocutor's perspectives and objectives, put yourself in their shoes, which does not equate sympathy or endorsing your interlocutors' views! See more examples in the Annex.

Example: Interlocutor: "We have worked a lot on country xxx but the situation is, as you know, difficult. We try to be careful as we monitor the developments closely".

Answer: It seems like the situation is complex and that makes your job difficult, we understand that. What do you think could be done to move things in a positive direction?

*Tip: Repeat three to five keywords in your interlocutor's last sentence in the form of a question. Ex: "We can't fulfil your request because there have been budget cuts."
Answer: "You can't because of budget cuts?"*

This answer invites people to repeat themselves but they will often feel a natural urge to further clarify what they are saying, giving you more information in the process.

You may further elaborate on your key messages and recommendations

Keep in mind that you should remain concise in your intervention so you can get reaction and information from your interlocutors.

4. When the meeting comes to an end

Restate your interlocutor's positions/commitments

Start by thanking them for taking the time to meet with you and make sure you restate and summarise your interlocutors' positions and commitments. This helps ensure the following three things:

1. A common understanding of what was said, and it gives the possibility for clarifications;
2. Increase the likelihood that your interlocutors will not forget about actions or commitments they made;
3. Offer the possibility for follow-up.

Information exchange

If you have any documentation you wish to share with your interlocutors, give it at the end of the meeting (and not at the beginning of the meeting as your interlocutor might be tempted to read it and get distracted instead of being focused on what you have to say). Similarly, contact details could be exchanged as you leave.

5. After the meeting

Whether it is later the same day or the next day, it is highly recommended that you send a 'thank you' email in which you will give a summary of the meeting (key messages, recommendations and next steps identified, e.g. interlocutors' actions/positions/commitments). Why? Because it offers the possibility to do the following three things:

1. Have a written record shared with your interlocutor(s);
2. Send documentation that you wanted, agreed or were requested to share but did not have at the meeting;
3. Convey professionalism.

Annex – Examples of responses to interlocutors' comments

“Change will be very limited if we act alone”, “We need support from other institutions/States to have a meaningful impact”.

It is understandable that you would prefer a collective approach as it is perceived as more impactful. However, we encourage you to think that individual initiatives can also make a difference and be effective (examples).

“Our influence is very limited”, “We have little leverage in this country”.

We imagine the frustration when faced with a situation where you feel limited because of the perceived lack of influence you have over a country/government. We nevertheless encourage you to explore different channels through which your influence can be exerted because there are always pressure points to be identified (give suggestions...).

“Besides human rights, there are also other elements to consider and they cannot be put aside”.

Arguably, relations with other countries can be very complex as there are different elements to consider which may lead you to compromise on different things. However, the notion of conflict of interest between the defence of human rights and other interests is questionable, especially over time. Human rights should be not seen as an adjustment variable but rather as a tool for prosperity, peace and security.

Have you got other examples? Let us know so we can add it to this Annex.



EuroMed Rights
EuroMed Droits
الأورو-متوسطية للحقوق