

DEVELOPING AN ADVOCACY CAMPAIGN

Developing and executing a successful advocacy campaign is not always an easy task. Advocacy goals can be hard to quantify and may require a large base of supporters and a relatively long timeframe. But a well developed, flexible advocacy strategy can help you anticipate obstacles and respond more swiftly to unexpected surprises. Developing a strong advocacy strategy will also improve your chances of success and help maximize the use of limited resources. So, what are the components of a strong advocacy strategy?



Goals & Objectives

As with any campaign or project, your organization first needs to determine what it is working toward. A goal represents a broad, primary outcome or a general guideline that explains what you want to achieve. Objectives, meanwhile, define the strategies and implementation steps you will need to take in order to achieve the larger goal. **Setting a clear campaign goal and developing SMART objectives is perhaps the most important step in developing your strategy.**

A campaign goal will clearly articulate the broad result you want to achieve. For example, a local environmental group might aim to make their city carbon neutral. To do this, however, they must identify a series of specific, actionable objectives that will provide a roadmap and key milestones towards the achievement of that goal. The group might strive to reduce carbon emissions in their city by 5% in one year by advocating for a mandate requiring the use of carbon scrubbers on all industrial exhausts. Such an objective would not achieve their campaign goal, but would help reduce carbon emissions and make progress towards carbon neutrality.

In order to actually be effective, an objective should be well-defined, realistic, and timely. To help you ensure that it is:

1. Be **Specific**: What do you want to do? Be clear about what you want to achieve and narrow down the scope so that it is manageable. Narrower objectives are more attainable, facilitate effective planning, and allow for course corrections. There are several ways to manage the scope of your objectives, including: limiting geographic parameters, focusing on one portion of the problem, prioritizing those most in need, and scaling down your target metrics.
2. Make your objective **Measurable**: How will you evaluate your progress and how will you know when you have achieved your goal? You should have some clear definition of success and target metrics to help you evaluate progress and assess your achievements. Target metrics represent the scale of your objective and can be expressed as a percentage (a 10% increase in humanitarian assistance), monetary amount (\$30 million investment), number or proportion of beneficiaries (350,000 families or 20% of graduates), etc.
3. Ensure that it is **Achievable**: Is the objective realistic and attainable? Do you see a path towards achieving it? Do you have the tools and resources to achieve it?
4. Make sure the objective is **Relevant**: Is the objective aligned with the campaign goal? Can you chart a path from the achievement of the objective to the achievement of the goal? Is this a current priority issue for your organization and the constituency it represents?
5. Be sure that your objective is **Time-bound**: How much time is required to achieve the objective? How quickly does change need to happen? Set a reasonable timeframe and milestones to help you evaluate progress. Keep in mind important dates that may affect your campaign, such as elections, key parliamentary votes, national holidays, and others.



Tactics

How you achieve your advocacy objectives will depend on the context in which you are working and tactics are what you must do to accomplish those objectives in that context. You can seek to directly influence policymakers or indirectly appeal to them through media outreach or by mobilizing constituencies. In some cases, you will deem it necessary to take both routes. In the same way, you can work at the grassroots level or at higher levels of decision making and may find yourself having to do both. These approaches will be determined by the nature of your objective and should be considered with an eye toward the resources at your disposal, the target audience you need to reach, and the message you wish to communicate. When developing tactics for your campaign, ask:

1. What needs to be done? Does it have to be done in a particular order?
2. What resources do we have to do these things?
3. What do we want to say and who do we need to reach?
4. How will we communicate our message?
5. How will we build community and/or political support? What strategies will we employ?

Common tools include, but are not limited to:

- **Lobbying:** Seeking to directly influence policymakers into supporting a cause
- **Mobilization:** phone call/email campaigns, sign-on letters, rallies, marches
- **Meetings and events:** private advocacy meetings, roundtable discussions, public panel discussions, lectures
- **Traditional media:** strategic placement of opinion articles, TV and/or radio interviews, press conferences
- **New media:** social media campaigns, podcasts, YouTube videos
- **Publications:** reports, policy analyses, policy briefs, memos, articles, blog posts.

The timeframe of your campaign and the resources on hand will be important guiding factors for developing your tactics and selecting your tools. If you are seeking to block a specific piece of legislation from passing in a vote that is only days away, for example, you could—depending on your resources—directly lobby legislators to vote against it and/or conduct an outreach campaign to mobilize grassroots constituencies to call their representatives and urge them to vote against the legislation. If, however, you have a longer term goal to increase public infrastructure spending in marginalized areas in next year's state budget, you may choose to educate the public and persuade policymakers through outreach campaigns, reports and studies, and/or meetings and conferences over the course of several months.

The nature of your strategy will also determine your tactics. If you have to build awareness and educate audience(s) about a particular issue, you will need to engage the media and/or deploy a social media campaign. Of course, who you are targeting will also determine whether and where you will place an opinion article in a specific newspaper or whether and where you might promote a hashtag on social media. In some cases, you will opt to do both. If you determine that you need to persuade a legislator or a legislative committee of an argument in favor of a specific policy recommendation, you may produce a report or policy brief to show evidence in favor of the recommendation or you could organize a sign-on letter signed by agents of change, influencers, a coalition, or a group of organizations.



Resources

In order to develop feasible and effective tactics, you must carefully assess your resources. Most advocacy campaigns are drawn out, medium- to long-term projects, **so it's important that you ensure from the outset that your organization has the resources necessary to see a campaign through.** You should consider your resources strategically, remembering to anticipate surprises that will demand new, or additional, resources and to consider opportunity costs.

Human Resources:

- Do we have a sufficient number of staff members and/or volunteers to help us reach our goal?

- Are staff members and volunteers well trained and capable of handling the demands of the campaign? Will they require additional training?
- Does the organization have enough staff capacity to take on other projects? Does the organization possess enough bandwidth to manage all ongoing efforts?
- Does the organization possess the necessary communication tools and skills necessary to help raise awareness?

Financial Resources:

- What will the campaign cost? What is the estimated budget for the campaign?
- Does the organization have sufficient funds to execute the campaign? Will further fundraising be required? Can a partnership with a like-minded organization help to defray or offset costs?

Network Resources:

- Are there other organizations we can collaborate with to help us reach our goals? Are there individuals, influencers, or allies whose support we can seek out to help achieve our campaign goal or objectives?
- Are there specific organizations within our network that we can rely on to compensate for any skills or resources we lack or that can reach different audiences?

As you answer these questions and develop your action plan, try to maximize the effectiveness of your resources rather than simply deploying as many tactics as your resources will allow. An effective campaign need not be expensive or wasteful, so think about where your resources are best deployed and mobilize them to maximize impact.



Audiences

Before you get to work, it's important that you get to know your audience and identify key stakeholders who might have an impact on your campaign. Many different types of constituents can influence an advocacy campaign including allies and opponents as well as influencers and agents of change.

ALLIES are those who share in your cause and who might be willing to take action to help you further your goal. Allies can be individuals, other like-minded organizations, grassroots groups, academics, journalists and professional unions, or even businesses and corporations. You should reach out and seek the support of your allies and encourage them to participate in your campaign in ways that will utilize different strengths and expand your reach.

OPPONENTS are those individuals or groups who take a stance against your cause or who have diverging interests. You will want to mitigate the negative impact that opponents can have on your campaign by considering what possible objections they may have and planning accordingly in order to preempt or respond to those objections.

INFLUENCERS are people who have broad reach and can sway the public. Besides those on social media, influencers include well-known media personalities, celebrities, and other public figures who have recognition and a platform. Influencers are not critical to an advocacy campaign, but can help raise public awareness and mobilize support.

AGENTS OF CHANGE are people in power who can take actions to help you realize your campaign goal. This group includes policymakers, legislators, and government officials, as well as business, religious, and civic leaders. **This group represents the main target in any advocacy campaign because this will be the group that can help you enact the change you are rallying for.**

To determine how to approach various audiences, assess the level of interest and influence that each has. A particular policymaker may have a high degree of influence over the policy you wish to enact, but if they are not interested in the matter, you will have to persuade them of its urgency. Alternatively, if you are working with an official who may have a deep interest in your issue but little influence over the policymaking process, you may benefit more from their

knowhow and network of more influential contacts. It's also important to spend some time getting to know your audience. What specific elements of the policy issue are important to them and why? What is the best way to approach them and how can your position be framed so as to appeal to their sensibilities? Which aspects of your message will be most persuasive to them?



Messaging

Investing some time and effort into crafting a strong, persuasive message can make all the difference between an impactful campaign and one that doesn't get very far. Developing a compelling message will require you to consider the other components of your strategy. First, think about your goal and objectives and ask yourself what you want to achieve. Next, think about your resources and tactics: how will you get your message out? Then consider your audience: what do they need to hear and what will motivate them to act? Finally, make a call to action: what do you want done and how should it be done?

Generally, it's best to have one primary message supported by two or three secondary ones.

- *The primary message is your main message and is broad, simple, and direct.* It is a consistent theme that holds the entire advocacy campaign together.
- *Secondary messages support the main message and explain how it is to be achieved.* Secondary messages should be tailored to the principles, perceptions, and preferences of the target audience.

Above all, your messaging should be:

- *Clear, credible, compelling, concise, and consistent.* This may seem like a lot of requirements for a short message, but crafting a message that checks all the boxes won't be a problem once you have clearly defined the problem and developed actionable policy recommendations.
- *Simple enough to understand and remember, but persuasive and incorporating a direct call to action.* Promoting clear, actionable, and evidence-based recommendations is critical to advocating for policy change.
- *Moral and rational, thereby appealing to both hearts and minds.* Your target audience should be persuaded by the principles espoused by your message and convinced by the reasoning behind it.
- *Consistent in visual style, repeated, and reinforced.* Your audience should be able to recognize your visual materials and easily remember your message because it is consistent and frequently repeated so as to be both familiar and persuasive. Repetition is a simple and effective persuasion technique. Used strategically, keywords, catchy phrases, and memorable refrains help to reinforce messages.

To reinforce a well-crafted message:

- Choose effective spokespeople who are credible, eloquent, and convincing communicators.
- Articulate problems and desired actions clearly.
- Emphasize the urgency and importance of recommendations.
- Incorporate human interest and evidence to appeal to hearts and minds.