

Advocacy Action Guide

A ToolKit for Strategic Policy Advocacy Campaigns

Strategic Planning:
How-to Guide

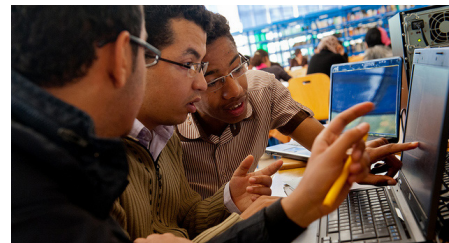




HELPFUL HINT:

Regularly update your action plan throughout your campaign. Remember that the campaign action plan is a living document that reflects the current advocacy environment – and that as the environment changes, whether as a result of an election or your advocacy efforts, so too should your plan. Examine the plan regularly to determine whether its initial strategies and activities are bringing you closer to achieving your policy objective. Designate periodic check-in times with the campaign leadership to review and revise your political mapping, monitoring and evaluation data, and campaign action.

Strategic Planning: How-to Guide



Why is it important?

An action plan provides a practical roadmap for achieving your campaign goal and is a critical part of the campaign process. An action plan helps to refine policy objectives, set policy-maker targets, clarify roles and responsibilities among partners, and determine campaign strategies. Over the course of your campaign, you will use your action plan to guide strategic decision-making and help you effectively monitor progress.

What needs to be done?

Campaign action plans can differ in format and level of detail, but they generally include the following types of information:

- Policy objective(s)
- Decision-maker targets and other key stakeholders
- Campaign strategies
- Communication tactics
- Partners

An action plan should also include a detailed work plan based on your selected campaign strategies. That workplan should highlight the following:

- Anticipated campaign activities and timelines
- Persons/partners responsible for carrying out the activities
- Required resources for the activities and who is providing them
- Indicators for monitoring activities and evaluating progress

A strong campaign action plan requires a thorough understanding of the political environment. Before you begin, do the necessary research to ensure that policy change is, in fact, the best way to address your public health concern. Examine the latest science and evidence in support of your public health issue, make certain you understand related laws and regulations and ensure that you've identified policy gaps. Also consider researching past advocacy efforts, so you know which strategies did or did not work. Your research should include creating a political map, which will detail the policy-making process and which decision-makers and influencers are involved.

Your action plan will be most effective if it is developed as part of a collaborative process among campaign partners. Identify a core group of organizations that can provide leadership throughout the planning period.



Getting Started

Gather your team

The size of your planning team may vary according to the scope of your campaign, but consider assembling a core leadership group of five to seven organizations that are skilled advocates and deeply dedicated to achieving your policy objective. (A larger group may prove unwieldy and make it difficult to reach consensus on critical campaign decisions.) Each of these organizations should send one or two senior-level representatives to participate in the action plan development process.

Whilst you are action planning, discuss which organization has expertise in a particular area, as well as resource constraints. This will help you to plan more effectively.

Gather background information

Once you have determined your campaign's core leadership team, divide responsibility for gathering and summarizing existing background information related to your public health issue. This may include the following types of information:

- Global, regional, national, and/or sub-national mortality and morbidity rates
- Primary causes of morbidity and mortality
- Economic costs-benefits analysis
- Relevant literature reviews and scientific studies
- Global and regional best practices and standards, including WHO guidance
- Recent media coverage
- Existing laws and regulations and any gaps in policy and/or their implementation
- Model policies from other jurisdictions
- Historical attempts to change related policy and their outcomes (successful and unsuccessful)



As part of the research process, the team should also conduct a comprehensive political mapping (see the Political Mapping: How to Guide), which includes identifying:

- Steps and timelines of the policy-making process
- Government bodies and decision-makers engaged in the process
- Individuals and organizations that can influence the process – and their potential motivations for supporting (or not opposing) your campaign.

Your team can likely conduct much of the necessary research, but consider engaging technical consultants to address any complex research needs. This might include technical or subject-matter experts, policy/legal analysts, media professionals, or political insiders. Consultants will likely speed up the research process, though they may require financial compensation. Once the research phase has been completed, ask all researchers to develop one to three page summary briefs (approximately one to three pages). Package the summaries together and distribute for review in advance of action planning.

Prior to action planning, you will likely identify minor holes in your background information and political mapping. That's OK! As the campaign progresses, you will naturally uncover additional information. However, if you identify major gaps in required data or analysis, you may want to consider commissioning research studies, packaging evidence, or conducting your own analysis as part of your campaign strategies and activities. Discuss this as part of your campaign action planning.

Initiating action planning

Complete the action plan with your leadership team over a one- or two-day period. In a group setting, participants will find it easy to share, debate and discuss information and ideas, which will help foster shared ownership and result in a more complete plan. The action plan can be completed either by the entire group or with small groups that work on specific sections and then re-convene as a large group to review and finalize content.

Consider identifying an external facilitator that can help guide your leadership team to complete the plan. A good facilitator can help all team members to fully participate, minimize power dynamics and conflicts, encourage in-depth discussion, ask clarifying questions, and help your team to arrive at consensus.

The campaign guidelines Essential Elements of a Policy Advocacy Campaign may be a useful resource for you, your campaign leadership team, and/or your external facilitator as you complete your advocacy action plan. Share before action planning.



Campaign Action Plan

Refine Policy Objective

Before you begin planning, you should already have a strong sense of your policy objective. Ideally, a shared policy objective is what brought you and your campaign partners together and guided your political mapping. During action planning, take the time to review and refine your policy objective as appropriate.

Remember: policy objective(s) represent the change you want to see happen, or the goal you are working towards, and as such set the direction for your overall campaign plan. Your policy objective should address a gap or weakness in the existing policy and provide an evidence-based solution for your advocacy issue. Your policy objective should be Specific, Measurable, Achievable, Relevant, and Time-bound or SMART. It should also contain the following three items:

- A policy “actor” or decision-maker - the person(s) or decision-making body with the power to make your desired change a reality
- A policy “action” or decision - the specific action you want them to take or decision you want them to make.
- Timeline for change - the date by when you want them to act or decide.

The tool Setting Policy Priorities can help you and your partners to further refine your campaign’s policy objective.

Policy Objective(s)

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Campaign Action Plan

Determine Policy Provisions and Non-Negotiables

Now that you’ve defined a policy objective as a starting point for your campaign action plan, your team needs to determine what policy provisions and specific language you would like to see included.

Based on background information you’ve collected prior to the meeting – in particular any global standards and examples of model policies – as a group list the main provisions you want to see included in the proposed policy. This will help you come to consensus on your “gold standard,” or ideal policy.

Next, identify the possible provisions you would oppose and discuss the reasons why.

Because quick decisions may need to be made during a campaign about whether to support a proposed compromise, your group should use this opportunity to anticipate possible compromises and what you are willing or unwilling to accept. Review each provision together and decide if there is an acceptable compromise.

If there is no compromise, then these are your non-negotiable items.

Keep this part of your action plan confidential. If opponents know in advance what you are willing to compromise, that may weaken your chances to secure the strongest possible policy

“Gold standard” provisions	Possible compromises
1)	1)
2)	2)
3)	3)
4)	4)
5)	5)
Provisions to oppose	Possible compromises
1)	1)
2)	2)
3)	3)
4)	4)
5)	5)

Non-negotiables:



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Campaign Action Plan

Finalize Workplan

You are almost finished! It's now time to combine the various elements of your overall campaign plan into a detailed workplan. While many campaigns last more than a year, having an initial workplan of about 12-months is extremely useful. For each of your main strategies, your work plan should delineate activities, needed resources, responsible persons and approximate timelines. In addition to reflecting your critical strategies, make sure your work plan captures intended communication activities, as well as efforts to monitor and mitigate the opposition and mobilize partners.

Your work plan also includes space for monitoring and evaluating whether your activities are bringing you closer to achieving your policy objective. At this point, you will want to create indicators to measure success. The documentation column can be used to verify indicators following completion of your activities. During work planning, it can be useful to have individual small groups complete the tables for the various strategies you identified.

Strategy:					
Activity	Resources	Person(s) Responsible	Time-frame	Monitoring & Evaluation	
				Indicator of Success	Documentation



Using your Campaign Action Plan

Congratulations! You have completed your campaign action plan. Before you begin implementing, review your plan one last time to ensure that you can realistically accomplish the activities you laid out and you did not overlook any key opportunities. Make note of any missing information in your action plan and determine how you will fill those gaps.

Next, take the time to determine when and how your campaign team will regularly review and update your plan. Specifically, discuss the frequency of your review and update meetings, methods of communication and data review, and approaches to decision-making (e.g. consensus, majority-vote or other). Consider who else may need to learn about your plan and whose feedback you want to capture. While your action plan may contain sensitive information that you won't want to become public, you may need to secure the buy-in of important stakeholders like policy champions or other committed partners. Think carefully about how to gain buy-in without breaching confidentiality.

Finally, discuss any potential risks or threats to implementing your action plan and determine how the campaign leadership team will respond if a potential crisis were to arise. This should include specific roles and responsibilities and will help to minimize negative impact to your campaign. The tool Managing Risks and Crises can help your team to assess and anticipate risks and develop an appropriate crisis response plan.

You are now ready to begin implementing. Good luck on your campaign!