

# Advocacy Action Guide

## A Toolkit for Strategic Policy Advocacy Campaigns

Talking with Policy-Makers





## Talking with Policy-Makers

As part of political mapping and campaign action planning, you should have identified key decision-makers and influencers you want to target. The next step is to persuade them to take action on your policy objective. Follow the checklist below to help build relationships with your policy targets and effectively engage them in your policy advocacy campaign.

Remember: your time will be best spent on those who support the policy objective and those who are neutral or undecided. Staunch opponents are rarely converted. Nevertheless, it is important to understand all opposition arguments and be prepared to counter them.

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### Before Meeting with Policy-Makers

#### Do your research

- Review your political mapping, which should provide basic information on your target(s), including their position on your issue — supportive, neutral or opposed.
- Update your political mapping with any new information on your targets' background, other issues they support, and their interests in public health.

#### Prepare what you are going to say

- Use your research to help you define your objective (or "ask") for the meeting and determine any key facts or statistics that will help you make your argument.
- Consider which messages will be most compelling to an individual policymaker and adjust accordingly. It is important to know what to emphasize (and what NOT to emphasize) to win people to your cause.
- Boil your message down to two to three main points that provide a clear and rational argument for why they should support your cause. Policymakers are busy people. You often won't have a lot of time with them to make your case.
- Anticipate any opposition arguments and be prepared to respond.
- Practice delivering your talking points with colleagues or friends and adjust content as necessary.

## Talking with Policy-Makers



### HELPFUL HINT:

When developing an advocacy message, put yourself in your target's shoes. Why should they be interested in or care about the issue? It may not be the same reason as your own. Use the Developing Advocacy Messages tool to help craft targeted and persuasive messages for your various policy targets.



### HELPFUL HINT:

If the solution to your issue lies in policy change, then your brief should contain language that will help elicit that change. If the solution lies in more effective implementation of existing policies then the brief should give practical examples of what actions need to be taken. The key thing to remember is your policy brief should be solution-oriented.

### ✔ Develop materials to leave behind

- ✘ Create a two-page policy brief that outlines the problem, provides supporting evidence, and defines solutions. The policy brief can provide information you were unable to cover in the meeting and serve as a reference point for the decision-maker after the meeting.



### ✔ Arrange an introduction and meeting

- ✘ Does anyone in your network have good relationships with your targets? Ask them to introduce and recommend you. This helps to cultivate good standing with the policymaker.
- ✘ Organize a 30-minute meeting with your policy target via email, phone, or letter and outline what you would like to discuss. Remember, policymakers are busy; you don't want to take up too much of their time.
- ✘ Cultivate good relationships with your targets' assistants and advisers. Often it is the staff that will determine your level of access.
- ✘ Develop an internal agenda that outlines the time you have with the policymaker and the topics you wish to cover. You may not be able to lead the meeting (the policymaker may wish to), but having an agenda helps ensure that all the most important issues are addressed in the time allowed.

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### When Meeting with Policy-Makers

### ✔ Have the right people in the room

- ✘ Do not send a junior staff member to meet with a senior official. For example, if it is a first meeting with a very important cabinet minister then brief your chief executive and have them conduct the meeting. If the meeting concerns legal text options, include a lawyer who can advise on legal language.



**Have a clear request**

- Know the responsibility or level of authority of the person that you are meeting so you understand what they can and cannot do to help your cause.
- Make a specific request and leave with a clear outcome. Your request may vary from asking the policymaker to take a specific action on your issue to simply meeting with you again.

**Clarify next steps**

- Note any requests for additional information or questions for which you were unable to provide answers. Promise to provide the information soon.
- Close the meeting with a clear picture of the next step and which party is responsible. Note if you have agreed to remain in touch via email or phone or to meet again in person.
- Distribute your policy brief. It is a good idea to have contact information included in the brief.

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**After Meeting with Policy-Makers**

**Conduct follow up**

- Always follow up the meeting in writing. Send an email thanking the person for their time, summarizing the conversation that took place, and detailing next steps and their timing.
- Answer any outstanding questions, provide requested information, and send them to the policymaker and their staff in a timely manner.

**Assign a main contact**

- Identify one person from your organization or coalition who will be the primary point of contact for each policy-maker. Main contacts should have strong interpersonal skills and follow-through.



**HELPFUL HINT:**

If you don't have the answer to a policymaker's question, be honest and say so. Do not make something up. Tell them that you will get the information, and then keep your word.



### HELPFUL HINT:

While more than one person from your organization may interact with the policy-maker, ALL communications should funnel through your group's main contact. Clear relationship management will make sure that communication is not duplicated—or worse, forgotten!

### ☑ Cultivate on-going communication

- ☒ Regular communication by phone, email, or in-person helps your organization demonstrate expertise and offer assistance as needed. A one-time meeting is unlikely to turn a decision-maker into a policy champion.

### ☑ Be a regular resource

- ☒ Provide your targets with background information and model policies, such as examples of strong legislation from other countries.
- ☒ Make yourself available as an expert for timely, accurate information about your issue.
- ☒ Offer to assist policy-makers in developing statements and drafting policy language.

### ☑ Seek policy-maker counsel

- ☒ Ask for advice and/or information from policy-makers and their staff, such as recommendations for other decision-makers to contact and suggestions for how your network can help them throughout the policy-making process.

### ☑ Maintain confidentiality

- ☒ Protecting information told to you in confidence is critical. Always clarify whether information your contacts provide is public or private. Even if you aren't able to use it publicly, it might help to inform your strategies and tactics.

### CAN'T GET A MEETING WITH A DECISION-MAKER?

If you are struggling to schedule an initial meeting with your target, try these other strategies for making face-to-face contact:

- ✓ Organize events such as round-table discussions, panels, workshops and report launches. These are an excellent way to engage policy-makers and grow your support base. Make sure to capture the contact information of attending policy-makers and introduce yourself at the event.
- ✓ Attend events you know policy-makers will also be attending.
- ✓ “Bump into” them in an informal setting, such as at a restaurant or worship services. Use these instances primarily as a chance to secure a time for a meeting. Don't go into too much detail.
- ✓ Enlist friendly journalists to call the policy-maker as research for an article. This helps the policy-maker see your issue as one they need to be briefed on.