

# INTRODUCTION TO ADVOCACY

## BASIC STEPS FOR GRASSROOTS ORGANIZATIONS



A simple guide  
to help grassroots civil society  
organisations in advocacy engagement



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A simple guide to help grassroots civil society organisations in advocacy engagement.



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WEB4YES

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## 1. WHAT AND WHO IS THIS GUIDE FOR?

This simple guide is a tool for all grass root civil society organizations and any individual that wants to engage in advocacy action. It seeks to provide a basic, clear and precise guideline that can help you plan, implement and evaluate a simple advocacy campaign. The direct targeted fields are youth employability and youth entrepreneurship, but the guide is structured in a way that it can address any topic of your interest and need. Moreover, the guide will offer you concrete links where you can search for more in depth information if you want to advance in your advocacy endeavour. The guide is compiled as a collection of online available resources, mentioning each of them respectively, and providing you thus also the references where you can explore more in depth.

The need for this guide came as a request of 15 grass root organizations that were part of the training “Development of Public Policies in the Youth Employment Field” implemented by Beyond Barriers organization in April 2019, in the frame of **Web4YES** project. Following the results of this training and the need expressed by the local organisations to have a guideline that can guide them step by step in better understanding the path towards formulation and implementation of an advocacy campaign, BBA decided to produce this simple tool that can hopefully help any grass root organization in the Western Balkan region to learn more on the basics of advocacy. Therefore we hope that you find this guide helpful and it support your local actions in civil society sector.



## 2. | WHAT IS WEB4YES PROJECT?

The Web4YES (Western Balkan Civil Society Organisations for Youth Employment Support) project has been supported under the framework of the Civil Society Facility and Media Programme 2016 – 2017 Consolidating Regional Thematic Networks of Civil Society Organisations by the European Commission. Web4YES project lasts for 36 months starting from January 2018 and ending in December 2020.

This Project represents a regional-scale initiative designed to deliver innovative cross-sectorial approaches and provide young unemployed citizens of the Western Balkan region opportunities for employability enhancement and employment. The Project is designed to address the existing challenges of insufficient cooperation among the civil society actors and public authorities in Western Balkan in the policy processes and decision-making toward the reform process regarding youth unemployment.

The project aims to empower civil society actors to make a substantial contribution to addressing many of the employment and entrepreneurship issues through their advocacy and oversight activities at a national, regional and local level, and thus put greater focus on the needs of young citizens in policy-making.

Within the Web4YES project, partners have identified several policy challenges and have commonly worked in creating a set of specific recommendations that are also part of the partner's advocacy campaigns. You can read the **Youth Employment and Entrepreneurship - Key Policy Challenges in the Western Balkans (4 in 1)** publication in 6 WB languages (Albanian included) and the **Regional Reports** that can serve as inspiration and help you formulate your advocacy goals or campaigns in the field of youth employability and entrepreneurship in the region.

The project coordinator is Belgrade Open School and the partners on the project are: Beyond Barriers Association (Tirana, Albania), Association for Democratic Prosperity – ZID (Podgorica, Montenegro), Institute for Youth Development KULT (Sarajevo, Bosnia and Herzegovina), NGO Lens (Pristina, Kosovo\*<sup>1</sup>), National Youth Council of Macedonia (Skopje, North Macedonia) and Olof Palme International Center (Stockholm, Sweden).

You can find more about the project on the official website [www.web4yes.eu](http://www.web4yes.eu) and in the online one stop shop platform [www.web4jobs.info](http://www.web4jobs.info)

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1 \*This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.

### 3. | THE MEANING OF ADVOCACY

#### What is advocacy?

To **advocate (verb)** means to speak, plead or argue in favour of; to support or urge by argument; to recommend publicly. The **Advocate (noun)** refers to a person that promotes/supports the interests of a group or individual.

We can therefore understand advocacy as **an action that aims to represent, promote, or defend some person(s) or groups, interests, or opinions.** Advocacy is also the deliberate process of influencing those who make decisions about developing, changing, and implementing policies (The CARE International Advocacy Handbook 2014: 7).

Effective advocacy may succeed in influencing policy decision-making and implementation, by:

a) educating leaders, policy makers, or those who carry out policies;

b) reforming existing policies, laws and budgets, developing new programs;

c) creating more democratic, open and accountable decision-making structures and procedures (An Introduction to Advocacy 1997: 5)

Advocacy in all its forms strives to ensure that people, specifically those who are most vulnerable in society, are able to:

a) Make their voices heard on issues that are important to them;

b) Defend and protect their interests;

c) Truly respect their views and desires while making decisions regarding their lives.



## What is public advocacy?

Out of many forms or types of advocacy, public advocacy is only one of them. Public advocacy refers to the process of taking action, using a series of strategies, to influence the creation and development of public policy. It makes use of multiple targeted actions directed at changing policies, positions or programmes.

Policy advocacy seeks to specifically:

- a) Establish new policies;
- b) Improve on existing policies and/or;
- c) Challenge pieces of legislation that impact negatively on particular individuals or groups.

Policy advocacy looks specifically at public policy, which a set of laws (or other types of legislation) is taken by government, or other governing bodies that have a local, national, regional or international reach. Its development involves a system of courses of action (or inaction), regulatory measures, legislative acts, judicial decisions and funding priorities concerning a particular issue. In summary, policy advocacy is directed at shaping public policy<sup>2</sup>.

The goals and objectives of advocacy

The goal is the subject of your advocacy effort. Goals can be defined as the desired change that we want to achieve in policies or practices in a set period of time. This means that goals are time bound, achievable within the timeframe of the campaign.

## Advocacy Goals:

1. Changing the policies or programs of any institution;
2. Putting issues on the public agenda;
3. Providing solutions to issues of public interest;
4. Building public support for issues and solutions;
5. Making the case for/against a public position or policy.  
(Guide to Youth Advocacy 2015)

<sup>2</sup> <http://menengage.org/wp-content/uploads/2014/01/Policy-Advocate-Toolkit.pdf>

An advocacy objective aims to change the policies, programs or positions of governments, institutions or organizations. More specifically it means **what** you want to change, **who** will make the change, by **how** much and by **when**. The advocacy objective should be specific and measurable so that you will know whether or not you have attained your objective in the time frame you have specified. (An Introduction to Advocacy 1997: 23)

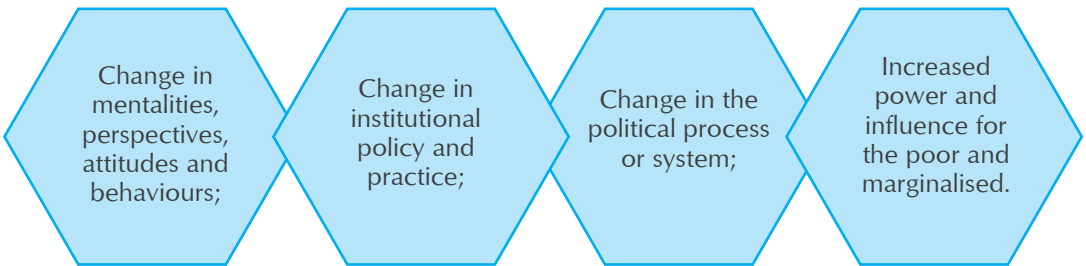
A target for advocating is tangible, practical and time-bound. We encourage you to use the **SMART** model when establishing your advocacy goals and/or objectives. Make yourself the following questions when working on goals.

|          |                   |  |
|----------|-------------------|--|
| <b>S</b> | <b>Specific</b>   | What will be accomplished? What actions will you take?                         |
| <b>M</b> | <b>Measurable</b> | What data will measure the goal? (How much? How well?)                         |
| <b>A</b> | <b>Achievable</b> | Is the goal doable? Do you have the necessary skills, expertise and resources? |
| <b>R</b> | <b>Relevant</b>   | How does the goal align with broader goals? Why is the result important?       |
| <b>T</b> | <b>Timebound</b>  | What is the time frame for accomplishing the goal?                             |



## 4. | ADVOCACY VS LOBBYING

As we previously stated, advocacy is a process that aims at influencing a change in policies by pushing political actors to take certain actions. The main purposes of advocacy are to achieve:



Commonly, advocacy seeks to enforce change as a result of making policy demands. Most of the time, the method primarily used is to send out information to get a specific message across, to mobilise people in order to weaken the position of a particular decision-maker, or to educate such decision-makers about the negative impact of the policies existing. (Advocacy Handbook 2015: 13)

### What is lobbying?

**Lobbying is a specialized form of advocacy.** Lobbying—face-to-face meetings with decision makers or influential people are a commonly used approach for many organizations that are defending the interests of a certain group of people or a cause. (Making Research Evidence Matter. A Guide to Policy Advocacy in Transition Counties 2012:29). Characteristics of lobbying are: open (two-way) communication, influencing by linking the interests of different stakeholders, creating win-win situations and investing in long-term relationships with decision makers. In order to have the power of lobbying your organisation, network or partnership should have or establish relations with people in public positions, and focus your efforts on being present and visible during government and public discussions concerning your interests.

Some examples of lobbying could be:

- **Coordinating visits by marginalised people to elected officials and other policy makers in order to describe their life situations and to directly propose needed changes in law and in social policies;**
- **Personal letters (e.g. to European Commission's President);**
- **Face-to-face meetings with decision-makers (e.g. Members of the Parliament);**
- **Meeting delegations (e.g. Caritas delegation meeting with EU Rotating Presidencies);**
- **Informal contacts at receptions (e.g. at a Ministry of Foreign Affairs; Ministry of Economy and Finance etc.);**
- **Working visits with decision-makers (e.g. technical stakeholder meetings with European Commission representatives);**
- **Personal exchanges over the telephone (e.g. with political leaders);**
- **Drafting of common positions (e.g. The Investing in Children Alliance Recommendations) (Advocacy Handbook 2015: 13)**

## How do advocacy and lobbying differ?

While most people use the words interchangeably, a difference is helpful to understand between advocacy and lobbying. If non-profit organizations lobby about themselves, they aim to influence every aspect of society, whether they refer to people regarding their actions, workers about their regulations, or government about their legislation. ***Lobbying specifically refers to attempts to lobby that aim to influence legislation.*** That difference is helpful to keep in mind, because it implies that laws limiting lobbying by non-profit organizations do not govern other political practices. **It is important to understand that lobbying is not always the same as advocating, as advocacy derives its energy from being a group effort and is done in an open and transparent manner.** Lobbying generally means trying to influence a public official's judgment on a particular topic. Advocacy on the other hand focuses on an issue that impacts a large group. It involves an issue or cause that many people care about. Rather than representing an individual interest, advocacy campaigns are broad-based and can be characterized as "the voice of citizens" or "the voice of students" (Guide to Youth Advocacy 2015:3)

Hence, **advocacy and lobbying do not come in a "one size fits all"**, therefore as an organization you should stay alert and flexible in order to adapt and shift between a range of activities in different areas, and also seek in involving different partners depending in the situation. This ability and readiness is the most effective way of influencing policy – from public pressure and one-on-one talks with decision makers, to analyses and the right intervention at the right time.

By developing your skills in lobbying and advocacy, you are thus acting as a watchdog, at the least.

Nevertheless, you should remember that lobbying and advocacy is about cooperating, establishing networks and partnerships, complementing each other's work, conducting in-depth, long-term research, responding flexibly to new knowledge and opinions, developing alternatives and persistently pursuing policy reform.

## 5. FIVE STEPS FOR YOUR ADVOCACY CAMPAIGN

Building an advocacy strategy

Different models exist that can support you to develop your advocacy strategy. For the purpose of this simple guide, we have selected the following model that is simple to understand, plan and implement for those that are new to advocacy engagement.

So let's look at how to develop your strategy based on **five** key questions:

1.

### WHAT DO YOU WANT TO ACHIEVE? - (OBJECTIVES/GOALS)



You should have a clear goal that you can explain to other people, and which you think you can achieve within the specific time frame you set for it.

#### CONSIDER:

- **What needs changing?**
- **Is it long term or short term?**
- **What do we want to ask for? Does it require change to: Legislation; Policy; Regulation; Programs or Funding?**

2.

### WHO CAN MAKE IT HAPPEN? - (AUDIENCE)



Who has the power to get you, your goal? For example, if you want to change a school policy, you should focus on your administrators or on the school board; if you want to address a state law, you should focus on legislators. This will be your primary audience. Next, decide who directly influences their decisions – the media, local businesses, taxpayers, etc. These groups also need to be included in your strategy.

#### CONSIDER:

- **Multi-layered approach: policy makers, media, key constituencies, public etc.**
- **You need different strategies for each target – research.**
- **Identify for example: provincial and territorial/local governments, health authorities and general public.**

3.

### WHAT DO THEY NEED TO HEAR? - (MESSAGE)



Think about your issue from the perspective of your audience. What do they need to hear to make the change you want? Your message should be clear, true, and persuasive to the group you are trying to influence.

#### CONSIDER:

- **Be clear on what you are asking for;**
- **Keep it simple and focused;**
- **Use positive language and communication;**
- **Tailor message to audience- research,**
- **Appeal to audience's self-interest,**
- **Acknowledge environment/context - be pragmatic,**
- **Make the case,**
- **Need to look at the problem, the solution(s) and the benefit(s),**
- **Be consistent,**
- **Distribute clear and concise position statements,**
- **Use evidence - facts carry more weight than anecdotal evidence**
- **Economic arguments are important.**

4.

### WHO SHOULD DELIVER THE MESSAGE? - (MESSENGERS)



Your message will sound very different depending on who gives it. In general, the most effective messengers are those who can speak from personal experience, professionals who have credibility in the field, and those who have a special connection with your target audience. Messenger can also be one of your partner organizations, if the advocacy campaign is being done in partnership.

#### CONSIDER:

- **The target audience will determine the messenger,**
- **As you cultivate champions, they will also become messengers,**
- **Appoint a designated skilful person to handle the media**

## 5.

**HOW CAN WE GET THEM TO HEAR IT?  
- (DELIVERY)**

Your message will also sound different if delivered in a private meeting, than it would at a protest. Think about how your audience would receive your group in different contexts. You may start with something small and move to a more public forum if you have not gotten the results you want (Advocacy Manual 2001: 5-6).

**CONSIDER:**

- **Advocacy is relationship building,**
- **Tactics change by target audience,**
- **Tactics to reach general public: Media stories; Editorials; Articles; Adds; Awareness campaigns; Local events.**
- **Tactics to reach media: Choose right communication tool; press releases; press conferences; letters; use positive language; choose and use credible sources; Provide information in timely manner; Localize the issue; Accent human interest angle; Demonstrate support.**
- **Tactics to reach political level of government: Meetings with elected officials – follow up; Letter writing campaigns then follow up in person; Distribute background documentation proving our case; Petitions, Appear before Caucus; Appear before a Parliamentary Committee.**
- **Tactics to reach departmental level of government: Meet with departmental employees responsible for issue; Meet with other government employees that may have an interest in the issue; Be prepared with discussion information and background info that they can use to make the case within government**

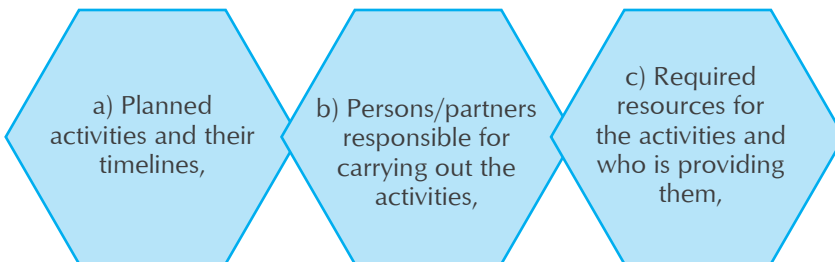


## Formulating the plan

Advocacy campaign action plans can differ in format and level of detail, depending on the type of campaign; the complexity of the issue that is being advocated for; the timeline; the stakeholders involved etc. Nevertheless, as a newcomer to advocacy, make sure that your plan includes the previous five steps that in a more specific ways are:

- 1. Your policy objective**
- 2. Your target decision-makers and influencers**
- 3. Your opponents and their planned tactics**
- 4. The timeline for relevant policy process**
- 5. Your core partners and your agreed process for communicating and decision-making**

It is a very good approach that while planning your advocacy strategy you use a detailed work plan that is based on your selected advocacy strategies and anticipated communications. This working plan should highlight 3 aspects:



Do not forget that the campaign process itself is dynamic and ever changing, and your campaign team should regularly revisit your shared action plan and adjust it based on current circumstances. Public policy is also not cast in stone, thus the planning of advocacy should also be revisited and adapted based on continuous reality check and further developments in the specific field. (Elements of a Policy Advocacy Campaign: Guidance for Civil Society Organizations p16).

## Implementing the advocacy plan

While having formulated the action plan, now it is time to implement it. In these regards, remember to:

### FOLLOW THROUGH

Commit to the plan. Do not start and then later on stop without finishing the campaign.

### BE TIMELY

It would be good to coincide the activities with specific dates that may have better impact when we do our activities during these dates. (AIPP 2013: 40)

### STAY FOCUSED

Keep everyone focused on the plan. Do not get distracted.

Also, do not forget that an advocacy campaign that is public, should have **a clear and well communicated start, as well as a clear and communicated end**. It is very important for you to publicly (using all communication means that your organizations has) communicate the start of the campaign, its continuation and developments, and its finalization, together with results achieved.

The most common mistake done in advocacy campaigns that use online media channels, is sometimes not informing the audiences on the finalization and/or closure of the campaign, so avoid this mistake in your advocacy engagement.

## 6. | TOOLS AND RESOURCES

Hoping that this simple guide has given you a clearer picture on advocacy and lobbying, we hope that it will be helpful in your grassroots work within your organizations and partnerships. The simple guide itself, has been compiled with the adaptation and inspiration taken and referred from the following sources and is presented as a simplified version, for better understanding of advocacy planning for organisations that are grassroots and would like to start engaging more with public advocacy.

Lastly, in the last section of this publication, you will find some selected links of materials, tools, resources and manuals that you can read online and that we gathered as a toolbox for those that want to improve the knowledge in the advocacy field.

**Our lives begin to end the day  
we become silent about things that matter !**

- Martin Luther King -

| RESOURCE   | SHORT DESCRIPTION   |
|--|---|
| The CARE International Advocacy Handbook.<br>CARE International 2014             | This manual is a toolkit of approaches, techniques and resources to help CARE staff, partners and other NGO colleagues think about how to integrate advocacy into their work. |
| Elements of a Policy Advocacy Campaign: Guidance for Civil Society Organizations | A manual that guides you step by step in planning, implementing, monitoring and evaluating public advocacy campaign.  |
| Advocacy Handbook.<br>Caritas Europa 2015  | The advocacy cycle and experience of Caritas EUROPA in the field of advocacy.   |

|  |  |
|--|--|
| <p>Advocacy Training Manual on UNSCR 1325</p>  | <p>A user friendly tool to increase learning on how to advocate</p> <p>for United Nations Security Council Resolution (UNSCR) 1325.</p>  |
| <p>Guide to Youth Advocacy.<br/>Center for International Private Enterprise 2015</p>   | <p>The guide is designed to help you, leaders of youth organizations (or organizations that wish to support youth), as well as intrapreneurs who wish to develop youth campaigns within their organizations.</p>   |
| <p>Policy Advocacy Toolkit<br/>How to Influence Public Policy for Social Justice and Gender Equality in Africa</p>                                       | <p>The resources provided within this toolkit specifically address issues related to the achievement of gender equality; HIV; gender-based violence; the promotion of sexual and reproductive health and rights; as well as rights of LGBTI people, but the whole toolkit can support advocacy for different topics.</p> |
| <p>Training Manual on Advocacy, Lobbying and Negotiation Skills for Indigenous Peoples in Climate Change and REDD+.<br/>AIPP. 2013.</p>                  | <p>A tool on advocacy, lobbying and negotiations, specifically for organisations that engage in climate change negotiations and beyond.</p>  |
| <p>Making Research Evidence Matter. A Guide to Policy Advocacy in Transition Counties<br/>Eóin Young &amp; Lisa Quinn, Open Society Foundations 2012</p> | <p>This guidebook is built around a core advocacy-planning tool, the elements of which are illustrated through 4 case studies from the region.</p>   |

|   |   |
|---|---|
| <p>The strength of lobbying and advocacy - Ten Recommendations from the field.</p> <p>Fair, Green &amp; Global alliance, April 2014</p> | <p>The Fair, Green &amp; Global alliance presents clear insights into the many shapes and forms of policy influencing according to ten factors that lead to success, including recommendations for policy support measures.</p> |
| <p>How to Design a Successful Advocacy Strategy</p> <p>Advocacy for immunization</p>  | <p>A dynamic and interactive website with information and steps on how to plan and design advocacy. It also offers worksheets for various elements that can help you in planning and designing.</p>                             |
| <p>Guidelines on lobby and advocacy</p> <p>ICCO, June 2010</p>  | <p>The ICCO 10 STEP approach for the development of project plans and effective lobbying and advocacy strategies.</p>   |
| <p>Advocacy Manual</p> <p>A Project of Youth Alive Oakland 2001</p>   | <p>This booklet includes advocacy steps and information on working with the government, the media, and the community. It is written by Teens on Target (TNT) and showcases their experience with advocacy.</p>                  |
| <p>An Introduction to Advocacy / Training Guide, Support for Analysis and Research in Africa (SARA/AED) 1997</p>                        | <p>An advocacy training guide composed of 10 modules, with theoretical input and concrete examples.</p>   |

**Notes :**

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