

Advocacy 101: Part 3 Implementing and evaluating your project

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Welcome back to the PedsCases advocacy podcast series. My name is Dr. Laura Betcherman, and I am here along with two of my co-residents, Dr. Katie Boone, and Dr. Amelia Kellar, We are pediatric residents at the Hospital for Sick Children in Toronto. This podcast series was developed with the help of Dr. Charlotte Moore-Hepburn, a pediatrician at SickKids and Canadian Pediatric Society Director of Medical Affairs.

This is the third in a three-part series on advocacy. In the first and second podcasts, we introduced you to the concept of public policy advocacy, levels of government and how to design your advocacy project. In this podcast we will talk about how to execute and evaluate your project.

Executing your project

- Campaigning
- Collaboration / Networking / Alliance building
- Communication
- Lobbying
- Evaluation



Once you have a careful plan in place, the next step is putting the plan into motion by executing your project. This involves several key steps: Campaigning, networking/alliance building and collaborating with those networks, communication, lobbying and finally, evaluating your project's success. It is important to note that not all projects require all activities. You need your execution plan to match your strategic objectives

Campaigning

- **Definition:** A series of coordinated activities (public speaking/demonstration) designed to achieve a social, political or commercial goal
- Campaigns are most effective when they incorporate some or all of the following:
 1. A clear message – focus on one message
 - Tangible “ask” for action
 2. A “simple”, “specific” solution
 3. Demonstrate “outrage”
 - Consider an example
 4. Use the media
 5. Leverage alliances
 6. Excite public action
 7. Engage “Celebrity”



Campaigning refers to a series of coordinated activities such as public speaking, designed to achieve a social, political or commercial goal. A good campaigning tool kit includes some or all of the following:

1. A clear message: focus on one message that can be tailored to fit a specific audience. When doing this, it is important to use simple, unambiguous language and brief, persuasive argument. Here you want a tangible “ask” for action – that is to say, asking your audience to take on a task rather than stating what needs to be done. Take the example of reducing accidents and injuries from biking accidents. Your ask will be to distribute flyers on helmet safety information to schools in your audience’s local district.
2. A simple solution: this relates back to your message – the solution here is “increasing helmet usage amongst Canadian youth by 25% within the next 2 years”. This message should be as clear, unambiguous and specific as possible.
3. Clear outrage: you must demonstrate a passion for the issue and explain why the current status quo is unacceptable. This is where a personal story may be used to exemplify the importance. In the above example you may use a case of a negative outcome from disuse of bike helmets.
4. Use of the media: this can take the form of newspapers, radio, television, or social media leaders
5. Leverage alliances with larger organizations, political parties or networks of like-minded people (such as a resident and/or physician group, professional association, clubs or community groups)
6. Public action: good campaigns must engage and enthuse the audience. Remember, citizens are voters, and voters drive political activity.
7. And celebrity: large name endorsers or spokespeople can help attract both public and media

Developing a campaign

1. Decide on target audience
1. Develop your message: a campaign is not an exercise in education.
1. Design, plan, timetable, and budget campaign activities
1. Ensure you have help: volunteers vs paid workers
1. Encourage collaboration with other groups with shared interests
1. Establish a way of recording the names and addresses of campaign supporters



Developing a public campaign involves several steps:

1. Deciding on a target audience: this involves deciding who will benefit from your campaign? Who will see it? What types of media do they have access to?
2. Communicate one message only, be straight forward and simple. Assume your audience knows nothing about the topic and recall that your message is not an educational opportunity – your goal is to ask your audience to make a change. Using pictures can be very effective in communicating your message
3. Design, plan and create a timeline and budget for your various campaign tasks
4. Ensure you have support from allies, partners and volunteers, and delegate clear roles
5. Encourage collaborative efforts among all parties involved
6. Establish a way of recording the names and addresses of campaign supporters. This will help you to maintain relationships and maintain enthusiasm for the project. It will also help you call on people in the future for support and provide them with feedback on campaign progress.

Collaboration

“if you want to walk fast walk alone, if you want to walk far walk together” – African proverb

Involve:

- Politicians
- Faith organizations
- Business associations and big companies
- Lawyers/judges
- Teachers
- Doctors
- Academics
- NGO,
- Regional/international institutions

LEVERAGE POWER MAP!



Collaboration is key to a successful advocacy project or campaign. Collaboration involves networking with other groups and important people, company and government in order to achieve funding, and advertisement. Networks can also help you campaign to other groups, companies and government organizations. Some people that may be contacted include: politicians, faith organizations, business associations, lawyers, judges, teachers, physicians, academics, non-governmental organizations, and regional or international institutions. Networking helps you utilize and leverage your power map.

Collaboration: pros and cons

ADVANTAGES	DISADVANTAGES
<ul style="list-style-type: none">- Different skills & experiences- Reaches wider donor pool- Reaches wider policy makers and media- Coordinates activities / division of labour- Increases credibility- Larger voice	<ul style="list-style-type: none">- Requires active management- Slower- Need for compromise/common view- Unequal participation- “selfish” members



As with all things, there are both pros and cons to “building a big tent”. Developing a collaboration has both positive attributes as well as challenges. You should be aware of both as you move forward.

Some of the advantages includes:

- Involving groups that have a different skillset and can bring different experiences to the table
- Reaches a wider pool of potential donors
- Reaches a wider pool of policy makers and media outlets
- Allows you coordinate activities and divide labour amongst various groups and group members
- It increases your credibility when you have more people and groups involved
- And this helps your campaign reach a larger audience and have a larger voice

Some of the potential disadvantages of collaboration include:

- The requirement for active management and coordination of all groups and group members
- It is often slower to accomplish tasks when more people are involved
- There is a need for compromise/to find a common ground for future planning
- There may be unequal participation between members
- And lastly, you are at risk of some members taking credit for the work
- There is no right or wrong answer to coalition building – it depends on the issue, the players and your plan. Be familiar with the pros and mitigate the challenges accordingly

Communication

Components of successful communication:

- Clear vision, realistic objectives, evaluation criteria
- Program that educates, persuades and motivates, creates awareness, creates a sense of injustice/ harm from current behaviours that promotes action
- Provides sufficient data in succinct forms (short reports and briefings)
- Includes dissemination in a number of venues (including conferences / seminars, traditional media, social media, etc)



Communication is key to collaboration, and key to successful project. We have outlined some key components to successfully communicating your campaign

1. Have a clear vision, realistic objectives and clear evaluation criteria for your project
2. Have a well thought through program that not only educates, but more importantly persuades and motivates its audience, creates awareness of your cause, creates a sense of injustice/harm from current behaviours that promotes a desire for action
3. Communicate your project succinctly through short reports and briefings – it is important to be both compelling and concise, simultaneously.
4. Ensure that you disseminate your message through a variety of channels, responding to the desired target audience. Think about conferences and seminars for the more academic audiences, as well as traditional media and social media for both public and political audiences.

Lobbying

Lobby: a group or organization trying to influence legislators or other public officials in favour of a specific cause

Lobbying: direct attempts to influence policy makers, public officials, or decision makers through personal interview and persuasion

1. Find out who is the right person in the organization to contact:
 - Searching institutional websites
 - Ask alliance/ network partners
 - Ask relevant friends/family
 - Speak to advocacy colleagues in other agencies
2. Call them or their assistant and say your name, who you are, and try to arrange a meeting
 - Be respectful
3. If you are not able to arrange an appointment, find alternate ways of contact (letter, e-mail)
 - Face to face is preferred



In advocacy work there is often a lot of talk of “lobbying”. We thought it would be helpful to talk about what this means, and to outline how to lobby.

The definition of a lobby is a group or organization that is trying to influence legislators or other public officials in favour of a specific cause. Lobbying, therefore, is a direct attempt to influence these policy makers, public officials, or decision makers through personal interviews and persuasion.

Step 1 in lobbying involves finding out who exactly is the right person to contact within an organization. To do this you can utilize several strategies such as searching their websites, asking network partners, asking your friends and family, or speaking to advocacy colleagues in other organizations.

Step 2 is to call that person, or their assistant. In doing so, state your name, who you are, what your organization is and try to arrange a meeting with the person you are trying to reach. Remember to be friendly and respectful, no matter who you are talking to, you never know how you may need them in the future!

Lastly, if you are not able to arrange for an appointment with that initial encounter, find alternate ways of contacting them to arrange for a face-to-face e-mail, either through a carefully worded letter, or an e-mail.

Tips for successful lobbying

1. PREPARE!! Plan and rehearse your brief – “An Elevator Pitch”
2. Make your message simple and explicit – Use specific and compelling examples
3. Listen actively to questions & build relationships (the messenger can be as important as the message)
4. Be polite
5. Be on time
6. Build relationships
7. Be transparent
8. Always finish a meeting by suggesting another meeting – **persistence is key**



We have summarized 8 tips for a successful lobbying practice:

1. Be prepared! Plan and rehearse your brief. This is analogous to your “elevator pitch” – a short summary that outlines what is the issue, why it is important, what is the intervention, and what you are asking from your audience
2. Make your message clear and simple – don’t confuse your audience
3. Listen actively to questions and Build relationships – the messenger can be as important as the message
4. Be polite
5. Be on time – don’t allow your talk to run too long, people have short attention spans
6. Be transparent in what you are asking for, and what your goals are – do not have a hidden agenda
7. And lastly, always finish your meeting by scheduling another meeting – persistence is key!

Evaluation

- Outcome measures:
 - Policy gains: specific changes in policy or practice
 - Implementation gains: degree of impact
 - Political gains: civil groups can gain increased recognition
 - Partnership gains: long-term collaboration
 - Organizational gains: increased public profile, respect, funding



Once you have completed your project or your campaign it is equally important to evaluate your work. First and foremost, this involves analyzing your outcomes

There are several outcome measures that can be analyzed. These include:

- Policy gains: were there any specific changes in policies or practice?
- Implementational gains: this refers to the extent to which stated policies are implemented, as well as evaluating how these have impacted the people and communities that were expected to benefit from these changes
- Political gains: that is to say, have any civil groups gained increased recognition or rights
- Partnership gains: have any networks been formed on the regional or national level? These can be important for fostering long-term collaboration
- Organizational gains: what were the gains specific to your organization? maybe the project led to increased public profile, credibility, or even increased funding

Conclusion

- Compare actual and anticipated outcomes with 3 SUMMARY QUESTIONS:
 - What was successful?
 - What was less successful?
 - What can be improved upon?

- And remember...
 - small successes = catalyst for larger goals in future



You should compare your actual and anticipated outcomes with three key questions: What was successful? What was less successful? What can be improved upon? Discuss why there was a discrepancy in outcome between your stated and observed objectives if any.

Do not take these discrepancies as a failure – focus on the small successes and learn from your mistakes! Use these as a catalyst for larger goals in the future.

Successful advocacy takes patience, persistence, energy and audacity. It is not an easy endeavor, but it is both hugely rewarding as well as hugely important.

Advocacy: take-home points

1. Generate a good idea
1. Gather your team
1. Design your project
1. Campaign, campaign, campaign
1. Evaluate outcomes

DON'T GIVE UP!



In this third podcast in our advocacy series we discussed how to execute and evaluate your project. We would like to conclude with **5 take-home points**.

1. Generating a good idea involves choosing a topic that you are passionate about, and that fits with the current political climate and societal needs
2. Gather your team. This should involve people who are knowledgeable, reliable, and share your goals.
3. Design your project: decide which level of government your idea falls under and design a strategy through power mapping.
4. Campaign, campaign, campaign! Deliver your message in a clear manner, understand your “ask” and most importantly, understand your audience.
5. Lastly evaluate specific outcome measures and discuss successes as well as areas to improve upon

And remember – don’t give up!

Thank you for listening to this PedsCases podcast series on Advocacy. Stay tuned for more PedsCases podcasts!