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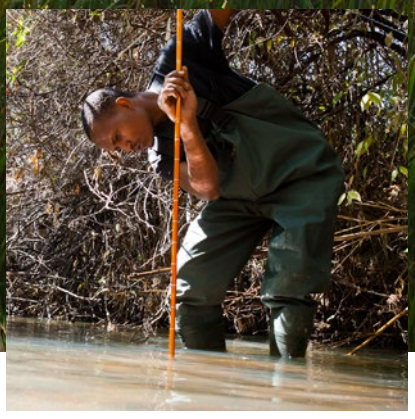
FRESHWATER CONSERVATION AND WASH ADVOCACY STRATEGY WORKSHOP

FACILITATOR'S GUIDE



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AFRICA BIODIVERSITY COLLABORATIVE GROUP

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FRESHWATER CONSERVATION AND WASH

ADVOCACY STRATEGY WORKSHOP

FACILITATOR'S GUIDE

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HOW TO USE THIS GUIDE

Advocacy plays an important role in creating and sustaining momentum for progress on conservation and human health policies. While multisectoral initiatives have been gaining attention in recent years, there are still many policy platforms that fail to recognize the critical links between human and ecosystem health. This includes comprehensive water policy that links freshwater ecosystem conservation with water, sanitation, and hygiene (WASH) planning and infrastructure maintenance. This facilitation guide lays out steps for conservation, health, and development practitioners to develop an advocacy strategy to design messaging and activities to urge donors, policymakers, and colleagues of the need to unite and join forces for conservation and health. Advocacy is a critical step in enabling integrated freshwater conservation-WASH management and must be closely tied to on-going stakeholder engagement and field-implementation of freshwater management strategies.

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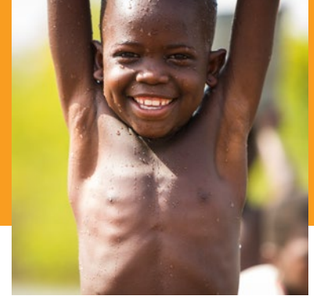

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We would like to thank the authors of the Stronger Health Advocates, Greater Health Impacts tool series, which inspired the creation of this advocacy manual for integrated conservation, health and development policies and programs. The authors adapted the step-by-step instructions in this guide based on the model in the PATH Policy and Advocacy Initiatives Workbook for Policy Advocacy Strategy Development and the accompanying Facilitator's Guide for the Workshop. Adaptations were informed by experiences piloting this integrated manual in several countries in Africa by the lead author and colleagues at IRC.

Special thanks to Rebecca Goodman and Evelyn Namvua from ABCG and Jessica Torrens-Spence from USAID's Africa Bureau for all their support in the process of publishing this document.

ii. ACRONYMS

ABCG	Africa Biodiversity Collaborative Group
AIIM	Alignment, Influence and Interest Matrix
CoP	Community of Practice
CSA	Conservation South Africa
CI	Conservation International
FANSA	Freshwater Action Network South Asia
FW-WASH	Integrated Freshwater Conservation and WASH programming
IRC	Netherlands-based WASH think-and-do-tank
JGI	Jane Goodall Institute
NGO	Non-Governmental Organization
SDGs	Sustainable Development Goals
USAID	United States Agency for International Development
WASH	Water, sanitation, and hygiene

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iii. EXECUTIVE SUMMARY

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According to threats assessments of biodiversity in Africa, freshwater ecosystems are under threat from fragmentation, infrastructure, and other human-induced changes to terrestrial and water systems (Cardona *et al.* 2018). Preserving free-flowing river systems, intact wetlands, and groundwater recharge areas are essential for maintaining ecosystem resilience and protecting water, sanitation and hygiene (WASH) infrastructure against the impacts of natural disasters and climate variability (Edmond *et al.* 2013).

In response to human-induced threats to biodiversity and freshwater resources in Africa, the Africa Biodiversity Collaborative Group (ABCG), with support from the United States Agency for International Development (USAID), convened conservation and development actors to address these multisectoral issues and develop solutions for improved human and ecosystem health in sub-Saharan Africa. ABCG is a voluntary coalition of seven US-based international conservation organizations[1] with field-based programming in sub-Saharan Africa. Together with their African partners, they collaborate to advance understanding of critical conservation challenges and their solutions in sub-Saharan Africa (ABCG 2019).

Based on field-level pilot activities in South Africa and Uganda integrating freshwater conservation and WASH (FW-WASH) over the past four years, ABCG members Conservation International (CI) and the Jane Goodall Institute (JGI) sought out approaches for designing advocacy strategies to promote the benefits of these integrated approaches to garner community and government support.

1. Members include African Wildlife Foundation, Conservation International, The Jane Goodall Institute, The Nature Conservancy, Wildlife Conservation Society, World Resources Institute, and World Wildlife Fund.

This advocacy strategy workshop facilitation guide responds to the needs expressed by ABCG member organizations, partner organizations, and local communities in South Africa and Uganda for improved messaging and promotion of innovative approaches of integrated FW-WASH programming. The target audience for this manual is facilitators and advocates who desire a supportive policy environment for integrated FW-WASH programming. The guide covers steps required for engaging effectively with decision-makers; increasing the impact beyond programmatic solutions; and influencing individuals, organizations, policies, regulations, and financing.

The expected outcome of the guide is to have ABCG members and partners increase institutional capacity to address policy gaps and challenges to multisectoral, integrated FW-WASH policy in sub-Saharan Africa. Participants will build skills in advocacy strategy creation, communications, and advocating for changes in policy. The objectives of this document are to:

- Provide individuals with guidelines for developing basic advocacy and facilitation skills and a process for building advocacy capacity of organizations working on FW-WASH.
- Present content and activities designed to develop basic skills in advocacy strategy design.
- Provide a platform for sharing existing advocacy experiences and expertise across one or more organizations.

Adapted from the PATH Advocacy model documents (PATH 2014), this guide includes an eight-step plan for a four-day workshop, with instructions for facilitators. It uses a variety of presentations, discussion, exercises, and group work to deliver the workshop content. The guide includes instructions, helpful tips, and examples from pilot workshops with Conservation South Africa (CSA), CI's local affiliate, and JGI Uganda.

STEP 1: Identify the advocacy issue, root causes, and evidence base
STEP 2: Develop advocacy goals and objectives
STEP 3: Define decision-makers and influencers (stakeholder mapping)
STEP 4: List opposition and obstacles
STEP 5: Identify advocacy strengths, limitations, and partnerships
STEP 6: Create advocacy approaches and activities
STEP 7: Craft advocacy messages
STEP 8: Measure advocacy progress and adaptive management

This advocacy strategy development workshop provides an opportunity for individuals working on FW-WASH integration at the community level to consider the politics, policies, and power at a national or sub-national level. The workshop process is designed to produce a draft strategy to address specific challenges identified through an advocacy lens.

Finally, the document includes recommended resources, templates, and case study examples for additional information useful for replication of an advocacy strategy design workshop.

1. BACKGROUND

According to the 2018 USAID threats assessment of biodiversity in Africa, freshwater ecosystems are under threat from fragmentation, infrastructure, and other human-induced changes to terrestrial and water systems. While air and water pollution are not major threats at a continental level, they are very serious in certain sites and countries, and are a growing problem in the face of expanding industries, especially mining, with globalization of trade. The drivers and root causes of these threats include poor governance; limited capacity for regulation and enforcement; inequitable access to land and resources; absolute shortage of land; and insecurity and conflict. impacts may occur at many different levels, including poor standards and practices; population growth; poverty, food insecurity, and poor health; and diseases such as HIV/AIDS and malaria (ABCG 2019).

Most of sub-Saharan Africa is under pressure from increasing population growth, urbanization, and consumption, as well as poorly planned infrastructure development. All these factors are negatively impacting the quality and availability of freshwater resources. Major watersheds attract development, and the resulting development leads to increased pollution due to inadequate wastewater management infrastructure, as well as contributing to increasing and competing demands, which can lead to scarcity (ABCG 2019). At the same time, climate change is impacting water resources in sub-Saharan Africa and is expected to further increase water stress in river basins across Africa. Millions of people still lack access to clean water and sanitation (ABCG 2019).

In response to these threats, the Africa Biodiversity Collaborative Group (ABCG), with support from the United States Agency for International Development (USAID), has brought together conservation and development actors to address these multisectoral issues and develop solutions for improved human and ecosystem health in sub-Saharan Africa. ABCG is a voluntary coalition of seven US-based international conservation organizations[2] with field-based programming in sub-Saharan Africa. Together with their African partners, they collaborate to advance understanding of critical conservation challenges and their solutions in sub-Saharan Africa (ABCG 2019).

Leveraging the wide-ranging networks of its members, ABCG is in a unique position to inform and influence conservation practice by developing, testing, and promoting new practices and approaches with broad stakeholders ranging from local African communities to global conservation professionals, and particularly with policy- and decision-makers in Africa, the US, and beyond. Since 2015, ABCG members Conservation International (CI), The Jane Goodall Institute (JGI), and others have convened development non-governmental organizations (NGOs) working in Africa to bridge the existing gaps in development and conservation practice, where organizations are working in the same areas but not actively cooperating to synergize outcomes. In the past five years, CI and JGI have piloted programming guidelines on integrated freshwater conservation and water, sanitation, and hygiene (WASH) in South Africa and Uganda, respectively, with NGOs, governments, and local stakeholders (Cardona *et al.* 2018).

In so doing, ABCG has demonstrated results in raising awareness among community members and government institutions about the need for improved planning and management frameworks. Building on these previous experiences in South Africa and Uganda, CI and JGI collaborated with local partners to build the capacity of local stakeholders in these countries (and potentially across Africa geographies) to promote

2. Members include African Wildlife Foundation, Conservation International, The Jane Goodall Institute, The Nature Conservancy, Wildlife Conservation Society, World Resources Institute, and World Wildlife Fund.

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the benefits of the integrated approaches to convince policymakers to adopt integrated programs and policies. Advocacy is fundamental to strengthen policies, legislation, and guidelines that promote freshwater conservation and WASH (FW-WASH) integration as well as improve community and ecosystem well-being in any country context.

Recognizing the critical need for improved policy advocacy around these multisectoral issues, ABCG engaged IRC, a Netherlands-based WASH think-and-do-tank working with governments, NGOs, entrepreneurs, and people around the world to build resilient WASH systems (networks of people, institutions, hardware, and resources necessary to delivery services) at district and national levels. IRC uses structured approaches (from policy to practice) to build people's capacity to plan, manage and maintain services; influencing and advocating; and documenting research and sharing knowledge. Starting in 2019, IRC staff worked closely with ABCG Members CI, JGI and WWF in Washington, DC, South Africa, and Uganda to develop and pilot-test this guide for developing a FW-WASH advocacy strategy. The purpose of this guide is to help similar organizations produce advocacy strategies, kick-started in a week-long workshop setting, and provide step-by-step facilitation instructions to deliver the workshop.

Both pilot sites in South Africa and Uganda were successful in engaging local government actors on understanding the linkages between FW-WASH. However, practitioners felt they lacked knowledge and approaches for turning local government understanding into political action. There was also a need to improve the ability to set measurable targets for these goals, beyond the penultimate goal of the creation of integrated policies. To highlight successful examples of integrated efforts, this task's Community of Practice (CoP) sponsored a webinar series, including organizations involved with the *Watershed empowering citizens program* (Jakinda *et al.* 2018). Practitioners shared their experiences advocating for integrated approaches in

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Kenya, including the use of a Training of Trainers methodology adapted by IRC on advocacy strategy planning and target setting. The results of this program were impressive, and it was exciting for the ABCG pilot sites to consider how they might create or adapt such a training program in to strengthen the advocacy components in their contexts.

1.1 – POLITICAL ECONOMY AND OPPORTUNITIES FOR INFLUENCE

Sustainable Development Goal 6 is to ensure availability and sustainable management of water and sanitation for all. This goal has six targets, which include drinking water, sanitation, hygiene, pollution and hazardous waste, freshwater conservation, integrated water resources management, and ecosystem management. Each of these targets is ambitious and often tackled independently without consideration for areas of overlap. The challenge in addressing the targets individually lies in a lack of alignment with political and decision-making structures within a country. The political economy of a country looks at how the economy affects socio-economic systems such as health, education, transportation, and the environment. The main takeaway is political economy examines politics, policies, and power. These three areas provide opportunities for change. The means to create that change comes from advocacy and influence. For further information on political economy analysis, please refer to the USAID guide Thinking and Working Politically Through Political Economy Analysis: A Guide for Practitioners. **https://usaidlearninglab.org/sites/default/files/resource/files/pea_guide_final.pdf**

ADVOCACY: Process of **strategically** managing and sharing knowledge to change and/or influence policies and practices that affect people's lives (PATH 2014).

INFLUENCE: Action or process of producing effects on the actions, behavior, opinions, etc., of another or others (Dictionary.com). Or to cause someone to change a behavior, belief, or opinion, or to cause something to be changed (Cambridge Dictionary).

The workshop laid out in this guide provides an opportunity for individuals working on FW-WASH issues at the field level to understand the politics, policies, and power at a national or sub-national level. It develops the skills to identify specific challenges and create a strategy to address them through an advocacy lens. A well-defined advocacy strategy is an important part of an integrated FW-WASH approach and needs to be closely linked to the stakeholder engagement, management strategies and the long-term monitoring of all FW-WASH advocacy and implementation components.

II. OVERVIEW OF THE GUIDE

2.1 – WORKSHOP OVERVIEW, STRUCTURE, AND FACILITATION

The four-day workshop outlined in this guide is designed to introduce advocacy and provide the rationale for the important role advocacy and influencing play to advance FW-WASH national and sub-national level targets through changes in policies, budgets, and practices. The workshop will create a foundation of knowledge and understanding of advocacy concepts and approaches and provide tools to apply the key elements of advocacy strategy design. Most importantly, it will provide an opportunity to learn from participants' existing advocacy and influencing experiences and expertise. Participants will build skills in understanding advocacy as well as advocacy strategy development.

The workshop's eight-step plan to craft an advocacy strategy is divided into four days. Each step outlines the related activities, organized into the following activity categories:

- **Presentations:** in plenary using PowerPoint slides or flip charts
- **Discussions:** in plenary guided by the facilitator. They follow the introduction of a topic or concept presented by the facilitator.
- **Exercises:** in small groups with instructions provided by the facilitator

Overview of the Workshop Days and Steps

DAY ONE	Welcome and introductions
	Advocacy Foundations: What is advocacy and why does it matter?
	STEP 1: Identify advocacy issue, root causes, and evidence base
DAY TWO	**STEP 2:** Develop advocacy goals and objectives
	STEP 3: Define decision-makers and influencers (stakeholder mapping)
DAY THREE	**STEP 4:** Identify opposition and obstacles
	STEP 5: Define advocacy strengths, limitations, and partnerships
	STEP 6: Create advocacy approaches and activities
DAY FOUR	**STEP 7:** Craft advocacy messages
	STEP 8: Measure advocacy progress and adaptive management
	Workshop closure and next steps

Objectives of the Workshop

The purpose of the workshop is to lay a foundation for participants to plan and implement advocacy strategies for FW-WASH. By the end of the workshop, participants should be able to:

- Identify the basic concepts and principles of advocacy strategy development.
- Demonstrate basic skills in advocacy messaging and communications.
- Identify the components of an advocacy strategy.
- Craft advocacy messages to address FW-WASH challenges.
- Design activities to influence decision-makers.
- Draft an advocacy strategy using the eight-step process.

Participants will leave with the key components of their advocacy strategy. It is important they finalize and validate their advocacy strategy with project, program, and/or organization as a follow-up step. This will increase buy-in from colleagues and organization leadership to implement the draft strategy that emerged from the workshop.

FACILITATOR NOTE:
It is important to use materials such as note cards and flip charts to solicit input from participants in diverse and appropriate ways. Flip charts are useful for documenting discussions in plenary or small groups. Encouraging participant input by having them write their thoughts on note cards will help ensure equality in participation and include the voice of those who may be nervous to participate or are hesitant to speak.

Workshop Content

This guide contains the basic materials to facilitate an advocacy strategy workshop:

- Workshop objectives and session learning objectives.
- Step-by-step facilitation instructions for sessions, activities, and small group work.
- Facilitator tips.
- Workshop PowerPoint slides to accompany the facilitation guide (Appendix 1).
- Participant Country context PowerPoint Presentation Template (Appendix 2).
- Facilitator Workbook (Appendix 3).
- Participant Workbook (Appendix 4).

The participatory workshop sessions are designed to foster adult learning and shared experiences. As participants proceed through the 8 steps for creating the advocacy strategy, the facilitators are expected to encourage open exchanges and sharing of ideas between individuals and groups. The workshop is designed for collaboration and peer reviews to be an influential part of participant advocacy strategy skills development.

The main teaching tools for the workshop are PowerPoint slides and flip charts.

It is recommended that facilitators prepare slides in advance of the workshop and review them with colleagues to ensure the concepts are clear and understandable. Flip charts are effective for recording ideas from brainstorming sessions, demonstrating examples, and walking through group exercises.

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Facilitators should review and adapt the slides prior to and during the workshop as needed. This may include adding, deleting, or updating slides. It is important the slides are appropriate for and address the country context and/or participant interests.

It is important to recognize that the first two days of the workshop contain the most intense learning and discussions. Depending on the knowledge and skills of the participants, the amount of time will vary greatly to complete the first two to three steps. The time needed for each step is an estimation and is meant to be flexible to move at the pace that works for the participants. It is the role of the facilitator to move the sessions along, but also to recognize when participants need more time, or less, to complete activities. It is important to re-evaluate progress along the roadmap at the end of each day and adjust accordingly.

This workshop can serve multiple purposes. The workshop has the potential to build basic advocacy and influencing skills as well as build the foundation for individuals and organizations to effectively influence decision-makers in FW-WASH. it is important to decide which key outcomes to cover and to articulate that to the participants at the beginning and throughout the workshop.

FACILITATOR NOTE: GUIDANCE ON BREAKOUT GROUPS

This workshop is centered on the development of policy advocacy strategies. Based on the composition of the group, participants may prefer to develop their own individual strategies, join with others on shared team strategies, or work as a full group to create a single strategy. Although the curriculum is designed with small team project work in mind, facilitators are encouraged to adapt this approach as needed. In whatever way they are used, small groups allow fuller interaction and different voices and ideas to shine through.

Before the workshop, facilitators should review the final list of participants and consider ways to divide them into teams that will promote the greatest degree of productivity and usefulness. Depending on the makeup of your participants, you may want to organize them by:

- **Country or region**
- **Organization type**
- **Project**
- **Random numbering**

No matter how you arrange your participants, small groups should be kept to a maximum of six people for best results.

(PATH 2015)

III. WORKSHOP PREPARATION

3.1 – CHOOSING THE RIGHT TEAM

In order to make the workshop successful, there are two important layers of preparation:

- Facilitator preparations
- Participant preparations

Facilitator

Choosing the right facilitator is important for effective execution of the workshop. For this workshop, advocacy knowledge and expertise are essential for the facilitator. In advance of the workshop, the facilitator should review relevant context and/or background information such as a political economy analysis. It is important that the facilitator be able to ask the right questions and guide the participants back toward an advocacy frame of mind. The right facilitator for this workshop understands and can articulate the difference between advocacy and implementation or programmatic work.

Designing a Project: Programmatic Strategy v. Advocacy Strategy

It is likely that the workshop participants will have a lot more experience implementing programmatic strategies rather than advocacy strategies. To reduce confusion between the design elements of a programmatic v. an advocacy strategy, the brief table below highlights key differences to keep in mind.

Programmatic and advocacy strategies complement one another and are frequently implemented jointly to achieve sustainable results. An effective intervention will often be both—focused on reducing threats on the ground while working with policymakers to influence government and other institutional bodies to adopt best practices at a larger scale.

	PROGRAMMATIC STRATEGY	ADVOCACY STRATEGY
DESIGN	focused on key conservation targets and focus on threat reduction	focused on advocacy issues and focus on addressing root causes
GOALS	tied to conservation targets	tied to advocacy issues and root cause
OBJECTIVES	SMART: Specific, Measurable, Attainable, Realistic, and Timely	designed around Who? What? How? When?
ACTIVITIES	developed with the focus on addressing threats and achieving set objectives/ intermediate results reflected in the activity's Theory of Change	developed with the focus on influencing target decision-maker
M&E	aimed at measuring the progress toward expected change	aimed at measuring the process and incremental changes along the way

The facilitator should ensure effective participant learning and the overall success of the workshop. The basic functions are to:

- Prepare materials in advance of the workshop including organizing the presentations, handouts, and materials.
- Create a collegial atmosphere in which participants consider their input valued and productive.
- Ensure the participants actively engage, keep focused, and respect others' time and opinions.
- Move the agenda forward while being flexible with the timing as participants gain knowledge. Participants should both understand the material/concepts and produce high-quality work.
- Review the meeting progress at the end of each day and adjust the following days' agenda and content as needed.

Participants

It is important to invite participants who are interested in advocacy and who will actively participate in the workshop. This can but does not have to be the person in the highest position within the organization or team. Invitations may be extended to country-level directors, program management staff, field technicians or staff focused on policy or government engagement.

In general, the workshop will be more effective for participants who can apply the skills they have learned directly to their work. If the advocacy strategy created during the workshop is meant to be implemented, it is essential the participants have the mandate and ability to see that through.

Participant criteria include the following:

- Demonstrated interest in advocacy and influencing.
- Understanding of the local political-enabling environment and policy gaps.
- Support from supervisors for their participation and strategy implementation after the workshop.
- Potential to implement lessons from the workshop into ongoing activities.

EFFECTIVE FACILITATOR TIPS

- ***Stay flexible with the schedule***
- ***Request and use feedback***
- ***Build on participant experience and expertise***
- ***Encourage critical thinking***
- ***Ask open-ended questions***
- ***Create a welcoming atmosphere***
- ***Encourage participant learning***
- ***Demonstrate enthusiasm***
- ***Remain neutral***
- ***Always come prepared***
- ***Observe and be responsive***

Adapted from the PATH Training of Facilitators Materials 2014

The ideal number of participants ranges from 10 to 15, particularly if there is only one facilitator. This allows for discussions and small group work to be managed easily. It is possible to hold a workshop for more than 15 people if the facilitator has experience with large groups; if there is additional support from additional facilitators and/or table coaches; and if the hosting organization adjusts its expectations about what the workshop will produce.

As part of the preparation process, participants should complete a pre-workshop assignment (see Participant Workbook, Appendix 4) and a country context presentation (see Appendix 2). The pre-workshop assignment gathers background information on participants and gets them identifying key issues. When possible, the pre-workshop assignment should be done collaboratively with all relevant staff providing input.

3.2 – FACILITATOR PREPARATION

General information for facilitators

One person can facilitate this workshop; however, it can be useful to have a second facilitator, especially if the group is larger than 10 people. Below are some helpful hints for effective co-facilitation.

Effective co-facilitation

- One lead facilitator for the session is ideal, with others as co-facilitators
- Facilitator should lead a complete concept or session and then exchange roles with a co-facilitator
- Co-facilitator can:
  - Record information on a flip chart
  - Offer an additional perspective
  - Help answer a question
- Co-facilitator tips include:
  - Allow the lead facilitator to manage the session flow.
  - Trust that he/she has a plan.
  - Don't jump in unless signaled to do so.
  - Write on the flip charts so the lead facilitator can face the audience and keep dialogue flowing.
- Facilitation teams check in with each other during breaks and at the end of day.
- Facilitation teams establish communication cues for each other to build teamwork.

Another useful facilitation tool is table coaching. Table coaching allows a facilitator to provide individual attention and ensure participants understand the concepts presented and are applying them correctly.

TABLE COACHING

During small group work, the facilitator(s) will float among teams as a mentor or "table coach." As a floating table coach, your primary role is to make sure participants follow instructions, understand the learning concepts, and apply those concepts correctly in their work. You are closely positioned to look for areas where participants may be confused and to answer questions as they arise. If there are two facilitators, one facilitator should serve as the table coach for the same small group(s) for the duration of the workshop.

During small group work, follow these general guidelines:

- Allow teams to work independently before jumping in. Position yourself nearby and observe while groups work independently.
- Pay attention to the conversation. If the team is getting off track or members clearly don't understand a concept correctly, don't hesitate to redirect or clarify ideas.
- Encourage the group's critical thinking. If the team asks you a question, respond with another question to get them thinking.
- Watch the clock. Teams may get into vigorous discussions, easily lose track of time, and thus fail to complete an activity. Offer time reminders at mid-point and five to ten minutes before the activity ends.
- Encourage the group to assign roles. Teams can function in an efficient and effective manner if a timekeeper, recorder, and spokesperson are assigned at the beginning of an activity.

FACILITATOR NOTE: EFFECTIVE TABLE COACHING

- Allow small groups to self-direct their own discussions.
- Observe groups from afar. Then subtly "check in" to make sure they understand the concepts and are progressing correctly.
- Inject help or guidance only when needed, and then step away.
- Guide groups to think critically to discover their own answers.
- Watch for dominant personalities and draw others out.
- Monitor the time, and keep groups focused and productive.

PATH 2015

Workshop Planning Schedule

Facilitators should start several months in advance of the workshop to allow time to complete all tasks. The following is a suggested timeline, adapted from PATH 2015:

TIME FRAME	TASK
2–3 MONTHS BEFORE	Identify the workshop team (facilitator, logistics coordinator, and any other relevant stakeholders)
	Reserve a venue and create a plan for logistics coordination
	Identify participants and send an invitation with a deadline for confirmation of their participation
1 MONTH BEFORE	Arrange travel logistics (earlier if visas are required) for participants and facilitator(s)
	Confirm participant list
	Send pre-workshop assignment and country context presentation
	Review and adjust workshop curriculum and agenda (if/as needed)
2–3 WEEKS BEFORE	Collect pre-workshop assignment and country context presentations
	Assign roles and presentations among facilitators
	Finalize and print materials, worksheets, etc.
	Re-confirm venue logistics
1 WEEK BEFORE	Print participant materials and assemble participant packets
	Print facilitation materials including case studies
	Create participant roster with contact information
1–2 DAYS BEFORE	Facilitator(s) travel to the workshop location
	Conduct facilitators meeting to review the agenda and complete final workshop preparation tasks
	Prepare the workshop venue

3.3 – PARTICIPANT PREPARATION PRE-WORKSHOP

Participants are responsible for several assignments in advance of the workshop including the pre-workshop assignment and country context presentation (Appendix 2 and pages 2-4, Appendix 4). It is the responsibility of the participant to coordinate with colleagues to gather the information needed to complete the assignments. This pre-work provides critical background information that will be used during the workshop and should not be considered optional exercises.

FACILITATOR NOTE: PARTICIPANT SELECTION AND GENDER

USAID recognizes that gender equality and women's empowerment are at the core of successful development programming. In 2019 USAID bolstered its existing gender policy to reduce gender gaps, address gender-based violence, and empower women and girls (USAID 2019). Advocacy is the process of voicing proposed solutions to existing gaps and problems and ensuring that diverse perspectives of men and women are represented when creating feasible policy proposals and equitable solutions. Ideally, advocacy proposals are informed by thorough gender analysis, and metrics are in place to measure progress on the impact of our program. Empowering women and girls to be leaders and use their voices as advocates for their needs is critical.

During the workshop planning process, organizers should consider these gender-related aspects when selecting participants for the workshop:

- Respective roles of men and women in the strategy upon which the advocacy is based;
- Impacts of the advocacy on men and women and roles in the advocacy process;
- Assigning activities and tasks for advocacy based on gender analysis.

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IV. WORKSHOP DAY ONE

4.1 – WELCOME AND INTRODUCTIONS

Estimated Time: 45 minutes

Learning Objectives: N/A

Materials and Preparation:

Flip-chart paper, markers, note cards, paper, and pens

- Review and adapt the presentation slides with the workshop objectives, workshop overview, and day one agenda.
- Prepare the following flip charts: Expectations, Workshop Rules, Parking Lot.
- Post the blown-up printed advocacy strategy roadmap or create a poster with the roadmap.

Additional resources:

- Icebreakers: **https://www.scienceofpeople.com/meeting-icebreakers/**

4.1.1 Activities with Instructions and Time Frames

4.1.1.1 Welcome, introductions, icebreakers, and expectations (30 minutes)

Welcome participants to the workshop. If there is someone from a coordinating organization, have him or her share the purpose of the workshop, background information if needed, and any other relevant information.

It is helpful to introduce structured opening and closing activities every day of the workshop. These activities will help set the tone for the day in the morning and will create a space for feedback at the end of the day.

Please note that ***opening activities*** take place at the very beginning of every day after "Welcome" and before the "Review of the agenda." The ***reflection activities*** take place 15 minutes before the end of every day: It is important to make sure that the time slot doesn't get used for another topic.

Opening Activity: ***Welcome Icebreaker***
(for more details on how to facilitate a great icebreaker, see the "additional resources" link above).

FACILITATOR NOTE: ICEBREAKERS

Icebreakers are activities that allow participants and the facilitator to get to know one another. This is a way to build rapport and trust among participants and with the facilitator. This is particularly important if the participants have not met or worked together prior to the workshop. It is useful even when participants know each other well as these "get to know you" activities provide space for more casual, not work-related, relationship building. It is important that the facilitator actively participate in the icebreakers to build trust with the participants.

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Exercise: Introduction and Icebreaker

- Lead the participants in a "get to know you" activity, often called an icebreaker. Example: Question circle—each participant (including the facilitator) writes a general question such as "What is your favorite fruit?" on a piece of paper. Ask participants to stand in a circle, then crumple the piece of paper with their question on it into a ball, and throw the paper into the center of the circle. Taking turns, each participant picks a paper from the floor, introduces themselves (name, organization, country, and position), and answers the question.
- If there is not time for an icebreaker, it is still important to provide time for introductions. Ask participants to state their name, country, position, and one additional fact such as their favorite fruit.

Discussion: Setting Expectations

- Ask participants to share their expectations for the workshop. Write out the answers on the flip chart.
  - Start with content expectations—what do they hope to get from the workshop?
  - Follow up with behavior for the workshop/rules of the workshop—what do they expect of themselves and the other participants? (Examples include active participation, time management, listen, respect all opinions.)
- Leave these two flip charts posted in the room. Revisit and refer to them throughout the workshop to see how the workshop is addressing the expectations.

FACILITATOR NOTE:

Expectations can also be collected in advance of the workshop in the pre-workshop assignment and collated. If this is done in advance, share the list of expectations on a PowerPoint slide or flip chart. In a short group discussion, ask participants to review and add any additional ideas.

4.1.1.2 Objectives and workshop overview (15 min.)

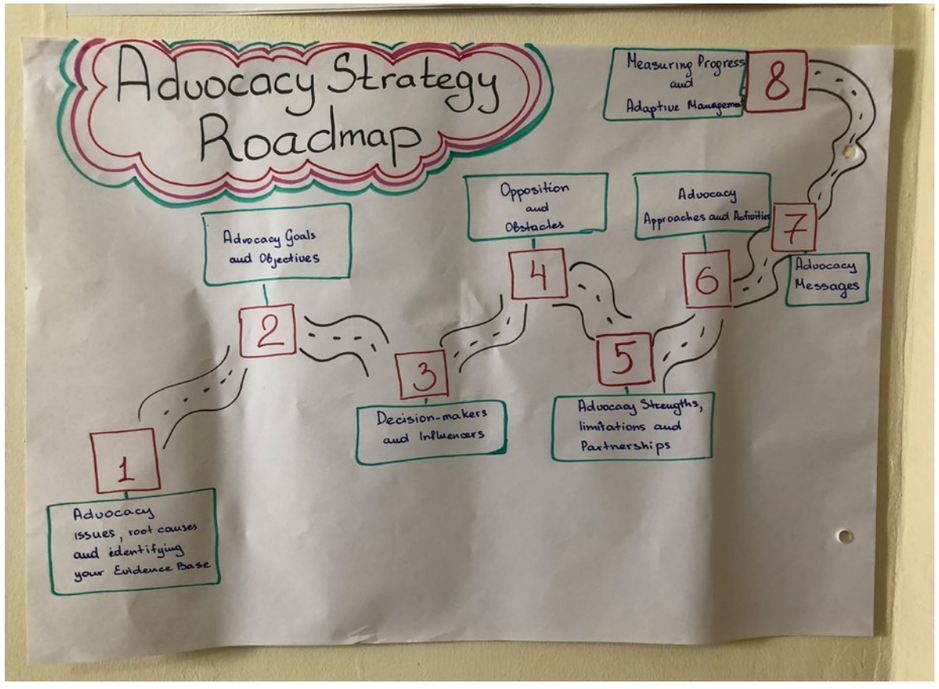
Presentation:

- Using the slide with the workshop objectives, broadly review the agenda for the week, including key themes for each day
- Ask if participants have any questions for clarification
- Post and discuss deliverables for the end of the workshop (strategy template completed in draft form, finalized country context presentation, finalized pre-workshop assignment)

FACILITATOR NOTE:
Outlining the deliverables for participants helps manage their expectations and provides justification for the extensive amount of work that will be done throughout the workshop.

Presentation:

- Introduce the advocacy strategy roadmap (sample included in Appendix 3) that outlines the eight steps to creating an advocacy strategy
- Provide a very brief overview of each step, noting that further details will be provided as the workshop progresses through each step.
- Introduce the parking lot—a place for all the ideas, concepts and questions that we cannot address in the moment they are brought up. Any participant can write these ideas on the parking lot and we will revisit them later in the workshop.



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4.2 – ADVOCACY FOUNDATION: WHAT IS ADVOCACY AND WHY DOES IT MATTER?

Estimated Time: 90 minutes

Learning Objectives:

- Understand the basic advocacy terminology and foundational elements of advocacy and influencing.
- Develop a common understanding of the important role advocacy plays to increase the impact of programmatic work.
- Clarify the differences between programmatic and advocacy approaches to freshwater conservation and WASH work.
- Provide the facilitator and participants an overview of the policy and political context.

Materials and Preparation:

- PowerPoint slides, note cards, pens, tape, flip-chart paper, markers, handouts: advocacy strategy process diagram, case study narrative, case study worksheet.
- Review presentation slides; put note cards and markers on the table; load the country context presentation(s).
- Prepare the following flip charts: Terminology; Side-by-side chart divided in two—Advocacy and Programmatic (using the chart in section 3.1).

Additional resources:

- **https://www.zerotothree.org/resources/504-a-glossary-of-policy-advocacy-terms-and-acronyms**

4.2.1 Introduction to the Module

This module lays the foundation for the key concepts and building blocks of the advocacy strategy and understanding the political, social, and economic context in which practitioners will be acting. It is critical to have agreement and common principles among the different actors in the advocacy strategy development and implementation in order to ensure effective messaging and outcomes.

4.2.2 Key Terminology and Concepts

- **Advocacy:** the process of **strategically** managing and sharing knowledge to change and/or influence policies and practices that affect people's lives (PATH 2015).
- **Lobbying:** a form of advocacy that involves directly engaging with decision-makers, particularly a politician or public official who has control or significant influence over a policy, piece of legislation, or regulation.
- **Influence:** the action or process of producing effects on the actions, behavior, opinions, etc., of another or others (Dictionary.com). Or to cause someone to change a behavior, belief, or opinion, or to cause something to be changed (Cambridge Dictionary).
- **Activism:** the use of direct and public methods to try to bring about social and political changes that you and others want (Cambridge Dictionary). Or the practice of vigorous action or involvement as a means of achieving political or other goals, sometimes by demonstrations, protests, etc. (Dictionary.com).

4.2.3 Activities with Instructions and Time Frames

4.2.3.1 Defining advocacy (20 minutes)

Presentation: Terminology Flip Chart

- Stand near the Terminology flip chart posted somewhere in the room.
- Tell participants you will present key words and definitions throughout the workshop. The Terminology flip chart is for words that might be new and/or need agreement on how we are defining it.

Exercise: Defining advocacy

- Ask each participant to write their definition of advocacy on a note card. Ask two to three participants to share with the group what they wrote. Alternatively, collect the cards and read them all aloud.
- Ask participants for the common words they hear, flip chart their answers.

Presentation: Definitions of advocacy and related terms

- Present slides to introduce the dictionary definitions of advocacy, lobbying, influence, and activism. Highlight "strategically" in the definition.
- Draw attention to what the definitions have in common with the definitions the participants shared. Note: Using the words highlighted on the flip chart will help.
- Follow the slide with a short discussion on the differences and commonalities between the participant definitions and the formal definition. Use the following questions as a guide: Are there key words or concepts you feel should be added or removed from the dictionary definition?

FACILITATOR NOTE:

- During the discussion provide feedback and ask follow-up questions. This is an opportunity to introduce the concept of programmatic work v. advocacy.
- Provide definitions for additional vocabulary and concepts as needed.
- After each PowerPoint slide, ask participants if the content presented is clear or if there are any questions or remarks.

Presentation: Advocacy approaches

- Present slide on advocacy approaches
  - Lobbying (see definition above)
  - Campaigns
  - Meetings with government officials
  - Translation of research: *Taking evidence and research and making is digestible*
  - Education/influencing events: *That could be workshops and conferences.*
  - Consensus building: *Ask the group - we will talk about that more, but does anyone know what it is? Answer: Reaching the same point of a way forward, as opposed to trying to influence everyone to accept your own idea.*
  - Creating champions: *Get a person on board to buy in to your idea.*

FACILITATOR NOTE:

While it is important not to deviate too much from the "formal" definitions, participants should feel they can relate and own advocacy and influencing based on the agreed definition.

4.2.3.2 Why Advocacy and Gathering Participant Experiences (20–30 minutes)

Discussion: Examples of advocacy

- Ask participants to share examples of advocacy based on the definition from the activity before. "What have you done in the last year that you would consider advocacy?"
- Present slides - characteristics of advocacy and the difference between advocacy and programmatic work.
- Introduce the programmatic v. advocacy flip chart and explain the flip chart will help us document the differences and examples of each throughout the workshop.

- Ask participants the following questions and flip chart their responses:
  - Why is advocacy important?
  - How does advocacy relate to your everyday work?
    - List of possible responses:
      - It creates an environment or enabling environment for programmatic work.
      - Amplifies citizen voice and participation.
      - A means to use data and case studies to create change.
  - Explain advantages of collective voice

Exercise: Collective voice game (OPTIONAL)

- Provide a phrase like "protect water sources, protect human health" to the first person and ask them to repeat the phrase repeatedly in a whisper until you say stop. The next participant adds their voice but again repeating the phrase in a whisper. Continue adding voices of the participants until all participants are saying the phrase together. Point out that the voices in the room become louder and louder despite everyone speaking in a whisper. This demonstrates the power of collective voice.

FACILITATOR NOTE:

- There may not always be time for every participant to share or contribute. Ask one or two volunteers to share their examples of advocacy when there are many participants (more than 12) or if there is not enough time.
- Keep written or mental notes about who volunteers to ensure equal participation. Encourage everyone to participate.
- Some people think that advocating for funding is the same as fundraising. Advocacy for increases in funding involves asking those with the power to fund systems—strengthening work to increase budget lines and/or disbursements, for example, if talking about government as the funder. Advocacy can also happen with other kinds of funders (bi- and multilaterals, corporations, foundations, etc.), but this involves trying to get them to change the way they invest. Advocacy is not asking donors to fund your program, project, or organization—that is fundraising.

4.2.3.3 Parts of an advocacy strategy (30 minutes)

Exercise: Introduction to advocacy strategies and the eight steps

- Hand out copies of the advocacy strategy roadmap (Appendix 3).
- Read it together or give people a moment to look it over.
- Ask participants what they think of the overview. Do they have any observations?
- Draw attention to the circular nature of advocacy efforts. Much like a rollercoaster loop, you do your research, then conduct advocacy activities that you think will bring about change. However, as things are happening, you need to periodically revisit them if those changes are occurring. If not, you need to consider what change is needed—more research, a new set of activities, or another step in the strategy process—and restart the ride. We are going to learn more about each of those steps now.

Presentation: Eight steps of the advocacy strategy process

- Show the slide of the eight steps to creating an advocacy strategy
  - Identify advocacy issue, root causes, and evidence.
  - Develop advocacy goals and objectives.
  - Define decision-makers and influencers.
  - List opposition and obstacles.
  - Identify advocacy strengths, limitations, and partnerships.
  - Create advocacy approaches and activities.
  - Craft advocacy messages.
  - Measure advocacy progress and adaptive management.

Exercise: Case study

- Introduce the case study
  - When introducing the case study, point out the case study is an example of what the advocacy elements of a strategy might look like in real life. The purpose of reviewing this case study is to understand the elements of an advocacy strategy, not to get all the answers correct. Note: Tell participants you will be unpacking each of the steps over the next several days.
  - Ask participants to form groups of two to four people and hand out the case studies and case study worksheet (Appendix 4).
  - Give participants 15 minutes to read The Sapphire Watershed case study and ask them to fill in the participant worksheet to identify the eight steps of an advocacy strategy framework.

- Ask the small groups to share their responses, go over the eight steps, and ask for responses (answer key in Appendix 3).
    - Open the discussion for questions from the participants and prompt the discussion with questions to participants such as Were any parts harder to identify than others?
    - Does this case study resonate with your work and/or experience?
    - **At the end:** Ask what was difficult, doable, and/or most relevant.
- Explain that over the next few days, they will be assembling their own version of an 8-step process, using the Advocacy Strategy Template in the Participant Workbook (pages 17-23, Appendix 4). Each section will be updated as we complete that step over the coming days.

4.2.3.4 Country Context Presentations (15 minutes per presentation ~1 hour)

Effective advocacy responds to the needs expressed by practitioners for improved messaging and promotion of innovative approaches to integrated FW-WASH programming. The political, economic and social context are critical to building the advocacy strategy and addressing the opportunities and gaps in the areas where these practitioners are working. This section of the workshop is fundamental to ensuring all participants have a common understanding of the political economy and relevant actors. As mentioned in the planning timeline above, facilitators should engage one or two participants to ensure the country context presentation is concise and allows for shared visioning.

Presentation: Country Context

- At least two weeks prior to the workshop, ask one of the participants to make a context presentation.
- Have participants deliver presentation (no more than 15 minutes and seven slides). See the instructions, parameters, and presentation template provided in Appendix 2.
- Provide at least 10 minutes for questions, answers, and discussions.
- Ask participants to validate and add to the discussion.

FACILITATOR NOTE:
Keep an eye on time and allow different perspectives and voices to be heard.

- To understand the political economy, policy environment, and other important background information, one person will give the presentation prepared as part of the pre-workshop homework (Appendices 2 and 3). If the participants represent more than one country, participants may need one presentation per country.
- If you have more than one presentation, hand out note cards. Ask participants to write any questions and/or comments on the cards. Make sure they label the card with the country presenting. Ask each participant to give the cards to the presenter.
- If the group is small or there is only one presentation, the note cards can be replaced by a discussion in plenary guided by the facilitator. This discussion serves the same purpose as the cards, to ask clarifying questions on the presentation and to provide feedback and link individual experiences with the content presented.

FACILITATOR NOTE:
If participants do not prepare content in advance, be prepared with questions in a short small-group discussion or add an alternative activity.

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4.3 – STEP 1: IDENTIFY THE ADVOCACY ISSUE, ROOT CAUSES AND EVIDENCE BASE

Estimated Time: 135 minutes (2 hours 15 minutes)

Learning Objectives:

- To put participants in the mindset to think from the perspective of advocacy and to be able to differentiate between an implementation approach and an advocacy approach.
- To identify the main problem or issue that will be addressed through advocacy and the reasons this is a problem.

Materials and Preparation:

- Power Point presentation, flip-chart paper, markers
- Participant handouts (Appendix 4)

Additional resources:

- Problem tree analysis activity (**http://www.mspguide.org/tool/problem-tree**)

4.3.1 Introduction

To create an effective advocacy strategy, it is necessary to define the "ask," or what specifically is the requested change from the target audience of decision-makers. Examples include a piece of legislation or a change in rules or regulations by decision-makers, who could be a community official or a national policymaker. Effective communication and messaging require a firm understanding of the factors or causes that make a potential change to the situation possible and the context in which these factors interact. Scientific facts and valid data or evidence can help strengthen advocacy messages and create compelling reasons for change.

4.3.2 Key Terminology and Concepts

- **Advocacy issue/problem:** a challenge that can be addressed through advocacy approaches
- **Root causes:** The most basic cause (or causes) that can reasonably be identified that decision-makers have control to fix and, when fixed, will prevent (or significantly reduce the likelihood of) the problem's recurrence (Tap Root **https://www.taproot.com/definition-of-a-root-cause/**). Or the most basic or deepest cause for a given behavior that leads to a change for a process that is failing.
- **Evidence:** the available information indicating whether a belief or position is true or valid (Oxford dictionary).
- **Data:** facts and statistics collected together for reference or analysis (Oxford dictionary).

- **Document source:** the link to the Web address where the document can be found (e.g., The National Water Act for Kenya can be found on this website: **https://wasreb.go.ke/the-water-act-2016/**).
- **Gender-Sensitive Indicators:** Measures to what extent and in what ways development programs and projects achieved results related to gender equality and whether/how reducing gaps between males/females and empowering women leads to better project/development outcomes (USAID 2019).

4.3.3 Activities with Instructions and Time Frames

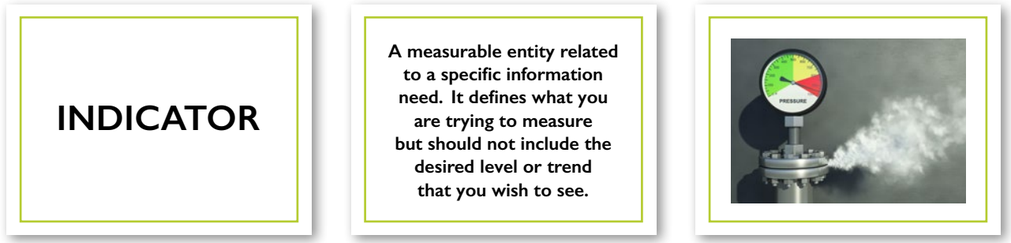
Exercise: Word Wall Match-Up (20 minutes)

During every step of the strategy development process the participants will come across new terminology. To ensure that new terms are well understood the facilitator can start each new process step with an activity that solely focuses on terminology. This fun activity will get everyone moving and will allow the participants to take time to process new terms and ask questions.

* All new terms are captured in a comprehensive glossary at the end of this guide. The facilitator may choose to distribute printouts of key terms throughout the workshop if helpful.

Preparation for Word Match-Up:

Prepare large A1 sheets with glossary terms, corresponding graphics, and definitions. Print each term, graphic, and definition on a separate A1 sheet. If printed on cardstock paper, they can be used multiple times. Please note that graphics you choose to use do not need to be perfect but should be easily understood by all participants. While matching correct terms with correct definitions is critical, the selection of a graphic can be more arbitrary. Below is a sample card set.



Instructions:

Break participants up into groups of 3–5 people and ask them to find a space where they will organize the cards. They can use a wall, a table, floor, etc. Each group receives a stack of well-mixed cards (make sure each set has correct terms with all corresponding graphics and definitions). Participants are instructed to work in their groups to match the term to an appropriate graphic and definition. The first group to finish raises their hands.

Once all teams have had an opportunity to complete the exercise, the facilitator gathers everyone around the group that finished first and asks them to present. This is an opportunity to ask questions and clarify any confusion participants may have.

The correct set of cards should remain visible (i.e., on the wall) throughout the workshop for participants to refer to as needed.

Presentation: Implementation v. advocacy (15 minutes)

- Present slide related to implementation v. advocacy and lead a discussion to clarify the differences between the two.
- Consider posting the implementation v. advocacy slide on a flip chart so throughout the workshop, examples can be added to the list. The flip chart can be used as a reminder of the differences between approaches and to maintain focus on advocacy.

Exercise: Problem tree activity - Optional activity (30 minutes)

- Problem tree analysis activity (**http://www.mspguide.org/tool/problem-tree**) to be done in small groups.

Discussion: Identifying the Problem (10 minutes)

- Group brainstorming of problems—validation of which problems could be addressed through advocacy.
- Ask participants to brainstorm issues in their work. Write them on a flip chart. Then discuss each issue to determine if it is a good issue for advocacy and indicate this by writing on the flip chart in another color pen.

Presentation: Introduce the qualities that make a problem good to be addressed via advocacy (10 minutes)

- Present slide of the key questions to identify root causes of your problem
  - A current objective or focus area of your program's work
  - Based in evidence
  - Can be improved with advocacy (a change in policy, implementation of an existing policy, change in budget, etc.)
  - Possible to do in three–five years
  - Specific and clear
- Ask participants to write down their issue (as brainstormed) and accompanying root causes in the participant work sheet.

Exercise: Impacting the Problem (50 minutes)

- Purpose of the activity: Focusing the scope of the problem, feasibility for impact and deciding your advocacy issue.
- Instructions:
  - Ask participants to brainstorm factors that help them choose one issue over another. On a flip chart write down participant responses. Add to the list any of the points below that participants do not bring up.
  - Mention the following:
  - A current objective or focus area of your program's work
  - Based in evidence
  - Can be improved with advocacy
  - Possible in 3–5 years
  - Specific and clear
  - Examples:
    - Resources (financial and human) available
    - Time available
    - Political climate
    - Upcoming elections
    - Likelihood of success
    - Likelihood that advocacy can significantly impact the problem
    - Opportunity
    - Amount of evidence to prove the problem
    - Potential for partnership to address the problem
    - Amount of political will to address the problem
    - Organizational experience and expertise
    - Risk to your organization
    - Feasibility of success in three–five years

  (Adapted from PATH 2015)

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FACILITATOR NOTE:

If you want to see whether there is consensus on the issue and root causes, ask everyone to stand on a continuum in the room. Left side: I do not like it. Right side: I like it, and let's move forward.

Another way is to ask participants to raise their elbows (low = I do not like it; middle = it is okay; and up = I like it).

Discussion: Defining the evidence base (15 minutes)

- Purpose: To understand how evidence and data play a role in advocacy and identify what evidence currently exists.
- Step-by-step instructions:
  - Brainstorming activity—in pairs or small groups, participants write down on note cards all the types of evidence they can think of in 2 minutes—one type per note card (examples include reports, data collected by the government, water quality testing, catchment data, functionality, etc.)
  - Each group nominates a person to read the cards aloud.
  - Once they are read aloud, the facilitator places the cards on the wall and categorizes them according to the source (government, academia, etc.)
  - Lead a discussion about how much of the evidence on the cards is available to the participants. Ask participants, Do you know where to find this evidence? Is this evidence available to you as an NGO?
  - Present slides.
    - Two approaches to evidence for advocacy—Approach 1: you have evidence and you use it to diagnose the problem; Approach 2: you have identified and diagnosed a problem and you find and/or collect the evidence you need to prove your problem is a problem.
    - The "trickle-down" data problem—data at different levels (district, regional, national, and global) does not always link.
    - What kind of evidence is compelling to your targets? Transforming evidence into messages and adapting for targets (this slide sets the stage for the messaging module).

Exercise: Small group work: Based on the pre-workshop assignment, participants complete the table in the advocacy strategy template for section 1. Encourage them to list the evidence and source they have or know about for the issue/problem they identified earlier in this module.

Discussion: Closure (15 minutes)

- End of the day, reflection on your learning journey—walking past/through the flip charts on the walls
- Pull out key points
- Reference training roadmap

Closing Activity: ***Plus/Delta***

Instructions: Explain to the group what a Plus/Delta is - Plus: what worked well, and they would like to be repeated/continued; Delta: what can the team change or add to bring more value/improve? The participants should focus on the process rather than focusing on people. The facilitator should be prepared to return to emphasizing the objectives of the workshop and how better to achieve them. Attendees may at first be unwilling to appear to criticize the meeting or may be afraid to participate. The facilitator should encourage participation until the practice becomes commonplace.

Preparations: draw a line down the middle of a flip chart or white board, label the top with "Plus" and "Delta." See an example below. Ask participants to raise their hands and share Pluses and Deltas. This can be a semi-structured process.

V. WORKSHOP DAY TWO

Opening Activity *(Choose One)*

1. The Word: Ask participants to take a few minutes to think about the first day of the workshop and write down *One Word* that particularly stands out for them from the day before. After a few minutes ask volunteers to share their "words" and explain why they stood out for them. Always encourage participation.

2. Plus/Delta Review: Quickly walk the group through the results of the Plus/Delta activity they completed at the end of Day 1 and explain how their suggestions were addressed (i.e., there were no pens at the table(s); there are now pens available for participants to use) or how we will keep those Deltas in mind during day two (i.e., not all participants felt like they had enough time to complete the activities; the agenda has now been adjusted to allow for five extra minutes for each activity).

5.1 – STEP 2: DEVELOP ADVOCACY GOALS AND OBJECTIVES

5.1.1 Introduction to the Module

Once the group has set the advocacy issue they are going focus on and gathered the supporting facts, it is critical to define the larger vision for what is possible to change in both the long term and short term. Delineating those time frames can help separate the more ambitious, long-term goal from the shorter-term steps needed to reach the advocacy objectives. This phase of the advocacy plan development process is essential for setting the course and having a plan to follow and monitor progress.

Estimated Time: 120 minutes (2 hours)

Learning Objectives:

- To understand the key concepts and processes for developing advocacy goals and objectives.
- To practice developing SMART objectives and apply a process for turning an advocacy issue into clear advocacy goals and objectives.

Materials and Preparation:

- PowerPoint slides, flip-chart paper, markers and note cards
- Participant handouts (Appendix 4)
- Check and adapt (if needed) the PowerPoint slides

Additional resources:

https://www.open.edu/openlearncreate/mod/oucontent/view.php?id=175&section=20.4

FACILITATOR NOTE:
It takes time to arrive at good goals and objectives. Don't be discouraged if this takes a lot of time—allow plenty of time.

5.1.2 Key Terminology and Concepts

The ***goals*** and ***objectives*** of advocacy are different and distinct.

- **Goal:** Long-term, higher level result or achievement where effort is directed.

A ***goal*** is the desired result of any advocacy activity. An advocacy goal will usually be a long-term result, and it may take three to five years of advocacy work to bring about the desired result. It is unlikely that your advocacy network can achieve a goal on its own; it will probably require allies to bring about the required change. It is vital to know what you are trying to do before you start your advocacy work. This involves developing a goal that applies to the situation that needs to change. (https://www.open.edu/openlearncreate/mod/oucontent/view.php?id=175&section=20.4)

- **Objectives:** Short-term steps to achieve a goal.
  - Desired accomplishment or outcome that will contribute to the overall goal.
  - A step toward your advocacy goal.

An ***objective*** is the intended impact or effect of the work you are doing, or the specific change that you want to see. The word "objective" often refers to the desired changes in policy and practice that will be necessary to help you and your community meet that goal. It is the most important part of your strategy, and is the next step after developing the goal itself. It is worth spending time writing clear objectives: You will find you are able to write the rest of the advocacy strategy much more clearly — and you are likely to be more effective in achieving change. (https://www.open.edu/openlearncreate/mod/oucontent/view.php?id=175&section=20.4)

5.1.3 Activities with Instructions and Time Frames

Presentation: What are goals and objectives and the differences between them? (30 minutes)

- Key elements of an advocacy goal and/or objective
  - **WHO:** the decision-making institution with the power to act on your advocacy issue.
  - **WHAT:** the change you would like to see relative to your advocacy issue.
  - **HOW:** the specific action the decision-making institution can take to accomplish the change.
  - **WHEN:** a time frame for the action to occur (often between six months and three to five years depending on the advocacy effort).

- SMART goals and objectives
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**elevant
  - **T**ime-based
- Present examples of objectives—SMART and not SMART to demonstrate the difference (use relevant examples based on the original case studies)
- Example 1
  - Non-SMART Objective: Conduct a pilot project on the importance of freshwater ecosystems.
  - **Example SMART Objective:** The Ministry of the Environment conducts a pilot project that will train community health workers to educate 80 villages about the relationship between healthy, freshwater ecosystems and healthy people by January 2021.
- Example 2
  - Non-SMART Objective: Get media coverage highlighting habitat restoration.
  - **Example SMART Objective:** A major national newspaper runs a series of articles about the importance of restoring riverine habitat along the Umzimvubu to protect human, livestock and ecosystem health by November 2020.

Exercise: Group-brainstorming activity—advocacy goal (based on the problem identified in Step 1) (30 minutes)

- Instructions:
  - Ask participants which issue to select
  - Write issue and root causes on a flip chart
  - Ask participants to brainstorm on the who, what, how, and when
    - Using one of the issues identified in module 1, participants will contribute the key elements of the advocacy goal (who, what, how, and when)
  - Once all the elements are stated aloud—write the goal on a flip chart and return to the SMART slide. Ask participants if the goal as stated meets all the SMART criteria.

FACILITATOR NOTE:

The example should be easy to understand and illustrative, so that when participants split into their small groups, they have a good example to follow.

FACILITATOR NOTE:

"SMART" is a way of reminding you that your objectives should be:

- **Specific:** you need to set a specific objective for each of your health programs.
- **Measurable:** your objective should be measurable.
- **Achievable:** the objective should be attainable or practicable.
- **Realistic:** your objective should be credible.
- **Time-bound:** you should accomplish and achieve the objectives within a certain amount of time.

Exercise: Drafting advocacy goals and objectives (45 minutes)

- Instructions:
  - Participants split into their small groups (assigned during module 1) and complete the goal and objective sections of the advocacy strategy template.
  - Participants should have at least two objectives that will lead them to their goal.
  - The facilitator(s) will walk around and help all the small groups.
  - Once the small group reaches consensus on the goals and objectives, they write them on a flip chart.

Discussion: Group-to-group feedback session with a facilitator (15 minutes)

- Instructions:
  - Small groups pair off and present their goals and objectives.
  - The group not presenting will provide feedback and ask questions (including identifying any missing SMART criteria).
  - After both groups have presented and received feedback, the small groups are provided additional time to finalize their goals and objectives.
  - During a break or lunch, each group will post its goals and objectives on the wall. The facilitators will review all the goals and objectives and provide additional feedback.

FACILITATOR NOTE:

It is extremely important to finalize the goals and objectives before moving to the next step and add this portion to section 3 of the Advocacy Strategy Template. The group will revisit the goals and objectives throughout the rest of the modules and may modify them to make them more realistic, so it may be a good idea to use pencil or write small so there is room for edits.

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5.2 – STEP 3: DEFINE DECISION-MAKERS AND INFLUENCERS

Estimated Time: 120 minutes (2 hours)

Learning Objectives:

- For participants to be able to identify key characteristics of decision-makers and influencers and the differences between them.
- To identify one to two key targets and validate whether the goals and objectives align with the identified targets.

Materials and Preparation:

- Materials: PowerPoint presentation slides, flip-chart paper, markers, tape, note cards, or materials needed for the power mapping activity (AIIM—note cards, flip-chart paper, tape, and markers)
- Preparation: Prep cards for stakeholder mapping following the directions included

5.2.1 Introduction to the Module

Understanding the motivations and context of the target audience for advocacy is fundamental to crafting an effective advocacy strategy. The process for evaluating the appropriate target for advocacy requires knowledge and evidence about the positions, interests, and needs of key actors who hold positions in institutions or governing bodies, where they can make decisions, formulate policies, and implement these policies. Complementing decision-makers, there are many potential actors or influencers who play significant roles in forming opinions, consensus, and agreements among groups. Understanding the relationships among these actors and the system of decision-making can help focus advocacy plans.

5.2.2 Key terminology and/or concepts

- **Power (dynamics):** the capacity of an individual to influence the conduct (behavior) of others.
- **Targets:** the individuals with the power to change the policy, budget, etc., including decision-makers and influencers.
- **Decision-makers:** people with the formal power or authority to take the desired policy action and/or their key advisers or staff.
- **Influencers:** people or groups who can have a compelling force on the actions, opinions, or behavior of decision-makers.
- **Gender sensitivity and gender awareness:** the ability to recognize gender issues and especially the ability to recognize women's different perceptions and interests arising from their different social location and different gender roles. Gender sensitivity is considered the beginning stage of gender awareness. The latter is more analytical, more critical, and more questioning of gender disparities. Gender awareness is the ability to identify problems arising from gender inequality and discrimination, even if they are not very evident on the surface or are hidden (i.e., not part of the general or commonly accepted explanation of what the problem is and where it lies). (**https://pdf.usaid.gov/pdf_docs/Pnadl089.pdf**)
- **Gender dynamics:** relationships and interactions between and among girls, boys, women, and men. (**https://eige.europa.eu/thesaurus/terms/1164**)

5.2.3 Activities with Instructions and Time Frames

Presentation: Defining decision-makers and influencers

- Present slides with definitions of decision-makers and influencers.
- Ask participants to provide examples of each, based on the definition provided. Examples include:
  - Decision-makers: parliamentarians, district planners, district water officers
  - Influencers: first lady, technical ministry staff, and political advisers

Exercise: Alignment, Influence and Interest Matrix (AIIM) or Stakeholder Mapping Exercise

Review the stakeholder analysis methodologies included in the Facilitator Workbook (Appendix 3) and select one of the two activities for your workshop. ***The amount of time needed in order to complete this step will depend on which activity is selected.***

FACILITATOR NOTE:

With each methodology, encourage participants to start with government actors because government actors are most often the target of advocacy.

For the Stakeholder Mapping, question participants about assumptions on the roles of men and women and how their actions differ according to power, knowledge, access, and agency in this context.

FACILITATOR NOTE:

Encourage participants when implementing the advocacy strategies produced from this workshop to review and update annually the list of decision-making entities and people; key influencers; and possible partners.

Key questions to ask:

- Who are the leading decision-makers with the authority to affect the change you have listed above for your issue?
- What is the general level of support they have for your issue area? Think about organizations, interest groups, NGOs, private sector entities, individuals, or coalitions that are currently working on the issue.

These exercises should help identify one to two key targets for your advocacy. It is important to think through how we can influence them and who we can partner with to amplify our messaging, voice, and influence. Defining the role of partners comes later in the process when identifying specific activities.

5.3 – STEP 4: LIST OPPOSITION AND OBSTACLES

Estimated Time: 90 minutes

Learning Objectives:

- Understand the concepts of oppositions and obstacles.
- Brainstorm on how to overcome potential obstacles and opposition to reach your goals.

Materials and Preparation:

- Flip-chart paper, markers, obstacle course cards
- Obstacle course cards, slides with terminology and any other relevant information; ensure stakeholder mapping exercise is posted on the wall or materials are laid out on each table
- Participant handouts (Appendix 4)
- Check and adapt (if needed) the PowerPoint slides

Additional resources:

http://www.advocacyinitiative.ie/challenges

https://ctb.ku.edu/en/table-of-contents/advocacy/advocacy-principles/identify-opponents/main

5.3.1 Introduction to the Module

In every situation there are differences of opinion and perspective on how best to affect changes. Because stakeholder engagement fosters transparent, open discussion of differing views, advocates need to understand the thoughts, positions, and rationales that influence opposing actors, who are adversaries or competitors to their advocacy issues. Similar in effect to opposition, obstacles are the factors that hinder or delay progress in achieving the advocacy goal.

5.3.2 Key terminology and/or concepts

- **Opposition:** a group of adversaries or competitors, especially a rival political party.
- **Obstacle:** something that blocks one's way or prevents or hinders progress.
- **Resistance:** the refusal to accept or comply with something; the attempt to prevent something by action or argument.
- **Influence:** the capacity to affect the character, development, or behavior of someone or something, or the effect itself.
- **Mitigation:** reducing the severity of the problem, issue, and/or obstacles.

5.3.3 Activities with Instructions and Time Frames

Exercise: Revisit the finalized goals and objectives (still posted on the wall) in a gallery walk for 10 minutes at the beginning of the module. A gallery walk is an activity in which participants walk through the room and review the content posted on the wall as if they were looking at art in a gallery. It is a great discussion technique that allows participants to get up and move around the room and answer discussion questions and review materials.

Presentation: Introduce key terminology of opposition and obstacles (5 min.)

- Instructions:
  - Present slides with key terminology
  - Provide time (approximately 5 minutes) to clarify any definitions

Exercise: Obstacle course activity

- Instructions:
  - Explain it is not just individuals and organizations that can stand in the way of your advocacy goal. Challenges and obstacles can come in many forms.
  - Ask the full group to come up with common obstacles that could interfere with their advocacy goals. Write those on a flip chart. Prompt with the following if needed:
    - Lack of funds to carry out advocacy activities
    - Limited staff time and/or capacity
    - Lack of coordination among key ministries or departments
    - Economic climate
    - An upcoming election slows down work or may change key decision-makers
    - Revision of relevant policy is scheduled for several years in the future
    - Lack of evidence
  - Divide the participants into two or three teams (Team A, B, and C) and ask each team to stand in front of a flip chart or paper.
  - Instruct teams to select one advocacy goal from their different goals, and write that goal on the flip chart.
  - Give each team the first "Obstacle course" card out of three (give other cards when they have written responses to the previous obstacle).
  - Ask participants to come up with 3 solutions for each card as quickly as possible. Encourage them to be strategic, creative but also realistic.
  - After the game, ask teams to present their solutions.

Exercise: Stakeholder mapping opposition (OPTIONAL if stakeholder mapping exercise was selected)

- Instructions:
  - Ask participants to go back to the stakeholder power mapping and stand in front of the content posted on the wall.
  - Ask participants to map out any people or groups that are strongly opposed to your issue and may stand in the way of your achieving your goals and objectives. Include the following:
    - The reason for their opposition (if known)
    - Level of influence on your targets (decision-makers and influencers)
    - Ways to mitigate their influence

Closing Activity: ***Suggestion Box***

At the end of Day 2 set up a Suggestion Box and ask participants to provide all feedback they may have after both Day 1 and Day 2 of the workshop. This form of offering feedback allows participants who may not feel comfortable sharing their thoughts out loud during the Day 1 Plus/Delta activity to provide inputs anonymously.

Facilitator reviews the notes at the end of the day and addresses all relevant suggestions at the beginning of Day 3 (similarly to how the Day 2 Delta/Plus activity was done).

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VI. WORKSHOP DAY THREE

Opening Activity

Distribute 2 half sheets of paper of different colors (i.e., blue and yellow) to each of the participants and ask them to take 3 minutes to write down the answers to the following questions:

1. What concept or tool would they like to spend more time on?
2. What are they most excited about?

Once everyone has had an opportunity to write down their answers ask them to hold their cards with the answer for question #1 up and find colleagues who had a similar answer. Allow 5 minutes for a group discussion and 2 minutes for a report out. Repeat the exercise with question #2.

Suggestion Box Review. For instructions on how to facilitate this activity see Day 2/ Plus/Delta Review activity.

FACILITATOR NOTE:
It is helpful to write down the questions ahead of time on a large flip chart where everyone will be able to see them. Remember to ask the participants to write in large font, one answer per question per sheet.

6.1 – STEP 5: IDENTIFY ADVOCACY STRENGTHS, LIMITATIONS, AND PARTNERSHIPS

Estimated Time: 150 minutes (2.5 hours)

Learning Objectives:

- To identify the key skills and resources most useful for advocacy and influencing and the strengths or limitations of those skills among individual participants and/or their organizations.
- Based on organizational limitations, identify key allies and partners that can support the advocacy goals and objectives.

Materials and Preparation:

- PowerPoint presentation, flip-chart paper, tape, markers, note cards, participant workbook, yellow cards, orange cards
- Participant handouts (Appendix 4)
- Check and adapt (if needed) the PowerPoint slides

6.1.1 Introduction to the Module

Reflection on the strengths and weaknesses of advocacy can help hone and focus messaging and steps to achieve the intended goals. Bringing in neutral, outside observers can help provide unbiased views of effectiveness and identify gaps and areas to work on. Partnerships are essential to building momentum for changes and careful consideration of complementary agendas. As the advocacy strategy grows in complexity and involves more partners and allies, the messages can be refined and updated to involve broader voices.

6.1.2 Key terminology and/or concepts

- **Coalition building:** bringing together an alliance or partnering of groups to achieve a common purpose or engage in a joint activity.
- **Grassroots:** general population, ordinary people.
- **Policy analysis:** a technique used in public administration to enable civil servants, activists, and others to examine and evaluate the available options to implement the goals of laws and elected officials.
- **Partners:** two or more people or organizations working together.
- **Coalition:** joining together of different individuals or groups for a particular purpose.
- **Alliance:** a long-term coalition with a permanent structure and organization.

6.1.3 Activities with Instructions and Time Frames

Discussion: Identifying advocacy skills and resources (10 min.)

- Instructions:
  - Ask participants to say aloud skills they think are useful or necessary to be effective in your advocacy. Examples include the following:
    - Drafting policy
    - Policy analysis
    - Community and social mobilization
    - Expertise in coalition-building
    - Creating/maintaining relationships with decision-makers and influencers
    - Expertise in web-based communication and social media
    - Public speaking
    - Negotiation skills
    - Message design and execution
    - Policy strategy design (identify clear advocacy goals and objectives)
  - Write responses on a flip chart; facilitator will add any specific skills not mentioned by the participants.

Exercise: Strengths and Limitations Assessment (30 min.)

- Instructions:
  - Refer to the participant workbook (Appendix 4), the Strengths and Limitations Assessment worksheet.
  - Individually (or in small groups), participants fill out the next part of the advocacy strategy template.
  - Reflect and ask for each item which name(s) they wrote in the worksheet. Guiding question: What role do you see for the specific people as mentioned?
  - After reflection per item, ask participants, What are the three greatest strengths you bring to advocacy (e.g., evidence, local knowledge, and relationship with decision-makers)? Write them on a flip chart.
  - Ask the participants to name the biggest gaps they have identified, and write them on the flip chart in a different color.

FACILITATOR NOTE:
To gauge consensus ask participants to raise their arms to show if they feel low, medium, or high confidence about the suggested people involved.

Presentation: Present the PowerPoint slides on partnerships and type of collaboration. Do a word association: Ask participants what comes to mind when talking about partnerships and any examples they have of partnerships in their work.

Exercise: After presentation of the PowerPoint slide, revisit the stakeholder mapping or AIIM. Write on cards/circle the partnership that you would like to have and people that you would like to target.

Yellow cards = expanded relationship

Orange cards = new partners

Discussion: Pros and cons of partnership

Ask participants to brainstorm what makes an effective partner and flip chart their answers. Stress that partnerships and collaboration may come in many forms, and there does not always need to be a financial transaction.

Ask participants to brainstorm types of partnerships and to give reasons to partner and reasons not to partner. Write down their answers on a flip chart that is divided into two parts. Examples include:

- Difficulty partnering
- Geographic dysfunction
- How to engage partners in other sectors (mutual value adds)
- Not always about the funding
- How to work together, bringing skills and expertise to work together
- Local to national
- Relationship building

6.2 – STEP 6: CREATE ADVOCACY APPROACHES AND ACTIVITIES

Estimated Time: 180 minutes (3 hours)

Learning Objectives:

- Identify different advocacy approaches.
- Build collaborative work plan with timeline.

Materials and Preparation:

- Power Point presentation, flip-chart paper, markers, participant handouts (Appendix 4)
- Check and adapt (if needed) the PowerPoint slides.

6.2.1 Introduction to the Module

Advocacy can take many forms, such as formal gatherings, communications to visualize important information, or simply asking for a meeting with a key decision-maker at a gathering he or she is likely to attend. An understanding of the many forms advocacy can take enables an advocacy strategy to include a variety of activities that are targeted for the decision-maker's interests and build on the capabilities of the partners involved. Being creative with different approaches and activities allows different audiences to be reached or can vary the means by which a specific individual is engaged on the advocacy topic. Specifics about who, when, and resources required for each activity will build the foundation for a collective work plan.

6.2.2 Key terminology and/or concepts

- **Advocacy approaches/activities:** a broad range of activities undertaken in order to make progress on or achieve an advocacy goal. This can include (but is not limited to) research, public awareness campaigns, meetings and special events.

6.2.3 Activities with Instructions and Time Frames

Below are a series of exercises for coming up with potential advocacy activities to use within the participants' draft strategies. Select exercises based on what will work best for the group and time available.

Exercise: Activity mapping brainstorm (OPTION 1)

- In small groups map out/discuss what activities and approaches are realistic. Ask participants to write each activity on a separate card and to post the cards on the wall under their goals and objectives.
- Ask each group (or just one group if you are short on time) to present its activities to the rest of the group. Have all participants rotate in front of each group poster as they present.

FACILITATOR NOTE:
It is important to present at least one example to make sure that all groups are on the right path and are choosing activities that support advocacy and not their traditional programming. Keep an eye to making sure the activities are realistic (human resources, funding, etc.) and contribute to achieving the objectives.

Exercise: Advocacy Activity Carousel (OPTION 2) from PATH, 2015.

- Divide participants into 4 groups by having them count off (1, 2, 3, 4 . . .)
- Put 4 flip chart papers on the wall with the following activity categories:
  1. Media/communications
  2. Events/meetings
  3. Materials/publications
  4. Generating data/evidence for advocacy
- Have each group stand in front of one of the category flip chart papers—each group should nominate one person as the scribe. Explain what the categories are and that everyone will have 30 seconds to write as many activity ideas under that category. After 30 seconds, the groups rotate to the next poster and are then given 30 seconds to add additional ideas to what is already on the flip chart. Repeat this so that all groups rotate to all four posters.
- At the end of the rotations, the facilitator reviews each of the posters with all participants, allowing time for questions and short discussion.
  - Guiding questions:
    - Is there something here on the list that you would add or move to another list?

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Discussion: Activity mapping and developing a strategic workplan

- Instructions:
  - Refer to the strategy template in the participant workbook (Appendix 4) and go over the activity planning section with the participants, using the Power Point to consider categories and key questions.
    - Based on one of the brainstorming activities above, participants should identify the specific activities they will undertake. This will include being specific about staff (human resources) that will be involved, who they will partner with, cost, timeline, etc. This information will help form a collective work plan.

    Examples of activities:

    - Meetings with targets, decision-makers, and influencers
    - Data collection, analysis, and visualization
    - Message creation and adaptation
    - Grassroots or other campaign
  - Ask participants to divide into small groups and complete the activity chart in Power Point, drawing a copy on flip chart to share.
  - Ask each group to present their flip-chart sheets on which they prepared the activities (staff, partner, costs, and timeline).
  - After discussion of the brainstormed ideas, the relevant activities should be transferred into the advocacy strategy template.

6.3 – STEP 7: CRAFTING ADVOCACY MESSAGES

Estimated Time: 75 minutes (1 hour 15 minutes)

Learning Objectives:

- Identify and craft effective building blocks of advocacy messages

Materials and Preparation: Power Point presentation, flip-chart paper, markers

- Participant handouts (Appendix 4)
- Adjust PowerPoint slides as needed

6.3.1 Introduction to the Module

Clear and impactful advocacy messages are essential for an effective strategy. The messages should convey the advocacy issues, why the decision-maker should care, a change or solution to address the problem, and specific actions a decision-maker can take in response. It is important to have a compelling message and to think about who the ideal messengers are for each message. Pitching, or delivering, advocacy messaging may sometimes feel unnatural to potential messengers, but can be improved with practice.

6.3.2 Activities with Instructions and Time Frames

Discussion: Ask participants before showing slides—What is messaging and why does it matter?

Presentation: What makes a good message?

- Ask the participants to list the criteria or qualities for what makes an effective advocacy message—what are the most important elements for a compelling message?
- Explain that having a clear request and one that targets key interests are the most important qualities, as you ultimately want someone to do something.
- Present the four parts of an advocacy message and ask participants—can you think of a slogan that was effective? Compare that message to the parts of the advocacy message. Explain that the same items need to be included to make a message compelling.

Exercise: Write a compelling message (10 min.)

- Ask participants individually to write in pen on a note card an example of a message that you want to get across that includes all 4 elements (as presented).
- Ask each participant to present their message to the group. The group then provides feedback on the messages about including how compelling they are and clarity of "the ask" or action item desired.

Exercise: Pitching session

- Ask the participants to write out their main advocacy message, with the most important decision-maker for reaching that goal in mind.
- After participants are done, ask what the different ways are to bring your message. How else can they reach their decision-maker besides a one-on-one meeting? Note their responses so they can potentially be applied in the next step.
- Give each person a different scenario in which they will role-play (asking for one person to pitch and one person to play the decision-maker), a scenario in which s/he may encounter that person. Potential examples include at a coffee break at a large conference/meeting, in the elevator of their office building, a formal, one-on-one meeting in the decision-maker's office, a community event, or other scenarios appropriate to the context. Be creative and don't be afraid to challenge people.
- Each participant should have a turn of about 5 minutes to introduce themselves and pitch, or deliver, their advocacy message. Make sure each participant has an opportunity to present and be presented to. After each pitch, discuss what went well and what could have been improved. Ask them to think about key elements such as
  - How to be concise
  - Program flyers, case studies, business cards, or other materials they might want to leave with a decision-maker targeted for advocacy action
  - Incorporating follow-up
  - Adapting messages for the appropriate audience
  - Using data or evidence to create effective messages
    - Storytelling v. stats
    - Using storytelling for effective message delivery

Closing Activity:

*Day 3 does not require a separate closing activity, but keep the *Suggestions Box* available for those who would like to provide their input and comments anonymously. Encourage the participants to do so at the end of the day.

As people are finishing their inputs for the suggestion box, remind participants to update the Advocacy Strategy Template (Appendix 4). Their draft should have something written down up to section 7. If there is not enough time at the end of the day, make the completion of these sections of the template "homework" for that evening.

VII. WORKSHOP DAY FOUR

Opening Activity: ***Confusing and Clear or "2Cs"***

Ask participants to take three minutes on their own and, thinking about the last three days of the workshop, write down anything that may still be Confusing on one side of a half sheet of paper and something that is very Clear on the other side. This can be anything from terminology, to broader concepts, to the advocacy strategy framework as whole. There are no right or wrong ways to complete this activity. Once the participants have had an opportunity to write down their thoughts, ask them to turn to their neighbor on the right and discuss their 2Cs. Allow five minutes for a discussion. If anyone would like to share what they've discussed, encourage them to do so. Use this opportunity to resolve any confusing topics or put those up on a Parking Lot to ensure that all questions are addressed by the end of the workshop.

7.1 – STEP 8: MEASURE ADVOCACY PROGRESS AND ADAPTIVE MANAGEMENT

Estimated Time: 120 minutes (2 hours)

Learning Objectives:

- Develop monitoring and evaluation measures for the advocacy strategy

Materials and Preparation:

- Power Point presentation, flip-chart paper, markers
- Participant handouts (Appendix 4)

Additional resources: Outcome Harvesting - https://www.betterevaluation.org/en/plan/approach/outcome_harvesting

7.1.1 Introduction to the Module

Once complete, an advocacy strategy must be adapted over time. New information from the defined activities or the perception that activities are not having impact should inform those changes. Strategy partners should determine when changes should be made either by frequency, such as a quarterly review, or by determining important milestones for the strategy. Progress on the strategy should be measured and monitored by small incremental change. Many sources are available for evaluation; tools like outcome harvesting or language measurement can define a process for identifying progress against the strategy targets.

7.1.2 Key Terminology and Concepts

- **Adaptive management:** a structured, iterative process of robust decision-making in the face of uncertainty, with an aim to reducing uncertainty over time via system monitoring (Wikipedia). Or an intentional approach to making decisions and adjustments in response to new information and changes in context (USAID 2018).
- **Milestone:** a significant stage or event in the development of something. (https://www.lexico.com/en/definition/milestone)
- **Indicator:** a measurement or value that gives you an idea of what something is like. (https://www.collinsdictionary.com/us/dictionary/english/indicator)
- **Theory of change:** a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. (https://www.theoryofchange.org/what-is-theory-of-change/)

7.1.3 Activities with Instructions and Time Frames

Discussion: Ask participants:

- What is adaptive management?
- When would you have a checkup on your advocacy strategy?
- What monitoring do you have for your programs?

Document the results on a flip chart.

Presentation: Effective ways to monitor advocacy

- Present slide on measuring progress
  - Measuring program tracking and executive, and measure the effectiveness of your advocacy, looking for small incremental change.
    - This can come in the form of changes in language in a proposed piece of legislation or public statements.
    - Tools that may help these efforts include outcome harvesting and language measurement (see reference included at the start of this module).
  - Emphasize the importance of measuring progress because it allows for "course correction" on aspects of the strategy that do not achieve the predicted results.
  - This also presents an important opportunity to revisiting your strategy—ask why, when, and what to do with the results. Are we gaining traction on the advocacy strategy? What has been the biggest success? Why is the decision-maker not engaged in our issue? Have we been able to access him/her directly? Is there a target influencer that is delivering our message?

Exercise: Measuring advocacy planning

- Explain the final section of template in the participant workbook (Appendix 4) and have each small group or pair fill in its plan for monitoring advocacy including the indicators they will use.
- Ask each group (if time allows) to present back their plans, leaving 5–10 minutes for discussion and feedback from the other participants.

Indicators and Sex Disaggregation

Data disaggregation is the process by which indicator data are separated into their component parts for analysis or for a project's or activity's logic model. Typically, these component parts, or subgroups, reflect demographic characteristics. At a minimum, USAID requires that all person-level indicators be disaggregated by sex, meaning differentiated by men and women.

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VIII. WORKSHOP CLOSURE AND NEXT STEPS

Estimated Time: 90 minutes

Learning Objectives:

- Review the advocacy strategy and components

Materials and Preparation:

- Power Point presentation, flip-chart paper for closing activity, markers
- Participant handouts (Appendix 4)

Exercise: Finalizing and presenting the advocacy strategy template (including adaptive management)

Give participants 30 minutes to review the portions they completed in the advocacy strategy template (Appendix 4). During this time, it is helpful if at least one member of the group records something in each section so they end the workshop with a working draft. If participants get stuck because of uncertainty around an activity, person or resources, remind them this is a working document, and anything put in there at this stage can be changed. If a group is far along in the completion of their advocacy strategy template, it might be a good use of time for them to type up their draft strategy (if a laptop is available) and/or draft a list of next steps for moving from draft to action. The group will discuss this in plenary before the workshop closes, but if one group is ready to start next steps planning while others are finishing their templates, that allows their next steps examples to guide the final discussion.

Discussion: Expectations and Parking Lot Review

- Review the expectations from Day One. Read each expectation aloud and ask participants if they think the expectation was met—if so, put a tick next to the expectation. If participants agree only partially, put a straight line across. If participants think the expectation was not met, put an "X" and make a note this should be followed up with their colleagues after the workshop.
- Review the parking lot poster following the same process as above.

Discussion: Next steps

Participants may be overwhelmed by the amount of work or content they have gone through over the past four days, but encourage them to hang in for one final but important discussion about using the advocacy strategy. Their drafts are a result of a lot of thought and hard work. In order for that good work not to be left in the workshop room, encourage them to lay out a process for next steps and finalization of the strategy. Potential steps/ideas for this discussion include:

- Seeking approval or reviewing the strategy draft with leadership within one or more of the involved organizations.
- Defining clear roles and responsibilities for portions of the advocacy strategy, perhaps even gaining buy-in from others included in the strategy who were not part of developing the draft.
- Defining deadlines and/or timelines for next steps as well as key milestone activities in the strategy you were not able to set while working on the draft in the workshop.
- Validating assumptions in the draft strategy with other members of your team or a partner organization who did not participate in the workshop. Is it appropriate to share the entire strategy with those actors or would they only need to see or be interested in specific aspects?

The next steps identified do not have to be comprehensive, but they should be clear and specific enough that each contributor to the strategy knows the plan and his/her part. If the next steps are identified, have members of the team work on items independently—perhaps one person seeking leadership approval, another getting partner validation, etc.—encourage the team to set a date after the workshop to meet about progress on next steps.

Closing Activity:

Ask each participant to provide an "answer" to the following statements on a post-it and stick each answer on the large sheet of paper it corresponds to:

- *What worked particularly well and why?*
- *It would be even better if…*
- *[add anything else you would like me to know]*

It is helpful to write down the questions ahead of time on a large flip chart where everyone will be able to see them.

This last closing activity serves as a mini end of the workshop survey. It will help you as facilitator to gain insights on the topics the participants would like further support on and ways the workshop design can be improved.

After all responses have been stuck on the charts, formally thank the participants for their time and attention and formally close the workshop.

IX. RESOURCE MOBILIZATION FOR ADVOCACY

For advocates, understanding how resource flows and funding are managed and allocated by decisionmakers is key to implementing a successful advocacy strategy. This topic is woven throughout the manual and this section highlights key points to consider.

- Funding for advocacy and influencing is a challenge particularly because advocacy is not "traditional programming". Funding for advocacy activities does not always produce the same tangible results for which many donors may invest. Non-traditional monitoring and evaluation approaches, such as outcome harvesting, may offer information that is easier to use and may demonstrate the effectiveness and impact of advocacy.
- There are several things we need to keep in mind related to funding, almost a point of caution. It is important that funding is not to be confused with fundraising. In the very beginning of the manual, when talking about the rationale for advocacy, participants may perceive fundraising (asking donors for money) as advocacy to donors. Therefore, it is important that any reference to funding or resource mobilization for advocacy is extremely clear.
- There are many materials available about funding advocacy that are geared towards donors, why they should fund advocacy, what are the advantages of funding advocacy. See Suggested Resources below.
- The skills developed for pitching and messaging to government officials can also be adapted to donors. The key is to understand what the donor interests are, how advocacy work fits in, and how to present an appeal and pitch accordingly.
- It is important to keep in mind that there are several ways to fund advocacy work—all of which are options and will depend on what is feasible and aligned with donor priorities and what can be pitched effectively.
  - Incorporate advocacy into programs just as you would do with M&E or any other cross-cutting issue.
  - Include advocacy specific activities as part of program—i.e. fully integrate it with other programming.
  - Create a stand-alone portfolio, program or project.

Particularly with donors in the US, stress how your work is aligned with the broad definition of advocacy used in this guide. Many US donors cannot fund lobbying, so it is important to clarify the differences between lobbying and broader advocacy work.

9.1 – SUGGESTED RESOURCES

These resources provide insight to what donors are being told about why to fund advocacy and could help shape advocates thinking about resource mobilization.

- Advocacy Funding: The Philanthropy of Changing Minds. **http://grantcraft.org/wp-content/uploads/sites/2/2018/12/advocacy_funding.pdf**
- Foundation Advocacy Grants: What Grantees Need to Know. **https://www.bolderadvocacy.org/wp-content/uploads/2019/04/Foundation-Advocacy-Grants-FInal.pdf**
- Philanthropy Advocacy Playbook: Leveraging Your Dollars. **https://www.bolderadvocacy.org/wp-content/uploads/2015/09/AFJ-Advocacy-Playbook-web.pdf**
- Global Program Advocacy Grants: What do They Tell us about Evaluating Advocacy? **http://www.pointk.org/resources/files/global_program_advocacy_grants_oxfam.pdf**

9.2 – ILLUSTRATIVE ACTIVITIES

The Watershed empowering citizen program offers illustrative examples of how to build the capacity of our civil society partners in funding advocacy. The examples listed below show how IRC's partner, Simavi, has conducted trainings at the country level on this topic in conjunction with the Freshwater Action Network South Asia (FANSA). These four examples can be adapted to country specific contexts for advocacy.

- **Donor landscape:** Conduct a landscape analysis of donors within and outside the WASH sector that support governance initiatives, networks, civil society and advocacy. In past examples, a consultant researched and analyzed regional and global donors with the potential to provide institutional funding for FANSA. In addition, consultants explored the most effective approaches to fundraising and the type of donor (categories and individual) most appropriately matched to FANSA's model.
- **Case for Support and Communications Materials:** The FANSA Secretariat to developed digestible communications materials that appeal to donors outlining the case for support for FANSA and its members. This included developing a process and template that can be adapted per donor around advocacy, collaboration, network coordination and technical assistance.
- **Bridge funding:** Relationship building with new donors can take two or more years to develop. Often donors will fund specific activities in smaller amounts as they get to know an organization, network, or collaboration. Donor relationship building is essential for longer-term institutional funding but did not resolve the immediate financial gaps FANSA faced. To address those gaps in funding, IRC supported FANSA to look for short-term, bridge funding. This included recommendations of donors that fall into this category, introductions to contacts where they exist and support to develop and/or review proposals as appropriate.
- **Skills and capacity strengthening:** Understanding donor priorities, adjusting messaging to their interests and pitching are skills necessary to build donor relationships. Through webinars and possibly in-person training, IRC under the Watershed program, provided skills building activities; shared documents and tools; and provided technical assistance to build the capacity of the FANSA Secretariat.

X. REFERENCES

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XI. GLOSSARY

Activism: Use of direct and public methods to try to bring about especially social and political changes that you and others want. (Cambridge dictionary) Or the practice of vigorous action or involvement as a means of achieving political or other goals, sometimes by demonstrations, protests, etc. (**dictionary.com**)

Adaptive management: Structured, iterative process of robust decision-making in the face of uncertainty, with an aim to reducing uncertainty over time via system monitoring. (Wikipedia) Or an intentional approach to making decisions and adjustments in response to new information and changes in context. (USAID **https://usaidlearninglab.org/lab-notes/what-adaptive-management-0**)

Advocacy: Process of strategically managing and sharing knowledge to change and/or influence policies and practices that affect people's lives. (PATH Facilitator Guide)

Alliance: Long-term coalition with a permanent structure and organization.

Coalition: Joining of different individuals or groups for a particular purpose.

Coalition building: Bringing together an alliance or partnering of groups to achieve a common purpose or engage in a joint activity.

Data: Facts and statistics collected together for reference or analysis. (Oxford Dictionary)

Decision-makers: People with the formal power or authority to take the desired policy action and/or their key advisers or staff.

Document source: Link to where the document can be found (e.g., The National Water Act for Kenya can be found on this website: **https://wasreb.go.ke/the-water-act-2016/**).

Energizers: (Facilitation term) Activities in the workshop to motivate participants and stimulate thinking and action by participants.

Evidence: Available information indicating whether a belief or position is true or valid. (Oxford Dictionary)

Gender: The economic, political, and cultural attributes and opportunities associated with being male or female. The social definitions of what it means to be male or female vary among cultures and change over time. (USAID ADS Chapters 200–203). Gender refers to the array of socially constructed roles and relationships, personality traits, attitudes, behaviors, values, and relative power and influence that society ascribes to the two sexes on a differential basis.

Gender dynamics: Relationships and interactions between and among girls, boys, women, and men. (**https://eige.europa.eu/thesaurus/terms/1164**)

Gender-sensitive indicators: Measures that show the extent and in what ways development programs and projects achieved results related to gender equality and whether/how reducing gaps between males/females and empowering women leads to better project/development outcomes. (USAID 2019)

Gender sensitivity and gender awareness: The ability to recognize gender issues and especially the ability to recognize women's different perceptions and interests arising from their different social location and different gender roles. Gender sensitivity is considered the beginning stage of gender awareness. The latter is more analytical, more critical, and more questioning of gender disparities. Gender awareness is the ability to identify problems arising from gender inequality and discrimination, even if these are not very evident on the surface or are hidden (i.e., not part of

the general or commonly accepted explanation of what the problem is and where it lies). (**https://pdf.usaid.gov/pdf_docs/Pnadl089.pdf**)

Goal: Long-term, higher level result or achievement where effort is directed.

Grassroots: The general public, the most basic level.

Icebreakers: (Facilitation term) Activities designed to introduce participants to get to know each other or loosen tension to encourage active participation. Example can be found here: **https://www.scienceofpeople.com/meeting-icebreakers/**

Indicator: Measurement or value that describes condition or state. (**https://www.collinsdictionary.com/us/dictionary/english/indicator**)

Influence: Capacity to affect the character, development, or behavior of someone or something, or the effect itself. (**https://www.lexico.com/definition/influence**)

Influencers: People or groups that can have a compelling force on the actions, opinions, or behavior of decision-makers.

Lobbying: Form of advocacy that involves directly engaging with decision-makers, particularly a politician or public official who has control or significant influence over a policy, piece of legislation, or regulation.

Milestones: Significant stage or event in the development of something. (**https://www.lexico.com/en/definition/milestone**)

Mitigation: Reducing the severity of the problem, issue, and/or obstacles.

Objective: Intended impact or effect of the work, or the specific desired change.

Obstacle: Something that blocks one's way or prevents or hinders progress.

Opposition: Group of adversaries or competitors, especially a rival political party.

Parking lot: (Facilitation term) List of issues or topics for discussion and/or resolution after a meeting or discussion.

Partnership: Two or more people or organizations working together.

Policy analysis: Technique used in public administration to enable civil servants, activists, and others to examine and evaluate the available options to implement the goals of laws and elected officials.

Power dynamics: Capacity of an individual to influence the conduct (behavior) of others.

Resistance: Refusal to accept or comply with something; the attempt to prevent something by action or argument.

Root cause: Most basic cause (or causes) that can reasonably be identified that decision-makers have control to fix and that, when fixed, will prevent (or significantly reduce the likelihood of) the problem's recurrence. (Tap Root **https://www.taproot.com/definition-of-a-root-cause/**) Or The most basic or deepest cause for a given behavior that leads to a change for a process that is failing.

Targets: Individuals with the power to change the policy, budget, etc., including decision-makers and influencers.

Theory of change: Comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. (**https://www.theoryofchange.org/what-is-theory-of-change/**).

XII. APPENDICES

12.1 – ABCG ADVOCACY STRATEGY WORKSHOP PRESENTATION

12.2 – ABCG ADVOCACY STRATEGY WORKSHOP COUNTRY CONTEXT PRESENTATION TEMPLATE

12.3 – ABCG ADVOCACY STRATEGY WORKSHOP FACILIATOR WORKBOOK

12.4 – ABCG ADVOCACY STRATEGY WORKSHOP PARTICIPANT WORKBOOK

USAID
FROM THE AMERICAN PEOPLE

IRC
Supporting water sanitation and hygiene services for life

AFRICAN WILDLIFE FOUNDATION
CONSERVATION INTERNATIONAL
the Jane Goodall Institute
The Nature Conservancy
WCS
WORLD RESOURCES INSTITUTE
WWF

Africa Biodiversity Collaborative Group