
MODULE 17

Advocacy

What Is in This Module?

This module builds on the elements of Positive Health, Dignity, and Prevention (PHDP) from earlier modules to create a greater understanding of policy and advocacy, as well as the process of advocating for change in relation to the elements of PHDP. This module was originally designed to use in conjunction with the module on Combination Prevention and PHDP. They can be used together or separately. The module on Combination Prevention, however, helps participants understand structural issues and their relation to policy and advocacy and PHDP.

The activities were also designed to be as practical as possible, so the module ends with participatory development of an outline for a concrete advocacy plan. There is a policy review section which must be undertaken in relation to key policy issues or documents, depending on local context (National Strategic Plans, discrimination policies, etc.). The number of participants will determine the number of groups, which then might determine the number of objectives in the plan. Some groups might work on the same objective or issue and then combine and compare their work. While the development of the plan is important (especially if this workshop is done with a homogenous group), it is most important that the participants understand the process (inputs and methodology) as well as the products.

OBJECTIVES	By the end of this module, participants should be able to: <ul style="list-style-type: none"> ▪ Explain policy and advocacy, and outline the relationship between them ▪ Identify at least two key priority policy issues for people living with HIV in relation to PHDP ▪ Develop the outline of an advocacy plan
TIME	Day 1—4 hours, 50 minutes Day 2—8 hours, 15 minutes Day 3—5 hours – 5 hours, 15 minutes
ACTIVITY OVERVIEW	<div style="background-color: #e0e0e0; padding: 10px; margin-bottom: 10px;"> <p>Facilitator Note: This module is designed to be delivered over a three-day period. However, activities can be extracted and used on their own, depending on time and the purpose of the workshop.</p> </div> <p>Day 1</p> <p>17.1 Introduction (30 minutes)</p> <p>17.2 Key Concepts: Advocacy and Policy (20 minutes)</p> <p>17.3 Other Advocacy-related Key Concepts (2 hours)</p> <p>17.4 The Ecological Model (30 minutes)</p> <p>17.5 Policy Issues Related to HIV in Jamaica (1 hour, 30 minutes)</p> <p>Day 2</p> <p>17.6 Day 1 Recap (15 minutes)</p> <p>17.7 Introduction to the Advocacy Process (45 minutes)</p> <p>17.8 Steps 1–2: Issue Selection and Analysis (2 hours)</p> <p>17.9 Step 3: Identifying Goals and Objectives Using an Advocacy Matrix (1 hour)</p> <p>17.10 Steps 4–5: Identifying Targets, Allies, and Resources (2 hours, 30 minutes)</p> <p>17.11 Step 6: Creating an Action Plan (1 hour, 45 minutes)</p> <p>Day 3</p> <p>17.12 Day 2 Recap (15 minutes)</p> <p>17.13 Step 7: Creating Key Messages (3 hours)</p>

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	<p>17.14 Step 8: Monitoring and Evaluation (1 hour)</p> <p>17.15 Being an Advocate: What It Means Personally (15 – 30 minutes)</p> <p>17.16 Next Steps: Refining and Implementing the Plan (10 minutes)</p> <p>17.17 Evaluation and Key Messages (20 minutes)</p>
MATERIALS	<p>For PowerPoint Presentation</p> <ul style="list-style-type: none"> ▪ Laptop, projector, screen ▪ PowerPoint: Goal, Objective, Activity: How the Concepts are Related ▪ PowerPoint: Policy Issues Related to HIV in Jamaica <p>Handouts</p> <ul style="list-style-type: none"> ▪ The Advocacy Process: Key Definitions ▪ Effective Representation (Legitimacy) ▪ Advocacy Framework (Key Steps) ▪ Advocacy and Related Concepts ▪ Example—Diagram of Targets and Allies ▪ Example—Advocacy Action Plan ▪ How to Choose Appropriate Advocacy Methods ▪ Methods of Monitoring and Evaluating Advocacy Work ▪ Key Messages—Advocacy <p>Other</p> <ul style="list-style-type: none"> ▪ Flipchart paper ▪ Flipchart easel ▪ Markers ▪ Nametags ▪ Crayons ▪ Small sticky notes <p>Masking tape (or a system to make key concepts and ‘decisions’ visible during the workshop)</p>

DAY 1

Activity 17.1 Introduction

OBJECTIVES	By the end of this activity, participants should be able to explain the process and expected outcomes of the module on advocacy and PHDP.
TIME	30 minutes
MATERIALS	<ul style="list-style-type: none"> ▪ Prepared PowerPoint (see Steps 1-6) ▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none"> ▪ Prepared flipcharts (see Steps 1-6) ▪ Flipchart easel

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STEPS	<ol style="list-style-type: none"> 1. Using a PowerPoint or prepared flipcharts, review the following: <ol style="list-style-type: none"> a. The goal of the workshop: To what broader change does the workshop contribute? b. The specific objectives of the workshop (this module, or this module along with the module on Combination Prevention) <ol style="list-style-type: none"> i. To increase understanding (on advocacy, policy, policy issues) ii. To increase skills in advocacy planning 2. The workshop agenda 3. Roles and responsibilities of the <ol style="list-style-type: none"> a. Facilitators b. Participants c. Administrative staff 4. Ground rules and group dynamics 5. Logistical issues 6. Facilitator and participant expectations <div style="background-color: #e0e0e0; padding: 10px; margin-top: 10px;"> <p>Facilitator Note: <i>Make at least some of the steps very participatory, so that everyone has a chance to talk to the full group as well as to his/her neighbours. Work introductions into the dynamics of the steps—it could be something like “name yourself, your organisation, your city, and one thing you would like to emphasise,” or add to the ground rules or use the section on expectations for introductions.</i></p> </div>
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Activity 17.2 Key Concepts: Advocacy and Policy

OBJECTIVES	By the end of this activity, participants should be able to define advocacy and policy and describe their relationship.
TIME	20 minutes
MATERIALS	<ul style="list-style-type: none"> ▪ Prepared PowerPoint (see Steps 1-8) ▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none"> ▪ Prepared flipcharts (see Steps 1-8) ▪ Flipchart easel ▪ Markers ▪ Flipchart paper (blank) <p>Handout</p> <ul style="list-style-type: none"> ▪ The Advocacy Process: Key Definitions
STEPS	<ol style="list-style-type: none"> 1. Ask, “What is policy?” <ol style="list-style-type: none"> a. You might need to prepare a few prompts or leading questions, such as: “Is a policy a document? Does this hotel where we’re meeting have policies?” 2. Write key words of responses on flipchart paper. 3. Discuss with the participants some of the answers that might be more or less appropriate, and agree on a general definition.

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4. Show and read aloud the definition of policy from the prepared flipchart/PowerPoint slide.
5. Next ask the participants, "What is advocacy?"
6. Write responses on flipchart paper.
7. Show and read aloud the definition of advocacy from the prepared flipchart/PowerPoint slide.
8. Distribute the handout 'The Advocacy Process: Key Definitions.' Use it to talk about how advocacy is different from other approaches to information sharing. Emphasise that the ultimate goal of advocacy is to influence policy change. Depending on time, ask people to read it and prepare a few questions for the following morning.

Activity 17.3 The Ecological Model

OBJECTIVES	<p>By the end of this activity, participants should be able to:</p> <ul style="list-style-type: none"> ▪ Describe the ecological model and show/explain how it helps people to understand how relationships are interrelated ▪ Illustrate some concrete policy issues in a person's life—someone who might be affected by those policy issues and who might affect or influence them (directly and indirectly)
TIME	30 minutes
MATERIALS	<ul style="list-style-type: none"> ▪ PowerPoint slide (see Step 1) ▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none"> ▪ Prepared flipcharts (see Steps 1 and 3) ▪ Flipchart paper (blank) ▪ Flipchart easel ▪ Markers ▪ Tape <div style="background-color: #e0f0f0; padding: 5px; margin-top: 10px;"> <p>Facilitator Note: As much as possible, lay out the circles of the Ecological Model on the floor before the activity begins. 'Draw' the circles, using strips of tape arranged in concentric circles.</p> </div>
STEPS	<ol style="list-style-type: none"> 1. Draw the Ecological Model on flipchart paper or display on a PowerPoint slide. Introduce the model to the participants and explain that it is a tool to help people understand how people live within ranges of influence and interaction. 2. Have a discussion about recurring issues and problems for people living with HIV. Establish the key pieces of a story of a particular person living with HIV, including a name. 3. Take the group to where the model is drawn on the floor. Place one person at the centre wearing a name tag of the person in the story. Review his or her situation. 4. Place some participants in the first circle around the individual; these comprise the immediate social circle of that person. These people should have name tags which describe their relationship to the central person (mother, sister, best friend, partner, etc.). Discuss issues of influence and support. 5. Place another group of participants in the community circle. Depending on the story of the central person, these might include health services personnel; geographically close

	<p>individuals, such as neighbours; peers, such as co-workers, occasional friends, or partners; and key community members in the lives of the person, such as a pastor, other people living with HIV, etc. Again, give each a name tag describing the relationship to the central person. Discuss the relationships and fluidity between the immediate and community circles.</p> <ol style="list-style-type: none"> 6. Finally, place some participants in the society circle. These might include politicians, key bureaucrats, business people, representatives of peer organisations and networks, etc. Discuss interactions between this group and the community group regarding the issues of the person. 7. Come back to some of the issues or problems of the person—especially where health and health policy are concerned. Ask: “Who can influence the policies in question? Who can influence those individuals having influence?” 8. Try to tease out issues of direct influence as well as indirect influence and the importance of finding allies and networking. Add some specific issues that disrupt the immediate circle, such as the person being thrown out of his or her home. How does that change the circles and influencers in the life of the person? 9. Review some of the concepts from the earlier exercise, such as vulnerability and social capital, and ask participants to explain the concepts regarding the people in the circles. 10. If this exercise is done in conjunction with the Combination Prevention module, review the biological, behavioural, and structural aspects of prevention as they relate to the person and his or her social circles 11. Make the central person the focus of a few common situations: Talk about his or her linkages to people on the outside—who can influence whom? 12. Use examples to show how a situation relates to ‘real life.’ For example: <ol style="list-style-type: none"> a. A person living with HIV has a new partner and wants to initiate a sexual encounter but is hesitant about using a condom. b. A person living with HIV is with her doctor; however, the doctor doesn’t know she has HIV. She fears what will happen if she discloses her status and also fears discussing the fact that she wants a child, naturally. 13. Ask the group to add other participants who are crucial to some element of the central person’s life. Give them identifying tags. Prepare some of these ahead of time but be prepared to add to them based on suggestions from the group.
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Activity 17.4 Other Advocacy-related Key Concepts

OBJECTIVES	<p>By the end of this activity, participants should be able to define and distinguish between concepts, such as:</p> <ul style="list-style-type: none"> ▪ Change and social change ▪ Information and evidence ▪ Analysis and synthesis ▪ Networking and decision making ▪ Social mobilisation and social capital ▪ Risk and vulnerability ▪ Lobbying and sensitising ▪ Goal (aim) and objective
TIME	2 hours

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MATERIALS	<ul style="list-style-type: none">▪ Prepared PowerPoint slides (see Step 5)▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none">▪ Prepared flipcharts (see Step 5) <p>Other</p> <ul style="list-style-type: none">▪ Flipchart easel▪ Markers▪ Flipchart paper (blank)▪ Tape <p>Facilitator Note: <i>Ensure that the formal definitions of these terms are written on prepared flipcharts or a PowerPoint before the session.</i></p>
STEPS	<ol style="list-style-type: none">1. Divide the group into small groups of three to five people.2. Give each group one of the following pairs of words (either by writing on a piece of paper or telling them). Depending on the number of groups and the local policy situation, you might want to add or subtract terms.<ol style="list-style-type: none">a. Risk and vulnerabilityb. Change and social changec. Information and evidenced. Analysis and synthesise. Networking and decision makingf. Social mobilisation and social capitalg. Lobbying and sensitisingh. Goal (aim) and objective (target audience)3. Instruct each group to take 20 minutes to<ol style="list-style-type: none">a. Explain each of the terms (give a simple everyday definition)b. Explain the difference or relationship between the termsc. Identify a person(s) to give a short report back to the large group4. Reconvene the large group.5. Ask each small group to make a short three-minute presentation on the words they received (definition and differences/relationship).6. Ask for questions. Be sure to emphasise key points of distinction in the terms.7. Distribute Handout—The Advocacy Process: Key Definitions. <p>Discuss and ensure that everyone understands the terms by clarifying the definitions using the formal definition of the terms on prepared flipcharts or a PowerPoint. Give examples, if needed.</p>

Activity 17.5 Policy Issues Related to HIV in Jamaica

OBJECTIVES	By the end of this activity, participants should be able to: <ul style="list-style-type: none">▪ Identify two to three key policy issues and related documents
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	<ul style="list-style-type: none"> ▪ Identify one to three priority policies for people living with HIV advocacy <p>Facilitator Note: <i>The policies will depend on the focus, location, and makeup of the group. In the initial workshops, for example, presentations were given on key policy issues related to stigma, discrimination, reporting and redress, and confidentiality in the healthcare system, as well as a summary of the National Workplace Policy on HIV and AIDS and the National Strategic Plan on HIV and AIDS.</i></p>
<p>TIME</p>	<p>1 hour, 30 minutes</p>
<p>MATERIALS</p>	<p>For PowerPoint Presentation</p> <ul style="list-style-type: none"> ▪ PowerPoint: Policy Issues Related to HIV in Jamaica (or a presentation of your own design) ▪ Laptop, projector, screen <p>Other</p> <ul style="list-style-type: none"> ▪ Flipchart paper ▪ Flipchart easel ▪ Markers ▪ Tape
<p>STEPS</p>	<ol style="list-style-type: none"> 1. Make a presentation on key policy issues and documents using the Policy Issues Related to HIV in Jamaica PowerPoint or a presentation of your own design. If there are recent policy analysis documents that are related to the subjects at hand or relevant, then include them. Try to make the presentations short and focused: key policy issues, a key policy document, particular issues for people living with HIV and PHDP. 2. For example, some of the following might be used in the context of Jamaica: <ol style="list-style-type: none"> a. Age of consent for HIV testing and treatment b. National HIV Workplace Policy (2013) c. Health and Safety Occupational Act d. National Strategic Plan e. National Network of People Living with HIV Strategic Plan f. Report of the Stigma Index Study (2011) g. National HIV-related Discrimination Reporting and Redress System in Jamaica (review) (2013) h. Situational Analysis of Patient Confidentiality within the Public Health Care Sector (2013) 3. If creating your own presentation, prepare approximately six slides for each of the policy topics included. Depending on the group, choose three to four key policies. These might include, for example: history of a key policy document, review of key policies from an existing analysis, and a review of issues relevant to people living with HIV. After each segment, ask for questions, comments, and additions. 4. At the end of the presentation, have a discussion and, as a group, identify key priority issues related to PHDP and people living with HIV. <p>Facilitator Note: <i>If time permits, you could begin the activity on issue selection from the next section, so participants could decide as a group their focus for the next day.</i></p>

DAY 2

Activity 17.6 Day 1 Recap

OBJECTIVES	By the end of this activity, participants should be able to: <ul style="list-style-type: none"> ▪ Define advocacy and policy ▪ Describe the Ecological Model and how it might be used in explaining some key concepts ▪ Define at least four key terms related to advocacy ▪ Identify at least two key policy issues for people living with HIV that are related to PHDP
TIME	15 minutes
MATERIALS	None
STEPS	<ol style="list-style-type: none"> 1. Ask one or more participants to volunteer to describe the main activities of the previous day and the key points they brought out about advocacy. 2. Prepare some leading questions to ask the group on the key points from the previous day.

Activity 17.7 Introduction to the Advocacy Process¹

OBJECTIVES	By the end of this activity, participants should be able to: <ul style="list-style-type: none"> ▪ Define what an advocacy issue is ▪ Name at least four steps in the advocacy process
TIME	45 minutes
MATERIALS	<p>Handouts</p> <ul style="list-style-type: none"> ▪ Advocacy Framework ▪ The Advocacy Process: Key Definitions ▪ Advocacy and Related Concepts <p>Other</p> <ul style="list-style-type: none"> ▪ Flipchart paper ▪ Flipchart easel ▪ Markers ▪ Tape
STEPS	<p>Green Light</p> <ol style="list-style-type: none"> 1. As a group, have participants describe a real work problem they recently encountered. It does not necessarily need to be related to policy and advocacy. In one version of this exercise, the group noted that there was a need to make the National Network office friendlier, for example. Note that this is an exercise, so do not spend a great deal of time on

¹ Adapted from The POLICY Project. 1999. *Networking for Policy Change: An Advocacy Training Manual*. Washington, DC: The Futures Group International, The POLICY Project.

choosing the problem.

2. Explain that this exercise is about how to brainstorm constructively and positively. Note that you will ask everyone to offer suggestions for improvement. The ground rules are basic: only constructive, positive input—there are no bad suggestions.
3. Gather ideas from the group on how to concretely solve the problem. Participants are not allowed to make any negative comments and can share only positive ‘green light’ ideas. Each person should be asked to provide the team with his or her ideas on how to solve or diminish the problem.
4. After the ideas are presented, the whole group should brainstorm for the most effective problem-solving strategy. Identify two to three concrete, simple ideas for improving the problem at hand that gain a major consensus.
5. This activity helps the team to openly communicate, formulate best practices, and draw from their core team values.

Facilitator Note: *This exercise could be woven into the previous part of the module. In the discussion, come back to some key points about working together and how sometimes that means creating a supportive environment for dialogue and generating new ideas and creative thinking. A brainstorming or idea-generating session benefits greatly from focusing on the positive—the ‘yes, but’ answer to community development communication. Begin with the positive solution-oriented ideas before moving on to criticising them.*

6. If time allows, divide the group into smaller teams and give them the steps of an advocacy process in separate pieces. Ask each group to put the steps in logical order. Give them a short time to do so (10 minutes). Review the order of the steps with the groups, discussing any variants of opinion and recognising that although flexibility in advocacy is necessary, there are key steps in a process.
7. Distribute the handouts *The Advocacy Process: Key Definitions and Advocacy and Related Concepts*.
8. If time is limited, simply ask participants to volunteer to read the following:
 - a. The steps involved in the advocacy process
 - b. The definitions of the key terms
 - c. How advocacy and other related concepts differ
9. Explain that the remainder of the session will involve going through the process step-by-step regarding the policy issues identified earlier—also note that steps can be taken individually and sometimes are overlapping or simultaneous.

Activity 17.8 Steps 1–2: Issue Selection and Analysis

OBJECTIVES	By the end of this activity, participants should be able to: <ul style="list-style-type: none"> ▪ Identify at least one issue that they want to address through advocacy ▪ Explain and use an analysis tool such as a Problem Tree and/or a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis
TIME	2 hours

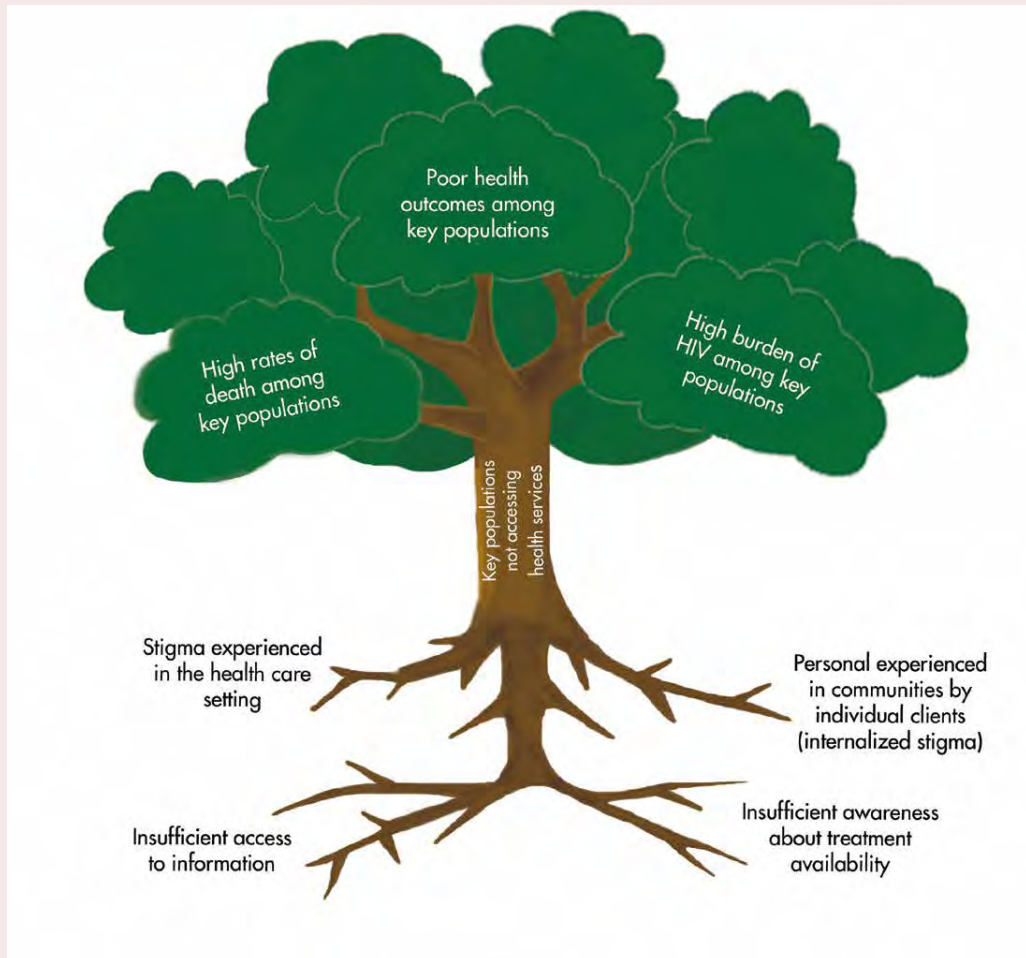
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MATERIALS

- Prepared Flipchart—Draw a table (similar to the one below) but with the larger letters (S, W, O, and T) removed

	Helpful	Harmful
Internal	Strengths S	Weaknesses W
External	Opportunities O	Threats T

- Sample Problem Tree (for display, if needed)



STEPS

1. Issue Selection

- Explain that, at the start of an advocacy process, an issue must be identified to advocate for a policy area that is most appropriate and effective as a focus for a group such as a network of people living with HIV.
- Review the issues from the day before. Instruct participants to brainstorm some of the issues on behalf of which they think it would be good to advocate.
- Record their responses on the flipchart.
- Explain that participants are going to rank the issues. Note that there are many ways to do this. For example, one of the most effective ways is to elicit some criteria from the group on what would help to determine priorities (e.g., relevance to the lives of people living with HIV, ability of a network to influence, etc.). Then go through the list.
- If time does not permit this, ask each participant to come up to the list and tick off the three issues that s/he feels are the highest priority or most important for PHDP and people living with HIV.
- At the end of the 'voting,' tally the ticks and write the total next to each issue.
- Circle the three issues that receive the largest number of votes.
- Note that group size might mean focusing on only two issues if you have a smaller group, or perhaps expanding to four issues with a larger one. Another approach is to have groups work simultaneously on the same issue.

Facilitator Note: Review the issues to make sure they are appropriate to the work of a people living with HIV network in relation to PHDP. If there is a need to narrow the number of issues, you might add the following steps:

- Explain that the next step is to narrow down or focus the issues. In the plenary, discuss the three issues in more detail, using the following questions as a guide:
 - Why is this issue important to the organisation or network at this time?
 - What are some examples of policy solutions for this issue?
 - What exactly does the issue encompass? Is there a particular aspect of the issue on which it might be more appropriate for a network of people living with HIV to focus its limited resources and energy?
 - How easy or difficult will it be to build support around the issue?
 - What else is happening with respect to this issue in the external environment?
- Explain that the process is not intended to determine scientifically which issue is the most important. Instead, the purpose is to determine which issue is most crucial to the work and lives of people living with HIV. Advocates are most successful when they feel a deep concern or passion for their advocacy issue.
- After each issue has been discussed, help the group reach consensus on the issue as the focus of its advocacy campaign. Remind the group that it will have the opportunity to take on other issues in the future.
- Divide the participants into smaller groups, so they can each take on an issue or an aspect of the issue and look at it in greater detail.
- Explain that there are several tools for exploring issues in a small group and that you will review a few of these.
- Explain the process of SWOT analysis and of a Problem Tree, as outlined below. Other options for analysis can be included.
- Divide the participants into smaller groups (five to eight people), each focusing on one issue. If the group is large and the number of issues small, then have more than one group focus on the same issue.

Facilitator Note:

There may be differing views about the issue or problem, so it is important to take time to discuss them and try to reach agreement. If the group has trouble agreeing, emphasise that this is primarily a learning exercise, so try to agree on something that makes sense in the short term.

Make sure that the groups focus on solutions that can be addressed through advocacy, rather than solutions that can be addressed through other methods. Refer participants to the workshop definition of advocacy.

It is optional to undertake this exercise at the end of the previous afternoon before beginning this section, so the participants have time to think about the issues over the course of the previous evening.

2. Issue Analysis

Issue Analysis: SWOT

Facilitator Note: If the advocacy involves organisational change, doing a SWOT analysis of the issue is important. It helps group members to have a better understanding of the issue for which they're advocating and what the organisation is most capable of undertaking.

- Discuss within the group the organisation's Strengths, Weaknesses, Opportunities, and Threats, as related to the issue, using a prepared flipchart.
- Review what has been written. Ask: "Any surprises?"
- Keep the responses as information that will add to the data to be gathered as the advocacy is being monitored. They can also be used to inform the Communications Plan.

3. Issue Analysis: Problem Tree

- Distribute markers and a blank sheet of flipchart paper to the group.
- Explain how to create a Problem Tree using the following instructions:
 - Draw a tree large enough to fit this paper. Make sure that you draw the roots at the bottom and some branches at the top.
 - Use a concrete example of a Problem Tree, illustrating something from the lives of the participants. This does not necessarily need to deal with a health problem, but make it clear that this is an exercise to explore an issue and decide where you might want to focus. Go through the 'problem' with them, eliciting causes and consequences until you have a couple of steps above and below, and then talk about where one could focus for the most effect—and then where a group of people living with HIV could focus to make a difference or to add their part to a change.
 - Note in this explanation that, as much as possible, it is a good idea to order the causes and consequences to see how one might lead to another, which then leads to another.
 - In the trunk, write the issue/problem that forms the basis for your exploration.
 - In the space under the roots, write as many causes of the problem/issue as possible. (If time allows, participants may also look at each cause and write down their deeper causes by connecting them with arrows/lines.)
 - In the space on the branches, write as many effects or consequences of the problem/issue as possible. (If time allows, they may also look at each effect and write down their further effects by connecting them with arrows/lines.) Try to see if there are any consequences that lead to others.
 - Review what has been written. Are there any surprises?
- Keep the responses as information that will add to the data to be gathered as the advocacy is being monitored or used to inform the Communications Plan.
- Have the groups present the results of their explorations and discuss at what level or where advocacy might be most effective and most appropriate for a network of people living with HIV.
 - The objective is to identify where the advocacy might best focus its efforts—at the

causal level or at the consequence level—or how to best use an organisation’s strengths or opportunities (or how to mitigate obstacles or build necessary skills in the process).

Activity 17.9 Identifying Goals and Objectives Using an Advocacy Matrix

OBJECTIVES	<p>By the end of this activity, participants should be able to:</p> <ul style="list-style-type: none"> ▪ Explain the difference between a goal and an objective ▪ Write a goal ▪ Write specific advocacy objectives for advocacy work ▪ Begin filling in an advocacy action matrix
TIME	1 hour
MATERIALS	<ul style="list-style-type: none"> ▪ Flipchart paper ▪ Flipchart easel ▪ Markers ▪ Tape
STEPS	<p>1. Goals, Objectives, and Advocacy Matrix</p> <ul style="list-style-type: none"> ▪ Explain that there is a difference between a goal and an objective by reviewing the definitions from Day 1 or asking the group to explain the difference again. Use a concrete example (such as the workshop itself). ▪ Ask whether participants are familiar with the term ‘SMART Objectives.’ If they are, ask them to volunteer to explain what each letter in the acronym means: S = Specific, M = Measurable, A = Appropriate, R = Realistic, and T = Timebound. Emphasise that it is important for objectives to be SMART. ▪ Use the groups that were created for policy issues. ▪ Ask each group to draft one advocacy goal and approximately three advocacy objectives for the advocacy issue(s) on which it is focusing. The goal statement should describe a long-term, desired change related to the issue to which the work of the people living with HIV network might contribute. The objectives are the changes by which the group can directly affect and contribute to the goal. <ul style="list-style-type: none"> ▪ Allow 30 minutes and ask the groups to write down their goals and objectives on flipchart paper. ▪ In the plenary, ask each group to share its goal and objectives and review them using the following questions to guide the discussion: <ul style="list-style-type: none"> ▪ Is the goal achievable through a series of policy changes? If policy change cannot contribute to achieving a particular goal, it is probably not an advocacy goal. ▪ Note that people often confuse an advocacy goal or objective with a service provided by an organisation. ▪ In the plenary, discuss how the clarity of the objectives will help determine the clarity of measuring results. Review the objectives according to the SMART criteria outlined above. ▪ Emphasise that a goal and objectives are the ‘changes’ the advocacy project should produce or to which it contributes.

Activity 17.10 Steps 4–5: Identifying Targets, Allies, and Resources

OBJECTIVES	<p>By the end of this activity, participants should have identified and written the following for their advocacy work:</p> <ul style="list-style-type: none"> ▪ Their target(s) ▪ Their allies ▪ Their resources
TIME	2 hours, 30 minutes
MATERIALS	<p>Handout</p> <ul style="list-style-type: none"> ▪ Example—Diagram of Targets and Allies <p>Other</p> <ul style="list-style-type: none"> ▪ Flipchart paper ▪ Flipchart easel ▪ Markers ▪ Tape
STEPS	<ol style="list-style-type: none"> 1. Explain that it is important to identify both targets and allies for the advocacy work. <ul style="list-style-type: none"> ▪ Define the target: On whom do we focus our advocacy efforts? ▪ Define an ally: With whom can we work in our advocacy efforts? <p>Targets—Diagram²</p> <ul style="list-style-type: none"> ▪ There are many options for mapping targets and allies. It is sometimes good to visualise them for your audiences. ▪ Explain to participants that they will first create a diagram to help them identify their targets. Refer back to the exercises that used the Ecological Model to help people understand that it is possible to have targets at different levels; sometimes a target becomes an ally to help with another target. ▪ Instruct participants to return to their groups. Explain to them that they will write, “People Living with HIV Community,” in the middle of a blank flipchart paper and draw a rectangular box around it. Then ask them to do the following: <ul style="list-style-type: none"> ▪ Think about different groups, organisations, government departments, and individuals who can be targeted to influence the proposed changes identified in their objectives. A circle on the paper will represent each group (department, etc.) Identified. ▪ Before drawing, use the following criteria to best show how the target relates to their objectives: <ul style="list-style-type: none"> ▪ Size of circle = influence on the objective ▪ Distance from the objective = closeness of the relationship with the advocates ▪ Pick a subject and then plot the targets as a group using a simple example. ▪ Discuss the findings. <p>Allies—Diagram</p>

² This exercise was developed using an advocacy process originally developed by the International Council of AIDS Service Organizations (ICASO) and used subsequently in a toolkit, “Advocacy to Action,” developed by the International HIV/AIDS Alliance in cooperation with ICASO.

- Explain to participants that they will now plot their targets and allies.
- Instruct them to return to their groups and, using the same diagram, draw their allies within square/rectangular boxes, using the same criteria of size, distance, and thickness of line as used for the targets.

Facilitator Note: *If time permits, the groups could also explore the following for each ally:
What will they gain by joining in your advocacy work?
What can they offer to the work?
What are the limitations or challenges in working with this ally?*

- Explain the importance of identifying resources.
- In the large group, brainstorm what kinds of resources (material, financial, human, or technological) will be needed for the work.
- Encourage participants to be as specific as possible about what they need. Refer to the list of allies and review who might help with resources.

Targets and Allies—Matrix

- Ask participants to return to their small groups one final time.
- Distribute blank flipchart paper and markers, and instruct groups to draw a table with four columns labelled as follows:
 - **Target**
What change do we want from them?
 - **Ally**
What contribution do we want from them regarding the change above?

Facilitator Note: *Have a sample of the matrix available on flipchart paper or a PowerPoint. One is to be done for each issue (if time allows). If time is an issue, allow each group to do at least one objective.*

- After 10–30 minutes (depending on whether groups are addressing one or three objectives), ask each group to tape its table to the wall. Review.

Activity 17.11 Step 6: Creating an Action Plan

OBJECTIVES	By the end of this activity, participants should be able to identify appropriate strategies and activities for moving an Advocacy Action Plan forward.
TIME	1 hour, 45 minutes
MATERIALS	<p>Handouts Example—Advocacy Action Plan How to Choose Appropriate Advocacy Methods</p> <p>For PowerPoint Presentation</p> <ul style="list-style-type: none"> ▪ PowerPoint: Goal, Objective, Activity: How the Concepts are Related ▪ Laptop, screen, projector

	<p>Other</p> <ul style="list-style-type: none"> ▪ Flipchart paper (blank) ▪ Flipchart easel ▪ Markers ▪ Tape 												
<p>STEPS</p>	<p>1. Create an advocacy plan.</p> <ul style="list-style-type: none"> ▪ Do a short presentation (using the PowerPoint ‘Goal, Objective, Activity: How the Concepts are Related’) on how a project’s goal, objectives, and activities relate. ▪ Distribute the handout ‘How to Choose Appropriate Advocacy Methods.’ ▪ Read the handout or ask a volunteer to read through it, emphasising that activities should take a chosen method into consideration. If possible, hand it out prior to the meeting and have people review it at that point. ▪ Ask the small groups to gather together again. ▪ Show them the Goal, Objective, Activity bull’s-eye that shows the relationship among the goal, objectives, and activities. Emphasise that for this activity, participants are to focus on the activities they will undertake to achieve their objectives. ▪ Distribute blank flipchart paper and markers, and instruct groups to draw a table with four rows labelled as follows (one is to be done for each objective): <ul style="list-style-type: none"> ▪ Objectives ▪ Key Activities ▪ When ▪ Who Is Responsible ▪ Resources needed (Facilitator Note: Find out—do they exist or do we need to create them?) <table border="1" data-bbox="386 1160 1430 1599" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 16.6%;">Objectives</th> <th style="width: 16.6%;">Key Strategies/ Activities</th> <th style="width: 16.6%;">Target Audience</th> <th style="width: 16.6%;">Key Messages and Channels of Communication³</th> <th style="width: 16.6%;">Timeline</th> <th style="width: 16.6%;">Outcome Measures</th> </tr> </thead> <tbody> <tr> <td></td> <td>When: Who Is Responsible: Resources Needed:</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> ▪ After 30 minutes, reconvene the large group and allow each small group to present its plans. ▪ Respond to questions that may arise. Emphasise the need for a network to be realistic in its planning. It’s better to keep things simple and focused at the beginning. ▪ Distribute the handout Example—Advocacy Action Plan. 	Objectives	Key Strategies/ Activities	Target Audience	Key Messages and Channels of Communication ³	Timeline	Outcome Measures		When: Who Is Responsible: Resources Needed:				
Objectives	Key Strategies/ Activities	Target Audience	Key Messages and Channels of Communication ³	Timeline	Outcome Measures								
	When: Who Is Responsible: Resources Needed:												

³ Note that Key Messages will be undertaken on Day 3.

DAY 3

Activity 17.12 Day 2 Recap

OBJECTIVES	<p>By the end of this activity, participants should be able to:</p> <ul style="list-style-type: none"> ▪ Name at least one criterion that helps to determine whether an issue is suitable for advocacy ▪ List the eight steps involved in the advocacy process
TIME	15 minutes
MATERIALS	<ul style="list-style-type: none"> ▪ Prepared PowerPoint (see Step 2) ▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none"> ▪ Prepared flipcharts (see Step 2)
STEPS	<ol style="list-style-type: none"> 1. Ask one or more participants to volunteer to describe the main activities of the previous day and the key points they brought out about advocacy. <p>OR</p> <ol style="list-style-type: none"> 2. Conduct a large group discussion on the key points of the previous day. Prepare some leading questions for the group, based on the discussions from the previous day.

Activity 17.13 Step 7: Creating Key Messages

OBJECTIVES	By the end of this activity participants should be able to identify key messages and communication channels for achieving their advocacy objectives.
TIME	3 hours
MATERIALS	<ul style="list-style-type: none"> ▪ Prepared PowerPoint slide (see Step 1: Elements of a Message) ▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none"> ▪ Prepared flipcharts (see Step 1: Elements of a Message)
STEPS	<ol style="list-style-type: none"> 1. Explain that one of the critical components of an advocacy plan is communications, centred on the key messages/ideas that support the advocacy work. <p>Elements of a Message</p> <ul style="list-style-type: none"> ▪ What is a key message? Have a short group discussion on what constitutes a key message and what media are used to convey messages. ▪ Write the following elements of a message on flipchart paper/PowerPoint: <ul style="list-style-type: none"> ▪ Content/ideas ▪ Language ▪ Messenger/source

- Format/medium
- Time/place
- Explain what each means (see *Facilitator Notes*).
- Ask the group to brainstorm a list of message media.
- Record the responses. Be sure to include such things as the following:
 - Face-to-face meetings
 - Executive briefing packets
 - Public rallies
 - Factsheets
 - Policy forums
 - Posters, fliers in public places
 - Petitions
 - Public debate
 - Press releases
 - Press conferences
 - Contests to design posters, slogans
 - Quotations or credible sources of information
- Ask the participants to think about the criteria they would use when choosing an appropriate medium.
- Be sure to include (and explain) the following (see *Facilitator Notes*):
 - Audience
 - Cost
 - Risk
 - Visibility
 - Time/place

One-minute Message—Introduction

- Introduce the elements of a one-minute message (elevator speech).

Statement + Evidence + Example + Action Desired

- Explain what each element means.
- Read the following example:

Statement. Domestic violence against women must be stopped. Violence against women has long been tolerated and women have suffered in silence. The seriousness and scope of the problem has been ignored.⁴

Evidence. In Jamaica, 13 percent of women surveyed in the Demographic and Health Survey in 2008–9 reported experiencing physical violence by a partner.

Example. Our network has been supporting a woman named Maria. One year ago, Maria was successfully balancing motherhood and a career. However, she became involved with an abusive partner and her life has never been the same. Maria recently lost her job because of tardiness, and her children have been disciplined at school for aggression and misbehaviour. Maria is one of the millions of women suffering from domestic violence.

- Ask participants what is missing from the message?
- Ask for volunteers to complete the message.

One-minute Message—Practice

⁴ Bott, S., A. Guedes, M. Goodwin, J.A. Mendoza. 2012. *Violence Against Women in Latin America and the Caribbean: A comparative analysis of population-based data from 12 countries*. Washington, DC: Pan American Health Organization. Available at: <http://www.paho.org/hq/index>.

- Ask small group members to get together in their groups.
- Instruct them to develop a one-minute message using the four elements.
- After 30 minutes, ask each group to present its message to the specific 'audience' on which they wish to focus.
- After each presentation, lead a discussion using the following questions:
 - Was the central advocacy message clear? What was it?
 - Were you, the 'audience,' informed, persuaded, and/or moved to act?
 - What was the most effective part of the message?
 - When is it appropriate to use personal stories?
 - What, if anything, would you add or do differently?

Activity 17.14 Step 8: Monitoring and Evaluation

OBJECTIVES	<p>By the end of this activity participants should be able to:</p> <ul style="list-style-type: none"> ▪ Describe the difference between a process indicator and an outcome indicator ▪ Identify one outcome indicator and one process indicator per objective
TIME	1 hour
MATERIALS	<p>Handout</p> <ul style="list-style-type: none"> ▪ Methods of Monitoring and Evaluating Advocacy Work <p>Other</p> <ul style="list-style-type: none"> ▪ Prepared PowerPoint slides on Developing Indicators (see Step 1) ▪ Laptop, projector, screen <p>OR</p> <ul style="list-style-type: none"> ▪ Prepared flipcharts on Developing Indicators (see Step 1)
STEPS	<p>1. Introduction—Monitoring and Evaluation</p> <ul style="list-style-type: none"> ▪ Ask participants to describe the difference between monitoring and evaluation. ▪ Write their responses. ▪ Then write the following phrase on the flipchart to distinguish monitoring from evaluation: "We monitor activities (process) and we evaluate results (outcomes or the changes described in objectives)." ▪ Point out that monitoring is a process that tracks the implementation of activities. An important monitoring question is "Did we implement the activities according to the action plan?" Evaluation is a process that assesses the results of the activities. In other words, "Did we achieve our desired results?" ▪ Distribute the handout Methods of Monitoring and Evaluating Advocacy Work. <p>Developing Indicators</p> <ul style="list-style-type: none"> ▪ Give a presentation using prepared flipcharts or a PowerPoint on Developing Indicators (Facilitator Notes). ▪ Ask the small groups to reconvene. Instruct them to develop, for each objective <ul style="list-style-type: none"> ▪ At least one result indicator

- At least one process indicator
- Reconvene the large group and ask participants to present their indicators.
- Evaluate them based on the criteria set out in the presentation.

Facilitator Note: *Monitoring and evaluation for advocacy is often difficult, as it can be a long-term process. Sometimes it is important to break down the process into milestones that will allow for some evaluation at distinct points in the process*

Activity 17.15 Being an Advocate: What It Means Personally

OBJECTIVES	By the end of this activity, participants should be able to explain what being involved in advocacy work will mean for them personally.
TIME	15 – 30 minutes
MATERIALS	None
STEPS	<ol style="list-style-type: none"> 1. Instruct each participant to pause and reflect on the following: <ol style="list-style-type: none"> a. What is my role in the refinement of this plan? b. What is my role in the implementation of this plan? c. What does it mean for my commitment in time? d. What does it mean regarding any disclosure or other issues that may arise?

Activity 17.16 Next Steps: Refining and Implementing the Plan

OBJECTIVES	<p>By the end of this activity, participants should have:</p> <ul style="list-style-type: none"> ▪ Identified, in writing, who will be involved in refining the plan and their possible contributions ▪ Identified, in writing, who will be involved in implementing the plan, their possible contributions, and how they might get their colleagues involved ▪ Set the dates for follow-up to refine and implement the plan
TIME	10 minutes
MATERIALS	<p>Handout</p> <ul style="list-style-type: none"> ▪ Effective Representation (Legitimacy) <p>Other</p> <ul style="list-style-type: none"> ▪ Flipchart paper ▪ Easel ▪ Markers

STEPS	<ol style="list-style-type: none"> 1. Ask participants to indicate whether they are <ol style="list-style-type: none"> a. Willing to do follow-up on the plan as to refining it b. Willing to do follow-up on the plan as to implementing it 2. Write their commitments on flipchart paper. 3. Distribute the handout <i>Effective Representation (Legitimacy)</i>. 4. Discuss the main points made about effective representation.
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Activity 17.17 Evaluation and Key Messages

OBJECTIVES	By the end of this activity, participants should be able to recall the key issues and learnings on advocacy and advocacy planning.
TIME	20 minutes
MATERIALS	Handout Key Messages—Advocacy
STEPS	Review of Key Messages <ol style="list-style-type: none"> 1. Explain that the group has finished the Advocacy module 2. Invite participants to share any further comments or reflections that they have at this time. Ask if there are any gaps in their understanding. 3. Explain that the group should conclude this module by reflecting on key take-away messages. 4. Ask participants to take three minutes to discuss with a partner, “What are your key learnings about advocacy?” Ask participants to note their responses so they can share them out loud. 5. After three minutes, ask for responses to participants’ discussions. Record responses on a large flipchart. 6. Distribute the handout Key Messages—Advocacy. Ask one person to read these out loud. 7. Facilitate a brief discussion, recognising key messages already identified by participants, highlighting any new ones, and clarifying any questions. Invite participants to include their additional responses on the Key Messages handout for their own future reference.

Handout: The Advocacy Process: Key Definitions

Key Word/Terms	Definition
Issue	The problem that requires a policy action
Goal	A statement of the general result you want to achieve
Objective	Incremental steps toward achieving your goal that are: <ul style="list-style-type: none"> ▪ Specific ▪ Measurable ▪ Realistic ▪ Time-bound
Target audience	The policymakers you are trying to influence to support your issue, e.g. Parliamentarians, local officials, ministry officials
Building support/allies	Building alliances with other groups, organisations or individuals who are committed to support your issue
Message development	Statements tailored to different audiences that define the issue, state solutions and describe the actions that need to be taken
Channels of Communication	The means by which a message is delivered to the various target audiences, e.g., radio, television, flyers, press conferences, meetings
Implementation	Carry out a set of planned activities to achieve your advocacy objectives (action planning)
Monitoring and Evaluation	<p>Monitoring – a process of gathering information to measure progress toward your advocacy objectives</p> <p>Evaluation – a process of gathering and analysing information to determine if the advocacy objectives have been achieved</p>

Handout: Effective Representation (Legitimacy)

Involving people directly affected by the advocacy issue or problem

Advocacy can be carried out by the people affected by an issue or problem, by other people representing them, or by both groups together. Advocacy is often more powerful if those affected by the problem or issue are involved with or lead the process.

If we advocate by representing others, we need to ensure that we represent their opinions and interests fairly. This means having a very close relationship with these affected by the problem or issue, a deep understanding of the issue, and **permission** from those affected by the problem or issue to advocate on their behalf. Having permission or the 'right' to advocate for other people is known as 'legitimacy'.

It is also important to ensure that advocacy work is supported by the mission or aims of our organisation, by senior managers, and by any external funders.

Why it is important to involve those directly affected by the advocacy issue, from early in the planning process

- They will have expert knowledge of the issue or problem
- They can suggest workable solutions based on direct experience of the problem
- They can view a problem from a different perspective
- They are often highly motivated, because they are directly affected by the issue
- People living with or affected by HIV/AIDS have been centrally involved in most major improvements in the field of HIV/AIDS
- Affected individuals and groups will gain more skills and confidence
- It is a good opportunity to reduce stigma against people affected by HIV/AIDS.

Problems caused by lack of legitimacy

Involving those affected by the problem or issue late, superficially ('tokenism') or not at all can result in:

- identifying irrelevant issues
- suggesting solutions which do not solve the problem, or make the problem worse
- public disagreement
- loss of credibility for the organisations and individuals involved in advocacy
- increased stigma and legitimised exclusion and non-involvement of those affected by the problem or issue
- disempowerment of those affected, so they are less in control of their own situations.

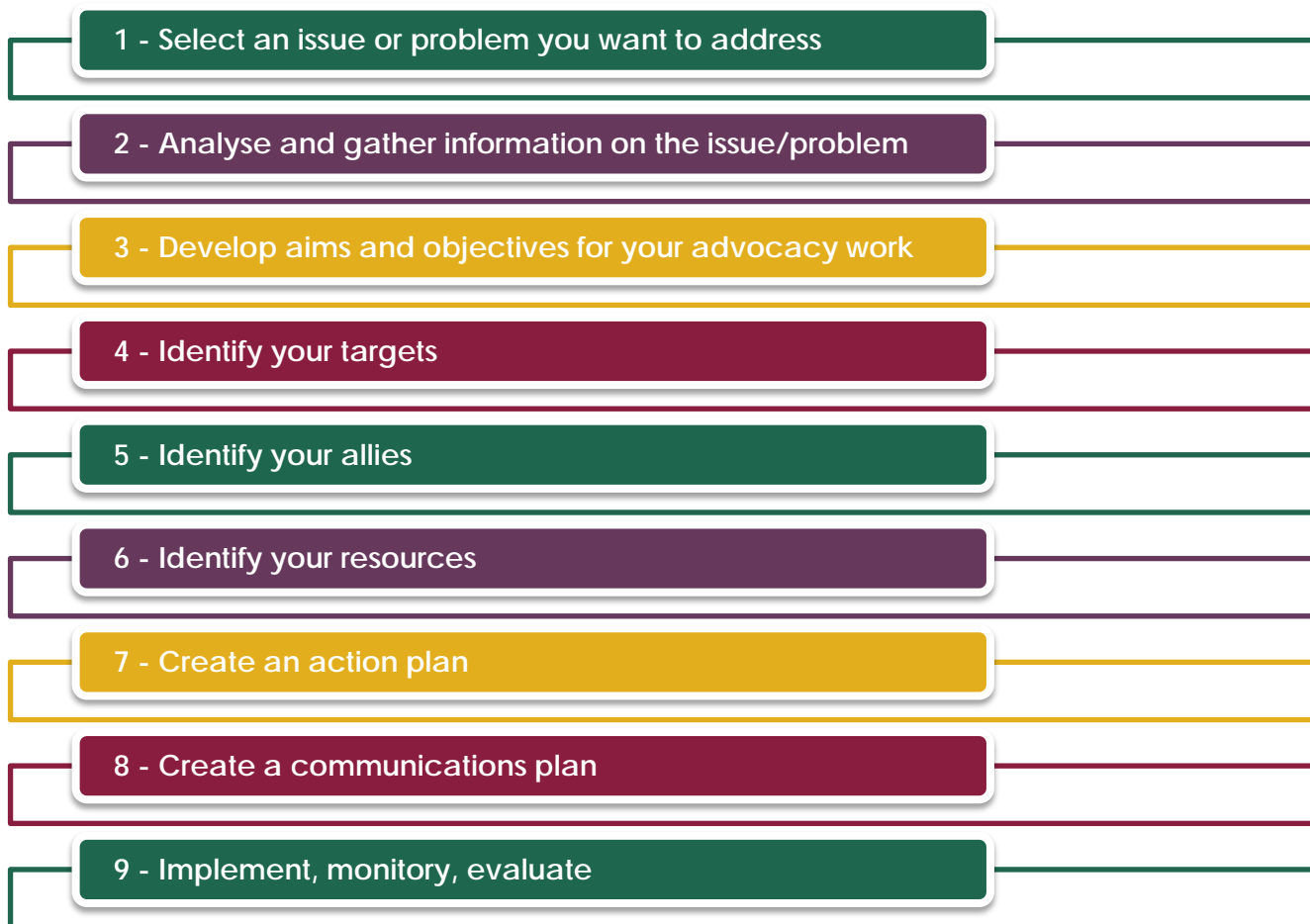
Methods of involving those directly affected by the advocacy issue

Finding a way of genuinely involving those directly affected by the advocacy issue will greatly strengthen the advocacy work in the long term. But it may take more time in the short term, especially if they are very busy, frequently ill, do not trust you, are hard to identify and reach, or challenge your ways of working. People affected by the problem or issue can be involved at all stages of advocacy: defining the problem or issue, planning, implementation and evaluation – as advisers, implementers or managers.

"It is important for any organisation working in the field of HIV/AIDS to include people living with the virus because it is we who have first hand experiences of the problems that we face."

Emily Chigidwe, Chairperson, Zimbabwe National Network of People Living with HIV/AIDS (ZNP+).

Handout: Advocacy Framework (Key Steps)



Adapted from an advocacy framework developed by the International Council of AIDS Service Organisations as cited in POLICY Project. 1999. *Networking for Policy Change: An Advocacy Training Manual*. Washington, DC: The Futures Group International, The POLICY Project.

Handout: Advocacy and Related Concepts

SECTION III UNIT 1

Handout III.1.4

Advocacy and Related Concepts

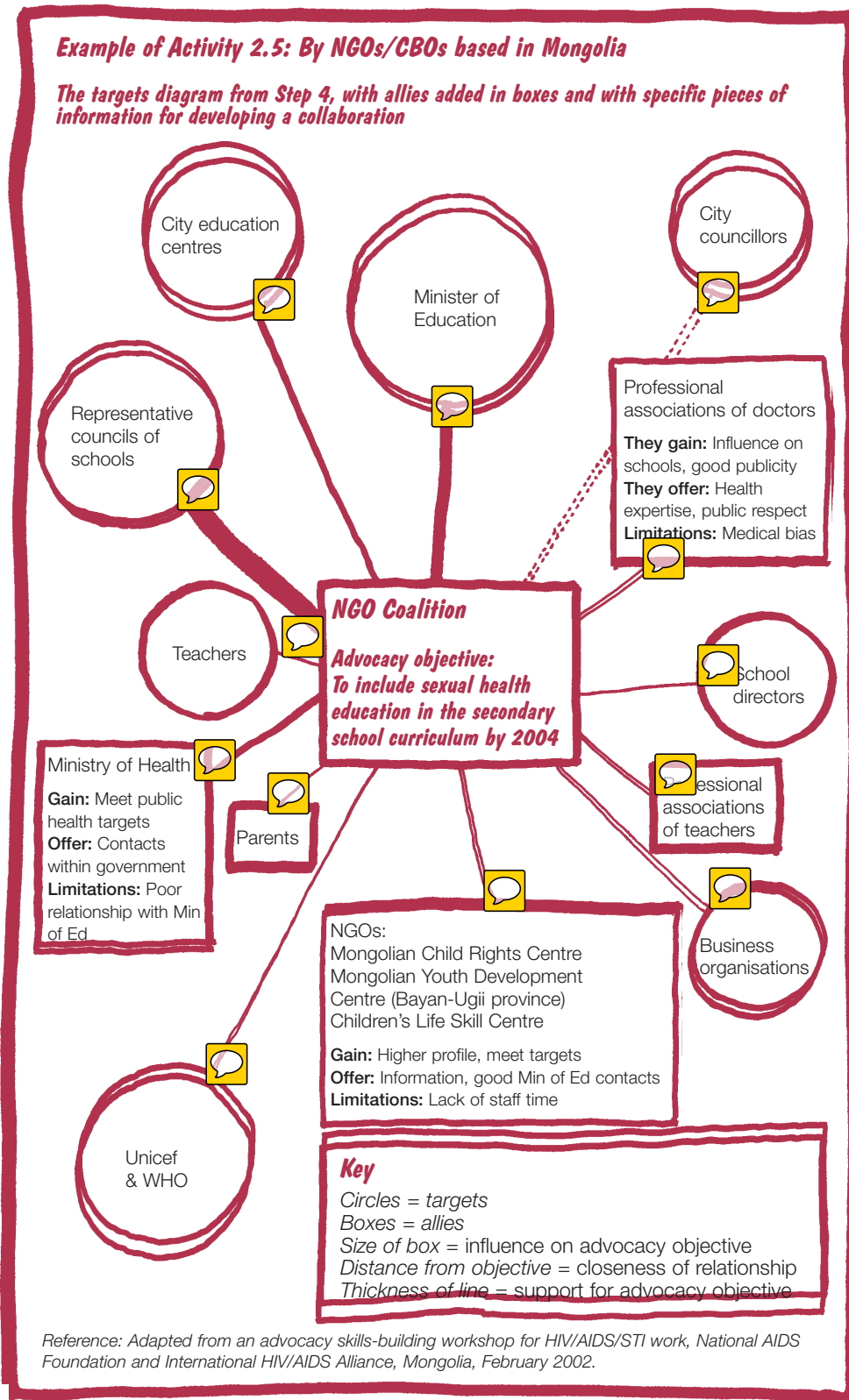
The following chart illustrates the difference between advocacy and several related concepts. Advocacy can usually be distinguished from other approaches in that the objective of advocacy is policy change.

III. THE ADVOCACY STRATEGY

1. WHAT IS ADVOCACY

Approach	Actors/ Organizers	Target Audience	Objective	Strategies	Measuring Success
Information, Education, Communication (IEC)	Service providers	Individuals Segments of a community (women, men, youth)	Raise awareness and change behavior	Sorting by audience Mass media campaigns Community outreach Traditional media	Change in knowledge or skills (behavior change) Process indicators Focus groups Service statistics
Public Relations	Commercial institutions	Consumers	Improve the company's image and increase sales	Large-scale advertising (radio, TV, print media) Public events Sponsoring a "charity"	Improved public perception Increased sales Increased market share
Community Mobilization	Community members and organizations	Community members and leaders	Build a community's capacity to rank needs and take action	Door-to-door visits Village meetings Participatory Rural Appraisal (PRA)	Issue-specific process and outcome indicators Quality of participation
Advocacy	NGOs/networks Special interest groups Professional associations	Public institutions and policymakers	Change policies, programs, and resource allocation	Focus on policymakers with the power to affect advocacy objective High-level meetings Public events (debates, protests, etc.)	Process indicators Media scans Key informant interviews Focus groups Opinion surveys

Handout: Example—Diagram of Targets and Allies



Handout: Example—Advocacy Action Plan

Example of Activity 2.8: By NGOs/CBOs based in Zimbabwe

Coalition: Family AIDS Caring Trust, Dananayi NGO, individual PLHAs, and Murambinda hospital

Advocacy aim: Encourage the community leaders in Gombahari to publicly support people with HIV/AIDS

Objectives	Targets	Activities	Resources required	Persons or organisations responsible	Timeframe	Expected outcome	Indicators
Objective 1 By July 2002, three influential community leaders will make positive public statements defending people living with HIV/AIDS	All community leaders	Meeting with all community leaders of Gombahari on stigmatisation of PLHAs	Manpower: Team leader, community leaders Stationery: books, pens, etc. for record-keeping Vehicle, Food, Money	Team leader of organisation	September 2001	Come up with three most influential leaders	Leaders: - who are listened to by other leaders from whom local people ask for advice most often - who have successfully led a change in policy or practice in the past Monitoring methods: informal survey, observation at meeting
	Three most influential leaders	One-to-one meetings with the three leaders who were most influential during the meeting	Team leader, community leaders Money Vehicle	Team leader	By early October 2001	Positive support from three community leaders willing to make public statements	Leaders: - show understanding of why stigma is a problem - show understanding of how public support for PLHAs can help promise to make public statements in support of PLHAs Monitoring methods: NGO reps observe and discuss after meeting
Objective 2	Community members	Meetings between three community leaders and their communities	Manpower: Team leader, three community leaders, PLHAs, community Vehicle, Food	Team leader Community leaders	April 2002	Public statements defending PLHAs	Number of positive statements Number of people hearing statements Monitoring methods: NGO reps attend and observe meetings; informal surveys in community

Reference: Adapted from an advocacy skills-building workshop for HIV/AIDS, International HIV/AIDS Alliance, Zimbabwe, July 2001.

Handout: How to Choose Appropriate Advocacy Methods

There are no simple rules for choosing the best advocacy methods. Your choice will depend on many factors: a) the target person/group/institution; b) the advocacy issue; c) your advocacy objective; d) the evidence to support your objective; e) the skills and resources of your coalition; and f) timing – for example, external political events, when a law is still in draft form, immediately before a budgeting process, time of year, stage of advocacy process. Below is an example of the strengths and weaknesses of some methods for a particular advocacy objective and targets. Remember that every case is different.

<p>Advocacy objective: To persuade managers of the 10 largest companies in the Andhra Pradesh state to end compulsory testing of workers and dismissal of HIV+ workers.</p> <p>Direct targets: General managers of companies.</p> <p>Indirect targets: Labour unions, boards of directors, personnel managers.</p>		
<i>Method</i>	<i>Strengths</i>	<i>Weaknesses</i>
Analysing and influencing legislation and policies or their implementation	If analysis shows that a company's current practices are costing them money, this can be powerful evidence Beneficiaries can provide expertise	Criticism of policies could anger managers Not useful for managers who dislike formal policies
Position paper or briefing note	Suitable for presenting to senior directors and managers Useful background briefing for journalists Ensures that public statements by allies always agree	Can easily be lost among other paperwork Some managers do not like reading papers Difficult to involve beneficiaries
Working from inside	Some managers will listen more closely to people they know Many opportunities within labour unions	Limited opportunities in companies – all policy is made by managers and directors
Lobbying or face-to-face meetings	Opportunity to present 'human face' of the issue and to build a personal relationship Beneficiaries can explain their case directly	Managers often too busy to attend Board members not interested in the issue, and afraid of HIV+ people
Presentation	Opportunity to present the issue in a controlled way, direct to decision-makers Beneficiaries can speak directly	Managers often too busy Difficult to gain permission for presentation to board of directors
Drama	Emotional appeal works with some managers Suitable for mass meetings of labour unions Beneficiaries can advise on story, or perform	Some decision-makers will feel that drama is only for the illiterate Difficult to find opportunity to perform to managers or directors
Press release	Useful for organisations needing public support Useful to launch a campaign or for quick reaction to opposition or new developments Inexpensive	No use for companies who do not need/want public support Difficult to involve beneficiaries
Media interview	Same as for press release Useful at times when advocacy issue needs 'a human face' Inexpensive	Can have negative impact if the interviewee is not prepared or does not deliver message well Can be manipulated by journalists
Press conference	Same as for press release Good for presenting evidence, esp. case studies/examples Useful to launch a major campaign or for reaction to serious opposition or major new developments Easy to involve beneficiaries and allies, and give them public recognition	As for press release Requires high level of organisation Expensive

Handout: Methods of Monitoring and Evaluating Advocacy Work

Monitoring is the measurement of progress towards achievement of objectives, and noting which activities are going well and which are not.

Evaluation is about making judgements about quality and impact. Evaluation asks why some activities went well and others did not. It also looks at the impact of activities, on the people affected by the problem or issue, on the organisation and anyone else.

There are numerous ways of monitoring and evaluating our advocacy work. The same methods can be used in advocacy as in monitoring and evaluating other activities. Methods can be:

- **qualitative** (for example, case studies, stories, opinions, feelings)
- **quantitative** (for example, statistics, numbers).

When monitoring and evaluating, we need to agree on our definitions of success, i.e., agree on the signs that will show us whether the situation is improving or not – these signs are impact **indicators**. Well-written aims and SMART objectives often make it obvious what kinds of evidence (indicators) are needed. For example:

Advocacy objective: To stop police harassment of sex workers (SWs) in Ulaan Baator by November 2003

Quantitative indicators: Reduction in violence, extortion and arrests

Qualitative indicators: SWs do not fear police, police attitudes more positive.

People affected by the problem or issue are often the best people to choose indicators of success and monitoring and evaluation methods, and undertake the monitoring and evaluation.

Monitoring methods can be simple or complex, depending on indicators and resources. For example, they may include:

- ✓ keeping records of anecdotes and conversations with target audiences
- ✓ tracking when others have used your arguments or wording in their literature or presentations
- ✓ keeping significant letters and e-mails that have been received
- ✓ documenting and filing the messages that you have put out, number of meetings held, and invitations to contribute to the issue from key external parties
- ✓ carrying out surveys and interviews to determine the impact that your actions have made
- ✓ monitoring the media for mentions of your work.

Whatever methods you choose, try to only collect information that will be useful in relation to your indicators.

Evaluating your work does not need to be a complex process. It can be simply analysing, discussing and making judgements from your monitoring information. Here are some examples of questions that may be useful:

- ? Have you achieved your aim and objectives?
- ? Is the situation better than before? By how much? If not, do you need to change your aim and objectives?
- ? If you did not achieve what you set out to do, why not? What will you do differently next time?
- ? Are the people involved in the advocacy work happy with the results? With the process?

Handout: Key Messages—Advocacy

1. Advocacy is the deliberate process of informing and influencing decision makers to affect policy change or improve implementation of a particular policy.
2. Policy is a definite course of action, selected from among alternatives and in light of given conditions, to guide and determine present and future decisions.
3. Policy issues related to PHDP and living with HIV
 - a. In order to undertake effective advocacy, it is necessary to focus on a particular issue (or issues) that is vital to the well-being of people living with HIV, and where people living with HIV have the capacity to influence decision makers.
4. Advocacy process
 - a. Good advocacy planning requires clear goals and objectives (the changes that you wish to contribute to or bring about), as well as clarity about target audiences and clear messages.
5. Being an advocate
 - a. Sometimes, being an advocate requires a person to be subject to public scrutiny or to speak in public about personal issues such as living with HIV. Be clear about where and when you are comfortable sharing personal information.