



INTERNATIONAL AGENCY FOR THE PREVENTION OF BLINDNESS

Advocacy for Eye Health: A Practical Guide



Part 2: The Toolkit

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**Front cover
Advocacy
meeting with the
President of
Liberia at the
Presidential
Mansion. 2006**

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Her Excellency the
President of the
Republic of Liberia,
Ellen Johnson-Sirleaf
and Co Chair of
the High-level Panel
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post-2015 UN
Development agenda

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Part 2:

The Toolkit

Campaigners have a range of tools that they can use to help them construct their advocacy and campaign strategies. None of them are essential (although some are strongly recommended in all but the most obvious situations). Their function is to help advocates to gather, analyse and present information in a way that they can make better choices and decisions. The tools don't make those choices – advocates still need to decide on their course of action.

Each tool listed in this toolkit includes a brief overview, suggestions on where they can best be used, and a detailed description of what the tool is and how it should be used.

This is not a comprehensive list, and some of the tools listed may have many variations. Suggestions for new or adapted tools that can be included in future editions of this guide are gratefully received by the author.

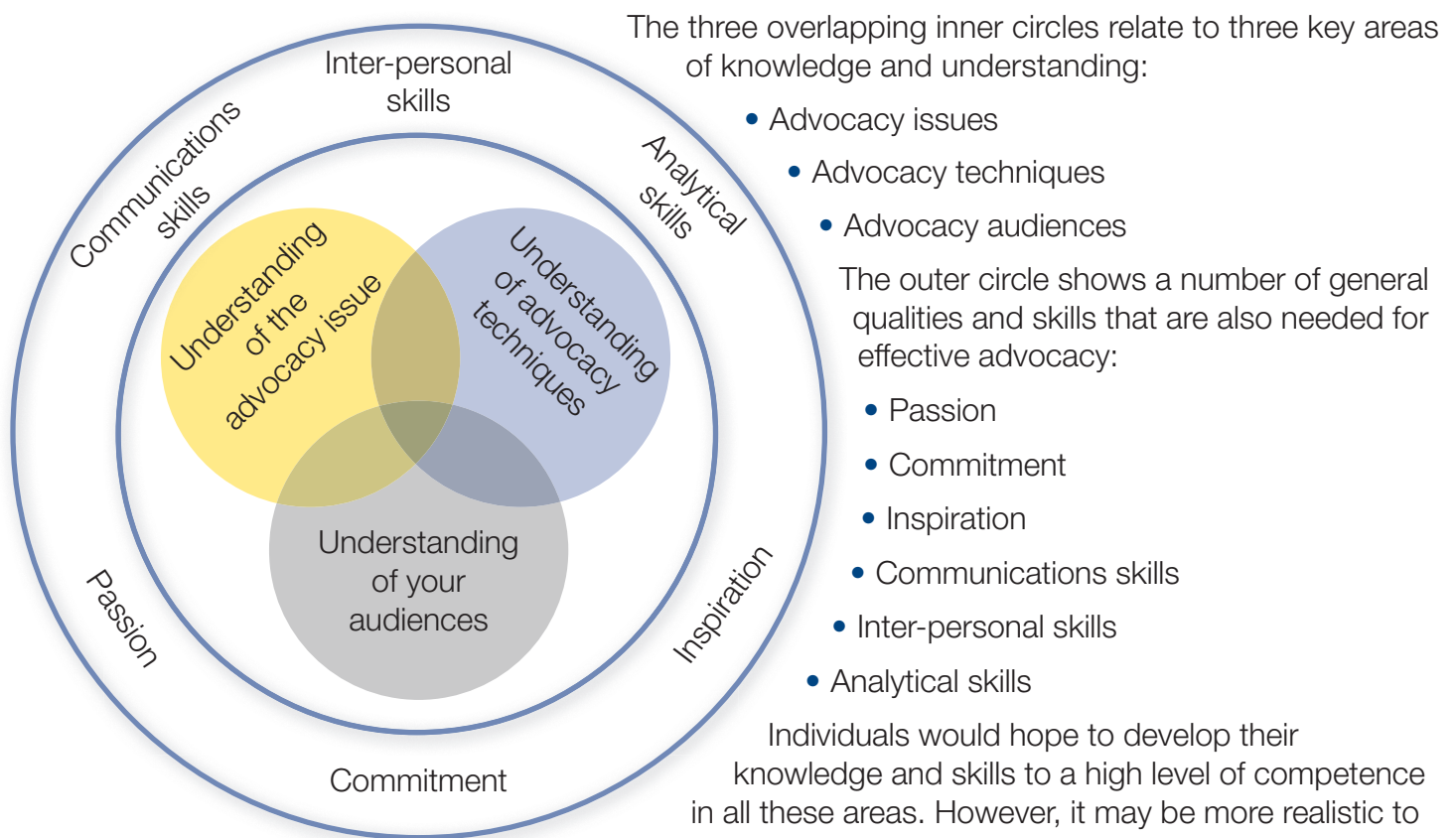
List of Tools

- Advocacy Capability Model
- AIDA Model
- Assertive Behaviour
- Event Timelines
- Fishbone Analysis
- Force-Field Analysis
- Influence Map
- Network Function Ladder
- PESTLE Analysis
- Press Releases
- Rhetoric
- Risk Management
- SMART Objectives
- Sources of Power
- Stakeholder Analysis
- SWOT Analysis
- Ranking Systems
- Target Audience Planning Template

Advocacy Capability Model

Name:	Advocacy Capability Model
Overview:	Graphical representation of the different knowledge, skills and qualities needed by individuals and/or teams working on advocacy.
Main uses:	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 2.2 – Assess capacity to influence change

There are many internal factors that can determine the advocacy capability of an individual, team or organisation. Some of the key ones are shown in this advocacy capability model devised by the author.



The three overlapping inner circles relate to three key areas of knowledge and understanding:

- Advocacy issues
- Advocacy techniques
- Advocacy audiences

The outer circle shows a number of general qualities and skills that are also needed for effective advocacy:

- Passion
- Commitment
- Inspiration
- Communications skills
- Inter-personal skills
- Analytical skills

Individuals would hope to develop their knowledge and skills to a high level of competence in all these areas. However, it may be more realistic to ensure that the teams put together to work on each advocacy project have all of these competencies covered. More

than this, the people demonstrating these competencies need to be working effectively together so that the use of the competencies is combined – “greater than the sum of its parts”.

Note: Some academic disciplines that are integral to the three overlapping inner circles are:

- *Social psychology – to understand the behaviour of people and groups and how to change it*
- *Organisational theory and management – to understand how organisations work, why they act as they do and how to change their practices*
- *Political science – to understand how and why governments take the decisions that they do and how they might be influenced*

AIDA model

<i>Name:</i>	AIDA Model
<i>Overview:</i>	Sets out four key steps that we need to take an audience through in order to get them to take an action or achieve a change in their behaviour.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 3.1 – Plan activities to engage each audience

This model has been adapted from one used in the marketing industry. It sets out four steps that advocates must try to take their audiences through when they are engaging them to take action. These steps are:

1. Attention
2. Interest
3. Desire
4. Action

This model can apply to engagement with specific individuals as well as to the targeting of groups of people (including the public).

Attention

The first stage in any communication is to get the audience's attention. We live in an age where people get hundreds, if not thousands, of messages every day, so your message has to grab the audience's attention. To do this, the communication could be bigger and louder than everything else; it could be shocking (although that might give more problems with the latter stages); it could be repeated so often that it becomes unavoidable; or it could be so different and innovative that it catches the audience's attention through its novelty. For organisations with few funds, creativity and innovation are their most cost effective means of getting people's attention.

Interest

Having gained the audience's attention, you must now engage their interest so that they actually read, watch or listen to your message. A number of approaches are possible, including:

- Demonstrating how relevant this issue is to the audience's priorities
- Telling a story about an individual and how the issue affects them
- Using metaphors and other descriptive phrases to evoke powerful images in the audience's mind

These approaches can be used in combination for even greater effect.

Desire

Being interested is not sufficient to take action – the audience must also feel a desire for the situation to be different and for your proposed solution to be put into place. More than this, they must also desire to play a part in making it happen.

In order for this to happen, you must clearly demonstrate:

- The current situation is undesirable, even intolerable
- There is a clear and viable solution
- The audience’s action will help and is needed to make that solution a reality

Action

Desire for change and to take action can quickly be dissipated, and so the audience should be encouraged and enabled to take that action as quickly as possible – ideally immediately. Any obstacles to their taking action should be removed.

For example, if you want someone to write to their member of parliament, you should provide them with that MP’s name and contact address. If you want them to come to an event, you should provide a clear map and directions of how to get there.

Assertive Behaviour

<i>Name:</i>	Assertive Behaviour
<i>Overview:</i>	A model that explores the behaviours that result from the attitudes that we hold about ourselves and the people we are trying to influence.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 3.1 Plan activities for each audience 4 Lobbying

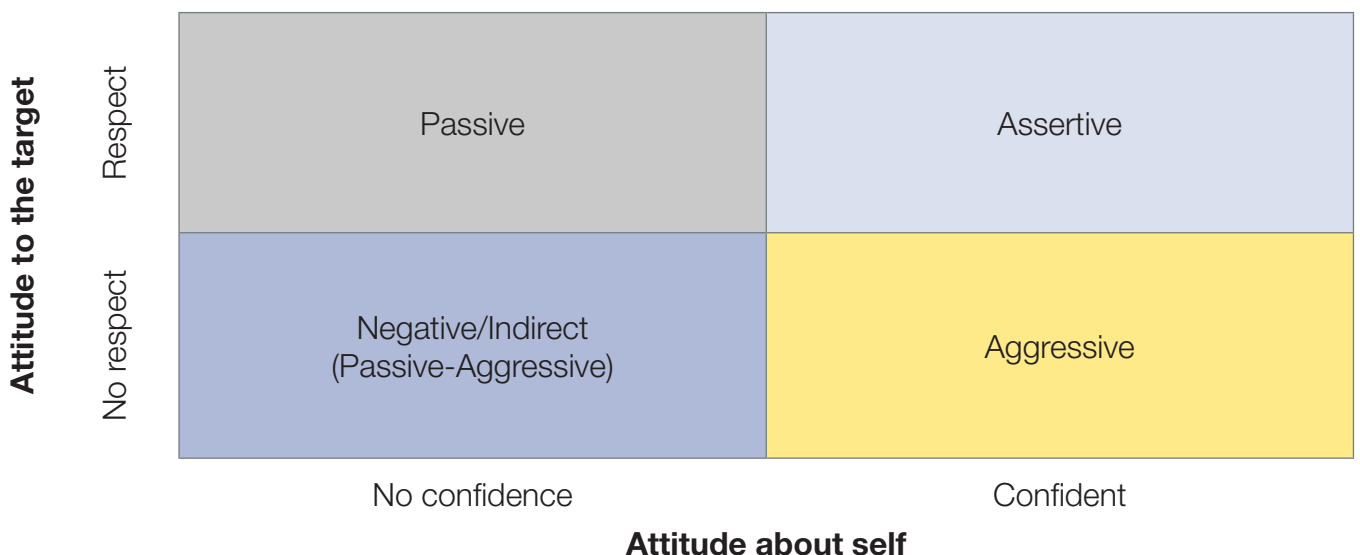
This model proposes that the behaviour expressed by a person in their interaction with another is based on the combination of two attitudes:

1. Their attitude to the other person
2. Their attitude to themselves

Both of these can be seen as positive or negative. Simply put we can ask:

1. Do they respect the other person or not?
2. Do they feel confident or not?

As the diagram below demonstrates, this can lead to one of four behaviours:



The only behaviour that can be effective in influencing others is **assertive behaviour**, as in this instance the target knows that they are being heard and respected, and are more likely to listen in return and be open to have their views challenged. Passive behaviour prevents us from putting our views across, and aggressive or passive-aggressive behaviour provokes aggressive or passive behaviour in return.

Event Timelines

<i>Name:</i>	Event timelines
<i>Overview:</i>	A graphical representation of the events that led to the current situation and those events in the future that could impact on the issue. Understanding the history of an issue can give us insights into how to change it.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 2.3 – Analyse the external environment

As part of a planning process or workshop, you could create a timeline of events that have led to the current situation on your advocacy issue. The format and timescale of the timeline will depend on your issue, what you need and would be useful to know. Timelines often break down events into three parallel tracks:

- Events that happened in the country related to the issue
- Events that took place in other countries or internationally that relate to the issue, and
- Events that happened in your organisation that relate to the issue.

Like all graphical tools, they are appropriate for working in teams or groups, as well as helping to identify relevant patterns.

An example timeline for advocacy planning:

Time:	2007	2008	2009	2010	2011	2012	2013	2014	2015
	← past					now	future →		
National									
Global									
Internal									

Fishbone Analysis

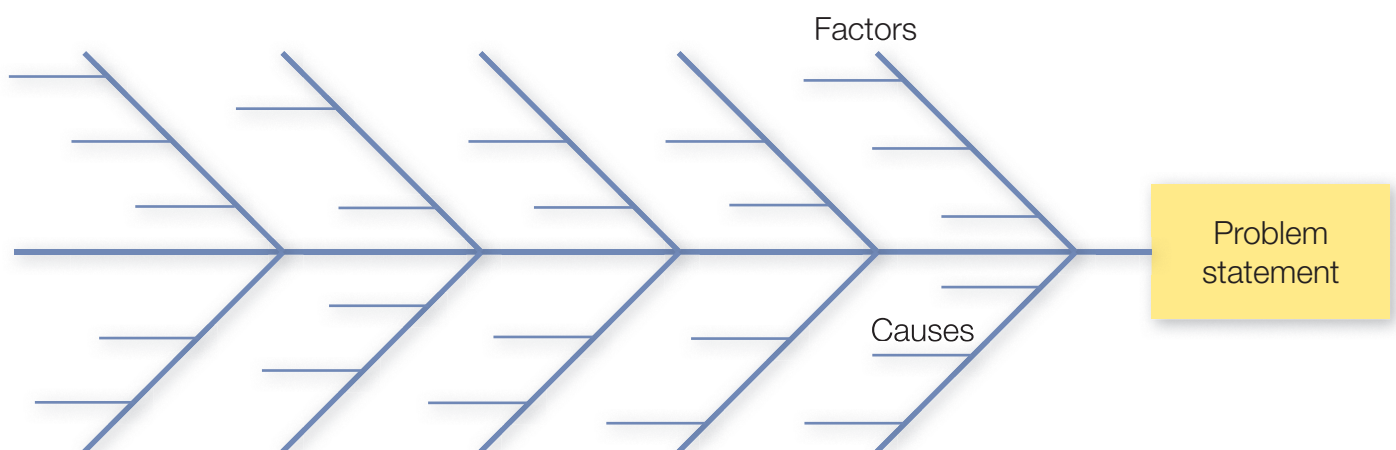
<i>Name:</i>	Fishbone Analysis (or Cause & Effect Diagram)
<i>Overview:</i>	A visual mapping tool to help identify all the causes of a problem, not just the obvious ones.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 1.2 – Problem analysis

Fishbone analysis (which is also called a Cause & Effect Diagram or an Ishikawa diagram) is a simpler version of a Problem & Solution Tree but, like the P&S Tree, it is a visual mapping tool and so ideal for use in a group. Producing a Fishbone Analysis diagram prompts the group to look at all causes of a particular problem, not just the obvious ones.

The first stage is to define the problem as clearly as possible. It can be helpful to state the problem in the form of a question (eg: Why are there insufficient primary eye-health workers in rural areas?). This should be written in a box on the right edge of the paper (the head of the fish) and a horizontal line drawn to the left of it (the fish's spine).

Next, the major factors that might be causing the problem are identified. These are represented by lines (bones) leading off the spine, which should be labelled accordingly.

Within each of these factors, brainstorm all the potential causes and write these as smaller bones coming off of each bones representing the factors. These could be written on post-it notes before being placed in the diagram in order to help with the positioning.



The finished diagram represents the group's analysis, from which the causes can be assessed in order of importance and appropriate solutions identified. It may prompt the group to undertake more research to extend or verify the analysis.

Force-Field Analysis

<i>Name:</i>	Force-Field Analysis
<i>Overview:</i>	A graphical estimation of the forces acting on a particular situation or decision and their relative strengths. Can be used for formal organisational policy decisions as well as the subconscious behavioural decisions of individuals.
<i>Main uses:</i>	<p>This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle:</p> <ul style="list-style-type: none"> 1.2 – Analyse the problem or issue 2.1 – Understand the change process (what influences the decision) 2.5 – Develop and agree key messages 3.1 – Plan activities to engage each audience

A force-field analysis is an extremely useful and versatile tool. Being able to understand the situation from the perspective of your target audiences – putting yourself in their shoes – is key to being effective in your advocacy.

The first stage is to define as clearly as possible the audience and the issue. The audience can be the person responsible for a particular decision within an institution, or they may be an individual or group of individuals whose attitudes or behaviour you want to influence. The line that divides the chart in two represents this audience and issue.

On one side of the line, list all the factors that the audience will take into account when making the decision that support the change you want (the promoting factors). On the other side of the line, list all the factors that the audience will take into account that are against making the change you want (the restraining factors).

The factors on both sides of the central line can be both rational factors as well as irrational. They can relate to the impact of the change on the intended beneficiaries, on wider society, on the organisation's political or economic interests, or on the audience's own status or interests. They may not be consciously considered by the audience being analysed but could influence their choice.

When listing these factors, you should not include “pressure from...” (the power and influence of others will be considered in the stakeholder analysis). Instead you should cite the effect of that pressure on the audience. For example, if the audience is an elected politician, then instead of writing “pressure from voters”, you should write “increase/decrease chances of re-election”.

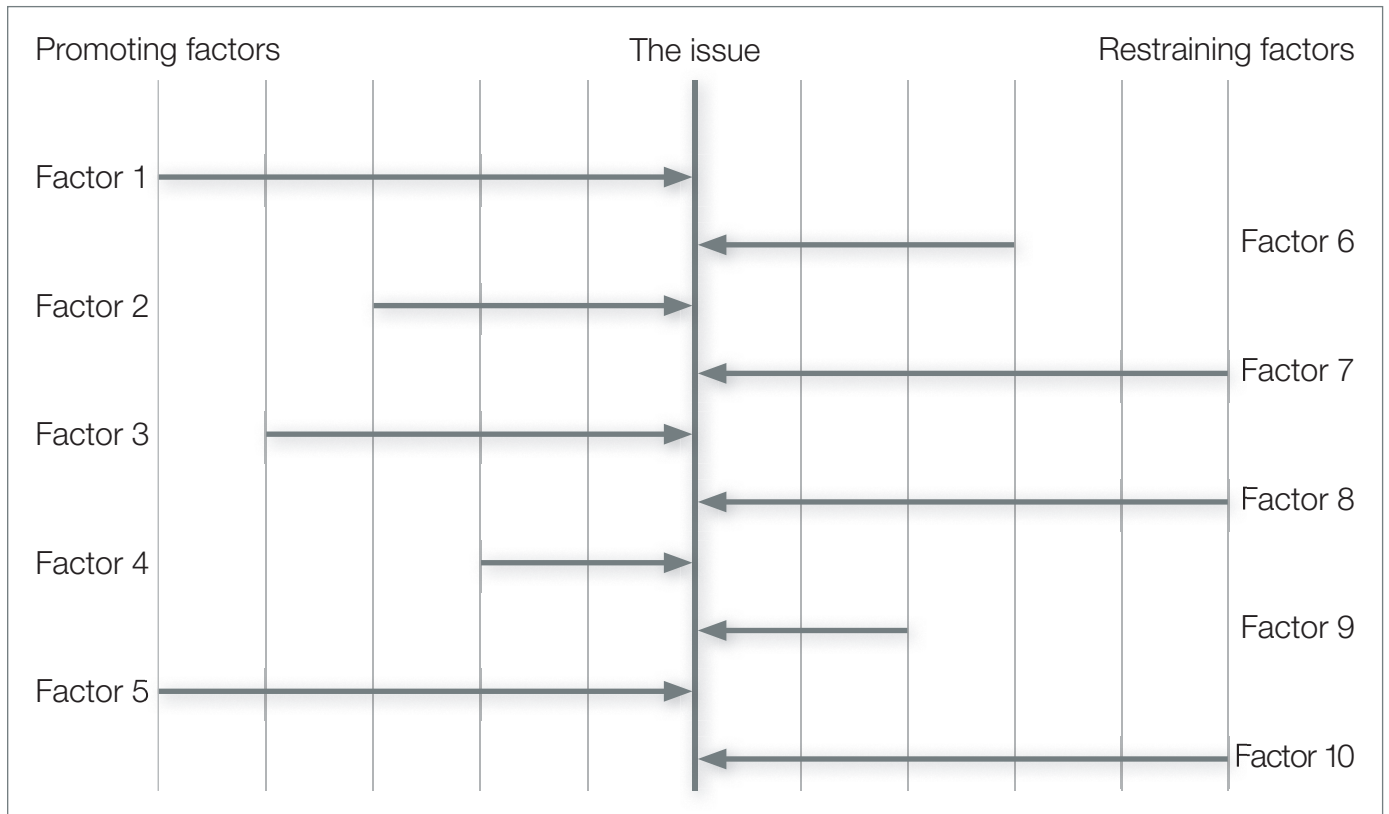
You should also be careful not to duplicate factors by writing them in different forms.

Once all the factors have been listed, you can then move to the second stage, which is to assess the relative strength of these factors **from the perspective of that audience**. It doesn't matter how important you think the factors are, only what you think the target audience's perspective would be.

This assessment can be done with varying degrees of gradation, the most common scales being from 1 – 10, 1- 5, or Low-Medium-High. In most cases a scale of 1 – 5 provides the optimum level of analysis. You represent your assessment by the length of the arrow that goes from the factor to the central line (see diagram on page 10).

Clearly, this assessment is very subjective. However, doing the analysis as a group and negotiating between you the agreed scoring helps to reduce that subjectivity. You can also ask representatives of your chosen audience to complete the analysis (as in a focus group session), but you may not get completely honest or accurate answers.

An example Force-Field Analysis:



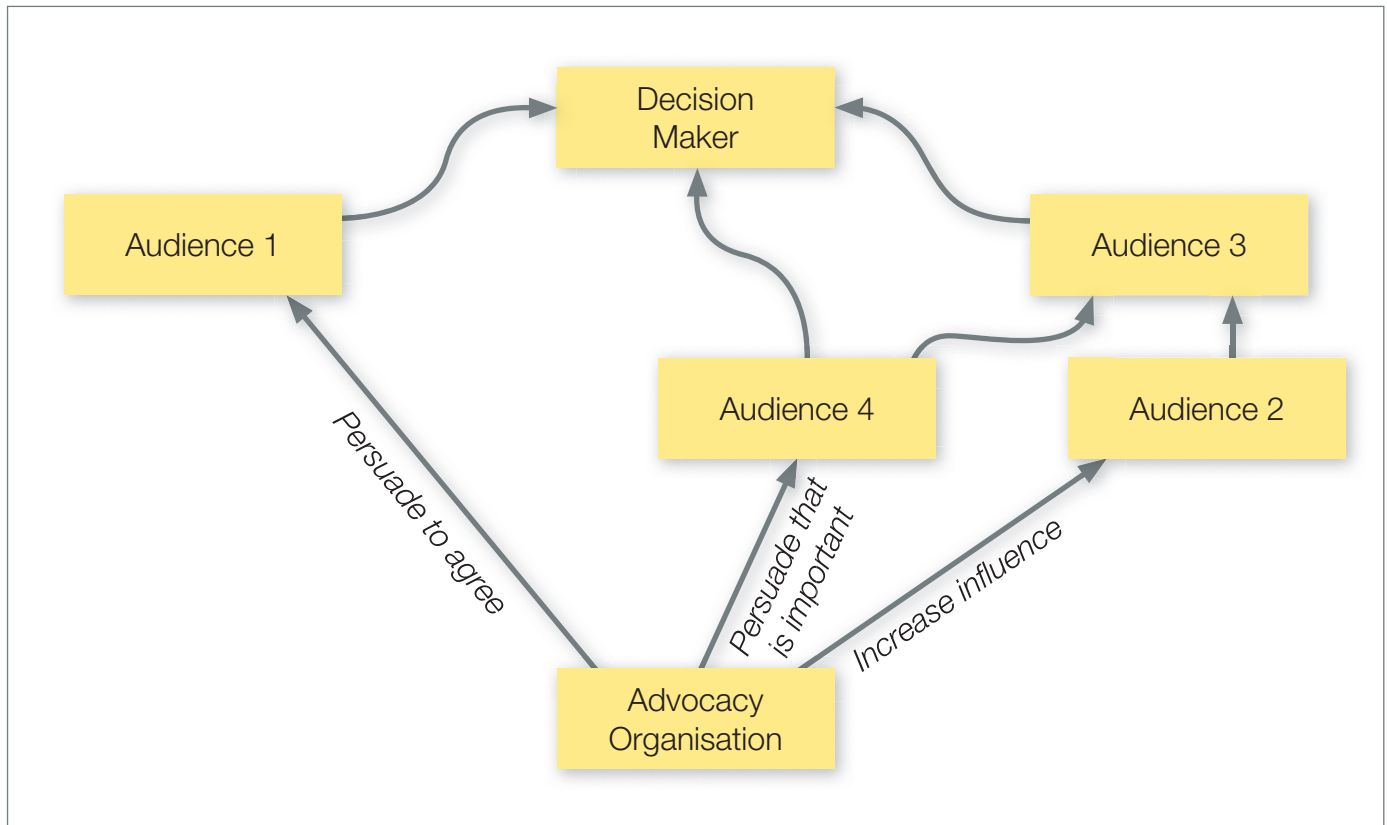
Influence Map

<i>Name:</i>	Influence Map
<i>Overview:</i>	A graphical representation of an influencing strategy.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 2.4 Select target audiences and influencing objectives

It is good practice in the development of an influencing strategy to represent it as a diagram. This has two main advantages:

1. It forces you to be clear on your strategy – who you will be targeting (and by their exclusion from the map, who you will not be targeting).
2. It is much easier to communicate to others so that they understand your strategy

The diagram should demonstrate the ‘theory of change’ that you are following – how your influence is reaching the decision maker. It shows the audiences that you are targeting and your influencing objectives for each of these audiences – see diagram on page 11.



Lobbying

<i>Name:</i>	Lobbying
<i>Overview:</i>	The process of persuasion through direct engagement, usually at a face-to-face meeting.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 4 Implement action plans

Lobbying is usually defined as the direct engagement with individuals (usually politicians or government officials) in order to influence them (although in the USA it also has a legal definition which is broader than this).

In your influencing strategy, you may have identified some individual politicians and officials whom you wish to influence. It is likely that your actions will include indirect methods of influence (ie, through general communications or the influence of others) and direct methods (such as through individual letters and personal lobbying meetings). Informal lobbying can take place through “chance” meetings at conferences, in office corridors, at a club. Formal lobbying is pre-arranged and is usually face-to-face at their office. The common feature is that the lobbying process involves a two-way dialogue.

Just as lobbying is only part of the advocacy process, so an individual lobbying meeting is only one part of the lobbying process. This section looks at what is involved with a single lobbying meeting; it assumes that the overall objectives for your advocacy are clear, and that you have a strategy that sets out a rationale for targeting this individual (be they a decision maker, an adviser or a key opinion former).

There are three distinct phases for the lobbying meeting:

1. Preparation
2. The meeting
3. Follow up

Preparation

- The key to successful lobbying, whether formal or informal, is preparation. You must:
 - Be clear why you want to influence this person – what is their role, what can they do, and what do you want them to do?
 - Know your target – what do they know and believe about the issue and about us? What are their priorities? What type of personality do they have?
 - Decide what it is you want from this particular meeting – your ideal outcome as well as your minimum expectations or ‘bottom line’. It is unlikely that you will achieve all your goals in one meeting, so you need to identify what will help move the influencing process further forward while establishing some form of on-going process and dialogue. This might involve, for example, a second meeting, an agreement to visit your project, or a promise to review the issue.
 - Agree who is going to the meeting from your side (if it is a formal meeting, it is best not to go alone), what roles people will play in your delegation and who will say what. Do not try to ensure that everyone in the delegation has an equal say. One person should be the clear lead who should also make the opening presentation. The others should be available to answer questions and to present evidence or additional points later in the meeting.
 - Be clear about what your position is and identify your sources of power. Rehearse your arguments and anticipate their counter-arguments and how you could respond to them.

You then need to arrange the meeting:

- If it is to be an informal meeting, you should find out their schedule so you can meet them “by chance”.
- If it is to be a formal meeting, you need them to agree to meet. It is likely that their agreement will follow from a process of phone and mail contact, or meetings with their subordinates. You should establish who will be attending the meeting, when and where it will take place, how long the meeting is scheduled for, and what the expected agenda is.

The Meeting

The meeting will only be successful if you conduct it with the right attitude:

- You are not trying to win an argument; you are trying to influence them and reach an agreement.
- You need to be assertive but not aggressive (nor passive or passive-aggressive). This demands both self-confidence and respect for the person you are lobbying.
- You want to question, listen and learn as much as you talk (and be seen to be

listening). Their attitudes can only change if they are actively engaged in a process of dialogue rather than passive listening.

Every meeting will be different, and you will need to be flexible to make progress. However, there are a number of stages to go through. You should:

- Arrive on time and establish rapport with your targets (how you do this is very culturally specific). Make sure everyone is introduced clearly and your credentials are established (ie, who you represent), exchanging business cards if appropriate.
- Briefly (no more than a couple of minutes) present your case to set the agenda for the meeting. You shouldn't spend too much time doing this – your target probably knows it already or else they wouldn't have agreed to meet you. Finish the opening presentation by setting out what you would like the person to do.
- Listen to their response (including any non-verbal signals) and probe them for more details if you don't understand their arguments.
- Answer their objections, but focus on your priorities and what you want them to do (don't get distracted). Keep calm. Pick up on any openings they are offering you.
- Maintain the dialogue by asking more questions, exploring options and suggesting compromise solutions, using "if...then" language.
- If you can, take notes of everything said.

Make sure something is agreed before the meeting ends, even if it just another meeting (you must establish a continuation of the process or your advocacy is dead in the water). Sum up what was agreed at the end of the meeting.

Follow Up

The first step is for the delegation to de-brief among themselves:

- De-brief immediately (before you go back to your offices)
- Review what was said and the body language used
- Gauge potential for further movement and plan your next steps
- Give each other feedback

Then you should write up the notes of the meeting and circulate them to your colleagues and network partners as appropriate.

You should also write straight away to the people you met, thanking them for the meeting and confirming in your letter what was agreed at the meeting. In this way, you are putting the agreements on the record and making it harder for the targets to change their minds.

If you agreed at the meeting to do something, you must make sure you do it promptly and well.

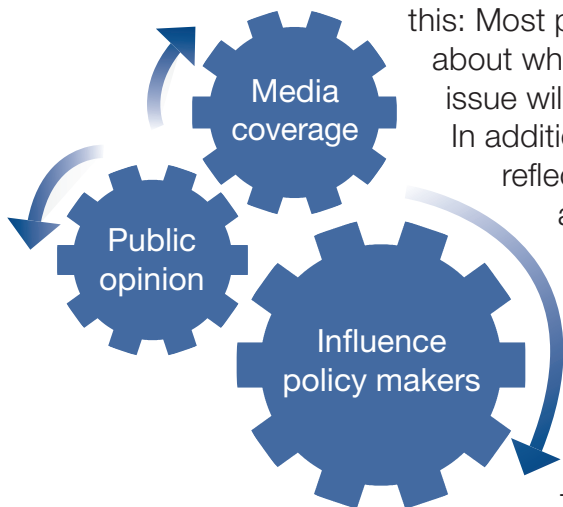
See also:

- **Assertive Behaviour**
- **Sources of Power**

Media

<i>Name:</i>	Working with the media
<i>Overview:</i>	Approaches to working with the media as part of an advocacy strategy.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 4 Implement action plan

Often advocacy campaigns target the media, by which we mean radio, TV, newspapers, magazines and internet news services that exercise editorial control over what they publish or broadcast. There are clear advantages to this: Most people rely on the media for their news and information about what is going on. Being covered in the media means that your issue will have a higher profile and may start to shape public opinion. In addition, policy makers often regard media coverage as being a reflection of public opinion, which can add weight to your advocacy campaign.



However, there are some disadvantages to media work:

- They may choose not to cover your issues despite all your efforts
- They may distort your message or misrepresent your organisation

These could be countered by paying for your coverage (as an advert, advertorial or other inducement) but this has its own problems. Apart from the cost, your message will lose the credibility of normal news coverage. Furthermore, if your story was not good enough to be published on its own merits, it is unlikely to be interesting enough to attract the attention of readers.

This section focuses on working with the media to promote our advocacy messages in the most effective way – mostly without having to pay for it.

Which media should we work with?

Different media are read/watched/listened to by different types of people, so your influencing strategy should have specified which media you wish to target in order to influence which audience.

That choice should have been based on a number of factors, including:

- Target audience – the typical profile of readers/listeners/watchers that the particular media outlet is aimed at. This could be on the basis of locality (such as a particular region or more generally rural or urban), ethnicity, educational level or social class. This may be partly determined by the language used by that media outlet. Some media are targeted at particular professional groups such as health workers or people with a particular interest or hobby.
- Reach – the numbers of such readers/listeners/viewers reached by that media outlet.
- Format and Style – what type of stories do they cover and in what way?

- Ideology – the political bias that they may put on news stories. This could be seen in terms of right and left wing, or pro- and anti- government. The government’s ownership or control of media outlets can be an issue in many countries when trying to put out a message that can be seen as critical of government policy. Equally, coverage of an issue only by the “opposition” media can make you seem to be part of the opposition, even if you do not intend this.

Overall, you must decide on what outcome you want from the media coverage, who your target group is and what your position is, and then decide which media will best help you to achieve your goals.

What types of coverage could you get?

Broadcast media (TV and Radio) could cover your issue through:

- News feature (part of a news programme) – with interview (live or pre-recorded) or video clip where possible
- Documentary feature (part of a longer documentary programme or as a single programme) – with interviews (live or pre-recorded) or video clips where possible
- Panel discussion
- Phone in programme
- New Drama or a storyline in a soap or existing drama

Coverage in the **print media** (newspapers, magazines, journals, etc) could include:

- News stories – with quotes and photos where possible
- Features (longer and more in-depth than news stories) – with quotes and photos where possible
- Photo spreads or essays (without much accompanying text)
- Cartoons
- Editorials (written by the Editor)
- Opinion pieces or “Op Eds” (written by outsiders to the paper, such as yourself)
- Letters to the Editor
- Competitions (eg, word search, quiz, etc)

On-line media (internet news sites) could include news and feature articles (as with print media) plus video and audio clips (as with broadcast media). They could also encourage feedback and debate through a ‘comments’ facility and publish links to your website. Established bloggers could also cover your issue and link to your website in their blogs and tweets and encourage discussion among their readers.

Overall, you should think broadly and creatively about the type of media coverage you want to gain and not just rely on news coverage in daily newspapers.

How do you get the media coverage you want?

The straightforward answer to this is to provide the media with what they want. And what the media want from you are the means to attract and retain an audience. Media professionals judge themselves and are judged by their employers on the size and type of audiences they attract. Commercial media outlets in particular are dependent on readers/listeners/viewers to get businesses to buy advertising space

so they can make a profit. So, if you can meet the needs of the media, they can provide you with the means to achieve your goals. It can be a win-win situation (as long as you are clear about what you want and why you want it).

To attract an audience, the media has to give their readers, listeners or viewers what they want: topical, relevant, interesting and entertaining stories. In presenting your issue, you should think about the following:

- Is it news? Is there some information here that will be new to the audience and may make them sit up and pay attention?
- Is it topical? Why should the media cover this issue now? Is there some hook that they can hang the story on, such as an international conference or a relevant anniversary?
- Is it interesting? People like stories about people, so rather than just talk about the issue, talk about individual people and how the issue affects them.
- Is it visual? TV and newspapers want pictures.
- Is it relevant? What is the relationship between the audience and the story? Does the issue affect them, or can they do something to change the situation?

The easiest way to get into the media without having our message distorted is through sending letters to the Letters Page, calling phone-in programmes on the radio, or writing comments on on-line articles or blogs. In these cases, keep messages short and to the point.

However, you will probably want to get more coverage in the media than these opportunities allow.

Your starting point should be to know your media so that you know their style and the types of stories that they like to cover, and who the editors, producers and journalists are. You should then build relationships with those individuals – these are the people who decide whether your issue is covered and what slant they put on the story, and whether to interview you or invite you to take part in a talk show or panel discussion. You want them to know and trust you.

Using these foundations, you can then talk to them directly to discuss and sell your ideas for how they can cover your issues. Direct contact (phone, face-to-face or personalised e-mail) will usually get a better response than impersonal methods such as press releases (although these also have their place, being a cheap and quick way of getting your story to a lot of different media outlets, and for setting out the story and your position clearly and succinctly) and press conferences (only worth it if you have a really big story or very high profile people to interview, or the journalists will think you are wasting their time).

Once you have gained their initial interest, you can:

- Provide them with a fully written article for them to edit and publish
- Provide them with good quality and reliable information – research, contacts, comments and quotes – so that they can write their own article
- Make yourself or other spokespeople available to be interviewed
- Take journalists to visit your projects or meet communities affected by the issue, where they can interview individuals and take pictures. The tour could also include some politicians travelling with the journalists to provide additional opportunities for articles (as well as exposing the politicians to the issues).

Media Interviews

The key to giving good interviews is preparation. What do you want to say, how are you going to say it, and what do you not want to say. You must make sure you have your facts and figures memorised, with some interesting stories about how people are affected by the issue. Prepare a “sound-bite” – a short and memorable phrase that sums up your argument or position.

Print journalists interview us to get more information and to extract interesting comments and quotes from us. Remember that there is no such thing as “off the record”.

TV and radio interviews can either be live or pre-recorded. Although live interviews can feel more stressful, they are better as what you say is being broadcast unedited. Pre-recorded interviews may never be broadcast, and if they are broadcast they will be edited with the journalist extracting what he or she sees as your most interesting or controversial comments.

Some general rules for being interviewed by TV and radio:

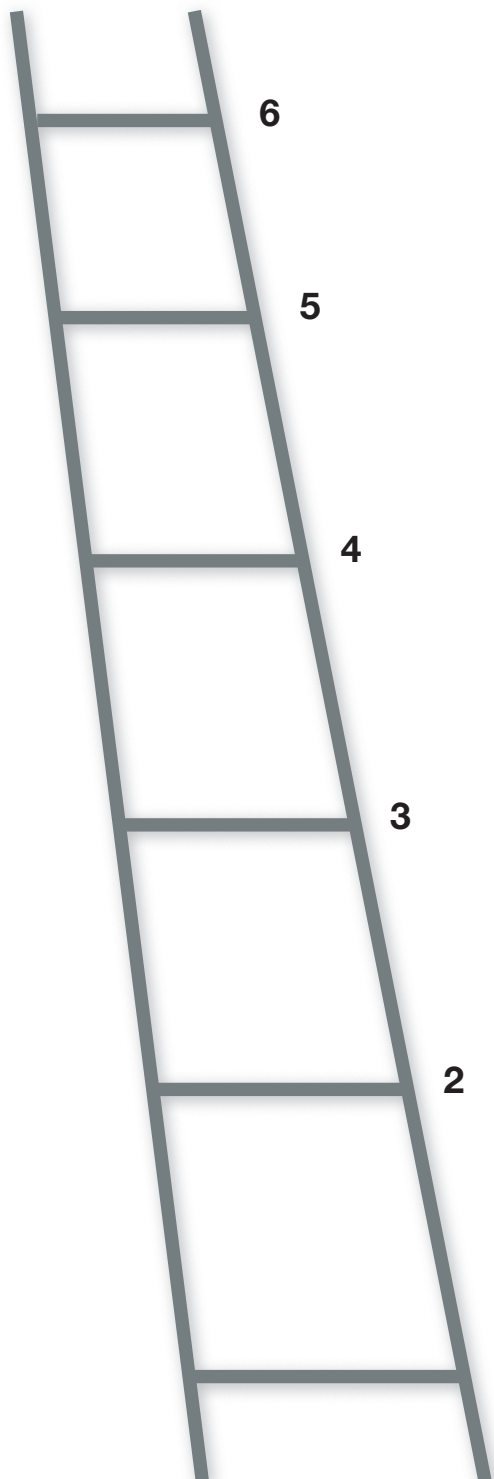
- Keep calm and polite – passionate is good, angry isn't.
- Get your main points in as soon as possible (the interview may be shorter than you think)
- Keep to the point – don't get side-tracked or waffle, and don't be afraid of repeating your main points.
- If you don't know the answer to a question then say so, and bring the topic back to your main issue. (Eg: “I can't answer that, but what is most important is that....”).
- Practice, practice, practice – ask colleagues to role-play an interview so that you are better prepared.

Conclusion

You need the media to get your message across, and the media need you to provide them with stories. You can work together effectively by building relationships of mutual trust and by respecting each other's needs.

Network Function Ladder

<i>Name:</i>	Network Function Ladder
<i>Overview:</i>	A model for describing the function of an advocacy network with regard to external representation.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 1.1 – Identify problem or issue for advocacy 2.3 – Analyse the external environment



One model for looking at advocacy network functionality is the network ladder. Each level builds on and includes all the levels below it. There may also be other functions or roles that are not directly advocacy related.

Level 6:

Secretariat empowered to represent the network to designated or all audiences within the parameters or agreed policy and strategy

Level 5:

Secretariat and/or designated members mandated to represent the network to designated audiences on specific issues

Level 4:

Network coordinates the advocacy actions of its members with designated audiences based on agreed influencing plan or strategy

Level 3:

The network agrees and members adopt common policy positions (and perhaps advocacy objectives) based on a shared analysis

Level 2:

The network coordinates and/or undertakes research shared with all members

Level 1:

The network facilitates the exchange of information and learning among all its members. Might also support or coordinate training and capacity development activities. Membership of the network is probably based on shared values or interests.

PESTLE Analysis

<i>Name:</i>	PESTLE Analysis
<i>Overview:</i>	A framework for external analysis, breaking down factors into six categories.
<i>Main uses:</i>	<p>This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle:</p> <p>1.1 – Identify problem or issue for advocacy</p> <p>2.3 – Analyse the external environment</p>

The task of external analysis can sometimes seem overwhelming. There are an almost infinite number of factors that could be taken into account, so how do you make the task more manageable and ensure that key information is not missing? One framework that can help is PESTLE, where you identify and rank the relevant factors and trends in each of the six categories:

- **P**olitical
- **E**conomic
- **S**ociological
- **T**echnological
- **L**egal
- **E**nvironmental

The factors and trends can relate to the issue as well as to your advocacy on the issue. As each advocacy issue and context is different, it is impossible to provide a definitive list of questions to address under each category, but some examples and ideas are given below.

Political factors can include (but is not limited to) the relevant policy positions of different political groups and the political power of those groups, the proximity of elections (if any), the profile of this issue within the political discourse and the degree of polarisation of opinion, etc.

Economic factors may include income and/or poverty at national, district, community and household levels, the cost of providing related services, inflation rates, national and international economic policy, etc.

Sociological factors can include demographic patterns (eg, population numbers broken down into age groups, gender, ethnic origin, marital status, occupation, geographic location, etc), education levels, belief systems, media readership, etc.

Technological factors could include the extent of the public's access to mobile phones and internet, technical innovations related to the issue, etc.

Legal factors would include the legal position on NGO advocacy as well as legislation related to the advocacy issue.

Environmental factors could include any ecological aspect to the issue as well as climate-related factors that could impact on our ability to enact the advocacy plans.

Press Releases

<i>Name:</i>	Press Release
<i>Overview:</i>	A quick and simple way of alerting the news media to an issue or story.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 4 – Implement Action plans

Press Releases should be written to interest the journalist in the story and to give them the bare bones and facts that they can use to write their article. There are some conventions to follow to encourage the journalist to read it rather than just throw it in the bin (some media outlets can receive hundreds of press releases every week):

- Always use headed paper showing your organisation's name, address and phone number. At the end of the press release also include the name and contact details (including out of normal office hours) of an individual in your organisation that journalists can contact for more details.
- Always type the press release, using wide margins and 1.5x or 2x line spacing (so that editors can make their own notes between lines).
- Only write on one side of the page. If using more than one page, always number the pages and put "MORE FOLLOWS" at the bottom of every page except the last one, which should have "ENDS" at the bottom.
- Keep the press release short – no more than two sides of paper.
- Give all the basic information in the first paragraph – who, what, where, when, why and how.
- Include a short and direct quote, naming the person giving the quote and their position/title.
- Give the press release a short and descriptive headline.
- Date the Press Release. Above the headline, write "FOR IMMEDIATE RELEASE" or "EMBARGOED UNTIL date & time". Use embargoes sparingly – journalists don't like them.

Rhetoric

<i>Name:</i>	Rhetoric
<i>Overview:</i>	Rhetoric is the art of persuasion through the use of language. It was developed by the ancient Greeks and its simple techniques are still taught today.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 2.5 Develop key messages and arguments 3.1 Plan actions to engage and influence each audience 4.1 Lobbying 4.2 Working with the Media

The Greek philosopher Aristotle (384-322 BCE) wrote extensively about Rhetoric – communications intended to persuade others. He stated that there were three key elements to a speaker’s ability to influence:

- **Ethos** – how the character and credibility of a speaker can influence an audience to consider him/her to be believable
- **Logos** – the use of reasoning, either inductive or deductive, to construct an argument.
 - Inductive reasoning uses examples (historical, mythical or hypothetical) to draw conclusions
 - Deductive reasoning uses generally accepted propositions to derive specific conclusions
- **Pathos** – the use of emotional appeals to alter the audience’s judgement.
 - This can be done through metaphor, amplification, story-telling or presenting the topic in a way that evokes strong emotions in the audience

This can be applied to advocacy on eye health. You need to ensure that your organisations and your spokespeople are respected as experts and trusted as impartial. You need to ensure that your arguments are clear and are illustrated with compelling examples. you need to ensure that your communications evoke strong emotions in your audiences through the stories you tell and the language you use.

There are a number of rhetorical techniques that we can use in your communications – both spoken and written:

- **Story telling** is one of the oldest and most effective means of communication. you have to be able to tell stories about individual people and how they are affected by your issues.
- **Contrasts** can be phrased in different ways. They can be simple comparisons (eg, the cost of a life-changing cataract operation in Bangladesh is the same as) or they can be contradictions (“I come here to bury Caesar, not to praise him”). Phrase reversals are also very powerful (“Think not what your country can do for you, but what you can do for your country”).
- **Puzzles & questions** are very good ways of attracting the audience’s attention at the beginning of a speech or document. It can be a question that you will then answer, or it can be a question with no answer (often called a rhetorical question).
- **Lists of three** are very powerful. There are many examples – “Liberté, égalité, fraternité”, “Government of the people, by the people, for the people”. If one in the list is longer than the others, it should be placed last – eg: “Life, liberty and the pursuit of happiness”.
- **Metaphors & similes** are excellent at creating an image in people’s minds, which is especially important if your topic is complex or technical. A metaphor is when you say one thing is the same as another (eg: “avoidable blindness is a tyrant who locks people in their homes”) whereas a simile is when you say something is like something else (eg: “for someone with cataracts, having surgery is like winning the lottery – their renewed sight opens up so many opportunities for a better life”).
- **Allegories & parables** are extended metaphors told as stories, and are effective enough to have founded religions.

- **Proverbs & aphorisms** are good ways to link your issue to accepted ‘truths’.
- **Alliteration & rhyme** can make your words sound more attractive and make them memorable. Alliteration is when the beginning of words sound the same (eg: “the Value of Vision”) and rhyme is when the endings sound the same (eg “the Right to Sight“)
- **Satire & irony** can be used to engage audiences in your issue and highlight how the current situation is unacceptable.

Risk Management

<i>Name:</i>	Risk Management
<i>Overview:</i>	A simple but essential process of assessing and reducing the risks involved in advocacy.
<i>Main uses:</i>	This tool is most appropriate in all stages of the Advocacy & Campaigning Cycle, especially: 1.1 Identify advocacy issue 1.4 Agree aim and objectives 3.3 Finalise M&E and Risk Management plan

All advocacy involves risks. It is your responsibility to manage those risks so that they are acceptable to the people that face them.

Risk management is a two stage process of:

- Risk Assessment
- Risk Reduction

Risk Assessment

The first part of the process is to assess the risks that you face to produce a “risk profile”.

To do this, all the potential risks are brainstormed so that a comprehensive list has been created. These potential risks are then ranked according to two factors: the likelihood of the risk happening and the impact it would have if it does. Those factors can be scored according to an agreed scale (a scale of 1 – 5 is usually sufficient). The scores for each factor are multiplied together to give an overall risk factor, with those risks having the highest scores getting the most urgent attention.

Benchmarks should be assigned for certain impacts to help ensure that risk profiles are easily comparable and to reduce time taken in assigning them a score. For example, in a 5-point impact scale the risk of death would clearly have a score of 5, whereas risk of a 10% drop in income might only merit a score of 2. Consultation with affected parties may be necessary to properly assess the factors.

Risk Reduction

Assessment is only useful if it leads to some form of action. Starting with the highest ranked risks, you need to address three questions:

1. What action can you take to reduce the likelihood of the risk occurring?

2. What action can you take (either now or in the future as a contingency plan) to reduce the impact of the risk if it does occur?

3. Is the risk still too high to continue with the advocacy campaign?

The risk management profile and your response should be documented and continually updated. It should form one part of the decision-making and approval process, and will be a critical document in the event of any subsequent investigation or litigation.

Risk Management Table

Description of the risk	Impact of risk happening (1 – 5)	x	Likelihood of risk happening (1 – 5)	=	Overall risk factor (1 – 25)	Action to reduce and mitigate risk
		x		=		
		x		=		
		x		=		

SMART objectives

Name:	SMART objectives
Overview:	A standard way of ensuring that objectives are written well.
Main uses:	This tool is most appropriate in all stages of the Advocacy & Campaigning Cycle, especially: 1.4 Agree aim and objectives

Objectives should be written as the outcomes you hope to achieve not the activities you will undertake. For example, instead of writing “*to lobby the government to increase spending on eye health by 20% in the next budget*”, you should write “*the government to increase spending on eye health by 20% in the next budget*”. By doing this, you are not pre-judging what approaches you will take to achieve your objective. Although this may seem a matter of semantics, it is important to clear our minds of preconceptions before we develop our strategies.

Whenever possible, objectives should be **SMART**:

- **S**pecific
- **M**easurable
- **A**chievable (or Realistic)
- **R**elevant (or Appropriate)
- **T**imed

For an objective to be **specific**, it must be very clear what the change is and who is responsible.

They should be **measurable** so that you know if you have achieved them or not (or how much progress you are making). Numbers are not always needed for an objective to be measurable.

Achievable objectives can still be ambitious and not guaranteed, but there should be some prospect of success to justify the time and resources you will spend.

Relevant means that the objective, if achieved, will contribute in a significant way to achieving your aims.

Timed objectives indicate how long you expect to spend achieving them. Given the complexity of the external environment, timing can be difficult to predict, but the objective should show for how long you are prepared to expend resources in your campaign in an effort to achieve it.

Sources of Power

<i>Name:</i>	Sources of Power
<i>Overview:</i>	A model for helping to identify the sources of power and influence that we (and others) have with a particular audience. There are many different models available for power analysis. This model is particularly suited for advocacy as it looks at those sources of power that vary according to the target and the issue.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 2.2 – Assess capacity to influence change

Power is the ability to act or affect something strongly.

An individual's power can come from either external or internal sources:

- Internal power, or personal power, comes from within you
- External power is given to you by other people

This can be equated to an organisation's power:

- Internal power relates to organisational capacity
- External power relates to the organisation's influence

External power is given to an individual or organisation by other people according to how they perceive you. According to this model, there are six sources of external power:

Expert knowledge:

The audience believes the organisation's case because it perceives it as being based on expert knowledge (at least as expert as the opposing voices).

In the short-term, this perception may be built through publishing well-documented research. Credibility could be enhanced through the endorsement of and/or participation in this research by acknowledged 'neutral' experts. In the long-term, this perception is only built through the audience's experience of the organisation's previous messages. Have they been authoritative before? Any instance of being proved wrong or partial can undermine an organisation's expert authority for some time.

Legitimate:

The audience believes that the organisation has the right to speak out on a particular issue. This can be because the issue clearly impacts on the organisation's public work, or because the organisation has some form of statutory or official status within a particular policy arena.

Lack of perceived legitimacy undermines an organisation's influence significantly, but once legitimacy is established with a particular audience on an issue, further strengthening a sense of legitimacy will not add extra power.

Representation:

The audience believes that the organisation is representing the views of others – for example, members, supporters, project partners, etc. The level of influence that arises from this depends on the importance of the constituency being represented, and how explicit the process of representation is. Organisations need to be careful not to undermine their case by over-claiming their representivity. For example:

- Has there been a formal and transparent process of reaching a representative position? Is this position consensual or majority based? Was the constituency pre-screened to exclude opposing viewpoints?
- Is the constituency being represented clearly defined? To what extent is the target audience concerned about the views of this constituency? Are their views likely to be shared by other constituencies?

Reference:

The audience sees the values and underlying beliefs of the organisation as being close to their own, or to which they would like to associate themselves. This could arise from a shared political or religious identity, or the 'halo effect' of NGOs being seen as 'modern-day saints'. This identity can be very clear for some organisations, and unclear for others.

Establishing an organisational identity is a long-term process, and can be affected by the 'identity' of the spokesperson. Associations with other organisations or celebrities can also help establish in the audience's eye what you stand for. Individuals representing organisations can also be given reference power by their advocacy targets if they have a positive personal or professional relationship with that target.

The above sources of power can be applied in relation to any audience, whether it be the advocacy target itself or to intermediate audiences. The sources listed below are typically only applied in relation to the target or decision maker as audience.

Trade:

The organisation has resources or information that the target wants, and which can be exchanged for the target agreeing with the organisation's messages.

For NGOs, this is typically more significant when influencing partner organisations who they also fund, rather than in influencing government bodies. However, the power of information should not be under-estimated, and this may be highly significant when assessing the influence of opponents (for example, trans-national companies).

Reward & Punishment:

The main opportunity for non-profit organisations to reward or punish the target is through praise or criticism. In a face-to-face negotiation, a little praise can go a long way. However, making the praise or criticism public can give it extra weight, depending on the organisation’s strategy and its influence with these other public audiences.

This power can be enhanced through increasing an organisation’s ability to communicate its view (by building its relationships with the media, for example) and the degree of trust that public audiences have in the organisation (relating to the sources of power outlined above).

It should be emphasised that all the above sources of power are dependent on the audience’s perception of the organisation, rather than on any objective reality. Therefore an organisation’s power will vary significantly between different audiences.

Stakeholder Analysis

<i>Name:</i>	Stakeholder Analysis
<i>Overview:</i>	This form of stakeholder analysis (developed by the author) helps us to make clearer and better-informed choices of target audiences in order to exert maximum influence on the decision maker for policy change objectives. It also helps us to determine our influencing goals with each of these target audiences.
<i>Main uses:</i>	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 2.4 – Select target audiences

This form of stakeholder analysis has five stages:

1. Clarify the objective and decision maker
2. List all the stakeholders
3. Analyse the stakeholders
4. Sort the results of the analysis
5. Select your target audiences and influencing approaches

Like most planning tools, it is best done in a small group and followed systematically in order to encourage both analytical and creative thinking. To facilitate maximum participation, all writing should be done on wall charts or flip charts. The participants should be familiar with the stakeholder analysis technique, the advocacy/campaigning issue being addressed and the advocacy/campaigning context around the decision maker (through having previously used other situation analysis tools such as SWOT, PESTLE, Decision Flowcharting, Target Mapping, etc).

Stage 1: Clarify the objective and decision maker

Stakeholder analysis can only be done for a single policy change objective that is clear and specific and with a named decision maker.

- If you have more than one objective, then you need to do a separate stakeholder analysis for each objective.

- Most policy change objectives will have a single decision maker (see 2.1) although there will be many other stakeholders involved in the decision making process, including decision advisors and approvers. However, there are some instances when decisions are taken by committees – for example, by the European Union’s Council of Ministers. In these circumstances, it may be necessary to do a stakeholder analysis for each member of that committee.

Before you start, ensure that every member of the group doing the stakeholder analysis is clear about the objective and the decision maker.

Stage 2: List all the stakeholders

Stakeholders are people and organisations who are affected by a particular issue, or who can influence the issue. For the purposes of the analysis, stakeholders can be individual people and organisations, or they can be groups or categories of people and organisations who share a broadly common position and interest on the issue.

In order to create the list of stakeholders, the group should do a classical brainstorm. The aim here is to get a long and comprehensive list. Participants should be encouraged to be creative in their suggestions, so the rules of brainstorming should be strictly applied (that is: all suggestions accepted and written down, no discussion or criticism of ideas until the brainstorm is over, keep the pace quick and the mood light-hearted).

When the brainstorming is over, the group may need to clarify how some of the stakeholders are defined so that their description is specific. You may also need to divide some stakeholders into smaller groups (or perhaps combine stakeholders into larger groups) so that each group can be said to share a broadly common position and interest on the issue.

Stage 3 – Analyse the stakeholders

In order to provide the analysis needed for selection, the stakeholders will be assessed according to three basic criteria:

1. How influential, relative to the other stakeholders, can this stakeholder be over the decision maker?
2. To what extent does this stakeholder agree or disagree with the advocacy objective?
3. How importantly, relative to the other issues that they face, does the stakeholder view the advocacy objective?

The answers to these questions can be quite simple:

How influential, relative to the other stakeholders, can this stakeholder be over the decision maker? You just need to answer this question as either High, Medium or Low. You are judging potential influence here (the stakeholder will only be exerting actual influence if they also feel that the issue is important) and this should be fairly easy to assess. If there is some doubt, then it may be helpful to refer to the tool on Power & Influence.

To what extent does the stakeholder agree or disagree with the advocacy objective? Here there are five potential answers:

- Solidly in favour (ie – your objective is so integral to their values or interests that they could not be persuaded otherwise)

- In favour (ie, they are sympathetic but could be persuaded to change)
- Neutral or undecided
- Against (ie, they are sceptical but could be persuaded to agree)
- Solidly against (ie, the opposing position is so integral to their values or interests that they could not be persuaded otherwise)

It is important to remember that you are judging whether they are in support of your specific objective, not the overall aim. You also need to identify their actual position and not their public statements.

For example, the Director of Infectious Diseases in the Ministry of Health would be in favour of improved eye-health in the general population, and they may say this publically, but during budget negotiations they will in all likelihood be arguing in favour of an increase in their own budget, and by implication (given limited resources), against an increase in the eye-health budget.

How importantly, relative to the other issues that they face, does the stakeholder view the advocacy objective? Again the answer is fairly simple – High, Medium or Low. However, you must be realistic when answering this question, as it is easy to over-estimate how importantly people see your issues. If there is any doubt, imagine that they have come into their office on a Monday morning with a huge pile of papers in their in-tray (including your issue). Which will they address first? Where will your issue fit into their list of priorities?

The results can be recorded by drawing a table onto a wall chart:

Stakeholder	Influence of stakeholder over Decision Maker	Attitude of stakeholder to the objective	Importance of the issue to the stakeholder
Stakeholder 1	H	AA	M
Stakeholder 2	M	N	L
Stakeholder 3	L	P	H
Stakeholder 4	L	PP	H
Stakeholder 5	M	AA	L
Etc			

(AA = Solid Anti; A = Anti; N = Neutral; P = Pro; PP = Solid Pro; L = Low; M = Medium; H = High)

The team should be able to make informed judgements to answer these questions without further research, based on their existing knowledge. Disagreement in the team about the answers may indicate that the category of stakeholder needs to be divided into more specific groups. If the team still can't decide, then further research may be needed.

Although these three questions are quite simple, the combination of the answers gives us a deep and powerful tool to prioritise and select our target audiences.

Stage 4 – Sort the results of the analysis

It is hard to interpret the results when they are displayed on a table, so to make it easier the results should be transferred onto the **Allies & Opponents Matrix**:

Influence of the stakeholder over the decision maker	High					
	Medium					
	Low					
		AA	A	N	P	PP
		Attitude of the stakeholder to the objective				

The Matrix should be written on large wall charts, and the names of **all** the stakeholders written in the appropriate boxes according to the analysis set out in the table. The vertical axis represents the influence of the stakeholder and the horizontal axis shows their attitude to your position. The 3rd dimension – how important is the issue to the stakeholder, relative to the other issues they face – is represented by the use of a particular colour or symbol when writing in the name of the stakeholder – see example below:

Influence of the stakeholder over the decision maker	High	Stakeholder 1 Stakeholder 11	Stakeholder 15	Stakeholder 7 Stakeholder 15	<u>Stakeholder 9</u>	
	Medium	Stakeholder 5	Stakeholder 12	Stakeholder 2	Stakeholder 6 Stakeholder 17	Stakeholder 10
	Low		Stakeholder 13	Stakeholder 8	<u>Stakeholder 3</u>	<u>Stakeholder 4</u> Stakeholder 16
		AA	A	N	P	PP
		Attitude of the stakeholder to the objective				

Importance of the issue to the stakeholder:

Plain text = Low

Bold text = Medium

Bold & Underlined text = High

This gives you a good visual representation of the current political dynamics of the situation that you want to influence.

Stage 5 – Select your target audiences

From the Allies & Opponents matrix, you can easily identify who are your most significant allies, opponents and neutrals (who might be called “the battleground”).

Influence of the stakeholder over the decision maker	High	Key Opponents		Key neutrals “The Battleground”		Key Allies
	Medium					
	Low					
		AA	A	N	P	PP
		Attitude of the stakeholder to the objective				

However, this assessment is limited as the stakeholder groups are not fixed in their positions and can be influenced. You want to shift the balance of power and ideas so that there are more stakeholders in the top right corner who also see the issue as important. Therefore, this matrix is used to help select from the stakeholders who would be the most suitable target audiences whom you can access and influence in order to achieve that shift in the balance of power and ideas.

You have to make clear, focussed and strategic choices here – you cannot target everyone and still hope to have a significant effect on their attitudes and behaviour. The matrix does not give you the answers automatically. You still need to use your experience and judgement as to how easy they will be to access and persuade, as well as to what extent targeting one audience might help you influence another.

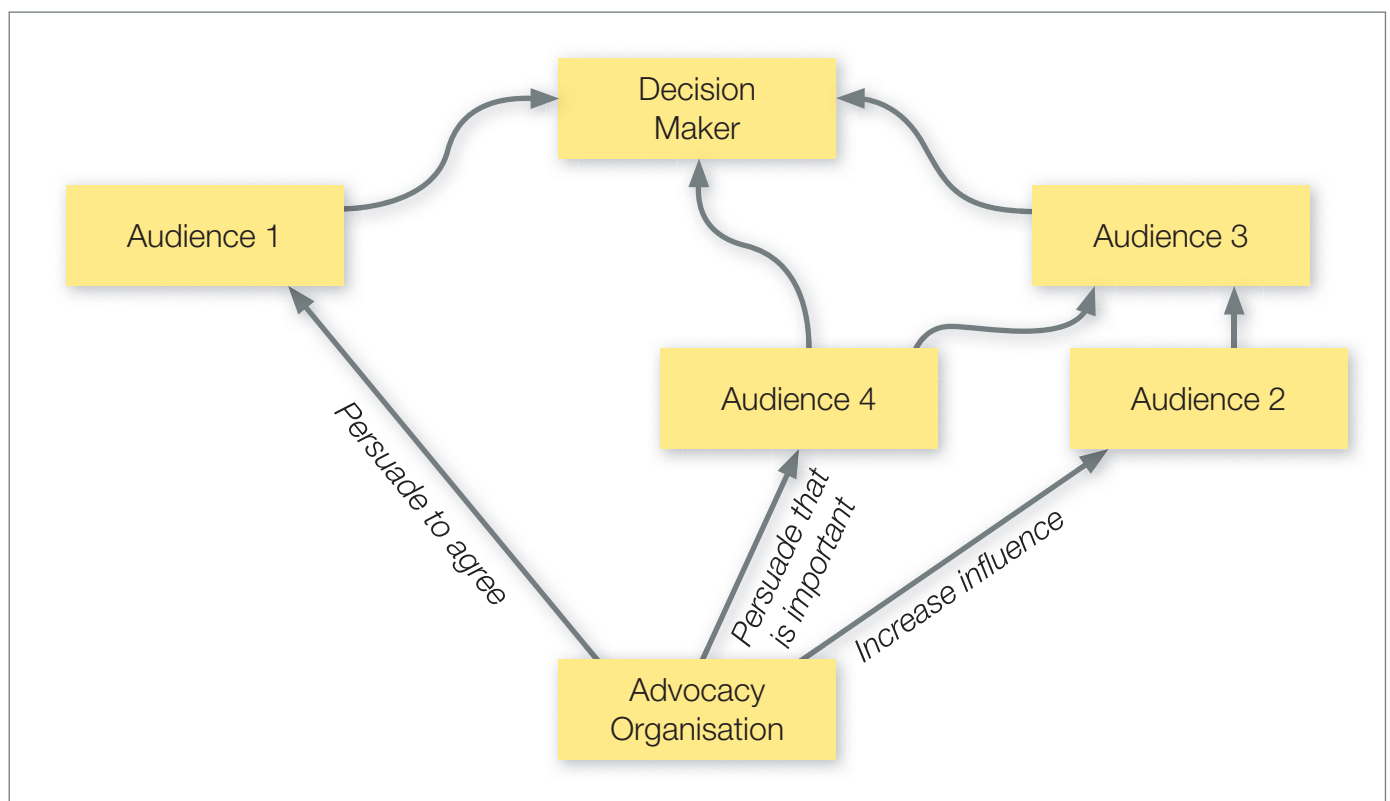
There are five potential influencing strategies, and which of these is appropriate for each chosen audience will depend on its position on the matrix:

- Persuading the stakeholder to agree with your position (*mainly for influential neutrals and soft opponents*)
- Persuading the stakeholder that the issue is important (*mainly for potential allies with high influence but low interest*)

- Build alliances (*with allies*)
- Helping to increase the influence of the stakeholder (*mainly for allies with low influence*)
- Reducing the influence of the stakeholder (*mainly for opponents with high influence*)

Some strategies are more resource-intensive than others, and the level of available resources needs to be taken into account in making the selection of target audiences.

Once the selection has been made, it should be represented in an Influence Map:



SWOT Analysis

<i>Name:</i>	SWOT analysis
<i>Overview:</i>	SWOT analysis is a versatile and widely used tool in all forms of planning, focussing attention on the four key areas of strengths, weaknesses, opportunities and threats.
<i>Main uses:</i>	<p>This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle:</p> <ul style="list-style-type: none"> – Identify problem or issue for advocacy 2.2 – Assess capacity to influence change 2.3 – Analyse the external environment 3.3 – Complete risk management and M&E plans

A SWOT analysis is a very useful tool for helping to assess both internal and external factors before making any strategic choices, covering the four key areas of:

- Strengths
- Weaknesses
- Opportunities
- Threats

It is typically written in a 2x2 matrix (see next page) as Strengths & Weaknesses are mainly internal and Opportunities and Threats mainly external, with Strengths and Opportunities being positive and Weaknesses and Threats being negative.

Strengths		
Weaknesses		
	Opportunities	Threats

However, as this is such a commonly used tool, it is often done quite badly. Results are often superficial – just listing factors rather than analysing them.

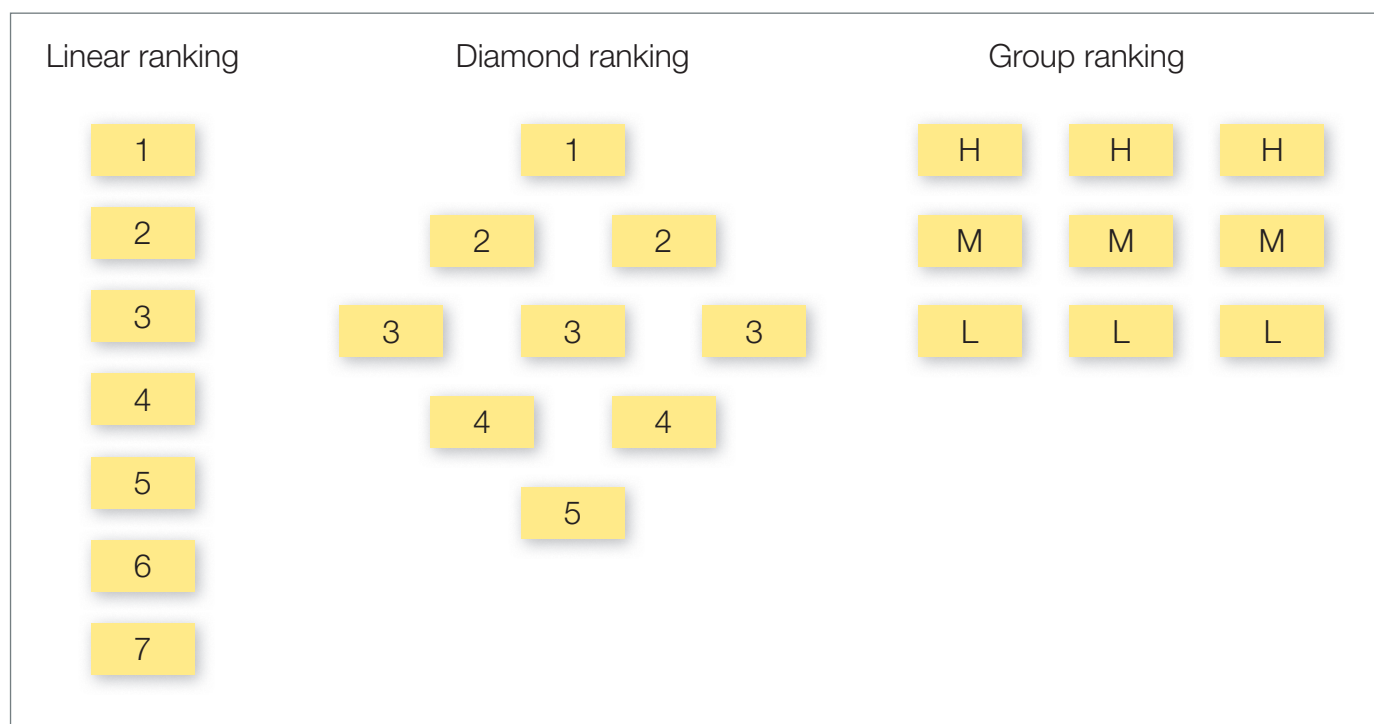
A true SWOT analysis goes through the following stages:

1. **Ensure clarity on the subject being analysed** – the more specific this is, the easier and better will be the analysis. For example, a SWOT analysis about an NGO in general will be very different to one focussed on that same NGO's ability to influence health policy in a particular country.
2. **Brainstorm factors in each of the four categories** – again being as specific as possible with each factor. It may be helpful to brainstorm these onto post-it notes.
3. **Rank the factors within each category** – this is where the depth of the analysis happens. For guidance on ways to undertake ranking exercises, see Ranking Systems.

Ranking systems

<i>Name:</i>	Ranking systems
<i>Overview:</i>	When different factors need to be ranked in order of importance, it is not always appropriate or possible to do a simple linear ranking. Alternative approaches are available.
<i>Main uses:</i>	<p>This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle:</p> <ul style="list-style-type: none"> 1.1 Identify problem or issue 1.2 Analyse problem or issue 1.4 Select aim and objectives 2.1 Understand the change process 2.2 Assess own capacity to influence change 2.3 Analyse external environment 2.4 Select target audiences 3.3 Complete risk management and M&E plans

There are many different forms of ranking, including simple linear ranking in order of importance, diamond ranking, or grouping into high, medium and low significance (see diagrams below). To undertake one of the ranking exercises, it is easier to write the items being ranked onto different cards or post-it notes so that they can be moved around until the group agrees the ranking.



Target Audience Planning Template

Name:	Target Audience Planning Template
Overview:	This template is designed to help plan activities with named target audiences to achieve previously agreed influencing objectives.
Main uses:	This tool is most appropriate in the following stages of the Advocacy & Campaigning Cycle: 3.1 – Plan activities for each audience

Audience		
Influencing objectives		
Starting point & other useful information		
M&E indicators and process		
Communication activity	Purpose/objective	

Appendix A

This section includes information on a number of international agreements and initiatives that can be used to support your advocacy:

- VISION 2020
- The UN Convention on the Rights of People with Disabilities (UNCRPD)
- The Millennium Development Goals (MDGs)

A number of other international, and regional, human rights conventions protect the rights of persons with disabilities specifically, or have provisions concerning persons with disabilities. Details can be found at the UN's Enable website – www.un.org/esa/socdev/enable/disovlf.htm

This section also includes links to a number of websites that provide data and other resources to support advocacy on eye health.

VISION 2020: The Right to Sight

The VISION 2020 Global Initiative was launched in 1999 with the goal of integrating high quality equitable eye-health services into strengthened national health systems. It has the twin aims of:

- Eliminating avoidable blindness by 2020;
- Preventing the projected doubling of avoidable visual impairment between 1990 and 2020.

VISION 2020 has established a set of global targets for the provision of eye-health services and their resourcing; these are adjusted to fit different national contexts. The targets provide an agreed common framework and guidance for the planning and collaboration of all the different stakeholders involved: state actors, multi-lateral donors, non-government organisations, public and private sector organisations.

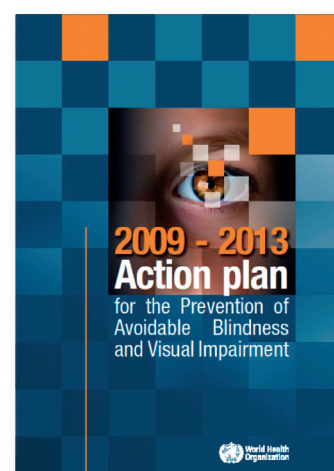
In May 2009, Health Ministers attending the 62nd World Health Assembly (WHA) adopted Resolution 62.1 which approved the WHO Action Plan on Prevention of Avoidable Blindness and Visual Impairment for the period 2009-13. This Plan was developed in collaboration with IAPB, and reflects the targets established by VISION 2020: The Right to Sight.

The Action Plan provides guidance for identifying the main global challenges for eye-health, opportunities for addressing them, and the action to be

taken by the international community in order to improve eye health globally.

It identifies three core approaches: disease control, human resource development, and infrastructure and technology.

The Action Plan follows and builds on two earlier WHA Resolutions WHA 56.26 adopted in 2003, and WHA 59.25 adopted in May 2006. WHA 59.25 "Prevention of avoidable blindness and visual impairment" urges Member States to reinforce efforts to set up national VISION 2020 plans,



mobilise resources and include prevention of blindness and visual impairment in national development plans and goals. Member States are called on to report their progress in eliminating avoidable blindness to WHA on a three yearly basis.

At its meeting in January 2012, the WHO Executive Board adopted a “Decision” to ask the WHO Secretariat to draw up a new Action plan to address avoidable blindness and visual impairment during 2014-19. This should provide a solid platform on which to pursue the objectives of VISION 2020 for the next five years.

UN Convention on the Rights of People with Disabilities (UNCRPD)

The United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) entered into force as international law in May 2008. So far (as at February 2012), 153 State Parties (ie countries) have signed; 110 have also ratified the instrument. The Convention:

- Seeks to “promote, protect, and ensure the full and equal enjoyment of all human rights, and fundamental freedoms by all persons with disabilities”;
- Does not confer any new rights. Rather it reaffirms that all persons with all types of disability must enjoy all human rights and fundamental freedoms on an equal basis with others. It imposes new obligations on signatories to ensure that the disabled are given equal opportunities such as access to education, health, employment, etc;
- Identifies areas where adaptations have to be made for persons with disabilities to effectively exercise their rights;
- Requires State Parties to monitor, and periodically report on their implementation of the Convention. Civic society has the right to participate in the monitoring process. Oversight will be provided by an elected, independent, UN Committee on the Rights of Persons with Disabilities.

In addition, the Convention’s Optional Protocol (90 signatures: 63 ratifications)

- Binds State Party signatories to recognise the competence of the UN Committee on the Rights of Persons with Disabilities, and allow their citizens to petition the Committee if they consider their rights under the Convention have not been fully respected.

While not having the force of international law, the United Nations General Assembly has adopted a number of resolutions over the years to promote the rights, and needs, of the disabled. Perhaps the most significant, recent, Resolution is No. 64/131 adopted in February 2009 on “**Realising the Millennium Development Goals for persons with disabilities**”. This:

- Urges the UN system to integrate disability issues into its work across the board;
- Encourages donors to ensure that their development cooperation programmes are inclusive of, and accessible to, persons with disabilities;
- Emphasises the importance of the participation of persons with disabilities at all levels of policy making;
- Calls on governments to build up knowledge databases about the situation of persons with disabilities to facilitate policy planning and evaluation.

Millennium Development Goals (MDGs)

“The eight Millennium Development Goals (MDGs)... [to be achieved by] the target date of 2015 – form a blueprint agreed to by all the world’s countries and all the world’s leading development institutions. They have galvanized unprecedented efforts to meet the needs of the world’s poorest”.

<http://www.un.org/millenniumgoals/bkgd.shtml>

Below the MDGs are listed alongside some suggestions of how they relate to issues of eye health and avoidable blindness.

MDG 1: Eradicate extreme poverty and hunger.

- Over 1 billion people suffer malnutrition (FAO, 2009). A high proportion are children. Vitamin A deficiency is a significant cause of blindness in children.

MDG 2: Achieve universal education.

- Of the 75 million of primary school age out of school, over 30% are disabled. In India. 50% of blind children never enrol in school.
- VISION 2020 partners include vision screening in schools, training in paediatric eye-health, and early intervention for retinopathy of prematurity.

MDG 3: Promote gender equality and empower women

- Two thirds of all those who suffer blindness are women. Women make up 80% of those suffering from severe trachoma. Up to 75% of those with cataract are women.
- Vision 2020 programmes place a high priority on an inclusive approach which ensures that the needs of women are fully addressed: The Moroccan National Blindness control Programme, which included a literacy campaign for women, achieved a 75% drop in the prevalence of Trachoma.

MDGs 4 and 5: Reduce child mortality and improve maternal health

- Many conditions that cause childhood blindness are also causes of child mortality (eg measles, diarrhoeal disease and meningitis). Until the recent success of large-scale vitamin A supplement programmes, 60% of children died within a year of becoming blind. Today cataracts are the main cause of child blindness.
- Amongst pregnant women, vitamin A deficiency leads to night blindness and may increase the risk of maternal mortality. Vitamin A supplements cost an average of \$0.10 per capsule.
- VISION 2020 supports the training of Primary Health Care and Community workers to ensure that eye-health needs of children and pregnant women are identified and treated at an early stage.

MDG 6: Combat HIV/AIDS, malaria and other diseases

- Both trachoma and Onchocerciasis (river blindness) are classed as ‘neglected’ tropical diseases, and are endemic in parts of Africa. The control programme for Onchocerciasis is estimated to have achieved a 20% economic rate of return.
- 50-70% of those suffering HIV/AIDS are likely to suffer ocular complications during their illness.

MDG 7: Ensure environmental sustainability

- People in low-income countries suffering disability are likely to be amongst the poorest with inadequate housing conditions.
- Facilitating access to clean water and basic sanitation is a vital component of the SAFE (surgery, antibiotics, facial cleanliness and environmental improvement) strategy for tackling trachoma.

MDG 8: Develop a global partnership for development

- At the global level, VISION 2020 unites IAPB (representing over 100 international and national organisations) and WHO (representing 192 Member States). National VISION 2020 Committees bring together a wide range of stakeholders.

Links

The following websites contain further useful information:

International Associations

American Academy of Ophthalmology (AAO)

www.aao.org/international/professional/intl_soc_listing.cfm

*Provides listings, and contact details, for national ophthalmology societies**

International Agency for the Prevention of Blindness (IAPB)

www.iapb.org

Provides up to date news, features, and a series of advocacy Briefing Papers

International Council of Ophthalmology (ICO)

www.icoph.org/advancing_leadership/ophthalmologic_societies.html

*Provides listings, and contact details, of eye care organisations by country**

VISION 2020: The Right to Sight

www.vision2020.org/main.cfm

Provides news, and has an advocacy resource centre

World Council of Optometry (WCO)

www.worldoptometry.org

*Provides listings of national optometry organisations**

International and Regional Health Organisations

World Health Organisation (WHO)

www.who.int/topics/blindness/en/

The site of the Prevention of Blindness and Deafness Unit (PBD), WHO Headquarters, Geneva. Provides briefings, statistics and news on both avoidable blindness and refractive error

WHO Regional Office for Africa (WHO-AFRO)

www.afro.who.int/en/

The site of WHO's Regional Office based in Brazzaville. Provides information on health programmes, and WHO's network of country offices in Africa

West African Health Organisation (WAHO)

www.wahooas.org

WAHO is a Specialised Agency of the Economic Commission of West African States (ECOWAS), and is based in Burkina Faso. The site operates in both English and French

(* None of these sites necessarily provide comprehensive national information since listings are dependent of membership of these umbrella organisations).

International Non Government Development Organisations (INGDOs)

There are numerous non government organisations active in the field of combating avoidable blindness and low vision. Amongst the largest active in Africa are the following (the sites provide details of what they do, where they work, and some have useful resource centres):

CBM www.cbm.org

Fred Hollows Foundation (FHF) www.hollows.org.au

International Centre for Eyecare Education (ICEE) www.icee.org

Sightsavers (SSI) www.sightsavers.org

ORBIS International www.orbis.org

Research/ academic Institutions

International Centre for Eye Health, London School of Hygiene and Tropical Medicine (ICEH) www.iceh.org.uk

Conducts extensive international research on eye health. Publishes a quarterly "Community Eye Health Journal" (free subscription). Maintains a database of links between African organisations and UK academic institutions

African Vision Research Institute (AVRI) www.avri.co.za

Supports research into eye health in Africa

Kilimanjaro Centre for Community Ophthalmology (KCCO) www.kcco.net

Centre for eye research Australia (CERA) www.cera.org.au

Wilmer Eye Institute, Johns Hopkins University www.hopkinsmedicine.org/wilmer

Specific Eye Disease Alliances

African Programme for Onchocerciasis (APOC) www.who.int/apoc/en/

An international coalition bringing together governments, international organisations, non government organisations and corporate entities dedicated to the elimination of Onchocerciasis

Global Alliance for the Elimination of Trachoma by 2020 (GET 2020)

www.who.int/blindness/causes/trachoma/en/

GET 2020 is supported by the International Trachoma Initiative www.trachoma.org

and by the International Coalition for Trachoma Control (ICTC)

www.trachomacoalition.org, *an alliance of NGOs dedicated to the control of Trachoma*

About the author

Ian Chandler is the founder and director of The Pressure Group Consultancy, which supports civil society organisations around the world to improve their effectiveness in advocacy, campaigning and communication. His previous roles included Campaigns Manager for Oxfam GB and Media Director for Amnesty International.

A world in which no one is needlessly blind or visually impaired and where those with unavoidable vision loss can achieve their full potential



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