



Guidelines on lobby and advocacy

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chapter 1

Introduction

“Like slavery and apartheid, poverty is not natural. It is man-made and it can be overcome and eradicated by the actions of human beings.”

Nelson Mandela

Poverty and exclusion are largely caused and maintained through unequal power relationships at all levels. It is part of ICCO's mandate to address the unequal power relations between the South and the North. For this purpose ICCO engages with decision-makers at national and international level. By using lobby and advocacy ICCO tries to exert influence on specific policy decisions and increase and stimulate the participation and emancipation of civil society organisations world-wide.

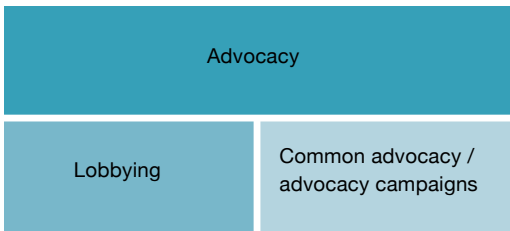
These guidelines bring together the expertise and best practices of ICCO and its partner organisations in the field of lobby and advocacy. These guidelines intend to provide a better understanding - both among lobbyists and non-lobbyists - of what lobby and advocacy entails and what may and may not be achieved by engaging in lobby and advocacy activities. They offer step by step suggestions for developing lobby and advocacy strategies to effectively influence policy and decision-makers so as to be a true catalyst of change.

What is lobby and advocacy?

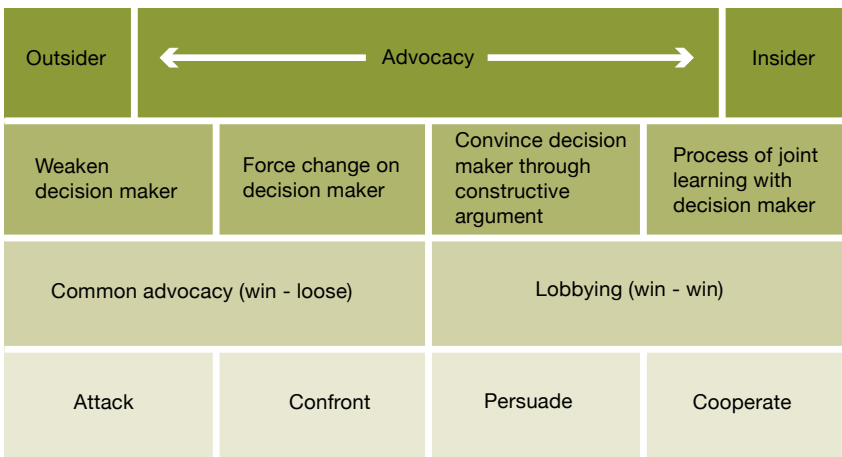
The overarching objective of any lobby and advocacy strategy is to influence decision makers in order to advance and improve conditions for your selected target group. Decision-makers can be politicians and policy-makers as well as other crucial decisive stakeholders, such as international companies, but also church leaders or tribal leaders.

Both lobby and advocacy increase the scope of influence to improve policies and achieve structural change in key areas such as agriculture, health, education or trade.

Advocacy or lobby?



Position towards decision maker



Advocacy

Common advocacy methods are often used to enforce changes by making demands. Most of the time these methods are primarily used to *send out* information to get a specific message across or to mobilise people in order to weaken the position of a particular decision-maker.

Examples of **common advocacy / advocacy campaigns**

- demonstrations
- petitions
- press releases - press conferences
- news paper articles, columns (e.g. by the director of ICCO)
- media campaigns
- lawsuits

Lobbying is a specialized form of advocacy. It is a strategic, planned and informal way of influencing decision-makers. Characteristics are: open (two-way) communication, influencing by linking the interests of different stakeholders, creating win-win situations and investing in long-term relationships with decision-makers.

Examples of **lobbying**

- personal letters
- face-to-face meetings with decision-makers (such as MPs in Parliament)
- informal contacts at receptions (e.g. at Ministry of Foreign Affairs)
- working visits with decision-makers
- personal exchanges over the telephone (e.g. with contacts at Dutch embassies)
- drafting of joint strategies

Limits

The tools and methods used will highly depend on the context and (cultural) setting you are operating in. In case you have limited political space or access to decision-makers to engage in a constructive dialogue you might be more inclined to organise a demonstration or a petition. Whereas in some countries or on specific topics more can be achieved through personal dialogue or through close collaboration. It is important you define your own terms of engagement. Carefully analyse the ways which are likely to generate the highest impact.

At the same time, be aware that it will be impossible to realise all your objectives at once. You are not in power yourself, you are not the decision-maker. It is also important to communicate this clearly to your beneficiaries. Set realistic goals. In the end, it is the decision-maker who decide on your influencing space. However, by playing it smart, you may create more space.

An extra limit to lobbying is that it is often necessary to compromise as you try to create a win-win situation (instead of a win-loose). An advantage of lobbying however is that, as you are presenting possible alternatives and solutions, it poses less of a threat to decision-makers than simply 'dumping' problems on their desks.



GOOD LOBBY REQUIRES SOME DEGREE OF CONSENSUS

Strategizing lobby and advocacy

Effective lobby and advocacy requires strategizing. Making use of opportunities as they present themselves is one thing, but it is always good to ask oneself: *Why are we carrying out this activity? Why are we targeting that decision-maker?* And to follow this up with the question: *Does it contribute to achieving our objective?* To be more efficient and to prevent you from getting distracted (e.g. by the media and the “issues of the day”), it is vital to have a clear strategy available for all those involved.

This will help to set realistic goals and promote strategic thinking. It will also help assess the impact of specific lobby and advocacy activities.

To facilitate strategizing on lobby and advocacy, ICCO staff uses project plans. A good project plan will prevent people from being distracted by other more ad hoc activities, and it will stimulate them to cooperate with others inside and outside the organisation, network or programme coalition. As such, the use of project plans contributes to a better coordination and more effective lobby and advocacy.

ICCO uses a 10 STEP approach for the development of project plans and effective lobbying and advocacy strategies.

These 10 steps, including tools to implement them, will be further explored in the next chapter. It should be noted that these steps *are part of a circular and ongoing process*: upon completion of step 10, the process must be continued by returning to step 1.

STEP 01

CLARIFY THE OBJECTIVES OF YOUR ORGANISATION, NETWORK OR PROGRAMME COALITION

What is the mission of the organisation, network or coalition?
What are the objectives, and what is the target group?

STEP 02

DEFINE YOUR TARGET GROUP For whom are you doing this?

Also define the interests and perceptions of your target group (beneficiaries).

STEP 03

CHOOSE YOUR LOBBYING AND ADVOCACY GOAL AND SET OBJECTIVE(S) Elaborate SMART

lobby and advocacy goals and objectives. Differentiate between the scope of concern and the scope of interest: what do you want to achieve and what can you achieve realistically? Less is more!

STEP 04

DEFINE THE DECISION-MAKERS Who do you aim to influence? Who are the decision-makers? What are their positions and interests? What are the various (official) procedures? Which phase in the decision-making process have you arrived at? Is there still room for influencing?

STEP 05

PREPARE YOUR ORGANISATION, NETWORK, COALITION FOR LOBBY AND ADVOCACY Which are the methods and techniques that your organisation, network or coalition is capable of using? What are their internal procedures? What is the added value of the organisation, network or coalition in relation to the topic?

STEP 06

IDENTIFY OTHER STAKEHOLDERS What are the opportunities and threats in the outside world? Who are other important stakeholders? Are there other groups that might undermine what you want to achieve? Can you identify other networks with whom you might collaborate?

STEP 07

CHECK WHETHER LOBBY AND ADVOCACY IS THE RIGHT INSTRUMENT Is lobby and advocacy still the most effective option to influence? Or should other methods and instruments be considered?

STEP 08

DEVELOP A LOBBY AND ADVOCACY ACTION PLAN Define the methods you intend to use and the resources you have at your disposal. Set a clear timetable and define responsibilities (who is doing what and when?). Integrate the indicators for monitoring and evaluation (see step 10).

STEP 09

IMPLEMENT THE LOBBY AND ADVOCACY ACTION PLAN

Carry out the lobby and advocacy action plan!

STEP 10

ENSURE MONITORING, EVALUATION AND FOLLOW-UP OF YOUR ACTIVITIES Develop a practical monitoring and evaluation system to keep track of the results and impacts of your lobby and advocacy efforts and to allow your strategies to be readjusted according to changes in the internal or external environment.

chapter 3

One step

at a

time

Clarify the objectives of your organization, network or coalition



The **vision, mission and objectives** of your organisation, network or coalition need to be clear to all staff in particular to

those members of staff who maintain the 'outside' contacts with decision-makers, other civil society organisations or companies.

There needs to be a degree of consensus within the organisation, network or coalition on the relevance of lobby and advocacy. If there is no such consensus, the risk of losing common ground further on in the influencing process will be considerable. This can have negative effects on the organisation, network or coalition's credibility, both in the eyes of decision-makers and / or the general public.

TOOLS TO CLARIFY THE OBJECTIVES OF YOUR ORGANISATION, NETWORK OR COALITION

- Organize **regular discussions** with staff about the role and the added value of the organisation, network or coalition in society. Topics for discussion could include: Where does our legitimacy and credibility derive from? How are we perceived by external contacts, the wider general public, other organisations and (governmental) institutions? Many of these perceptions may be misguided, thus reducing willingness to cooperate. E.g., certain civil servants may perceive farmer groups as being 'backward' and not very well organised. As such these civil servants might be less inclined to engage in a constructive dialogue with these farmers' organisations, even though in reality they might be well-organised, progressive and more than capable of proposing valid alternatives.
- Organize **sessions for reflection** on the issues outlined above with input from external experts (for instance, policy advisors from other development NGOs, consultants working in lobby and advocacy, lobbyists from the private sector).

Define your target group

Why?

Ultimately, your lobby and advocacy efforts should contribute to resolving the problems of your target group. To be able to

effectively do so, you need to be a recognised representative of their interests. It is the target group that must provide ICCO with the necessary **legitimacy and mandate**. Therefore lobby and advocacy within ICCO always needs to be **partner-based**.

The target group will have its own expectations: they expect you to solve their problem, to inform them about policy changes, etc. A good lobbyist must manage these expectations throughout the influencing process. Ideally, there will be ongoing consultations and full integration of the target group into any lobby and advocacy programme. Such partner-based lobby and advocacy will strengthen the legitimacy of your efforts.

Examples of **target groups**

- farmers' organisations
- women's groups
- teachers' unions
- confederations of transporters
- organisations of people living with HIV/Aids, etc.

An **organised and informed target group** will enhance opportunities for effective consultation and participation in lobby and advocacy campaigns. An organized and informed target group can help lobbyists put pressure on decision-makers.

However, keep in mind that the target group is **never a homogenous group!** For instance, farmers' organisations often comprise a wide range of small, medium and larger farmers with diverging interests. It is therefore important to identify their specific needs and expectations, images and perceptions in relation to the issues up for lobby and advocacy (not only with respect to decision-makers, but also to ICCO /NGO coalitions, and to other organisations).

TOOLS TO DEFINE AND ORGANIZE YOUR TARGET GROUP

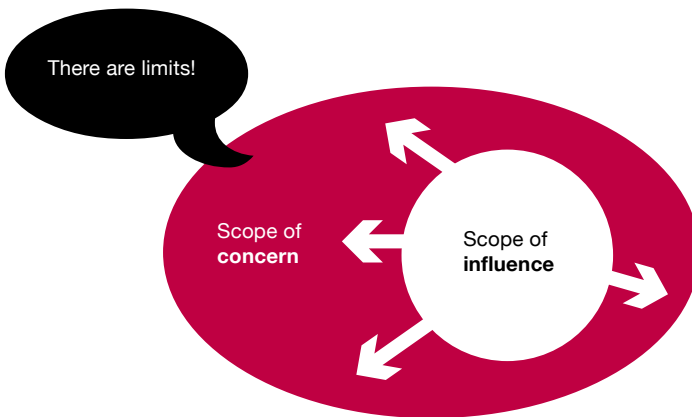
- Regularly check and discuss the mission of your organisation, network or coalition: on **whose behalf** do we act? Are the groups whose interests we represent involved in our lobbying and advocacy activities? ICCO's regular consultations with partner organisations may be used as opportunities to gather and verify this kind of information.
- Develop a process for **ongoing feedback and input** from the target group to ensure their active involvement in the process. Incorporate regular consultation meetings in your programme. Or try to set up joint lobby activities (for instance, joint meetings with relevant MPs, civil servants or companies).

Choose your lobby and advocacy goal and set objective(s)

Why?

It is important to make a distinction between your **scope of concern** and your **scope of influence**: What

are the specific objectives that you wish to achieve? Which results can realistically be accomplished by influencing the decision-makers? Always keep in mind that there are limits to what lobby and advocacy may achieve.



A first step is to determine the **essence of a problem, its causes and its consequences**, preferably in close cooperation with the target group. An effective methodology may be the “problem and solution tree” (see further on). Once causes and consequences have been determined, it may be possible to begin identifying possible solutions. These solutions need to be translated into lobby and advocacy goals and objectives.

Lobby and advocacy goals and objectives should be as specific as possible. Raising awareness, agenda setting and public information campaigns are not lobby and advocacy objectives in themselves, but *activities which support your final objective*. Raising awareness doesn't necessarily lead to the desired policy change. Take the example of female circumcision. The topic has been successfully put on the political agenda, however without providing clear solutions and clear directions. Meanwhile, the measures taken by decision-makers (more severe punishment in Europe) are not welcomed by the target group (women from risk countries and their daughters). There is a fear that the proposed measures will not have the desired effect and will force people to go underground. Successful approaches (such as encouraging communities in the countries of origin to abandon the practice of circumcision) have never even entered the debate. It is therefore crucial to distinguish between these possible means, in order to keep a sharp focus on the final objective.

Try to formulate your objectives as **SMART**ly as possible: **S**pecific, **M**easurable, **A**chievable, **R**ealistic and **T**ime-bound. This will help you to maintain your focus and to set up effective monitoring and evaluation of your influencing process. Remember: Less is more!

A lobby objective aims to change the policies, programmes or positions of decision-makers (at any level, from village head to prime minister). Your lobby objective is determined by:

- *what you want to change*
- *for whom*
- *who will make the change*
- *by how much and*
- *by when.*

An objective is thus an incremental and realistic step towards a larger goal or vision; it is not a general goal (for example, to increase family planning among couples). An objective must focus on specific and tangible action that decision-makers may take.

Examples of lobby objectives

Useful framing of lobby objectives

- The Minister of Education will start a national government programme to build twelve schools for children between the age of 6 to 12 in each district in the next two years.
- In the next year, the Minister of Social Affairs will increase funding for family planning education programmes for married couples through the family planning council.

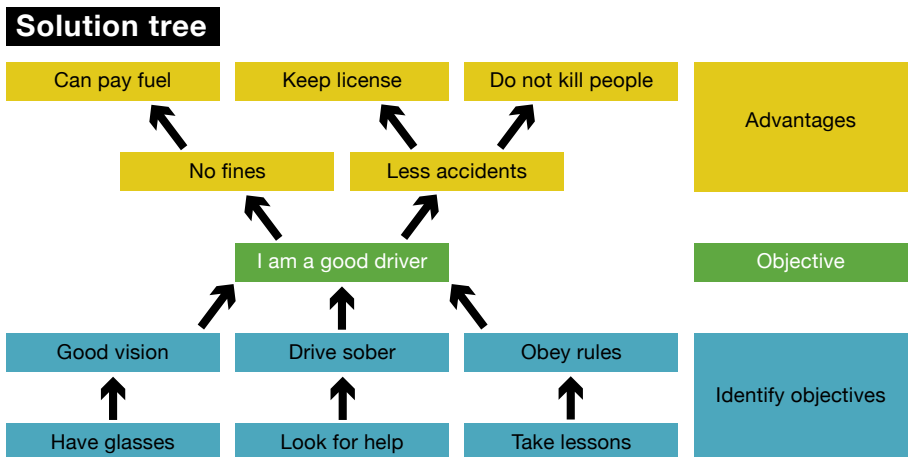
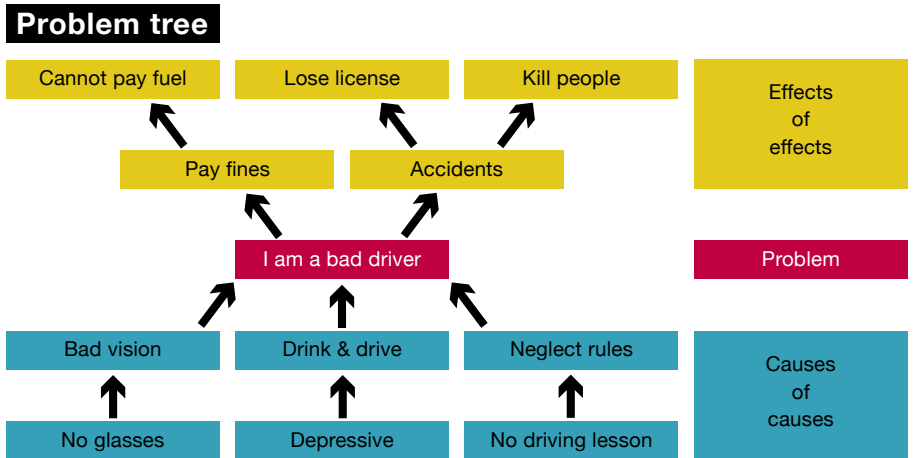
Avoid overly general lobby objectives

- Increase girls' attendance at district level primary schools.
- Increase the use of family planning among married couples.

TOOLS TO IDENTIFY THE ESSENCE OF A PROBLEM, ITS CAUSES AND CONSEQUENCES

- Conduct a policy scan:
 - Track government funding histories for specific issues identified with the target group, e.g. funding for HIV/Aids programmes
 - Identify supportive policies / regulations that have been adopted but are not being enforced
 - Identify existing policies / regulations that should be changed
 - Identify gaps that need to be addressed with new policies / regulations in favour of your target group.

- Conduct a needs assessment at the level of your target group (the affected population) to identify the core of the problem or use data already collected from research institutions. You can do this by using a problem and solution tree (see the examples below):



TOOLS TO ELABORATE YOUR LOBBY AND ADVOCACY OBJECTIVES

Elaborate your lobby and advocacy objective in a series of logical steps:

- Describe the context and the problem you aim to address
- Describe who you aim to support (the target group, see also above)
- Verify whether this connects with the mission and objectives of ICCO, the network or programme coalition
- Verify whether there is a role for a decision-maker (if there is no such role, then lobby and advocacy is not the right tool.
- Describe what the role of the public sector should be
- Describe what you want the public sector to do: what should be changed?
- Describe who in the public sector is responsible for bringing about the necessary changes
- Describe what you want from this person and when
- Elaborate your objectives as SMARTly as possible (see above).

Define the decision-makers

Why?

Pick out those decision-maker(s) who have the **power and influence** to change the policy related to the problem identified. Questions

you need to ask yourself are: *Who is responsible, who are the decision-makers who may solve the problem? Who do you want to influence? Who needs to change something and when is the most opportune moment to accomplish that?*

Examples of decision-makers are politicians (elected & appointed officials), social leaders, government agencies, international bodies such as the United Nations, World Bank, European Union, or powerful companies (e.g. Unilever, Shell, Monsanto).

Often there are persons who are not official decision-makers, but who have a lot of influence on decision-makers. Examples are church officials, wealthy individuals, husbands, wives, etc. Try to find out who those people are so you can include them in your strategy. ICCO's Middle East Advocacy campaign is a good example of a lobbying effort targeting a wide range of decision-makers and decision-influencers.

Example: Middle East Advocacy

ICCO's Middle East Lobby and Advocacy campaign has been running for several years now. In ICCO's view, the Dutch government ought to be playing a more active role in putting pressure on the government of the state of Israel to achieve self-determination for the Palestinian people - the main objective of the campaign and a highly sensitive issue in international politics. In order to change the position of the Dutch government, ICCO, after *careful analyses of the various power relations* in the Dutch Parliament, decided to focus its lobby and advocacy efforts on certain specific political parties in the Netherlands

ICCO focuses its efforts in three distinct, but complementary ways:

- 1)** By trying to influence the **Dutch government** directly, targeting key officials responsible for policies on the Middle East. This is done in cooperation with United Civilians for Peace (UCP). High-level members of political parties are identified and targeted with letters, factsheets and invited to round tables. Unfortunately, it is proving very difficult to change their positions and opinions on this sensitive topic. As such we are evaluating our efforts and considering a shift in strategy.
- 2)** By targeting the **Christian community** in the Netherlands via the Olive Tree Campaign. ICCO hopes to feed into a movement that will exert pressure on Christian policy-makers in the Netherlands to change their Middle East policies. The Olive Tree Campaign is carried out in cooperation with YMCA, YWCA and other organisations in order to broaden its impact in terms of awareness-raising and to provide sympathisers with a scope for action (i.e. sponsoring an olive tree and thereby supporting Palestinian producers). The campaign has thus far been very successful and has proved to be an effective way of expressing solidarity with the Palestinian people. It is hoped that in the longer term it will contribute to a change in position of the Dutch political parties.

3) By exerting pressure on **Dutch companies** that profit from the occupation.

The campaign relies on the combination of lobby and advocacy activities (personal meetings with party members, awareness-raising campaigns, etc.) and the fact that it provides people with scope for action to show their solidarity. Its highly targeted approach (with specific messages tailored to specific decision-makers) also contributes much to its success. Another key factor is the permanent dialogue with ICCO's partner organisations in the Middle East.

This allows us to explain the sensitive nature of the Israel-Palestine debate in the Netherlands and the reasons behind the positions taken by Dutch politicians, which are often considered "much too vague" by our partners, who would like to see much quicker results. Lastly, working with other organisations on this campaign helps spread the risks for individual organisations engaging with this sensitive subject.

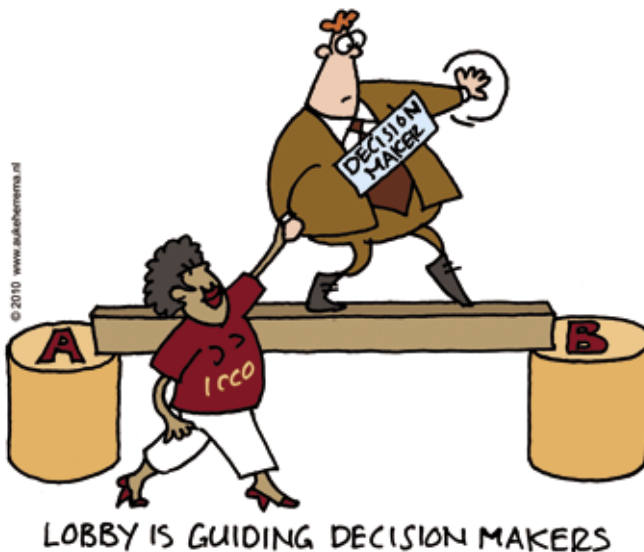
For any lobby and advocacy campaign to be successful, it is essential to find out the **positions, interests and needs / motivations** of the decision-makers you are trying to influence. Personal gain, incompetence or lack of awareness may hamper the desired change. Access to such information may help you target and/or "educate" the right people and turn them around to your point of view. This will serve to enhance your future influence. Before trying to persuade anyone of the rightness of your cause or objective try to develop meaningful and insightful relationships with them. In the end a decision-maker is a person and not an institution or structure. Also always analyse the personal motives of your decision-maker and see how you can appeal to the personal drives of the person you want to influence.

One of the classical tools is to distinguish between the positions (i.e. concrete demands) held by the decision-maker and their underlying interests and needs.

Be aware of bribery!

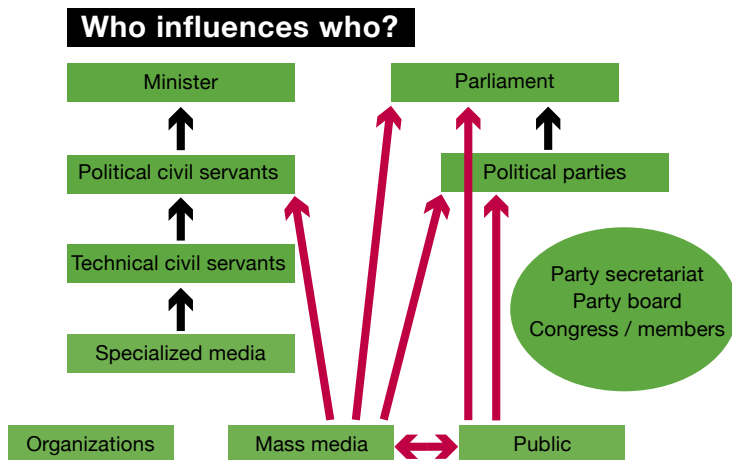
It is important to be aware of corruption and the possibility of being co-opted when you become more involved with decision-makers. Steer clear of corruption! *Think about the long run: lobby and advocacy is about establishing long-term relationships.* Quick fixes are not what you are looking for. You will merely strengthen the position of corrupt decision-makers if you go along with them. Focus on fair and transparent decision-makers, and provide them with the information they need to fight corruption.

An effective lobbyist must make sure he/she is aware how decision-making processes relating to their lobbying and advocacy objectives run **in all relevant political arena's**. These may include the national parliament, the appropriate national ministries, the European Union level, national embassies and diplomatic posts, etc. Knowing how decisions are arrived at (e.g. having detailed information on the procedures that are being followed in the national parliament, the EU, etc) will help you not only to focus your stakeholder analyses, but also to identify the decision-makers that matter. This will contribute to your overall effectiveness.



TOOLS TO PICK OUT RELEVANT DECISION-MAKERS AND TO IDENTIFY THEIR POSITIONS, INTERESTS AND MOTIVATIONS

- Identify **relevant decision-makers and their positions, interests and motivations** using the following questions:
 - What are the objectives and interests of the decision-maker?
 - What solutions can we offer which are of interest to the decision-maker?
 - What phase in the decision-making process has the decision-maker arrived at?
 - What are the procedures for decision-making?
 - How do decision-makers perceive your organisation, network or coalition?
 - How do decision-makers perceive your target group and their issues?
- The graph *Who influences who?* presents an example of a diagram that may be of use to you to illustrate and explain the relations of influence between different decision-makers:



As the figure shows, breaking down the layers of decision-making as much as possible provides lobbyists with more and better opportunities to target their lobbying and advocacy interventions and to identify key relations of influence (red lines).

- The table below gives an example of how information may be structured and may provide you with a clearer idea about the win - win situations you are looking for as a lobbyist. It may help to make it easier to find a suitable strategy to influence the decision-makers.

Win - win situation

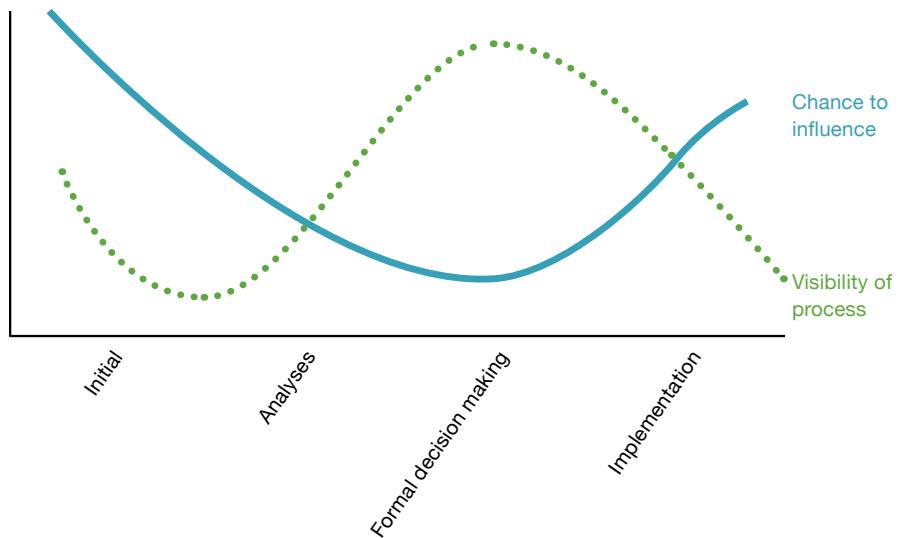
<p>Problem identified: Illiterate women are less capable of providing for themselves and are more dependent on support.</p> <p>Objective: Development of teaching materials to teach illiterate women to read and write within a 1-year time frame.</p>	
<p>Target group: Illiterate women</p>	<p>Decision maker: Minister of Education</p>
<p>Interest: The ability to read and write helps women to provide for themselves</p>	<p>Interest: Active involvement allows Ministry to co-decide upon the content of the teaching materials. Less women who need public support</p>
<p>Win-Win: Women are able to provide for themselves and will not be needing public support</p>	
<p>Perception: Unaware of what Ministry can do for them</p> <hr/> <p>Strategy: Explain the role / responsibilities of the Ministry of Education</p>	<p>Perception: Illiterate women are “not clever”</p> <hr/> <p>Strategy: Arrange meeting with Illiterate but smart women</p>

Obviously, the **timing** of your lobby and advocacy activities is essential. It is therefore important to find out in **which phase the decision-making process** stands in relation to your lobby and advocacy objective. Generally, we distinguish four phases in the decision-making process: the *initial phase*, the *analytical phase*, the *formal decision-making phase* and the *implementation phase*. Decision-makers require information tailored to each of these phases (research data, experiences from the field), as well as assistance to generate sufficient public and political support for their decisions. Lobbyists should place themselves in a position to offer the required information and support at the right time, i.e. in the right phase of the decision-making process. Presenting results

and recommendations from a research project after Parliament has already taken its decision serves no purpose and will only irritate the people concerned. Such findings should be presented at the earlier stage when decision-makers are looking for direction and policy alternatives.

TOOLS TO FIND OUT THE PHASE OF THE DECISION-MAKING PROCESS

- The figure below (importance of timing) may be used to assess the phase in the **decision-making process**. It relates the chances for lobbyists to exert influence to the various phases in the decision-making process (initial, analytic, formal decision-making and implementation phases):



As you can see, the chances to influence are highest in the initial phase of the decision-making process. This is because the issue is not yet (or just has been put) on the political agenda and there are still many opportunities to get your point across. In the analytic phase, information and facts will increasingly be put forward, making it more difficult to change the opinion of the people concerned. Chances are lowest at the moment of formal decision-making: generally decision-makers do not like to change their position at this point in the process (they would appear to suffer a loss of face). In the implementation phase, new stakeholders generally come into play, which means new opportunities for influencing the implementation of the decision made. However, the overall conclusion must remain that it is always best to seek early influence.

The graph also shows the visibility of the influencing process; showing a high visibility at the moment of formal decision-making (often related to high media coverage by the decision-maker). However, a lobbyist is often looking for less visibility as this might help to seek out suitable alternatives and win - win situations without the risk of stakeholders and decision-makers “losing face”.



STEP 05

Prepare your organisation, network or programme coalition for lobby and advocacy

Why?

To gain more knowledge and control over your lobby and advocacy programme you have to prepare your organisation, network or coalition. This often starts with an **assessment** to help you to get a better idea of the current organisational situation and of the actual resources available for lobby and advocacy. Such an assessment can give you a better feel for future developments, whether positive or negative.

Important questions are: *What are the methods and techniques (e.g. awareness-raising, public action, meetings with MPs, petition) that the organisation, network or coalition has at its disposal? What are the internal procedures for issuing statements, writing position papers and the like? What is the added value of the organisation, network or coalition in relation to the identified lobby and advocacy topic (e.g. expertise from partner organisations).*

TOOLS TO PREPARE YOUR ORGANISATION, NETWORK OR COALITION FOR LOBBY AND ADVOCACY

- Assess the **strengths and weaknesses** of your organisation, network or coalition for implementing a lobby and advocacy campaign aimed at the desired policy change by using a **SWOT** analysis:

SWOT	
<p>Strengths (internal)</p> <p>Internal characteristics of the organisation positive to achieving the objectives</p>	<p>Weaknesses (internal)</p> <p>Negative internal characteristics of the organisation preventing the achievement of the objectives</p>
<p>Examples:</p> <ul style="list-style-type: none"> • expertise, legitimacy, credibility, finances, transparency, bureaucracy, (lack of) coordination), turn over of staff etc. 	
<p>Opportunities (external)</p> <p>Characteristics of the external environment which may can help achieve the objectives</p>	<p>Threats (external)</p> <p>Characteristics of the external environment which prevent achievement of the objectives</p>
<p>Examples:</p> <ul style="list-style-type: none"> • law, political developments, socio-economic changes, technological developments, donor policies, infra structure etc. 	

After the SWOT exercise, try to identify and plan concrete activities to address any weaknesses and threats, and to make optimal use of the identified strengths and opportunities!

- Set up your organisation, network or coalition to be more **pro-active**. Often we are too late to influence decision-makers and we only have time to react or protest. Naturally this is not the most effective way to influence, although it may help to reduce “the damage done”. The most effective way to influence is to become pro-active. This means **trying to influence decision-makers as early on in the process as possible**. In order to do so, one must:

- Take the initiative (have something to offer to decision-makers, an alternative!)
- Determine what is important and what is not (understand the decision-making process)
- Make sure we have sufficient time to prepare our arguments and our strategy
- Make sure we have sufficient time to build coalitions with (potential) allies
- Make sure we have sufficient time to get reliable data
- Be willing to let decision-maker(s) take credit for the decision we have helped bring about.

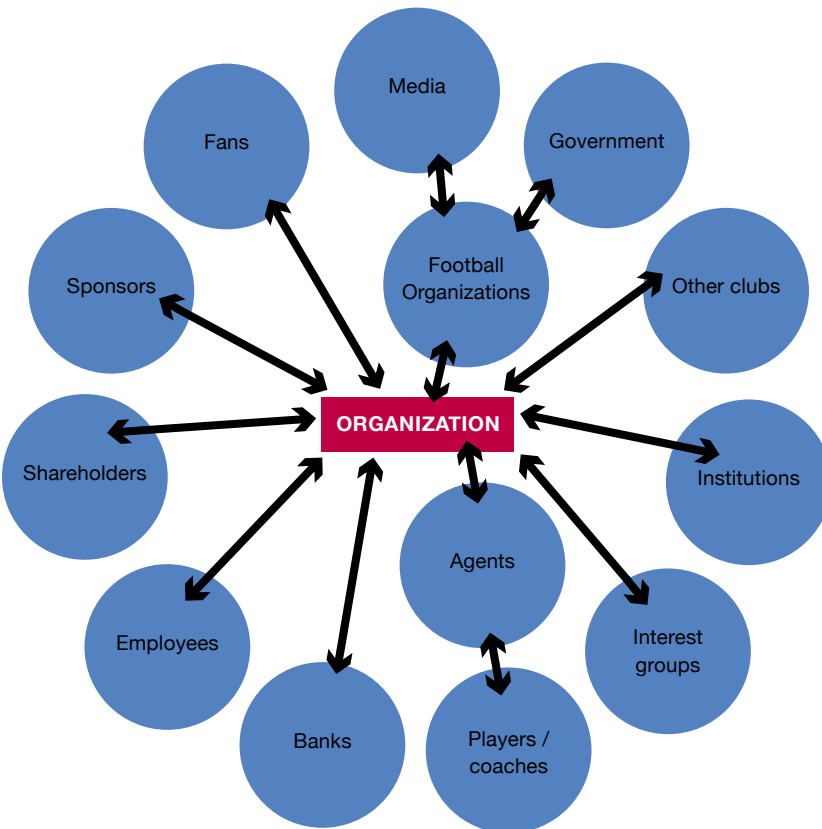
Keep in mind that being pro-active also means being prepared to contribute to the development of more appropriate procedures, and to be willing to take co-responsibility for the outcomes of the process. As these results can be both positive and negative, it is important to identify any potential risks beforehand!

- Ensure you and your organisation, network or coalition are **accepted by decision-makers**. To check, ask yourself the following questions:
 - Who gives you the right to speak (on behalf of the target group)? How many people do you represent?
 - Why are your target group and their problem(s) of importance? What is the urgency of the issue(s)?
 - Why should a decision-maker listen to you and believe you? What is your credibility in the eyes of decision-makers? What is your accountability?
 - What is your added value? What do you have to contribute?
- **Build and strengthen capacity in lobby and advocacy**, for instance by using role plays on how to approach decision-makers in various settings (Parliament, Ministries, at international conferences, round tables, receptions, etc). This will enhance the impact of your lobby and advocacy efforts. Other capacity-building methods are: training sessions, intervision, coaching, on-the-job training. Make sure you integrate such capacity-building activities into your lobby and advocacy action plans.

Identify other stakeholders

Why?

As a lobbyist you need to get an overview of **all stakeholders working on your lobby and advocacy objectives: friends, neutrals and enemies**. These constitute the so-called *advocacy arena*. You need to take the actions of these stakeholders into account as they may support / strengthen your lobby (allies) or start a counter lobby (opponents). Moreover, the neutrals are of particular interest as these may be influenced in such a way that they become allies. Gaining a better insight into the positions and capabilities of these stakeholders helps you to improve your lobby and advocacy strategy.



Important questions to ask oneself are: *Who are the other important stakeholders (in addition to the decision-makers)? Are there other groups or persons that may undermine what we want to achieve or state? If so, what are their reasons and arguments? Can you identify other networks that you may collaborate with?* ICCO's Climate Change and REDD lobby presented below, in which Southern partners were trained to become strong allies in the influencing process, provides a valuable example.

Example: Climate Change and REDD

ICCO has been actively implementing a lobbying and advocacy campaign on Climate Change and Reducing Emissions from Deforestation and Forest Degradation in Developing Countries (REDD), with a special focus on forest conservation for CO₂ storage. The expertise among ICCO partner organisations on this topic has allowed ICCO to offer informed contributions to the debate and to formulate policy recommendations.

The process started 1.5 years before the Summit in Copenhagen (December 2009), with the organisation of a consultation meeting with Care International, the Rainforest Foundation, various Southern organisations, and ICCO partners. This resulted in a very rich exchange of information and experiences between the participants and an enhanced participation of Southern partner organisations in the Climate Action Network. The Network managed to participate successfully in a 3-day Climate Conference in Ghana where various financing mechanisms for REDD were discussed. Partners received training to strengthen their advocacy skills to lobby during the conference and thus enhance their active participation.

Difficulties were encountered as well, particularly due to the difference in interests between the regions in relation to REDD. Also, some of the participating organisations continue to harbour serious reservations about the effectiveness of lobby and advocacy, as they have no confidence in their governments.

Nonetheless, the advocacy experience resulted in better information exchange on policies, both between partners and between development NGO's (such as ICCO, and others like Care International, Rainforest Foundation, Aprodev). The experience also helped to generate more attention for the Southern (development) perspective in the discussions and served to strengthen partner organisations' lobby and advocacy skills.

Effectively, a change in the discourse at the political level was achieved (more awareness of Southern development issues, such as the impact on food security, the impact on tribal groups, etc.). Moreover, the advocacy experience showed that permanently involving Southern partners in the discussion helps them get quickly up to date with current developments at national and international level - which opens up enhanced opportunities for more South - South lobby and advocacy, as well as for linking up with Northern influencing processes.

TOOLS TO IDENTIFY OTHER STAKEHOLDERS

- **Stakeholder mapping** (see also step 4): Brainstorm within your team to list all stakeholders and determine whether they are a friend, neutral, or opponent in relation to your lobby and advocacy objective. For instance, if your objective is to put pressure on the Dutch government to increase spending for climate adaptation in developing countries, the stakeholders may be mapped out as follows:

Stakeholder	Friend	Neutral	Opponent
Cordaid	×		
Greenpeace	×		
Christian Democratic Party	×		
Southern NGOs	×		
Media		×	
Ministry of Environment		×	
Liberal Party			×
Petrol company (Shell)			×

Using this kind of information, proceed to try to find out for each stakeholder the following issues:

- What are their successes and failures in finding support for their positions?
- What do they want in relation to your lobby and advocacy objective: what do they propose?
- Are there opportunities for collaboration?
- What are the risks (personal, institutional, financial) involved in collaboration or non-collaboration with these stakeholders?

Advanced stakeholder mapping. A grid may be used to make a more detailed mapping of stakeholders, their position, their influence and relevance.

In addition to your own organisation, once again list all the stakeholders relevant to your lobby and advocacy objective at the national, international and transnational level, in a grid which allows you to make an inventory of more than one issue relevant to your lobby and advocacy campaign (see below).

Proceed to **assess** the following aspects for each issue:

- The position of each stakeholder identified in relation to the issue: in favour, against or indifferent
- The influence of each stakeholder. This depends on their (formal) position and power, their network and contacts, their resources, etc.
- The relevance of each stakeholder, which is expressed in terms of both of their position and their influence in relation to the issue.

The grid thus allows you to identify the key stakeholders, their position and influence regarding a specific issue. It helps you to pinpoint which stakeholders to contact or not to allow for a win-win scenario, a loss scenario or a negotiating scenario. Perhaps most importantly, the exercise also allows you to identify stakeholders holding positions and an influence you do **not** know. These should be contacted, as they are potentially interesting stakeholders to include in your lobby and advocacy strategy (in the example below: for instance, Shell).

In the previously mentioned case of a lobby and advocacy effort focused on obtaining enhanced resources for climate adaptation in Southern countries (to combat the negative impact of climate change), such a grid might look like this:

Stakeholder	Position	Influence	Relevance
Own organization			
• ICCO	+	?	+/-
National level			
• Greenpeace	+	+	+
• Cordaid	+	?	+/-
• Christian Democratic Party	+	+	+
• Ministry of Environment	+/-	++	++
• Liberal Party	-	+	+/-
• Shell	-	+++?	+++
International level			
• Southern NGOs	+	+/-	+
• Southern governments	+	+?	++
Transnational level			
• IPCC	+	+	++
• Media	+/-	++	++

Check whether lobby and advocacy is the right instrument

Why?

For **effectiveness**, it is important to assess whether lobby and advocacy is in fact the most relevant influencing method to use.

The internal and external environment in which you are operating may have changed, which may have an impact on your lobby and advocacy strategy. Depending on the conditions, other options, including legal steps, may be more opportune.

TOOLS TO VERIFY WHETHER LOBBY AND ADVOCACY ARE STILL THE BEST OPTIONS

- Ask yourself the following questions:
 - Do we have the right partners (allies) and do we have a consensus at the level of the target group and within our organisation, network or coalition?
 - Does our organisation, network or coalition have sufficient legitimacy to carry out lobby and advocacy on this topic?
 - Is there enough lobby and advocacy capacity (skills, competences) to go on? Do we have enough information? Can we put forward proposals specific enough for decision-makers?
 - Does our organisation, network or programme coalition have an open channel to the relevant decision-makers?
 - Is there a risk of negative effects on our target group or the decision-maker? If so, how can we reduce this risk?
 - Can we exert a sufficiently timely and pro-active influence?
 - Do we have sufficient financial resources for our lobby and advocacy?

Develop a lobby and advocacy action plan

Why?

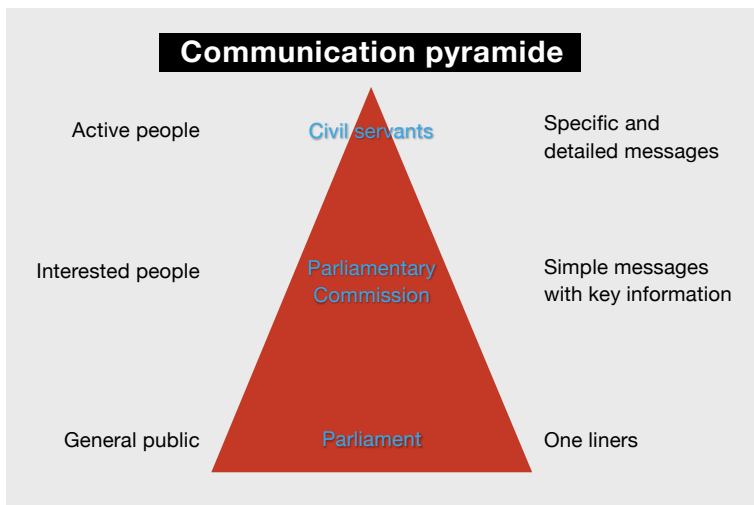
You need a **clear lobby and advocacy action plan** to be able to work strategically and to divide responsibilities and tasks within

ICCO and within your network or coalition. Define the methods you intend to use, and the resources you have available. Set a clear timetable and define responsibilities (*who is doing what and when?*). Identify lobby and advocacy activities and messengers that may influence those in power.

In order to accurately plan your lobby and advocacy activities, make sure you take into account the timing, procedures and budget cycles at the appropriate decision-making level(s). For instance, the run-up to the annual presentation of the Dutch National Budget offers good opportunities to influence key decision-makers in the Netherlands. Also make sure of the reasoning behind your choices to opt for a specific lobby or advocacy activity.

TOOLS FOR DEVELOPING A LOBBY AND ADVOCACY ACTION PLAN

- Identify a **set of criteria to assess and select the most effective lobby and advocacy activities**. Consider using the following criteria:
 - Level of influence the activity will have on decision-makers, their opinion, attitude, etc.
 - Level of risk (human, financial, loss of credibility) to your programme, organisation or coalition in pursuing the activity.
 - Resources that are needed (to assure continuity of your lobby and advocacy).
 - Access to effective messengers (also with an eye to increasing your / ICCOs visibility).
- Identify **suitable methods** (e.g. meetings with decision-makers, public events, petitions, round tables, newspaper articles, etc) and **suitable messengers**. Examples of messengers are: media, celebrities, patients, experts, peers, donors (national / international). Make sure you draft the **right messages for the right type of decision-makers** (see the communication pyramid)



As you can see, the general public, interested actors and decision-makers require different kinds of messaging. The example from ICCO's work on EPAs presented below shows the importance of adjusting your messages according to the people you want to target.



Example: Economic Partnership Agreements (EPAs)

The negotiation of the Economic Partnership Agreements (EPA) between the European Union and regional trade blocks in Africa, Latin America and Asia, has been the focus of concerted ICCO lobby and advocacy efforts for quite some time.

Due to the technical language involved in these trade agreements, one of the major challenges for ICCO has been how to *translate this complex language into concrete examples decision-makers can understand and feel compelled to act on*. ICCO opted to proceed by providing concrete examples of the impact of EPA provisions on the daily lives of people, like small farmers in Cameroon. By “unpacking” and translating the agreements’ highly technical language into simpler language and self-explanatory illustrations of their implications, ICCO contributed to a better understanding among policy-makers and politicians of the EPAs’ potential harmful consequences. To be able to do this, a thorough (technical) understanding of the potential consequences of EPAs was necessary as well as the availability of reliable data.

ICCO also achieved some important results in terms of strengthening alliances to target the EU institutions and Southern governments. In cooperation with the South Centre, ICCO facilitated the training and capacity-building of Southern high level negotiators, which demonstrably helped increase their knowledge of the workings of the EPAs. The ICCO/South Centre trainings also helped achieve an enhanced cooperation between the negotiators of the various regional trade blocks to strengthen their position vis-à-vis the European Union.

Use **ICCO’s Lobby and Advocacy project plan**. The L&A format outlines the key steps for developing a comprehensive lobby and advocacy action plan and can be downloaded from the ICCO intranet.

Implement the lobby and advocacy action plan

Why?

Implementation of your lobby and advocacy plan will move you on towards your desired end results. Make sure you remain flexible and

well-informed throughout the implementation process.

This will allow you to make any necessary adjustment to your chosen approach, as and when changing circumstances demand.

Seek to operate from and build on the strengths of your organisation, network or coalition when establishing relationships with decision-makers and potential allies.

Don't expect quick results. Remember that establishing confidential relationships takes time.

It helps to document your progress by listing the (immediate) results of your actions and activities, as the following example of ICCO's lobby and advocacy campaign on security sector reform in the Great Lakes region shows.

Example: Security Sector Reform in the Great Lakes

Security is a precondition for development. This is recognized by most government officials and development organisations. Enhancing a fragile state's security situation often starts with reforming and strengthening its police force, army and legal institutions. An impediment in many cases is that not all stakeholders involved recognise the need for an inclusive process which comprehensively integrates the security needs of the local population (in all their diversity) as a prerequisite for sustainable security sector reform (SSR) policies.

In the Great Lakes region, ICCO is engaged in a lobby and advocacy campaign aimed at enhancing the participation of the local population and civil society organisations in SSR, in order to establish more sustainable reconstruction and development processes. A more participatory approach will contribute to enhanced (public) support for the necessary reform and reconciliation between the various parties involved. A secondary objective for ICCO is the integration of a gender perspective into the SSR policies.

ICCO currently aims its lobby interventions primarily at Dutch government officials and research institutions like the Netherlands Institute of International Relations Clingendael. ICCO also targets other development organisations. In the near future, ICCO is set to expand its lobbying scope to include relevant European institutions in Brussels to persuade them to follow a more comprehensive approach when designing SSR policies for fragile states, comprising a more inclusive civil society dialogue in order to get a better perspective on the needs of less-empowered stakeholders in local society. ICCO is an interesting discussion partner for decision-makers as ICCO can bring the full experience of its partner networks in the Great Lakes region into the debate.

ICCO has already succeeded in putting the need for an inclusive and gender-based SSR dialogue firmly on the agenda with the relevant civil servants in the Dutch Foreign Office. It has also managed to sensitise several other

leading development organisations in the Netherlands to these issues, which offers scope for coalition-building. In recognition of ICCO's expertise, the aforementioned Clingendael Institute has asked ICCO to contribute to an SSR policy proposal for the Great Lakes region that the Dutch Foreign Office has asked them to develop.

In February 2010, a Ministerial delegation from Burundi visited the Netherlands to discuss the cooperation between Burundi and the Netherlands. International experts and relevant stakeholders were invited to share their views with the delegation. ICCO was able to provide valuable background information for these meetings, because of its systematic documenting of all issues relating to SSR in Burundi and its in-depth knowledge of the positions of the various stakeholders in relation to these issues. A concise contribution could be prepared in advance, because of ICCO's conscientious monitoring of the political agenda, which ensured that the upcoming Burundese Ministerial visit was flagged at a timely stage.

This example serves to underline that scrupulous monitoring and documentation of your lobbying and advocacy efforts will provide you with better insights in on-going processes and help you identify opportunities for intervention. Careful mapping will not only help to pinpoint your specific areas of expertise in relation to other stakeholders, but also flag possible gaps in your knowledge and prevent duplication of efforts. All of which will help you act with decisiveness as you tailor your approach to the ever-fluid political process.

TIPS AND TRICKS FOR THE IMPLEMENTATION PHASE

- Your legitimacy, output and efficiency can be significantly increased by joining forces with like-minded organisations in **advocacy networks and coalitions**. But always keep in mind that such alliances must remain **the means to an end** and not an objective in themselves. It is always advisable to take some time to carry out a prior assessment of the potential added value and possible pitfalls when you are contemplating joining a coalition.
- Keep track of all the current relevant decision-making processes so that your knowledge is always up to date. This will greatly enhance the effectiveness of your interventions. Draw on the expertise of your network or coalition partners and/or like-minded stakeholders to gain access to additional information on official procedures, personal interests of decision-makers, etc.
- Invest time in building confidential relationships with Members of Parliament, their staff and civil servants in relevant units within the various government departments. Do not focus exclusively on the key office holders, but also invest in contacts with their assistants and key staff in their departments. They often not only have considerable influence on incumbent decision-makers, but may well turn out to become the key decision-makers of the future. Also make sure you're up to date with any changes in office among decision-makers and their staff, as well as any alterations to the stakeholder landscape relating to your lobby focus.
- Don't spend too much time gathering background information from mailing lists, websites, etc. Make sure you stay abreast of current developments, but be selective! Establishing the usefulness of all the bits of information that people throw at you will often take up precious time that is much better spent either *telephoning or meeting in person with key stakeholders*.

- Finally, be aware that working in lobby and advocacy carries its own specific risks.

First of all, there are professional risks. As a rule of thumb, lobbyists must present a united front and always make sure that they and their colleagues are not communicating conflicting messages to the same policy-makers, so as not to undermine their credibility. Likewise, your organisation's trustworthiness may be undermined if members of alliances you collaborate in attract negative attention in the media. A good lobbyist must be prepared for such events.

In unstable and fragile political contexts, lobbying may even entail personal risks, as not all stakeholders may have an equally positive take on your lobby and advocacy efforts.

A regular risk assessment will position you to deal with volatile situations as they arise.

On working in advocacy networks and coalitions

Please find below a concise checklist of issues that will need addressing when teaming up in advocacy networks and coalitions. The list includes points to consider when setting up a network, advice on strengthening established networks and some tips to enhance general ownership by members.

SETTING UP A NETWORK

- **Stakeholder mapping and power analysis.** A stakeholder mapping will provide you with essential information to build an effective advocacy network. Start by mapping out all relevant stakeholders at the various levels and identifying their interests in relation to the future network's advocacy objective. Outline their main positions and their levels of influence; indicate which stakeholders to rank as decision-makers, or as allies or opponents.
- **Existing expertise.** Build on the existing knowledge, expertise and analyses in your partner network. This will prevent unnecessary duplication of efforts and generate enhanced support from the participating organisations.
- **Joint policy analysis.** Carry out a joint analysis of the policy environment at different levels (local, national, international) to serve as a starting point for the elaboration of a joint lobby and advocacy strategy.
- **Set clear advocacy objectives.** Set clear and realistic lobby and advocacy objectives in relation to specific issues. Be as SMART as possible and take into account the policy environment. Maintain sufficient strategic flexibility to respond to changes in the policy environment.
- **Joint strategy.** Work with and from a joint strategy. Network members must operate from the same strategy, but bear own responsibility for their delegated tasks.
- **One voice.** Stimulate cooperation between members of the network in order to facilitate speaking with one voice. Working closely together at the different levels (grass-roots, provincial, national, international) is a prerequisite.
- **Share information.** Stimulate the sharing of information on the mission, vision and activities of the participating organisations. Network members in the network must be aware of each others' strengths and weaknesses to achieve the necessary complementarity and be able to speak with a single voice.

- **Look for complementary members.** Seek to incorporate strong member organisations with complementary areas of expertise. This is not only important for evidence-based advocacy. It also allows for member organisations, depending on their respective expertise, to take on different advocacy roles (e.g. research, creating public awareness and public support, organizing campaigns, lobby government institutions, etc.).
- **Clear roles and responsibilities.** Make sure all network members are clear on their roles and responsibilities, the coordination and any substructures within the network (e.g. subgroups working on specific lobby and advocacy topics). This will contribute to more effective and more consistent messaging.
- **Leadership.** Clarity on the leadership of the network is essential, not only to motivate members but also to enhance the network's visibility.

STRENGTHENING THE NETWORK

- **Timely communication.** Ensure comprehensive and timely communication within the network to exchange information on new evidence, new policies, new stakeholders, etc. Establish simple but effective communication guidelines (e.g. working with focal points, sharing contact details, making one person responsible for communication, etc.).
- **Build capacity among members.** Invest in capacity-building for members of the network, e.g. on lobby and advocacy methods, drawing up stakeholder and power analyses, strategizing for lobby and advocacy, etc. Use coaching methods to provide continuous feedback to network members during the planning and implementation phases of your lobby and advocacy activities.
- **Remain open to change.** Ensure your network remains open to linking up with potential stakeholders that may present themselves, in order to strengthen the network's lobby and advocacy efforts.
- **Monitoring.** Staying abreast of current political and policy developments at all relevant levels, as well as of the progress at the level of the member organisations is essential to the timely adjustment of the network's advocacy strategies and enhancing its potential impact.

Ensure monitoring, evaluation and follow-up of your activities

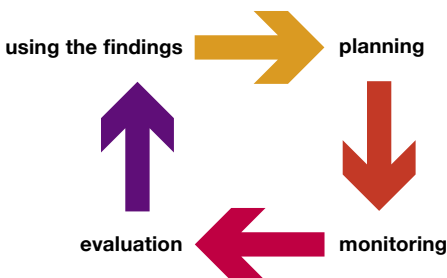
Why?

Monitoring and evaluation is essential because lobbyists need to be:

- Accountable for their lobby and advocacy activities / the investments in human and financial resources of their organisation, network or coalition
- Able to adjust their strategy according to changes in the internal and external environment
- Able to learn from their activities.

Effective monitoring and evaluation is facilitated if you have based your lobby and advocacy efforts on SMART objectives.

Monitoring can take place in various ways. However, process indicators are always a valuable tool. Results are ideally evaluated by keeping a log book of activities and their outcomes. Such a log must comprise the activities effectuated and the (intermediate) objectives achieved. The feasibility of lobby objectives must be evaluated periodically according to changing contexts and (new) insights - do prior assumptions still apply; are the objectives still attainable?- and adjusted accordingly.



TOOLS FOR MONITORING AND EVALUATING LOBBY AND ADVOCACY

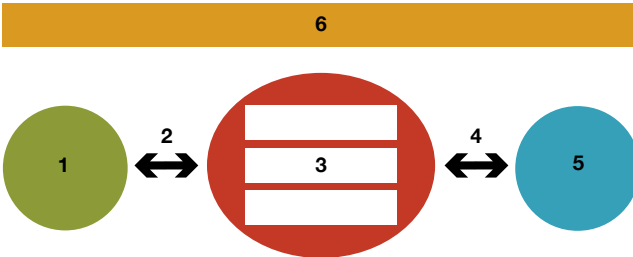
- **Output - outcome monitoring and evaluation:** outputs show whether the lobby and advocacy activities have met with success. Examples of outputs: public statement from a MP supporting your lobby and advocacy objective; support from the general public signing on to a petition (number of signatures); number of attendees at a conference on SSR.

Outcomes indicate the effectiveness of your lobby and advocacy activities in achieving identified goals. Examples of *outcomes* are: new resources allocated to a certain programme; applicable laws passed or changed; specific regulation implemented.

Outcomes may vary according to the phase of your lobby and advocacy campaign. When evaluating outcomes it is helpful to remind yourself of your starting points:

- 1) What were your lobby objectives? - Depending on the phase in your campaign this may be a policy change, carrying out a piece of research, mobilisation of partners, etc.
- 2) What was your initial course of action to achieve those objectives?
- 3) Which activities were carried out?
- 4) Was the initial framework for lobby and advocacy in any way affected by unforeseen circumstances?
- 5) What did you manage to achieve through your lobby and advocacy activities?
- 6) Was there cause to readjust your initial objectives?
- 7) What are the lessons learned from the experience?
- 8) What would you say were the strengths of your campaign?
- 9) What were its weaknesses?

- The following six steps may provide an example of what form a checklist to evaluate the effectiveness of your lobby and advocacy campaigns may take (both at the quantitative and the qualitative level).



- 1) The effect of your lobby and advocacy on the **target group**.
Useful indicators include:
 - Have conditions improved for your target group?
 - Has your target group reached a new level of understanding of the usefulness of lobbying and advocacy and what it takes to be effective?
 - Has your target group reached new insights into factors that influence their lives?
- 2) The **relationship you have with the target group** you are supporting. Possible indicators include:
 - Did the accountability towards your target group improve?
 - Is there a good flow of communication between lobbyists, networks and coalitions and the relevant target groups? Is the necessary information filtering through?
 - Has the quality of the lobby and advocacy input provided by the target group improved?
- 3) Your **organisation and position** in your network. Indicators may comprise:
 - Has the network membership enhanced the focus of your organisation on the objectives?
 - Is there a consensus within your organisation on the identified lobby and advocacy objectives?
 - Has network membership enhanced the timeliness of your lobby interventions?
 - Has network membership strengthened recognition for your organisation as an authority in the field?

- Is there enhanced support for lobbyists, within your organisation as well as within the network and/or programme coalitions?

4) Your **relationship with decision-makers** (politicians, civil servants at various levels). Indicators may comprise:

- How do decision-makers perceive your organisation, its network or coalition?
- Do decision-makers get in touch with you, your organisation and/or its network or coalition for information/viewpoints?
- Are decision-makers more accountable to you?
- Are there more participatory mechanisms to provide and receive input?

5) The effect of your lobby and advocacy on **decision-makers** (politicians, civil servants at various levels). Indicators may include:

- Are decision-makers more aware of the issues you raised?
- Are decision-makers more aware of your target group ?
- Did you, your organisation, or its network or coalition reach an understanding with decision-makers?

6) The effect on **the broader society**. Indicators may include:

- Where the issues you raised relevant to the wider general public?
- Have you succeeded in raising awareness in relation to your issues among the wider general public?
- Have you managed to raise awareness among the wider general public of your target group?

TOOLS FOR FOLLOWING UP YOUR ACTIVITIES

- Make sure your lobby and advocacy plan also allows for **follow-up activities** (for both positive and negative outcome scenarios) in order to ensure sufficient continuity.
- There tends to be a failure at the decision-making level to implement decisions taken, whether as a result of lack of expertise, lack of capacity, or lack of resources. It is therefore vital for lobby and advocacy organisations and networks not to withdraw once a favourable decision has been reached, but to **keep up the pressure to ensure implementation**. This requires on-going monitoring of the decision-making process

chapter 4

Concluding remarks

We take it that it is understood that what we offer here are *guidelines*, nothing more and nothing less, to be adapted to suit varying circumstances and priorities.

There is no one-size-fits-all recipe for effective lobby and advocacy. Much depends on the lobbyist's own powers of analysis, knowledge, commitment and ability to find the right structure and intervene in the right processes at the right moment. A lobbyist needs personal commitment and enthusiasm, as well as the courage to take risks and, last but not least, stamina and perseverance to continue looking for new opportunities in often difficult (political) circumstances.

Cooperation with other experts and institutions is essential to planning, implementing, monitoring and evaluating a (successful) lobbying and advocacy campaign. The challenge to those engaging in lobby and advocacy is to continue to develop new ways of engaging with others and to motivate them to continue the process.

These guidelines underline the need for *collective learning* in order to improve your effectiveness. To enhance your impact, you have everything to gain by joining forces and sharing your positive and negative lobby and advocacy experiences. Plus, it makes it a lot more fun!

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