

# Guide to using Tearfund's Advocacy Toolkit

## Getting Started

The Advocacy Toolkit is designed to be used by an organisation, a community or any group of people considering an advocacy intervention. The 16 sections are in a logical order to be followed by groups that are completely new to advocacy. Each section is self-contained so groups can use whichever sections are most appropriate to their current needs (although it would be wise to cover everything in Parts A and B before tackling the advocacy planning in Part C). Possible places to start include:

- unconvinced that advocacy is Biblical - start at Part B
- unsure how advocacy links in with development project work - start at A2/3
- unsure of how decisions are made in a country or region - start at A5
- convinced of the theological and practical need for advocacy, but unsure how to go about it - start at Part C
- confident in undertaking advocacy, but unsure how to develop good policies - start at C4

No external facilitator is needed, but a facilitator from the group is required. Ideally, this should be someone with some advocacy experience. The facilitator should take time to read the Toolkit thoroughly, understand the theory, and be confident with using the materials. If an external facilitator is used, they may be used for the whole process, or just at certain key stages eg at the start, before Part C, after the planning process and twelve months after the start of any advocacy work.

## Training Scenarios

There are many different ways to deliver advocacy training using the Toolkit, whether internally or externally facilitated. Most methods are likely to include workshops of one form or another, and these are what we address below. Ideally, advocacy workshops will be part of an ongoing programme, not a one-off intervention. Effective advocacy training usually requires follow-up and support, in order to implement the learning.

The training scenarios below start with more general advocacy workshops (which can be done with a number of organisations and issues), but then go into more detailed training scenarios (which need to focus on the detailed issues that the organisation plans to address).

The type and length of workshop depends on the aim that you have for advocacy training. We have given details of workshops that will fulfill 4 broad aims:

AIM 1: to introduce some of the basic ideas in advocacy

AIM 2: to deepen understanding on specific issues

AIM 3: to undergo a detailed advocacy planning process

AIM 4: to develop some specific practical skills

## **AIM 1: to introduce some of the basic ideas in advocacy**

These will serve as ‘taster’ course. If using an external facilitator, it is important to follow up soon after the workshop (certainly within 3 months) to assess what further support organisations think they will need in developing the ideas they have been introduced to. These tasters can be as short as half a day, or as long as 3 days, depending on what is covered and in how much detail. Tasters should not be longer than 3 days because participants will need to go away and apply some of the ideas they have learned, not just be overwhelmed with new material!

Below are some possible components or modules of a taster programme, which can be mixed together as appropriate. All can be done either in half a day or a whole day, apart from the basic advocacy planning process, which will usually need a whole day. A useful guide for each of the exercises is that to do most of them properly will take between 1 hour and 2 hours. It is best to do fewer exercises and to spend more time making the links, as opposed to rushing them.

### **1. INTRODUCTION TO ADVOCACY (WHAT AND WHY)**

Learning outcomes - by the end of the session you will be able to:

- Understand how advocacy is both speaking for others, working with others and helping others to speak for themselves.
- Understand how advocacy happens at different levels, and determine which level is the most appropriate for your organisation at the present time.
- Understand how advocacy has both a theological rationale (part of mission of the church to bring justice) and a practical benefit (tackles root causes, levers greater change).
- Understand how advocates have different roles eg speaking for others, mediation, building capacity of others to speak for themselves, and determine which roles are most appropriate for the organisation.
- Relate the theory to your own practice or that of other organisations.

Methods:

- What is advocacy? (exercise 3)
- Levels of advocacy (exercise 4)
- Potential roles of an advocate (exercise 5)
- Reasons for becoming involved in advocacy work (exercise 7)
- Case studies (Section A2, A3 & A6)

### **2. ADVOCACY AND DEVELOPMENT LINKS**

Learning outcomes - by the end of the session you will be able to:

- Understand how advocacy is most effective when coming out of existing development work, and plan for how this can be done.
- Understand how advocacy is needed because development work may not tackle the root causes of a problem.
- Understand the benefits of advocacy, as well as drawbacks and risks.
- Plan how to overcome these drawbacks or minimise the risks, and learn how others have done this.
- Relate the theory to your own practice or that of other organisations.

Methods:

- Links between advocacy and other development work (exercise 9)
- Issue identification (tools 1-5)

- Benefits and drawbacks of an advocacy approach to development (exercise 10)
- Ways to overcome concerns and risks in advocacy (exercise 11)
- Case studies (Section A2, A3 & A6)

### **3. THEOLOGY OF ADVOCACY**

Learning outcomes - by the end of the session you will be able to:

- Understand how God's kingdom has already come in part, although we await its final consummation.
- Understand how working for justice is part of the mission of the church to bring about God's kingdom and therefore advocacy is part of our role of bringing good news to the poor.
- Explore the reasons for lack of involvement in advocacy by the church in your context, and plan how these may be addressed.
- Understand how Jesus fought for justice and spoke out against the authorities of this day, both political and spiritual, and use him as a role model for action.

Methods:

- Should Christians be involved in advocacy? (exercise 20)
- The mission of the church (exercise 21)
- Objections to church involvement in advocacy (exercise 22)
- Jesus and power (exercise 24)
- Bible studies (Section B3)

### **4. POLITICS, POWER AND INFLUENCE**

Learning outcomes - by the end of the session you will be able to:

- Understand how everyone is 'political' in the sense that everyone plays a part in local or national life, whether through paying taxes, voting, party politics, involvement in the church etc.
- Recognise the areas in which you are already involved in this way.
- Understand how power is the ability to get something done and how there are open, closed and hidden faces of power.
- Map who has the power in your situation and how decisions are made.

Methods:

- Understanding politics (exercise 16)
- Understanding power (exercise 17)
- Mapping power relations (exercise 19)
- Case studies (A5)

### **5. WORKING WITH THOSE AFFECTED BY THE SITUATION**

Learning outcomes - by the end of the session you will be able to:

- Understand how good practice in advocacy is similar to good practice in other development work.
- Plan how to ensure the participation in your advocacy work of those affected by the situation, in order that they can identify and understand their own problems and work to bring about their own solutions.
- Plan how to ensure that when speaking for others you accurately represent them.

Methods:

- Participation (exercise 12)
- Representation (exercise 13)

- How to approach a community (exercise 3 – Section C)
- Issue identification (tools 1-5)

## **6. UNDERSTANDING CAUSES AND POSSIBLE INTERVENTIONS**

Learning outcomes - by the end of the session you will be able to:

- Analyse the root causes of poverty for a given situation and turn this analysis into objectives for change
- Understand possible advocacy interventions and identify which level is the most appropriate for you to intervene.

Methods:

- The why exercise and problem tree (tool 10)
- Advocacy options (exercise 27)

## **7. UNDERSTANDING YOURSELF AND YOUR ORGANISATION**

Learning outcomes - by the end of the session you will be able to:

- Develop a vision for change for your current situation.
- Understanding your own ‘power’ and areas of influence. and plan how to use this to your advantage.
- Understand your strengths and weaknesses for advocacy and plan how to build on the strengths and minimise the weaknesses.

Methods:

- Developing a vision for change (exercise 8)
- Understanding your own power and influence (exercise 18)
- Organisational assessment (tool 24)
- SWOT/BEEM (tool 25)

## **8. BASIC PLANNING PROCESS**

Learning outcomes - by the end of the session you will be able to:

- Plan a basic advocacy intervention using the Advocacy Cycle:
  - identify issues upon which to advocate
  - undertake good quality research and analysis
  - write a basic advocacy strategy
  - select appropriate advocacy methods
  - evaluate any advocacy intervention

Methods:

- Summary advocacy strategy (exercise 2 – Section C) with quick and easy overview
- STAGE 1 – ISSUE IDENTIFICATION
  - Identifying and agreeing priority needs (tools 1-5)
- STAGE 2 – RESEARCH AND ANALYSIS
  - The ‘why?’ exercise and problem tree (tool 10)
- STAGE 3 – PLANNING
  - Developing your goal (tool 14), setting SMART objectives (tool 15), setting indicators (tool 16), stakeholder mapping and analysis (tools 17 & 18), networking (tool 27) and activity planning (tools 22 & 23)
- STAGE 4 – ACTION
  - Choosing your methods (tool 20), developing a position (tool 26)
- STAGE 5 – EVALUATION
  - Evaluation (tool 35)

## **AIM 2: to deepen understanding on specific issues**

Some issues cannot be adequately addressed in a short session and may need more time for input and discussion. This depends on the level of understanding of the participants, and their particular needs. Some of these ‘deeper’ sessions may be an obvious follow-up from the ‘taster’ training sessions outlined above, and are likely to take 1 or 2 days. Examples include:

### **1. UNDERSTANDING THE ROLE OF THE CHURCH**

This session is often needed as an introductory session for organisations that are not convinced that advocacy is an issue for the church or for Christians to get involved in. A good approach is to look at the Biblical and the practical reasons together, so that participants are convinced that advocacy is both part of our mandate from God, and an effective response to tackle the causes of poverty.

Learning outcomes - by the end of the session you will be able to:

- Understand how advocacy is part of the role of the church in bringing good news to the poor.
- Address any lack of involvement in advocacy by the church.
- Understand how Jesus fought for justice and spoke out against the authorities of this day, and use him as a role model for action.
- Develop a vision for change for your current situation.
- Understand what options are open to you and how to use the opportunities to bring about change.
- Understand the risks involved in advocacy and plan how to overcome them.

A useful follow up to this workshop can be a workshop to deepen understanding of the context and issues (see AIM 2:2, p6, below) and then a more detailed advocacy planning workshop (see AIM 3, p7, below). Together these could form part of a trio of 2/3-day workshops, held a few weeks or months apart.

#### • PART 1 – THEOLOGICAL BASIS

This part can also be supplemented with materials from Tearfund’s Discussion Paper: *The mission of the church and the role of advocacy* (2002)

- Should Christians be involved in advocacy? (exercise 20)
- The mission of the church (exercise 21)
- Objections to church involvement (exercise 22)
- Jesus and power (exercise 24)
- Understanding power from a Biblical perspective (exercise 26)
- Bible studies (Section C3)

#### • PART 2 – PRACTICAL APPROACH

- Reasons for becoming involved in advocacy (exercise 7)
- Developing a vision for change (exercise 8)
- Understanding your own power and influence (exercise 18)
- Advocacy options open to Christians (exercise 27)
- Ways to overcome concerns and risks in advocacy (exercise 11)
- Risk management (tool 21)
- Case studies (Section A2, A3, A5, A6)

## **2. UNDERSTANDING THE GENERAL AND SPECIFIC CONTEXT**

It is useful to do this training session a few weeks or months before a session that looks at a detailed advocacy planning process (see AIM 3, p7, below). It will ensure that participants at a workshop for a detailed advocacy planning process will come with the necessary information and knowledge of their context and so are able to develop a realistic advocacy plan. It means that they will know which issue on which they plan to undertake advocacy. If they do not approach a planning workshop with the necessary information, the strategy developed is likely to be inadequate.

Learning outcomes - by the end of the session you will be able to:

- Analyse the forces operating on their society, the main issues and the main historical influences and the likely significant events coming up.
  - Map the main stakeholders and plan who to build alliances with and who to target for policy change.
  - Map who has the power in your situation and how decisions are made.
  - Analyse the root causes of poverty for a given situation and turn this analysis into objectives for change.
  - Identify sources and types of information and analyse this information for bias and usefulness.
  - Understanding your own ‘power’ and areas of influence. and plan how to use this to your advantage.
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- **PART 1 – SETTING THE CONTEXT**
    - Force field analysis (tool 6)
    - Drawing a timeline of key events (tool 7)
    - Contextual analysis (tool 8)
    - Stakeholder mapping and analysis (tools 17-19)
    - Mapping power relations (exercise 19)
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- **PART 2 – GOING DEEPER**
    - The ‘why?’ exercise and problem tree (tool 10)
    - Sources and types of information (tool 11)
    - Assessing information for bias and usefulness (tool 12)
    - Understanding your own power and influence (exercise 18)

## **3. WORKING WITH COMMUNITIES (PRA/PLA TOOLS)**

Some PRA (Participatory Rural Assessment) and PLA (Participatory Learning and Action) tools to enable communities to identify the issues they want to work on, to understand the causes of poverty and to plan for action are included in tools 1-5. However, for a fuller treatment of PRA tools, it is advisable to refer to a specific trainers guide (see Section C6, p79, for suggested resources)

### **AIM 3: to undergo a detailed advocacy planning process**

Before any organisation can undertake advocacy, they will need to plan. It is advisable that advocacy planning is only done after the organisation is convinced that advocacy is a key part of its mandate and a useful activity to do, and when they have clearly identified the issues and understand the context they are working in. If they are both convinced of the need to act and have enough information, they can go ahead and plan. Strategic planning for advocacy should then be done by following the process outlined in Section C of the Advocacy Toolkit. The outline below simply follows what already exists in the Toolkit and suggests a few preliminary exercises before launching into planning.

#### Learning outcomes - by the end of the session you will be able to:

- Understand your strengths and weaknesses for advocacy and how to build on the strengths and minimise the weaknesses.
- Develop a vision for change for your current situation.
- Implement a basic advocacy strategy for an issue you are tackling.
- Monitor progress and adapt the strategy accordingly.
- Use specific advocacy skills and methods effectively.
  
- PART 1 – SETING THE CONTEXT
  - Organisational assessment and SWOT/BEEM analysis (tools 24 & 25)
  - What drives you in advocacy (exercise 6)
  - Developing a vision for change (exercise 8)
- PART 2 – STRATEGIC PLANNING
  - Issue identification (tools 1-5) – should have been covered before the workshop
  - Research and analysis (tools 6-12) – should have been covered before the workshop
  - Planning and writing the advocacy strategy (tools 13-21)
  - Activity planning (tools 22&23)
  - Evaluation (tools 35-36)
- PART 3 – HONING SPECIFIC SKILLS (OPTIONAL)
  - Any tools from 26-34 which participants particularly want to practice, either if they feel weak in that area or know they will be using these skills in the future.

### **AIM 4: to develop some specific practical skills**

It may be that an organisation has the confidence to undertake advocacy but they realise the need to undertake some very specific training to develop their skills. The Advocacy Toolkit gives some pointers towards this, but is only very basic. It would be advisable to find a specialist in the chosen field to lead any training.

#### Learning outcomes - by the end of the session you will be able to:

- Use specific advocacy skills and methods effectively

These may include: research (tools 6-12), writing policies (tool 26), networking (tool 27), lobbying and negotiating (tools 28-30), mobilising people for action (tools 31&32), writing for the media (tool 33), radio interviews (tool 34) etc.

Graham Gordon, June 2002.