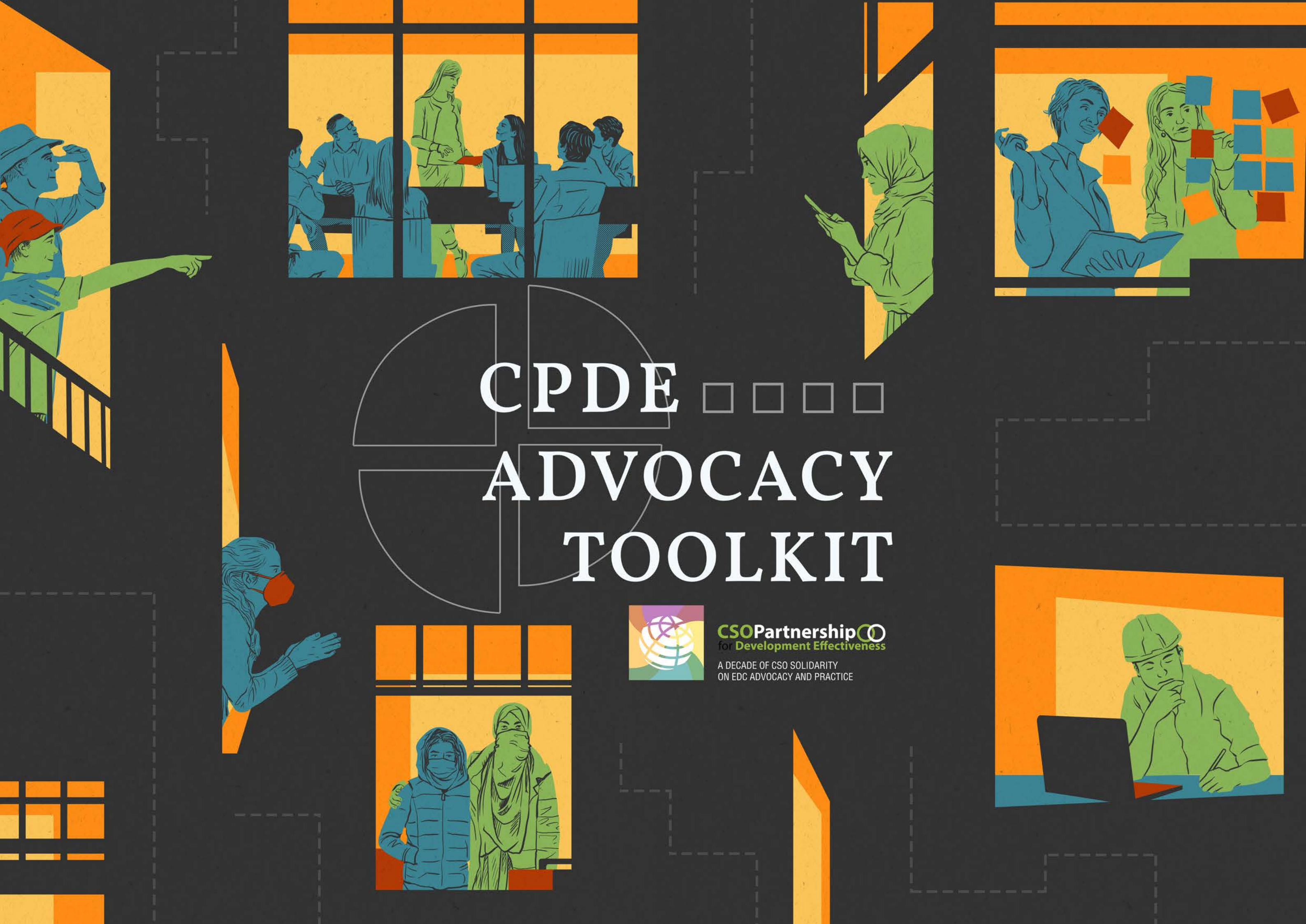




CPDE ADVOCACY TOOLKIT



CSO Partnership
for Development Effectiveness

A DECADE OF CSO SOLIDARITY
ON EDC ADVOCACY AND PRACTICE



CPDE ADVOCACY TOOLKIT



CSO Partnership 
for **Development Effectiveness**

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ON EDC ADVOCACY AND PRACTICE

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About this Advocacy Toolkit

What is the purpose of this Toolkit?

Civil society organisations (CSOs) are important development actors. They play a critical role in ensuring that development programmes are carried out to create meaningful change, especially by upholding people's rights. This advocacy toolkit provides the necessary information, guidance and practical tools that can assist CSOs in advocating for effective development cooperation (EDC) in their specific local contexts.

How can this toolkit be used to advocate for development effectiveness and effective development cooperation?

CSOs, through coordinated and organised action as effective development actors can take on the indispensable task of advocacy in reforming the delivery of aid and development to people. This Toolkit was designed to help CSOs within and outside the CSO Partnership for Development Effectiveness (CPDE) platform to advocate for the full realisation of human rights, social justice, decent work, gender equality, environmental sustainability and democratic processes in development co-operation through:

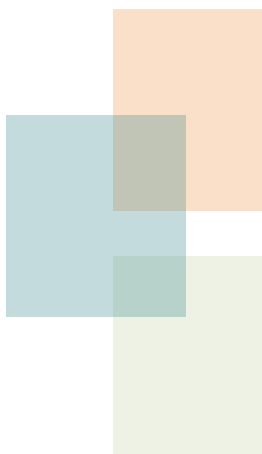
- ◆ developing and cultivating technical and operational understanding of effective development co-operation, particularly on how these translate to the local context and affect the program of work of civil society;

- ◆ assisting CSOs in identifying critical barriers that negatively affect the practice of EDC in the country level;
- ◆ facilitating an increased appreciation of the advocacy processes at the national, regional and global levels and access to advocacy points in the 2030 Agenda;
- ◆ suggesting tools to map the main stakeholders, identify key targets, influencers, and opponents in advocating for EDC in national level, and;
- ◆ providing suggestions on how to develop effective messages and identify a range of advocacy activities or tools vis-à-vis the respective stakeholders for conveying their messages and mobilising support for their change objectives.

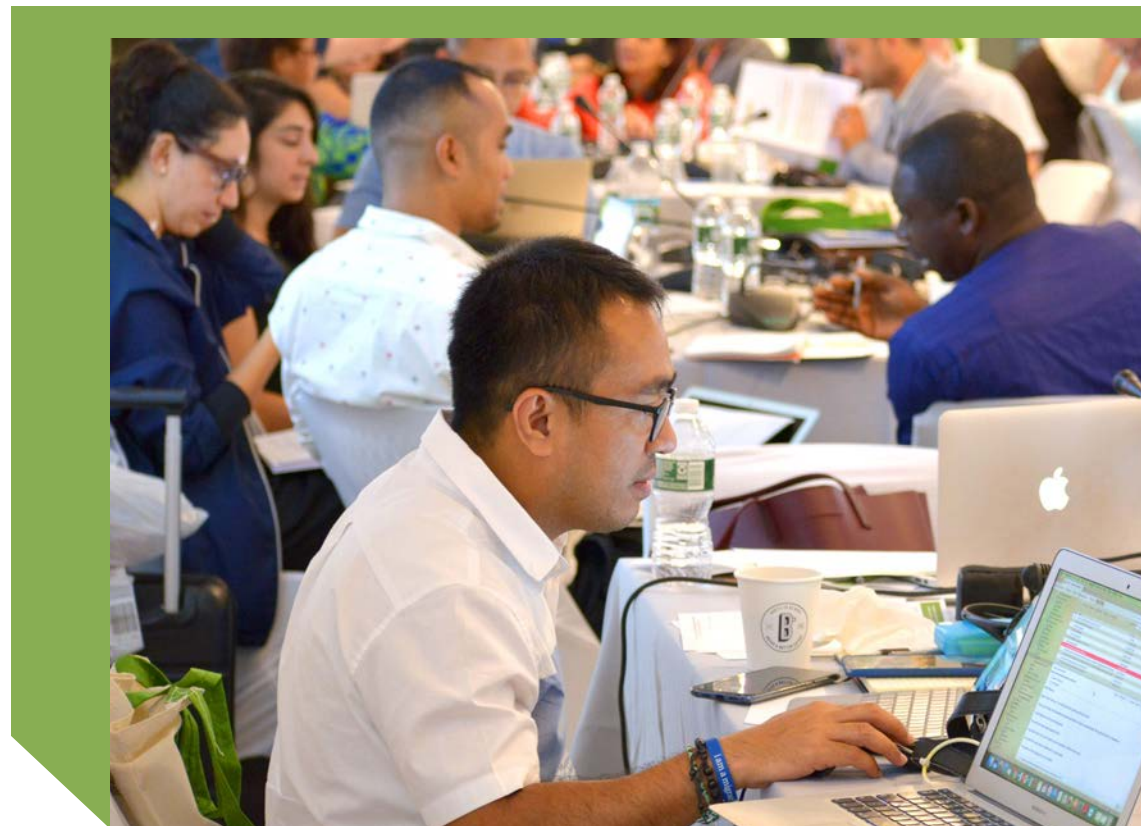
This toolkit is developed primarily for the use of CPDE's members and constituencies to provide more clarity as well as ideas on how to advocate and bring the lens of development effectiveness and effective development co-operation into their respective work programs.

This toolkit is intended for CSOs working at various levels, which might have potential interest to join the CPDE and actively influence how development co-operation is carried out in their

Who are the intended users of this toolkit?



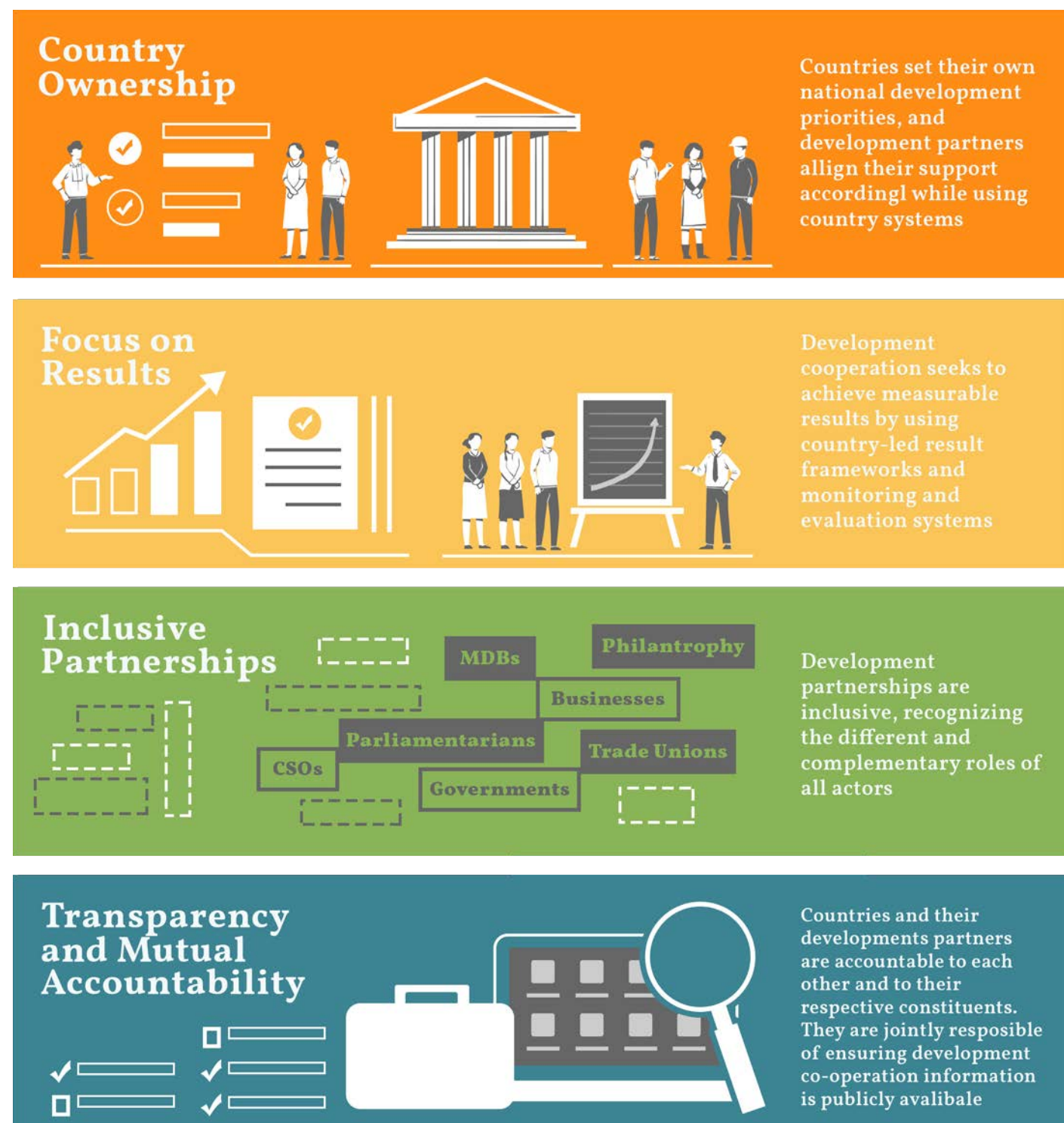
communities. It is also designed for other development stakeholders and development effectiveness advocates, within and outside the CPDE network, who are keen on supporting the realisation of CPDE's commitment to carry out the principles of effective development co-operation.



What is Effective Development Co-operation or EDC?

Effective development co-operation (EDC) provides a foundation for addressing governance and accountability in development co-operation processes.¹ EDC is a framework based on four principles, aiming to achieve genuine and inclusive development, by promoting more equal and empowered partnerships and more sustainable development outcomes.

¹ Development effectiveness refers to increasing the impact of development cooperation aid, programs, activities and partnerships.



EDC informs development partnerships with a view to achieving development effectiveness. The four principles of EDC are Country Ownership, Focus on Results, Inclusive Partnerships and Transparency and Mutual Accountability.



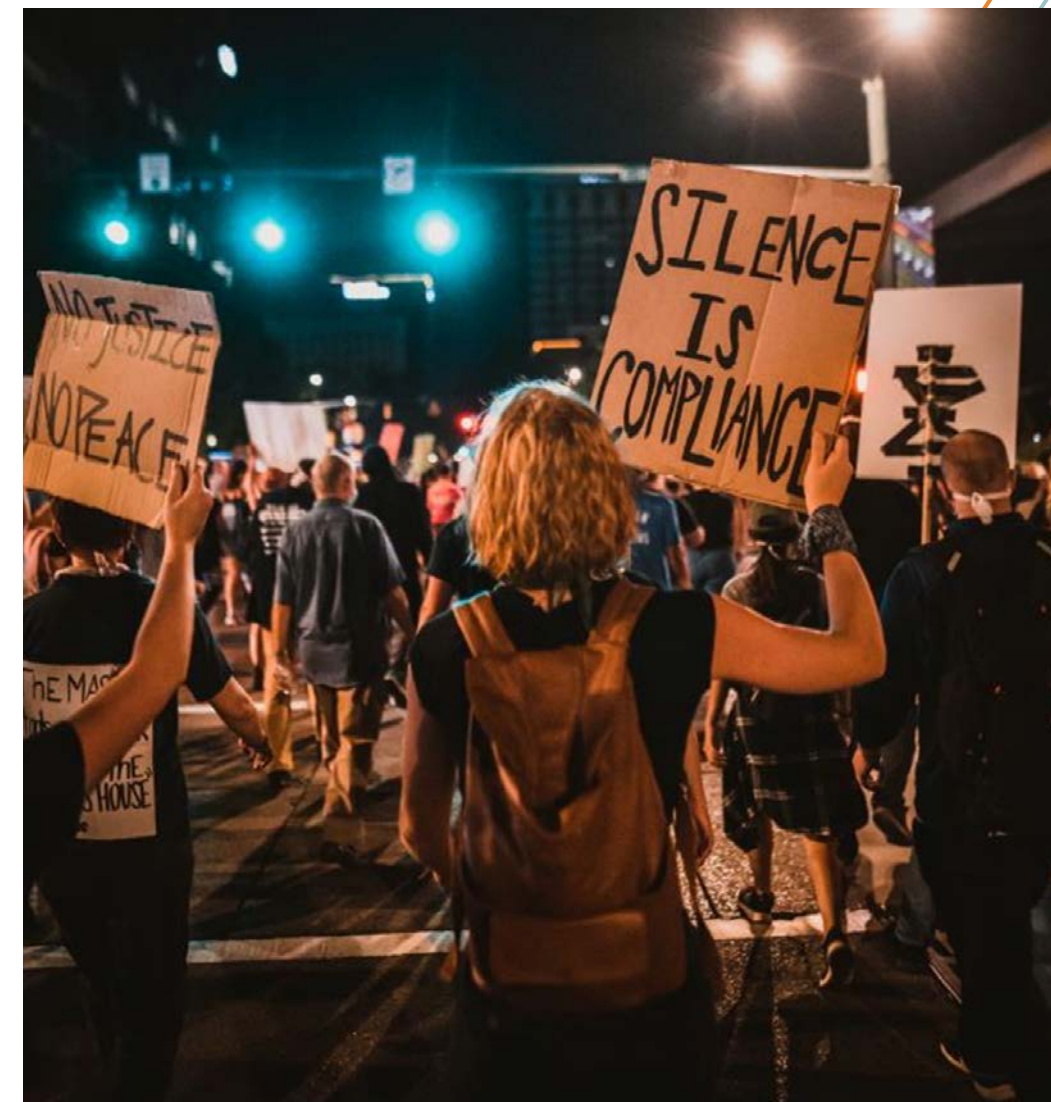
EDC also guides our work as development actors so that what we advocate for and how we deliver results to people are done through inclusive and participatory methods, mutual accountability, and democratic ownership. As a CSO platform, CPDE engages in the EDC agenda by advocating for equal representation of different development actors in the aid and development arenas – particularly CSO representation, as well as for inclusive accountability structures for donors and governments. The application of EDC is an ongoing and multi-level political and policy process which aims to drive positive behavioural change among decision makers, bureaucracies, and development stakeholders.

CPDE's advocacy brings CSO perspectives on EDC to global political arenas, such as the Global Partnership for Effective Development Co-operation, the Organisation for Economic Cooperation and Development (OECD), and the United Nations (UN), in order to hold development co-operation stakeholders accountable for commitments made in Rome, Paris, Accra, Busan, Mexico, and Nairobi.² Additionally, CPDE's advocacy has focused on building and further developing the capacity of CSOs to engage with the EDC agenda at the country and regional levels. CPDE has also worked on responding, adapting and realigning its EDC advocacy to face rapidly changing and mounting challenges such as the climate, humanitarian, conflict, and most recently, the health crisis around the world.

² CPDE participation in GPEDC webinar 2021; CPDE engagement of the 2020 DAC CSO Dialogue; CPDE's critique of the reliance on the private sector by the 2030 Agenda (2020); CPDE Statement on the 2019 GPEDC SLM

What we are doing: CPDE's advocacy areas

- 1 Advancing the implementation of Effective Development Co-operation (EDC) commitments as a contribution to the means of implementation of the 2030 Agenda and the Addis Ababa Action Agenda.
- 2 Promote accountability and development effectiveness of private sector engagement in development partnerships.
- 3 Contribute towards reversing the pattern of closing and shrinking space for civil society in development partnerships.
- 4 Promote the development effectiveness agenda in financing climate actions for the Sustainable Development Goals (SDGs).
- 5 Ensure that the nexus of humanitarian, development, and peace issues (or the 'triple nexus') advances the effective development co-operation and human rights agenda.



Where we are at the global level

For more details, proceed to Annex I: CPDE's advocacy areas and our global engagement

Box SECTION: CPDE's work on EDC today and the challenges brought by the COVID-19 pandemic

- 1 Global Partnership for Effective Development Co-operation (GPEDC)
- 2 Organisation for Economic Co-operation and Development (OECD)
- 3 United Nations, High-level Political Forum (HLPF), Financing For Development, UN Development Cooperation Forum, South-South Co-operation and BAPA+40, General Assembly
- 4 World Bank, IMF, and ADB; European Union Development Days; other CSO alliances and platforms

In discussing where we are at the global level, we cannot set aside the pandemic situation that is crippling the world as we know it. Since the beginning of the COVID-19 crisis, CPDE, its members, and all operations have been even further constrained. Facing changes in donor priorities, retraction of funding, increasing surveillance and reduction of civic space, the EDC agenda has never been as relevant as it is today. Development partnerships are a critical asset needed to tackle the political and socio-economic impact of this pandemic. Recognising this, CPDE and its constituents have focused their efforts on the following activities and engagements, to push and continue progress on EDC from civil society's perspective.

- ◆ Generate studies and data on the impact of the pandemic from different regional and sectoral perspectives;
- ◆ Ensure transparency and accountability in COVID-19-related actions of governments and donors;
- ◆ Strengthen public health systems at the community level as the frontline of defence against the pandemic;
- ◆ Harness civil society knowledge, expertise, and initiative in addressing the pandemic;
- ◆ Focus efforts on ameliorating the impacts of COVID-19 on the vulnerable, impoverished, and marginalised;
- ◆ Campaign for governments to stop using pandemic containment as a pretext for monitoring and suppressing political dissent and social mobilisation.



Defining advocacy and identifying the policy cycle

Advocacy is a set of organised activities designed to influence the policies and actions of those in power in order to achieve lasting and positive change. In the context of our work as CSOs, advocacy often goes beyond changing policies. It also entails opening up political spaces to challenge decision-making processes, consolidating grassroots positions, and creating enabling conditions and opportunities to historically marginalised communities. This way, they can articulate their realities, claim their rights, amplify their voices, and be heard and included in development processes.

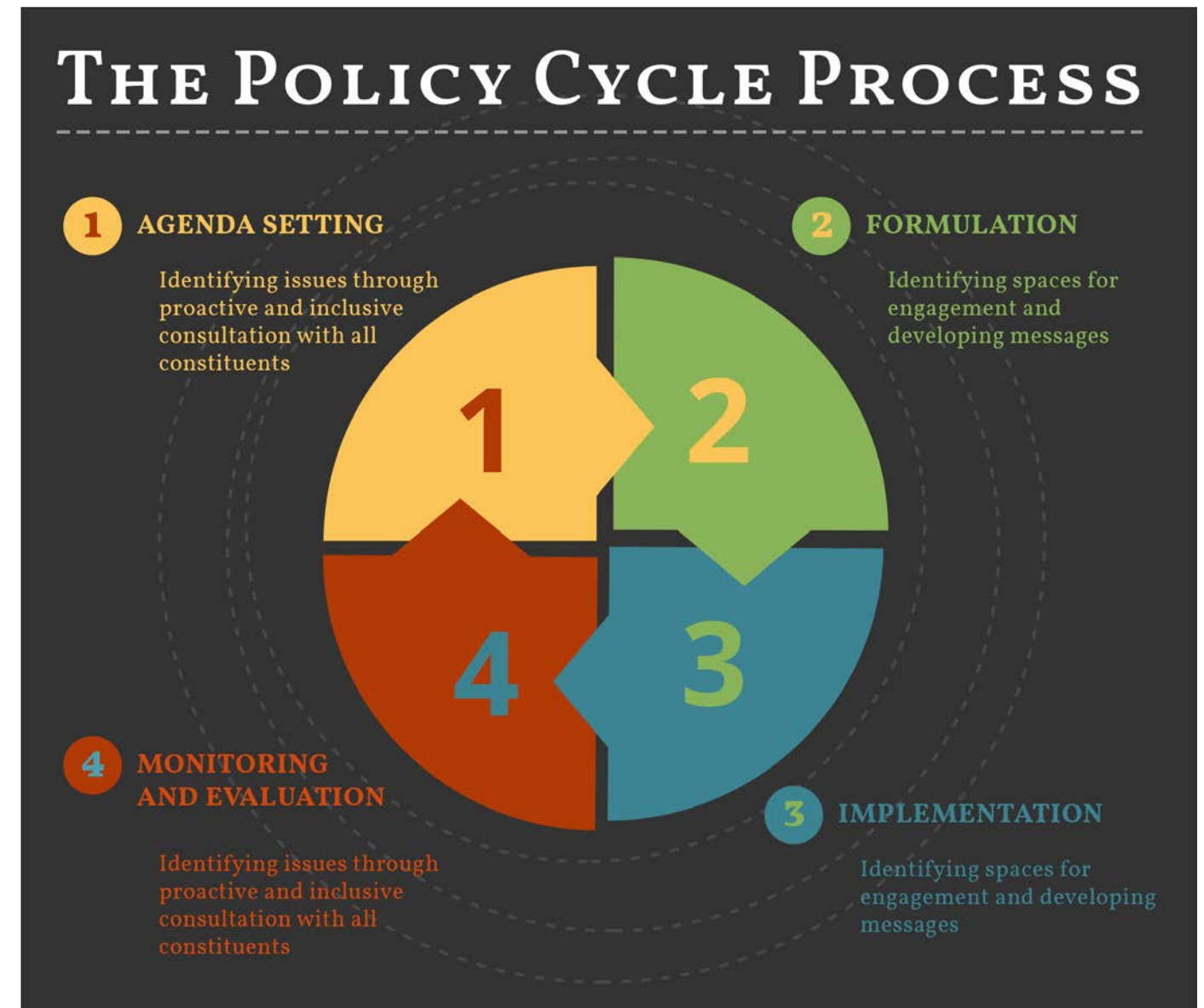
Part of this process is to provide CSOs with tools to influence key decision-makers in important political processes so that they can have a say in issues that directly impact their lives and livelihood.

Advocacy is also a tactical way to achieve change when:

- ◆ There are no policies, laws, and regulations to adequately support the participation and positions of CSOs in development co-operation;
- ◆ Existing policies, laws, regulations, and practices are 'disabling' to CSOs and impact on their ability to participate and assert people's participation and inclusion in relevant political and policy-making process, and;
- ◆ Enabling' policies, laws and regulations exist but are not being implemented

Strategic planning lies at the core of effective advocacy. This is especially true for development organisations and CSOs that work within limited time, material, and political resources. CPDE has developed this toolkit out of its own experience in developing its advocacy through strategic planning.

By drawing its advocacy from the diversity of perspectives brought from its constituents, and through the policy cycle as shown in the diagram below, CPDE is able to implement its plans, convey its messages, and achieve its objectives.



CPDE has a rich and diverse experience in policy formulation and advocacywork. Because of this, it can offer a framework by which to model other advocacy strategies and formulate policy positions. The Policy Cycle can be understood in four iterative steps. These are illustrated bellow by building from our platform's experience:

**CPDE
policy
cycle**



FORMULATION:

The CPDE Steering Committee, the Advocacy and Policy Committee, and the thematic task forces:

- 1 Process the information identified by advocacy strategy;
- 2 Determine where and whom to engage;
- 3 Identify CPDE's potential contribution and value proposition;
- 4 Identify the types of outputs needed to inform advocacy – case studies, desk research, member surveys, stories from the ground, literature reviews, etc.;
- 5 Articulate messages in the form of policy positions and communications outputs;
- 6 Identify advocacy targets and political and policy roadmaps where we want to take our messages to achieve maximum results and impact our objectives;
- 7 Develop mechanisms for monitoring and evaluation, including establishing indicators for measuring the impacts and contributions of CPDE's work to the EDC discourse.

For example, the results of a similar process conducted by CPDE are embodied in the 2020-2023 CPDE Strategic Plan and the CPDE Manifesto. As members of CPDE, your advocacy messages may also be based on or take inspiration from these existing strategic documents and messages.

Identifying spaces for engagement and developing messages

AGENDA SETTING:

Identifying issues through proactive and inclusive consultation with all constituents

- 1 Analyse the political landscape and development co-operation environment at global, regional, national and local levels
- 2 Survey and understand the different priorities, positions and advocacy agenda of CPDE constituencies (members)
- 3 Solicit and process guidance from CPDE governance structures
- 4 Draft/develop strategy at working committee level with support from the Global Secretariat
- 5 Consult regions and sectors about proposed CPDE advocacy strategy
- 6 Convene Global Assembly and Coordination Committee to approve the CPDE advocacy strategy





IMPLEMENTATION:

Identifying and deciding where we engage other CSOs and non-CSO constituents as advocates, critics, analysts, watchdogs, and partners

- 1 Deliver messages in conferences like the UN, during negotiations in spaces like the GPEDC and the OECD, in consultations with experts, or in general communications or media campaigns to impact public opinion and practitioners. In most cases, a combination of all is necessary;
- 2 CSOs are also implementers and undertake their own projects and produce their own publications - regional and country-level aid observatorios, country compacts, researches, and capacity building activities;
- 3 Campaigns are a crucial tool for civil society, critical to rallying support and gathering allies and potential partners around an advocacy or policy objective. CPDE has played a pivotal role in global campaigns such as the CPDE Global Day of Action 2019 and the Belgrade Call to Action. At the country level, CPDE has been advocating for monitoring aid commitments, providing enabling conditions for CSOs to operate and participate in development partnerships and discussions, reversing the trend of shrinking civic spaces, and institutionalising mechanisms to improve the effectiveness and accountability of CSOs as development actors.

MONITORING AND EVALUATION:

- 1 Monitor and assess whether or how CPDE contributions have made impact at various levels;
- 2 Analyse our impact with the aim of assessing our strategies, learning lessons, consolidating our gains, and identifying our approach to future agendas.

Assessing the impact of our policy messages on discourse and learning from our success and mistakes





TOOL 1: Agenda Setting

The agenda setting tool will begin the process of crafting your advocacy strategy. Here, your foundation will be set by identifying the problem and objectives of your advocacy and how these relate to EDC.

For beginners, start with activity 1. For organisations with established advocacies, proceed to activity 2.

ACTIVITY 1:

THE PROBLEM STATEMENT AND IDENTIFYING ITS ROOT CAUSES AND CONSEQUENCES

The first step in developing an advocacy strategy is to understand the landscape, context, and situation you are and will be operating in. Your policy-related problem may be easy or difficult to determine. In many cases, the problem has already presented itself through the campaigns of other non-governmental organisations or people's organisations. In other cases, you may need to unpack or consolidate inputs from your constituents to be able to identify your issue. It is important not to assume you fully comprehend the problem in its entirety, as this may lead to ineffective advocacy.

For the first activity, the problem diagram will help you articulate your issue into a problem statement and identify the relationships and interlinkages of many other issues that revolve around it. This is a team exercise designed to arrive at a concise problem statement at the centre of the diagram.

This discussion will eventually lead you to other related issues such as possible causes and consequences of your problem. The circles surrounding the problem statement are spaces where these issues can be listed down. These will be useful later on when determining how we solve the problem. When you are stumped or having a difficult time, a useful tip is to keep asking yourselves why your issue is a problem to begin with.

It is also very helpful to qualify what has been written down by adding more information on the sides of the diagram or the text circles. This will help you along the way as you progress through the toolkit. You may use these suggested questions to guide you: Are the issues listed improving or regressing? Which are the easiest or most difficult to address? And which ones could be addressed by an advocacy campaign?

ACTIVITY 2:

IDENTIFYING
YOUR MAIN
OBJECTIVE,
SECONDARY
OBJECTIVES,
INDICATORS,
AND DESIRED
OUTCOME

Now that the problem and issues have been defined, it is time to develop the plan that will set everything in motion. This next activity is designed to articulate how to address the problem through objective-setting and strategic planning. It begins with identifying the main objective, a goal whose outcome addresses or solves the problem. Secondary objectives are then used to expound on your main objective. Setting your objectives is a fundamental part of your advocacy work. Grounding your advocacy initiatives and campaigns in your goals helps maintain focus for your activities, as well as to determine what kind of actions, alliances, and engagement are strategic and ensure meaningful gains.

Yet, determining your objectives alone might be insufficient. It is also important to strategise how these will be operationalised. This can be done by better clarifying what the desired outcomes are and identifying indicators which will measure the progress you make with your advocacy strategy.

When having trouble defining your objectives or trying to find the right language for what you want to say, it is helpful to abide by the SMART technique (Specific, Measurable, Achievable, Realistic, Time-bound). There are also examples in the activity table that can aid you in the process.



ACTIVITY 3:

LOCATING
EDC IN YOUR
ADVOCACY
WORK

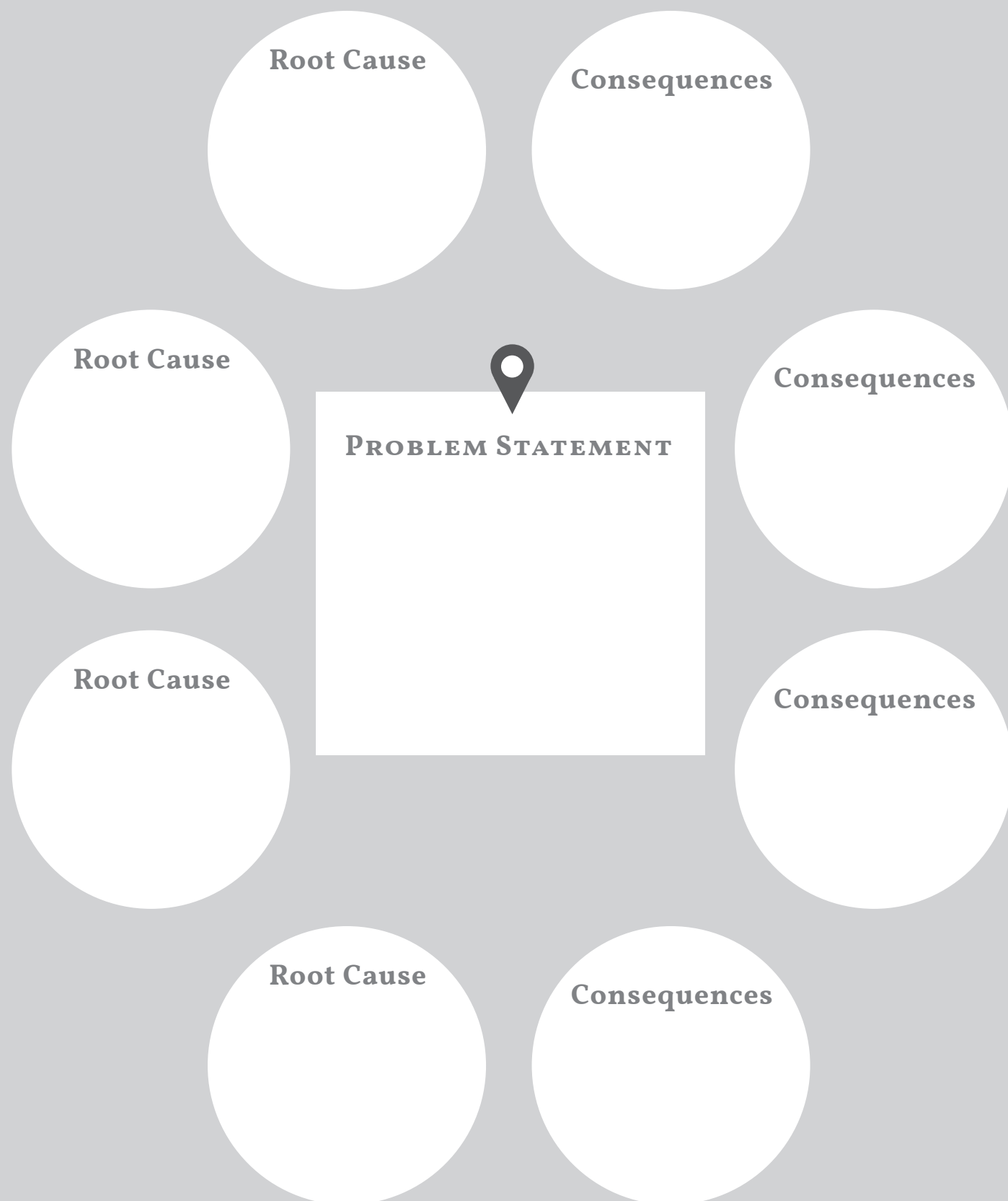
The next and last step in completing the agenda setting process is linking your now developed advocacy objectives with the key EDC advocacy areas. The strength of CPDE’s advocacy work comes from the combined effort and struggles of its entire constituency. This is also true inversely, where EDC brings immense value to the work that you do on the ground as a CPDE member.

Defining how to establish the linkage of EDC with your advocacy objectives can be a challenge. This activity tries to make this easier by building on the desired outcomes you have already established from the last activity. You and your team are encouraged to work together to match your desired outcomes with the most appropriate CPDE advocacy area themes provided in the activity. The CPDE advocacy area column in the activity is based on the 2020-2023 Strategic Plan and has been presented with a more pragmatic approach which will make it easier to match advocacy plans to.

The final column of the activity invites you to explain how the EDC advocacy area themes you have matched with contributes to the realisation of your desired outcomes. This activity will not only help align your advocacy strategy with CPDE’s strategic plan and that of fellow members, but also allow synergies in terms of messaging, rallying support, and finding collaborations and related literature. To aid in this activity, especially for the final column, follow the guide questions which can help articulate what you want to convey: What can help inform your indicators? What will help build the strength of your advocacy strategy? How are the identified issues affecting your organisation’s capacity to engage in development projects and realise your desired outcomes?



ACTIVITY 1: THE PROBLEM STATEMENT AND IDENTIFYING ITS ROOT CAUSES AND CONSEQUENCES



ACTIVITY 2: IDENTIFYING YOUR MAIN OBJECTIVE, SECONDARY OBJECTIVES, INDICATORS, TARGETS, AND DESIRED OUTCOME

RESTATE PROBLEM STATEMENT		
Main and secondary objectives <i>Example:</i> Promote accountability and development effectiveness of private sector engagements in development partnerships.	Indicators <i>Example:</i> Accountability mechanisms of business practices' application of EDC principles and HRBA, including Kampala principles, in utilising public finance.	Desired outcome <i>Example:</i> Development partnerships exercising a degree of accountability mechanism and development effectiveness in their approach to private sectors.

ACTIVITY 3: LOCATING EDC IN YOUR ADVOCACY

Desired Outcome	CPDE Advocacy Area themes	Added value through EDC
1. Local groups are involved in planning, implementation, and evaluation of government projects	<u>EDC</u> • Monitoring of EDC commitments • Engagements of the GPEDC and the UN • Dialogue with development stakeholders at national, regional, and global levels • Involvement or engagement of country-level observatorio <u>Private Sector Engagement</u> • Engaging private sector • MonitoringHRBA and EDC in private sector engagements • Outreach with MSMEs and social enterprises <u>Shrinking spaces for CSOs</u> • To raise awareness and promotion of dialogue on CSO Enabling Environment • Campaigns on shrinking spaces • Follow-up on Belgrade Call to Action <u>Climate finance</u> • Engagement of arenas and dialogue on climate finance • Researches and case studies on climate finance <u>Triple Nexus</u> • Conflict, fragility, peacebuilding, humanitarian aid • Dialogue with governments and public official on these issues • Study sessionsand webinar on the nexus	Messages and strategies on dialogue with stakeholders will be of valuable resource to our approach to involve local groups institutionally while the outcome of this advocacy strategy will help inform country-level observatorio

ACTIVITY 3: LOCATING EDC IN YOUR ADVOCACY

Desired Outcome	CPDE Advocacy Area themes	Added value through EDC



TOOL 2: Formulation

The second tool is focused on identifying and developing the content of your advocacy strategy. Tool 2 will guide you in identifying your stakeholders, mapping your engagement opportunities, and developing your messages.

If your organisation does not have a strategy yet, start with activity 1. For organisations with identified stakeholders and partners, please proceed to activity 2.

ACTIVITY 1:

MIND MAP FOR STAKEHOLDERS AND OPPORTUNITIES FOR ENGAGEMENT

This step will guide you in identifying the people and institutions you need to reach to make change happen. These may be people and organisations that have formal authority to deliver policy such as legislators and parliamentarians or people who have the capacity to influence those with formal authority such as media, and key constituencies.

Effective advocacy requires organisations to have a clear sense of what are the decision and policy making processes you most want to influence, and what actors play or might play what role in the power dynamics behind those policy processes. The list below should guide you when determining which stakeholders would be most relevant to your advocacy objective.

- ◆ Stakeholder's interest in the issue (identify stakeholders interests, whether they are primary or secondary stakeholders, and duty bearer and/or rights holders)
- ◆ Stakeholder's level of opposition to or support for the issue (strong ally, medium ally, neutral, medium opponent, strong opponent)
- ◆ Stakeholder's influence over the issue identified (unknown, no influence, some influence, moderate influence, significant influence, very influential)
- ◆ Importance of stakeholder's engagement (unknown, no importance, some importance, moderate importance, very important, critical player)

The first activity to carry out is a mind map that logically organises the stakeholders according to their role in your advocacy based on the criteria above. Begin with categorising stakeholders such as those you need to convey messages to and those who can be strategic allies or important beneficiaries. These can range from those that are typically very influential and critical players but are somewhat opposed to your advocacy objectives such as neoliberal institutions and international organisations. Other categories depending on your advocacy may include medium allies with some influence such as international non-government organisations (INGOs) or strong allies with low influence but with high importance such as rights holders and local CSOs.

For a more comprehensive guide to identifying your stakeholders, proceed to Annex II: Guide questions for conducting stakeholder analysis

Rights holders and other CSOs are vital to your advocacy strategy. Alliances and coalitions can also strengthen any advocacy initiative or campaign. They allow the consolidation of the strength and resources of diverse groups of people at the national, regional, and international level.

Building alliances is also an effective means to mobilise the solidarities of different stakeholders towards common behavioural change objectives. When solid, the presence of alliances and coalitions also helps in obtaining stronger public support and influencing norms and values around a specific issue.

While providing added-value to many advocacy campaigns, alliances are not always easy to form and sustain. Precisely because of the diversity of groups of people coming together, resolving agreements and coming to a common framework and advocacy strategies will most probably remain a persistent challenge.

It is important to understand capacity building as a key part of the process of growing a critical mass around specific issues. When we work together with other CSOs to increase our knowledge and appreciation of a common problem and develop skills and tools for addressing it, we are strengthening our own and collective advocacy efforts and opportunities.

ACTIVITY 2:

DEVELOPING MESSAGES

Advocacy campaigns and initiatives ultimately aim to inform, persuade, and move people to action. Central to every advocacy campaign is a core or primary message that expresses the position and changes you aspire and intend to bring about.

The primary message provides the focal point on which your entire advocacy campaign will stand - an anchor that captures the state of affairs, position, proposed changes and call to action that your advocacy espouses.

Concepts like EDC and development effectiveness are not easy to digest, not only for the target audiences you wish to influence but also possibly even among CSOs who you want to engage in the issue.

And while they are not easy to reduce to simple messages, extra effort will be needed as complex and technical messages are unlikely to drive people into action. Simple and direct messages allow more people and collectives to better understand and resonate with your position and proposed change objectives. Drawing your audience to an immediate message also creates more opportunities to explain the issue in detail.

This second activity provides you with a guideline on how to craft your ideas into effective advocacy messages. Here are some helpful tips:

- ◆ Summarise and present your advocacy messages in three to four sentences.
- ◆ Your primary message is not the campaign slogan. Rather it is a concise statement that serves as the handle from which you will develop slogans, sound-bites, talking points, discussion guidelines, stories, and other materials that are the main vehicles to deliver your advocacy.
- ◆ Recall the information you have listed down in the previous tool such as the identification of the problem, goals, and stakeholders.
- ◆ Advocacy messages are often categorised into primary and secondary messages. The primary message is an overarching statement that universally speaks to all audience segments of your campaign (i.e. Development co-operation should uplift the lives of the poor and marginalised). More specific messages tailored to influence a particular audience segment are communicated through secondary messages.
- ◆ Secondary messages or targeted messages provide more details on how the primary message can be achieved, including the actions you wish your audience to take. Your advocacy campaign may contain several secondary messages, each tailored to the specific needs of your identified audience segments.

For more details, proceed to Annex III: Tips for developing effective messages

ACTIVITY 1: THE PROBLEM STATEMENT AND IDENTIFYING ITS ROOT CAUSES AND CONSEQUENCES



ACTIVITY 2: DEVELOPING MESSAGES

<i>What we want to achieve?</i>	<i>What we want to achieve?</i>
--	--



TOOL 3:

Implementation and Enforcement

The third stage of developing your advocacy strategy is piecing together your agenda and content into an action plan viable for implementation. Activity 1 focuses on how to convey your messages while Activity 2 is centred on determining possible gaps that may arise in your action plan and helping you identify any capacity needs that will help address these gaps.

ACTIVITY 1:

DEVELOPING THE ACTION PLAN

There are many channels to deliver your advocacy messages. Among the most widely used channels are lobbying, negotiating, engaging with the media, using social media, and mobilising public support, as well as conducting capacity building and sharing information on the topics you advocate for. Choosing the strategic and appropriate format to communicate with your audience will depend on your appraisal of your current political situation, context, and understanding of your audience, key stakeholders, and political processes will help you determine the best tactics and method to communicate your messages.

Choosing the formats to deliver your messages will differ according to who you are speaking to, what you want to say, your purpose or aim, and ability to work with the selected format. Oftentimes, you may need to use multiple information strategies especially when communicating and reaching out to diverse audiences. No single format or channel will determine the success of your advocacy campaign. What's important is how you study and utilise the different channels to advance the change you want to realise.

Another aspect that must be considered when developing your action plan is the impact of the COVID-19 pandemic to policy advocacy work. In many instances and places, using digital communications is almost the only avenue at your disposal during these challenging times. If your advocacy strategy hinges even just partially on personal interaction, chances are that there is a need to shift to digital advocacy. This will greatly impact on the format and place of how you choose to do your advocacy.

The main adjustment will come from how we do advocacy without being able to convene our constituents or engage in formal meetings. Advocacy strategies shifting to digital mode are encouraged to capitalise on the volume and frequency of their online engagement as opposed to relying on large targeted in-person conferences.¹ Strengthening

¹ Opinion: How to advocate effectively in the age of COVID-19 <https://www.devex.com/news/opinion-how-to-advocate-effectively-in-the-age-of-covid-19-96812>



your networks will be as vital as always. Choosing the right channels is also crucial such as which social media channels are more frequently used by the decision makers you are trying to engage.

Another important factor to consider in choosing the format of your advocacy messages and identifying your digital communications channel is the scope of who you are speaking to, which most likely have changed during the pandemic. No longer are we just pitching to groups of organised delegations at a conference or on Twitter - the audience of a COVID-19 grounded world is more spread out in different parts of the world and on different platforms. Conveying your messages effectively to achieve your objectives and desired outcome will therefore have to be agile and adapt to the realities we are facing.

Constantly building a critical mass around the advocacy objectives you are trying to convene is crucial in expanding any organisational messaging and guaranteeing your efforts go beyond the local territory and/or niche of organisations working on similar issues.

This activity is a table that groups together all the components of developing an advocacy strategy we have discussed so far. It begins with organising the pertinent information you have listed down in this toolkit. After that, you and your team will be guided by a step-

by-step process in determining what your audience responds to the best, the format of how you will convey your message and the best time and place to do this. In its completion, this activity serves as the summary of your new advocacy strategy which may form the basis of your policy implementation.

ACTIVITY 2

SWOT ANALYSIS OF CHALLENGES AND CAPACITY NEEDS TO IMPLEMENT YOUR ACTION PLAN

Upon completing activity 1, you will notice a gap wherein to achieve your goals, there are hurdles to either convey your messages, compel your stakeholders to change, or physical barriers to advocacy and engagement. This is normal and almost second nature to our work as civil society. The pandemic has only made this reality even more difficult.

Activity 2 aims to remedy this through a SWOT analysis of your challenges and any capacity needs. Depending on the international context and your national reality, the ongoing pandemic also requires more modifications to how we do advocacy which is an important consideration to make when accomplishing this activity.

Your needs and what you can provide are part of what makes networks such as CPDE, powerful. Identifying your strengths and weaknesses in this activity is a step toward finding solutions to your issues and making a better and more effective advocacy strategy. Before proceeding to the activity, it is helpful to follow the steps below to aid you in articulating your points.

- ◆ Based on activity 1, what challenges and gaps do you face in implementing your advocacy strategy?
- ◆ What kind of adjustments do you need to make in the face of the COVID-19 pandemic's impact? (e.g. limited budget, remote ways of working)
- ◆ What do you consider your biggest strengths and weaknesses in addressing these gaps?
- ◆ How can CPDE and other CSOs improve how you address your needs and build your capacity?
- ◆ What can you do as an organisation to improve your strengths and weaknesses?

To learn more about the capacity needs of CPDE members and our struggle against the impact of the COVID-19 pandemic, proceed to Annex V: Challenges and capacity needs identified by CPDE constituents and our experience battling the impact of the COVID-19 pandemic

For more details on the forms of delivering your message, proceed to Annex IV: Different ways to convey messages

ACTIVITY 1: DEVELOPING THE ACTION PLAN

Advocacy goal Restate your advocacy goal (Tool 1: Activity 2)			
Relevant CPDE advocacy areas Restate the advocacy areas relevant to your strategy (Tool 1: Activity 3)			
Target audience Restate the relevant stakeholders and engagement area (Tool 2: Activity 1)			
Supporting alliances List any campaigns or methods your alliances have that coincides with or supports your messages (Tool 2: Activity 1)			
Advocacy messages Restate the messages you have developed for the advocacy goal (Tool 2: Activity 2)			
Source Whom will the audience respond to and find credible? For example, local celebrities or opinion formers who have been personally touched by your issue (e.g. human rights violations) might work with some audiences while an eloquent spokesperson from civil society or a foreign internationally renowned expert might be better in other cases.			

Format Which way will you deliver your message for maximum impact? For instance, a letter, a face-to-face meeting, a policy paper, a report, a flyer, an advert, a high-level conference or a documentary or a combination of these formats? In a shift to digital advocacy in light of the pandemic, what digital deliverables (teleconference, webinar, online events, tools, publications, and social media) does your advocacy need to create maximum impact?

Place Is there a location or venue to deliver your message that will enhance your credibility and political impact? For example, a side event at an international conference or a presentation in parliament or at a well-reputed institute associated with civil society issues.

Be creative in deciding where to deliver your messages given the emphasis on remote ways of working and digital tools. Identify which digital channels your audience most likely frequents or engages in. Also consider the limitations of certain people and groups who have limited access to digital infrastructure.

Timing What is the best time to deliver your message? • Can you time your message with a particular moment – known as a hook – in either the decision-making process or your advocacy initiative? • Can you make it coincide with a relevant anniversary or a national day to mark a relevant issue? • It is likely that you will have to take advantage of several appropriate opportunities – or hooks – during the course of your advocacy. ‘Hooks’ are particularly important when planning your media strategy.

ACTIVITY 2: **SWOT ANALYSIS ON CHALLENGES AND CAPACITY
NEEDS TO YOUR ACTION PLAN**

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS



TOOL 4:

Monitoring and Evaluation

The final phase gives the users a tool that can be used to measure and monitor the effectiveness of their advocacy strategy during implementation. This tool contains only one activity and provides the users with a modular template that they modify according to their advocacy strategy.

ACTIVITY 1:

MONITORING AND EVALUATION, PROCESS AND IMPACT MONITORING

Monitoring and evaluating your advocacy is a systematic way of knowing whether your campaigns, strategies and initiatives are working. Tracking your progress along the way, through monitoring, allows you to determine whether your strategy is working or you will need to make adjustments, refinements or discard elements of your strategy that are not working. Evaluating your advocacy campaign meanwhile is important, in order to determine the extent by which you have accomplished what you have set out to do and if you have done it well.

Good planning, monitoring, evaluation and impact assessment are essential for effective advocacy, for accountability and strategic learning. However, since advocacy is not a straightforward endeavour - being that it aims to influence complex social and political environment - it is important to continually track the effect of your advocacy activities or tactics as it enables you to look for evidence of change as you go along, assess progress in bringing about change and test whether your assumptions about how change happens in your context are correct.

There is no one way of measuring progress and impact in advocacy. Different methodologies have been developed and applied by different organisations, coalitions and networks. In general, a good and sound planning process will set the precedent for your monitoring activities. This means laying down a well-thought-out change objective against which you can monitor your progress as you move along. When monitoring progress, it is important to assess both the process and impact of your advocacy.

Process monitoring will allow you to judge periodically whether:

- ◆ your approach and tactics are working;
- ◆ enough target audiences are being reached and if your messages are accessible to them;
- ◆ you are using the most appropriate channels to convey your messages;
- ◆ you are collaborating with the right allies and partners.

Impact monitoring, meanwhile is useful to know whether:

- ◆ your objectives are likely to be achieved in the given timeframe;
- ◆ you need to do more to sustain change in the longer-term;
- ◆ what unintended impacts – positive or negative – may have occurred;
- ◆ commitment to specific changes by your targets have been followed through.

Good planning, monitoring, and evaluation are essential for upholding our commitments to accountability and transparency. Moreover, ensuring that information flows freely within your organisation and broader CPDE network will make monitoring and evaluating your advocacy work easier and more straightforward.

This activity is an open-ended activity where you may use the template and modify it according to the advocacy strategy you have developed. Follow the information you have provided for your advocacy strategy and the guidelines to measure process and impact monitoring accordingly.

Follow this guide for a full-fledged monitoring template patterned against CPDE’s advocacy areas. Annex VIII: Monitoring and evaluation template



MONITORING AND EVALUATION

EDC			
Advocacy change objectives	Activities	Indicators of Process These should directly reflect the milestones and activities you have identified in the advocacy plan	Indicators of Impact Evidence that there has been positive change (in policy and practice) towards achieving the objectives
Obj 1	1.		
	2.		
	3.		
	4.		
Obj 2	1.		
	2.		
	3.		
	4.		



Conclusion

The completion of the four tools is only the beginning of your advocacy strategising. These were designed according to the CPDE policy process and the platform's own experience and will need to be tailor-fit to each organisation that will use them. It is also up to you now as a development actor and CSO to turn this exercise into reality. To take this work further there is much more that you can do to ensure an even more robust advocacy strategy.

Below, you will find a short description and links to two additional components that are essential for implementing and monitoring your advocacy strategy.

Risk analysis

As CSOs you know that challenging power through advocacy can be risky. In some instances, it can potentially result in backlash and conflict. It is therefore important to consider the risks, challenges and potential negatives you will encounter in the process of deciding how to delivery your advocacy. Carrying out a comprehensive risk assessment will help you select appropriate and effective advocacy strategies and think through how to minimise or mitigate the risks to your organisation, staff, volunteers, activists and the people you work with.

The advocacy risk analysis tool helps you think through potential risks you may face as you embark on your advocacy initiative, the impact that these risks and negative situations could have on your organisation, your staff and others, how likely it is that these situations might happen and what action you could take to minimise, address and/or avoid these risks

If your advocacy plan requires that your organisation engage the media then it is important to be aware of the several tools which can be used to influence the media. The most widely used are press releases, feature articles, news conferences, letters to editors, TV or radio interviews, newsletters, briefs, conferences, seminars and workshops.

In many countries, online platforms such as websites, online news channels, blogs, and social networking sites like Facebook and Twitter, are fast becoming emerging media platforms that have strong capacity to influence and shape public opinion and perception.

Follow this guide for instructions and a template on how to use risk analysis on your advocacy strategy. Annex VI: Risk analysis

Communications and working with the media

Follow this guide to learn more about communications and working with the media through a series of helpful tools and tips. Annex VII: Communications and working with the media



ANNEX I:

CPDE's advocacy areas and our global engagement

CPDE's Advocacy areas

1. Advancing the implementation of Effective Development Co-operation (EDC) commitments as a contribution to the means of implementation of the 2030 Agenda and the Addis Ababa Action Agenda.

CPDE aims to advance EDC implementation by building capacity and instruments at the country-level while continuing impactful engagement at the international level. Training and capacity building of national CSOs on monitoring EDC commitments will go hand-in-hand with the development of country-level observatories that study and track the application of EDC principles in SDG partnerships.

CPDE will also continue to promote and facilitate dialogue with governments, development partners and stakeholders at all levels. In particular, CPDE will continue to actively engage the GPEDC and the 2030 Agenda while putting an emphasis on GPEDC monitoring and the Voluntary National Review (VNR) processes.

2. Promote accountability and development effectiveness of private sector engagement in development partnerships.

CPDE will engage global and national policy forums on development co-operation which tackle private sector engagement. CPDE will also focus on building capacity and the creation of a CSO online hub for monitoring EDC commitments, Human Rights-Based Approach (HRBA), and the Kampala Principles in ODA-supported private sector initiatives.

CPDE's efforts to monitor the private sector are directed mostly towards large corporations. For MSMEs and social enterprises in development co-operation, CPDE will make an effort to outreach and foster dialogue with these partners.

3. Contribute towards reversing the pattern of closing and shrinking space for civil society in development partnerships.

Continued engagement at relevant global, regional, and national processes tackling the issue of an enabling CSO environment including GPEDC Workstream 2.4 on CSO Partnerships, is at the forefront of this advocacy area. Aside from engagement, CPDE aims to raise awareness and promote dialogue on the issue by launching national campaigns.

In an effort to unite CSOs around the world through the Belgrade call to action, CPDE aims to follow this up and take it further. A Global Action Plan will also be developed which should contain lessons learned and action points on CSO effectiveness and enabling environment.

4. Promote the development effectiveness agenda in financing climate actions for the SDGs.

The climate crisis affects everyone regardless of race, sex, or social status. Given the reality that the world is about to breach the threshold agreed upon in COP-21, a lot needs to change. In response to this, CPDE aims to engage the issue by honing its positions on climate finance, identifying relevant global policy arenas to which it can engage, and commissioning policy researches and case studies that examine the application of EDC in climate finance.

5. Ensure that the nexus of humanitarian, development, and peace issues (or the 'triple nexus') advances the effective

CPDE's engagement at the global level

development co-operation and human rights agenda.

CPDE will engage relevant global policy arenas on the triple nexus such as the New Deal and the International Dialogue on State building and Peacebuilding. CPDE will also engage state and public officials to ensure transparency and accountability in addressing the urgent needs of people living in conflict and fragility amid the COVID-19 crisis.

Finally, policy researches and case studies will be commissioned to examine the effectiveness of humanitarian aid while study sessions or webinars will be conducted to increase understanding of this particular advocacy area.

1. The Global Partnership for Effective Development Co-operation (GPEDC)

Following a decade of high-level engagements on aid effectiveness (Rome Declaration on Harmonisation, Paris Declaration on Aid Effectiveness, Accra Agenda for Action), the Busan High-Level Forum in 2011 has seen a shift from a Northern donor-driven arrangement to an inclusive international framework, which led to the creation of the GPEDC.

The Global Partnership is a multi-stakeholder platform to advance the effectiveness of all forms of co-operation for development. GPEDC's work is focused on the delivery of long-lasting results that contribute to the 2030 Agenda, Sustainable Development Goals (SDGs), and monitor progress in the implementation of the EDC principles by providing practical support, guidance as well as sharing knowledge to boost development impact with a strong country focus.

CPDE has been engaged at all levels of the GPEDC since its outset and is an active member of the Steering Committee alongside governments and other stakeholders; its engagement is mostly focused on the monitoring framework and how this complements the implementation of the 2030 Agenda.

Recent achievements and engagements with the GPEDC:

- ◆ Participated and contributed to the 1st High-Level Meeting in Mexico City (HLM1), the 2nd High-Level Meeting in Nairobi (HLM2), and the 2019 Senior-Level Meeting in New York City (SLM). CPDE has successfully led reforms and progressions in the GPEDC such as helping maintain the identity of the GPEDC as the premiere multi-stakeholder body on development co-operation and the acknowledgement and political support on shrinking spaces for civil society. Today, CPDE is currently engaging the GPEDC on the form and scope of the 2022 GPEDC Summit.
- ◆ Participated in the global monitoring exercise from its first to third round. CPDE has heavily contributed to the enhancement of the global monitoring framework especially on indicator 2 on civil society and is currently involved in developing the framework further.
- ◆ CPDE was successful in introducing the Non-executive Co-chair (NECC) and currently holds the position until 2022.

2. Organisation for Economic Co-operation and Development (OECD)

CPDE engages the OECD primarily through the OECD Development Assistance Committee (OECD-DAC). The OECD DAC is a forum within the OECD that discusses aid and development co-operation in the context of poverty eradication and the implementation of the 2030 Agenda. CPDE, through its members, participates in the DAC CSO reference group which coordinates the positions of civil society that are then brought up to the OECD through the DAC CSO Dialogue.

Achievements and Engagements with the OECD:

- ◆ CPDE has had a long history of engagement with the OECD-DAC. This matured into the Framework for Dialogue between the DAC and CSOs which forms an institutionalised space for CSOs to influence DAC and OECD decisions.
- ◆ CPDE members regularly engage in the OECD DAC CSO dialogue and in the last annual meeting in 2020 have raised numerous

issues.

- ◆ These range from findings of a study which discusses how DAC members work with civil society to the important role of CSOs in pushing for non-DAC donors to uphold the same commitments expected of the DAC.

3. United Nations, United Nations High-level Political Forum (HLPF), United Nations General Assembly (UNGA), United Nations Forum on Financing for Development (FfD), United Nations Development Cooperation Forum (UNDCF).

In the context of the 2030 Agenda and the Financing for Development (FfD), CPDE stresses the need to apply EDC principles in these processes. This corresponds to the Addis Ababa Action Agenda's emphasis on the primary role of national policies and development strategies and on the need to maximise the impact of development cooperation through these principles.

It means that all development co-operation actors must be held accountable that they accomplish their commitments, respect each country's leadership and policy space and sufficiently raise the bar to effect change. CPDE engagement with the UN has also continuously asked for assurances that internationally agreed principles and a human rights-based approach (HRBA) to development are not lost in a landscape increasingly focused on private sector and market development.

Achievements and Engagements with the UN:

- ◆ CPDE has engaged the UN HLPF since its onset and has contributed vital insights on the progress of implementation. CPDE has also launched independent studies and annual Voluntary National Reviews (VNR) surveys and reports which provide an unobstructed picture of progress on the ground;
- ◆ CPDE works with the GPEDC on the GPEDC monitoring framework which measures the EDC commitments globally and is used to inform SDG 17.16;
- ◆ The platform and its members have made many contributions to the 2030 Agenda process. This is most evident in monitoring the involvement of the private sector in various other areas of the

UN such as through the FfD reference group, the UN DCF, and the UNGA.

4. Others

World Bank and the International Monetary Fund (IMF), Asian Development Bank (ADB), Asian Infrastructure Investment Bank (AIIB), New Development Bank (NDB)

- ◆ CPDE engages international financial institutions in many forms. To combat the rise of overdependence on governments with blended finance, CPDE sought to engage the World Bank Group head-on by pushing for the application of the EDC principles. Studies through CPDE constituents have also targeted the plans and aimed to expose the real performance of many of these institutions such as the ADB, AIIB, and NDB.

South-South Co-operation and BAPA+40

- ◆ This advocacy area focuses on co-operation between southern countries and in reducing reliance with northern developed countries. CPDE engages South-South Co-operation through its members in promoting the EDC principles to ensure that its agreements and decisions remain people-centred and aligned with a Human Rights-Based Approach.

European Union Development Days (EDD)

- ◆ This annual conference is hosted by the EU and helps development actors connect and collaborate with one another. It is important for CPDE to communicate the values and contributions of EDC to the broader development world in order to secure more support and better traction for the EDC principles.

Other CSOs, alliances, and platforms

- ◆ Through the Belgrade Call to Action, CPDE has demonstrated its commitment to working with all civil society in the advancement of HRBA and democratic principles. In particular, as space for civil society continues to shrink, CPDE works through alliance building with other civil society platforms and actors to make governments and international organisations accountable to their actions.



ANNEX II:

Guide questions for conducting stakeholder analysis

1. Identification of stakeholders

- ◆ Who is likely to gain from the proposed changes?
- ◆ Who might be adversely affected?
- ◆ Who has the power to make the changes happen? Who complains about the issue?
- ◆ Who are the vulnerable groups that may be affected by the project?
- ◆ Who are the primary stakeholder and who are the secondary stakeholders with regards to the issue?
- ◆ Who are the rights holders and who are the duty bearers?
- ◆ What are the relationships between the individuals, groups and institutions listed in the questions above?

2. Assessment of stakeholder interest

- ◆ What are the stakeholders' expectations of the project?
- ◆ What benefits are likely to result from the project for the stakeholders?

- ◆ What resources might the stakeholders be able and willing to mobilise?
- ◆ What stakeholder interests conflict with the project goals?

3. Assessment of stakeholder support or opposition to the issue

- ◆ Does the stakeholder publicly support or oppose the issue?
- ◆ Is the public support or opposition different from private support or opposition?
- ◆ Who else is the stakeholder allied to and opposed to?
- ◆ Does that shed additional light on the stakeholder's support or opposition to the issue?
- ◆ What has the previous position been on similar issues?
- ◆ Has the stakeholder's position changed over time? If yes, how?

4. Assessment of stakeholder influence

- ◆ What is the political, social and economic power and status of the stakeholder?
- ◆ How well is the stakeholder organised?
- ◆ What control does the stakeholder have over strategic resources?
- ◆ What level of informal influence does the stakeholder have?

5. Assessment of stakeholder importance

- ◆ Does the issue compromise the stakeholder's rights, and does the stakeholder have a right to solutions for the issue? Is the stakeholder a rights holder?
- ◆ Will stakeholder engagement help address deeper underlying causes to the problem, so that solutions can be sustainable in the future?



ANNEX III:

Tips for developing effective messages

CPDE's Advocacy areas

1. **Use audience appropriate language:** Speaking to your audience means knowing about what resonates with them. Find out what they know, their concerns, their values, and priorities, and the kind of language they use.
2. **Know your political environment and moment:** What are the big controversies, the big issues and fears in your context? How might they affect your messaging? What is considered left, right and centre?
3. **Keep your messages simple and brief:** Ensure someone who does not know the subject can easily understand the information. Avoid jargon!
4. **Use real life stories and quotes:** EDC has real impact on human lives. Adding a human element to your messages helps the audience realise that the problem or issue is real. Quotes and personal stories bring to life the challenges faced by those directly affected. They also help to make the message locally relevant by

presenting information relating to the local context and therefore more easily understood by your audience. It also allows your audience to connect better with the issue at hand.

5. **Use precise, powerful language and active verbs that will move people to action**
6. **Use facts and numbers accurately and creatively:** The facts you choose and the way in which you present them to make your case is very important. For example, saying “1 in 3 women...”, rather than “over 30% of women...” conveys the same fact more clearly. Comparing figures without actually quoting numbers may also convey your message effectively, for example: “More is spent on buying chocolate in our country every year than what we contribute to fight global poverty”.
7. **Adapt the message to the medium:** Understand the possibilities and limitations of each medium you choose
8. **Allow the audience to reach their own understanding:** by providing basic details as too much information may appear dogmatic and may cause you to lose your audience’s attention.
9. **Encourage the audience to take action:** by clearly stating your call to action and offering straightforward suggestions on how your audience can support your cause such as “support the pull-out of military forces”, “sign our online petition”.
10. **Present a possible solution:** Always tell your audience what you propose in order to advance a better policy for CSOs and keep it simple. For instance: “The government needs to show its commitment to civil society as an important development actor by providing new policy and appropriate funding regulations for CSOs”.



ANNEX IV:

Different ways to convey messages

1. Lobbying refers to direct one-to-one conversations and/or meetings where people gain access to a decision-maker to influence them to bring about the change desired. One-to-one communication with people in power, or those that hold influence over them (influential), can take many different forms. These can range from informal conversations in social settings (e.g. over lunch or coffee) to formal meetings in official settings (e.g. in a politician's office). Experience has proven that direct engagement with decision-makers can be a very effective strategy to deliver your messages. Nevertheless, you must take note that it may not be possible at all times. For instance, where civil liberties are constrained gaining access to a decision-maker may not only be difficult but also risky. You will need to practice sound judgement and weigh in on how suitable direct engagements with decision-makers and influencer/s are in your context.
2. Negotiation is an important component of advocacy for social justice. It is the process of resolving conflict by presenting a position and debating with an opposing party or side. Through negotiation, different groups work out their differences to

come to a solution that is acceptable for both sides. However, in instances where compromises are not reached or become unlikely or where you are unable to advance your change objective, entering into negotiation becomes a good opportunity to draw attention to your advocacy change objective. Negotiations take place in different settings and are carried out in various ways -- through both informal and informal means, during high level political meetings or even in low-key gatherings or stakeholder summits. In whatever setting they take place, entering into the negotiating processes require a good understanding of the existing power dynamics between the personalities, institutions, and parties involved in the debate.

3. Engaging the media can be a powerful strategy to raise awareness, drive visibility and gather support for an issue. Advocating through the media allows you to communicate with large numbers of people to advance a social or public policy and influence attitudes and perception around it. Working with the media can also put additional pressure on key decision-makers who are critical to carrying out the change you want to achieve.





ANNEX V:

Challenges and capacity needs identified by CPDE constituents and our experience battling the impact of the COVID-19 pandemic

1. Challenges identified by CPDE constituents

- ◆ Shrinking democratic spaces and the lack of an enabling environment (difficulty in registration, funding restrictions, outright harassment and persecution)
- ◆ Instability, war, and conflict
- ◆ Absent or Weak recognition of CSOs as development partners
- ◆ Absent or Weak institutional mechanisms for women's participation
- ◆ Non-inclusive arenas where barriers such as accreditation challenges, highly-technical skills and knowledge requirements, watered-down unities and agreements persists.
- ◆ Various internal organisational challenges such as coordination, communication, messaging, limited financial resources especially at the country level, difficulty with donor requirements.

2. Capacity needs identified by CPDE constituents

- ◆ Multi-stakeholder engagement at country level
- ◆ Advocacy and campaign strategies
- ◆ Policy development
- ◆ Messaging
- ◆ Media engagement and communication strategies

3. CPDE and our experience battling the impact of the COVID-19 pandemic

CSOs are also deeply constrained by the health crisis and socio-economic impact of the COVID-19 pandemic. Budget allocations for many programs continue to decline while in many advocacy areas, projects and even long-running programmes are either rescinded or falter almost seemingly overnight.

NGOs from the south and smaller national CSOs however are affected even worse. Not only do they have to withstand more precarious conditions and often in less effective pandemic response by their governments - limited funding and short-term projects with donors also offer little protection in the way of sustained resources and support. In its 2020-2023 Strategic Plan, CPDE acknowledges the impact the pandemic has on our development priorities and advocacy strategies.

Aside from migrating to more remote ways of working and adapting our tactics to maximise our effectiveness in this given reality, additional areas where we must advocate for EDC include:

- ◆ Ensuring transparency and accountability in COVID-19-related actions of governments and donors;
- ◆ Strengthening public health systems at the community level as the frontline of defence against the pandemic;
- ◆ Harnessing civil society knowledge, expertise, and initiative in addressing the pandemic;
- ◆ Focusing efforts on ameliorating the impacts of COVID-19 on the vulnerable, impoverished, and marginalised sectors;
- ◆ Governments and international institutions must stop using the pandemic containment as a pretext for monitoring and suppressing political dissent.



ANNEX VI:

Risk analysis

The risk analysis template below will allow you to identify potential risks you may encounter in your advocacy and give you an opportunity to plan ahead on ways to mitigate these risks. Discuss with your team your ideas while you answer the tool. In using the tool you must:

- ◆ Discuss and identify potential risks you might face in carrying out your advocacy initiative with your colleagues and peers. Think about what major things might go wrong and how could people’s lives be endangered? Could your actions provoke a negative backlash and put your organisation, staff and the people you work with in danger? What is the nature of these risks and are they different for different stakeholders implicated by your advocacy initiative? List down the risks, challenges or obstacles you have identified on the first column.
- ◆ Once you have identified the major risks, assess their potential impact on your organisation (in terms of reputation, status, funding, and operations), the staff and volunteers and the external people you work with. You may use the following categories to weigh on their impact according to HIGH: a catastrophic impact threatening the future existence of your organisation/group/movement endangers people’s lives or

could lead to a potential reversal of the issue you are trying to change (e.g. criminalising CSOs that speak out); MEDIUM: some damaging effects in the short term but with little repercussions in the longer term; or LOW: a noticeable impact that has little effect on the organisation, the people or your advocacy.

- ◆ Now think about how likely it is that the risks or negative situation will actually happen. Decide whether their likelihood is HIGH: likely to take place in the next x months or years, or may be already taking place; MEDIUM: could potentially happen in the next x months or years; or LOW: it would be very surprising if it did happen.
- ◆ Discuss and develop clear strategies for risks that have a high impact and high likelihood, as well as some medium level risks. What management strategies might help you minimise their impact, or avoid them altogether if possible. What could you do to reduce the risk for the organisation/group, the people and yourself if your advocacy didn’t work as planned? What would you need to have in place? Who would have the authority to take action? List down these strategies on the last column.
- ◆ The analysis of risk should be revisited periodically as your advocacy develops and unexpected outcomes are considered.

RISK ANALYSIS			
Risk	Impact (high/med/low)	Likelihood (high/med/low)	Risk management strategy



ANNEX VII:

Communications and working with the media

In order to take advantage of most effective media coverage, your message needs to have solid content and framed to draw attention. It is useful to consider that journalists and news outlets are normally driven by their viewers' or readers' demand for fresh and original perspectives on an issue, event or injustice. Knowing this can help you weigh on how you can frame your messages to draw attention that your issue needs.

Looking towards social media or social networking platforms, these have increasingly become relevant and invaluable channels to surface relevant social issues and move people to action. In varying contexts, we have witnessed how social media platforms such as Twitter, Facebook, Instagram, YouTube, and LinkedIn contributed to raising the visibility of important social issues, growing a constituency or network of "followers" and supporters, mobilising people into action, and even stimulating social protests.

Varied examples and experiences exist. Internationally we have witnessed how Twitter was used as an instrumental platform to organise and mobilise people during the 'Arab Spring'. In your own settings, you may have observed how local influencers – politicians,

celebrities, and other local personalities – utilised these platforms to build support and influence social norm and public perception.

Social media can prove to be an especially viable process for delivering your advocacy messages for civil society as it allows you to reach and strategically connect with people, build networked communities of support, and share information through a simple, cost-effective, and timely manner.

If used strategically in line with your programmatic goals, social media platforms can be viable and effective channels to influence social norm and public perception, consolidate consensus, build constituencies, and mobilise people. As of late, different CSOs have witnessed how effective use of the platform can be a viable means to not only arouse, organise and mobilise people, but more importantly, link them to organised social justice movements happening "offline."

Use the tool below to assess whether or not your advocacy will benefit from a media campaign. It will also help you determine the kind of media engagement you should be using. It is important to understand that engaging the media can mean using both media and social media or just one of the two areas. The rest of this section provides tips on how to conduct communications and maximise your work with the media.



WORKING WITH THE MEDIA Yes/No

MEDIA

	Will it help you reach your target audience?
	Does your target audience still access media platforms such as the news and print publications?
	Do you have the technical and human resources to launch and sustain your advocacy campaign with the media?
	Is it a culturally-accepted platform in your community
	Is public perception important in advancing the change you want to achieve?

SOCIAL MEDIA

	Will it help you reach your target audience?
	Does your target audience have access to social media platforms?
	Do you have the technical and human resources to launch and sustain your advocacy campaign on social media?
	Is it a culturally-accepted platform in your community
	Is public perception important in advancing the change you want to achieve?

I. Engaging the media

Engaging the media for your advocacy campaigns:

- ◆ Compile a media list: identify all relevant media outlets (newspapers, radio stations, TV), particularly those that may influence your advocacy targets, and find out who you should talk to about your issues and ideally who has covered these issues in the past.
- ◆ Drafting a press release or a letter to the editor outlining your 'story'. Press releases are generally issued to mark, a launch or an event.
- ◆ Contacting the media at least one week before your event, or at key moments in your advocacy. Send your press release to all contacts on your media list. You may also pitch your story to sympathetic journalists who have covered your issues in the past or who have demonstrated a particular interest.
- ◆ Follow up with each contact by phone to confirm receipt. Use each moment of interaction with them as an opportunity to pitch your story idea. Ask them if they think your story will be of interest to them, or if they have other suggestions. Most reporters are happy to talk to you if you are professional and respect their deadlines. If they are on deadline, ask them if you can call them back at a more convenient time.
- ◆ Expect to give interviews when your story runs in the media. This is when your 'Sticky Questions' paper might come in handy. The 'One-Minute Message' tool below might also help you prepare.
- ◆ Thanking reporters after your story runs is a good way to maintain working relationships with the media. Contact the reporter and thank them for their time and for sharing your message with the public. A simple handwritten note card or an email is a very nice gesture.
- ◆ Providing content to the media is the most commonly used strategy in advocacy campaigns, you may also consider organising briefing, orientation or discussion sessions or fora with media practitioners. These kinds of interactions prove beneficial not only in increasing the media's sensitivity to a certain issue but also prove to be good opportunities to cultivate champions for your advocacy.

2. How to prepare a press release:

- ◆ Be clear what message you want to convey: identify 3-4 clear and specific messages.
- ◆ Make it short: ideally one page and definitively no longer than two pages.
- ◆ Use precise, clear language and active verbs.
- ◆ Avoid using technical language.
- ◆ Use quotes to make your arguments stronger.
- ◆ Include clear recommendations and calls for action.
- ◆ Start for the most important information and leave the background.
- ◆ Include links for further information.

3. How to give interviews

- ◆ Stay calm – remember that you know more about the issue than the journalist does.
- ◆ Keep your answers brief using simple language and don't use acronyms or jargon.
- ◆ Be creative, paint a picture “imagine what it must be like to...”
- ◆ Never answer a question in haste. If you need more time just repeat the question.
- ◆ Don't make things up. If you don't know just say it.
- ◆ Do not get sidetracked and always take the journalist back to your key messages. You can use several phrases known as ‘bridging’ to do that (e.g. “I think what you're saying is important but the main issue is...”, “we really need to focus on...”, “the real issue here is...”, “what the research tells us is...”, “the thing to remember is...”, “but...” etc.)
- ◆ Do not let the journalist set the agenda and the message.

4. How to use social media in advocacy work

- ◆ Create quality, interesting, compelling and thought-provoking content that resonates with your audience. While, keeping the content appealing to your audience you must find the balance in ensuring that the content has a purpose and is linked to your overall advocacy objective and programmatic work.
- ◆ Engage with the audience by fostering dialogue, responding to

comments and making enough space for interaction. Engaging with the audience on social media can help you build good relationships with the public and cultivate advocates.

- ◆ Collaborate with individuals, organisations or causes that can help connect you to your target audience. Collaboration is a way of expanding networks and tapping into new resources that may contribute to advancing your change objectives.
- ◆ Create networked communities for support and information sharing through creating Facebook Community Pages and Groups where individuals, organisations, coalitions, and advocates can exchange information, and brainstorm innovative strategies to amplify your issues.
- ◆ Always link ‘online activism’ with on-ground organised social and political actions to enhance the impact of your advocacy campaign.



Monitoring and Evaluation Framework Template			
E D C			
Advocacy change objectives	Activities	Indicators of Processthese should directly reflect the milestones and activities you have identified in the advocacy plan	Indicators of ImpactEvidence that there has been positive change(in policy and practice) towards achieving the objectives
Obj 1			
Obj 2			

PRIVATE SECTOR ACCOUNTABILITY			
Advocacy change objectives	Activities	Indicators of Processthese should directly reflect the milestones and activities you have identified in the advocacy plan	Indicators of ImpactEvidence that there has been positive change(in policy and practice) towards achieving the objectives
Obj 1			
Obj 2			

CLIMATE FINANCE			
Advocacy change objectives	Activities	Indicators of Process these should directly reflect the milestones and activities you have identified in the advocacy plan	Indicators of Impact Evidence that there has been positive change (in policy and practice) towards achieving the objectives
Obj 1			
Obj 2			

TRIPLE NEXUS			
Advocacy change objectives	Activities	Indicators of Process these should directly reflect the milestones and activities you have identified in the advocacy plan	Indicators of Impact Evidence that there has been positive change (in policy and practice) towards achieving the objectives
Obj 1			
Obj 2			