

# **GUIDELINES for DEVELOPING POLICY ADVOCACY CAMPAIGNS**

## **I. INTRODUCTION**

### **A. Policy Issue of Concern**

State very briefly the public policy or policy area you have selected to address, the social or other conditions it impacts, and what some of the conflicting positions are on it that make it an issue.

### **B. Personal Involvement**

In addition to knowledge and skills, and of course resources, there are three personal factors which influence one's effectiveness in public interest policy advocacy: commitment to the issue, degree of faith in the political system, and liking for the activities involved in the advocacy process.

Address the three following questions. (1) How did you become interested in this policy issue and what motivates you to want it resolved? (2) What are your fundamental attitudes toward and confidence in the political system relevant to your policy issue? (3) If you would like to personally involve yourself in advocating for this or other issues -- rather than simply developing a position and strategy to guide others - - what aspects of the policy advocacy process would you enjoy and what others might you not enjoy? [For those working in teams this paragraph might best be addressed individually by team members.]

### **C. Policy Issue and Campaign Goals**

Explain why you chose this issue, the criteria upon which you decided to engage in a policy advocacy campaign. Analyze the causes of the problem and how they relate to public policy. State the long-term advocacy goals and short-term objectives of the campaign to be undertaken.

## **II. THE POLICY CONTEXT**

### **A. Current Policy Status**

If there currently exists a related policy or body of policy — and there almost always does — state what that policy is and discuss its relevant history. When was it formulated, under what conditions, and how has it been modified or challenged?

### **B. Policy Levels, Institutions, and Phases**

In delineating the policy position and strategy you are developing, state the governmental level(s) at which you are addressing that policy: local, state, national, and/or international. Make clear the institutions you are addressing: legislative, executive, administrative, and/or judicial. Also clarify which phase(s) are involved: agenda setting, policy formulation, enactment, and/or implementation.

### **C. Target Institution and Its Policy Process**

Describe and analyze the institution(s) you are attempting to influence. With what authority and power does the institution operate? And what limits are there to that authority and power? How is the institution structured and how does that impact the decisions made? What are the established regulations and procedures by which the institution deliberates? What part do the formal or informal leadership patterns play in policy making? What external forces, public or private, influence the decision makers?

**D. Interest Group Players**

Identify the stakeholders in the policy issue. That is, which segments of the population might win or lose depending on the policy decision made? Which stakeholders support your general policy position, which likely oppose it, and which are indifferent or undecided? What is the political strength of the major stakeholders in each category? Which of these stakeholders are already active or likely to become active on the issue, and what is their respective institutional capability?

### III. POLICY POSITION TO BE ADVOCATED

**A. Alternative Policy Positions**

Identify the major policy positions currently being considered or proposed by either policy makers or interest groups. If none of these positions is sufficiently congruent with the values you espouse and the goal you wish to achieve, i.e. the change in social conditions resulting from a change in policy, then generate another alternative.

**B. Analysis of Alternatives**

Analyze the alternative policy positions in terms of both their likely effectiveness in accomplishing your objectives and the likelihood of their enactment. What risks are involved in the proposed policy change, what are its likely costs and benefits, and what are its possible unintended consequences? What is the general political climate and the stakeholder force field relevant to the positions, and are they likely to change significantly?

**C. Position To Be Advocated**

Briefly state the policy position you would propose, and provide your rationale for that choice. Also state the most minimal fall-back or compromise position you would be willing to accept if your desired position could not be enacted.

### IV. STRATEGY FOR ACHIEVING ADVOCATED POLICY

**A. Alliances and Coalitions**

Identify other existing movements, networks, coalitions, or organizations with which you would collaborate to advocate your policy position. Explain the common ground you share with them and assess their capability to contribute to the common effort. The combined capability should include policy research, media outreach, active grassroots constituency, lobbying expertise, financial resources, and influence with diverse and significant segments of the public. State briefly how the coalition would be organized.

**B. Public Education through Media**

Sketch the outlines of a media campaign to educate public opinion in support of your position. What segments of the public would you target, with what message? Would you create your own media, e.g. paid advertisements, public service announcements, videos, infomercials, and/or rely on media relations with the established media? What media outlets would you target, electronic and/or print, news and/or entertainment, and what methods and newshooks would you use to promote your policy position?

**C. “Inside” Lobbying**

Sketch the outlines of a direct lobbying campaign. On which parts of the institution would you focus your efforts? Who would be your likely allies, your likely opponents, and the likely undecided actors within the institution? On which policy makers and/or their staffs would you focus your efforts. How would you support your allies, win over the undecided, and counter your opponents? Finally, what methods, e.g. information and resource sharing, testifying at hearings, drafting suggested legislation, would you use in order to achieve the policy change you are advocating?

**D. Constituency Education and Mobilization**

Sketch the outlines of an “outside” or grassroots lobbying campaign. How will you educate the coalition's legislative networks or constituencies about the policy process and the policy position being advocated? By what means, e.g. policy issue backgrounders and newsletters, conferences and trainings, action alerts and phone trees, will you inform and mobilize those constituencies? What means of communication, e.g. letters, phone calls, e-mails, visits, will you urge them to use in advocating their position to the policy makers? If public or popular demonstration of support would be helpful, what would be its nature, target, and message and how would you organize it?

**E. Monitoring and Evaluation of the Campaign**

How will you know whether the campaign is a success? Indicate the objectively verifiable indicators you would establish by which to measure whether the overall goals and objectives of the campaign will have been achieved. Establish indicators for each of the major sections of the campaign.