



Advocacy Workshop Series:

## Module Two - Planning for Getting What You Want

### Introduction

The smartest and most effective advocates think, plan and act strategically. Experienced advocates have a long-term vision/dream and use action planning to get there. Saskatchewan *in motion*'s vision is: "that the people of Saskatchewan will be the healthiest, most physically active in Canada". Coupled with clear advocacy goals and plans, this is an example of proactive advocacy.

Inexperienced advocates wait until something happens and then react to it. For example, the Minister of Education announces that the approved infrastructure program that was to update, replace or build playgrounds for every primary school in the province has been cut. Advocates who don't have an advocacy plan are scrambling to put together action that can reinstate the playground program.

The *Planning for Getting What You Want* workshop will provide you with a methodology and a framework for effective action and can be used for changes, big or small, that impact on increasing physical activity opportunities where we live, learn, work, commute or play.

Planning for advocacy is a process that is ever evolving. Your advocacy plans will change based on available resources, emerging opportunity and shifts in priorities. Tobacco advocates speak of the challenges of getting policy change on the current municipal government agenda, almost having it approved, then, having the city council of the day change as a result of an election. Then having to loop back, review their advocacy planning and start again.

This workbook, accompanied by the power point presentation slides, will guide you through the process of planning for getting what you want. You are welcome to share this material with your Action Team members and others who are ready and willing to cause a commotion!

## Getting started

In Module One we learned and practiced skills that built our confidence for speaking out. In this module we are going to explore planning for action; developing a framework for planning and looking at techniques for motivating action heroes. You will connect with others who share your passion for a healthy and physically active Saskatchewan. We will work with **your** challenges and situations in our session and send you back to your community with a good start on your advocacy action planning.

Seth Godin in his book **Tribes** speaks of the challenge of change.

“Our culture works hard to prevent change. We have long had systems and organizations and standards designed to dissuade people from challenging the status quo. We enforce our systems and call whoever is crazy enough to challenge them a heretic. And society enforces the standards by burning its heretics at the stake, either figuratively or literally.

But the world has changed a lot. There are heretics everywhere you look.....burning heretics isn't particularly effective any longer. As a result more people-good people, people on a mission, people with ideas that matter-are stepping forward and making a difference.”

In 1963 Martin Luther King, one of the most influential “heretics” in our time spoke of his dream....that one day his four little children would live in a nation where they would not be judged by the colour of their skin but for the content of their character. He died for this dream on April 4, 1968 but his words still rang out loudly when Barak Obama was elected President of the United States of America November 4, 2008. These words inspired a 45 years of actions; some big, some small, some random but many carefully planned, to lead to this historic moment.

The Saskatchewan ***in motion*** community engagement model, found in Appendices, summarizes the phases that communities go through to effect change on physical activity. This is not a linear model. Communities may be taking action in several phases at the same time, depending on their projects. Study this model carefully as it will help you to determine where and how your advocacy plan may unfold. Let it be the back-story for your action planning.

You are a leader in the fight for increasing physical activity opportunities in your community. You want changes that will stick and that will last. This module will help you and your group to achieve whatever your goal may be.

## What is advocacy?

Module One advocacy was defined. This section is a reminder of our discussions.

Before direct action comes planning, and before planning comes an understanding of what needs to be put in the plan. So first, here's a reminder of what advocacy is (as well as what it is not).

- Advocacy is *active* promotion of a cause or principle.
- Advocacy involves *actions* that lead to a selected goal.
- Advocacy is one of many possible strategies, or ways to approach a issue.
- Advocacy can be used as part of a community initiative, nested in with other components.
- Advocacy is *not* direct service.
- Advocacy does not necessarily involve confrontation or conflict.

Some examples may help clarify just what advocacy is:

- You join a group that helps build houses for the poor--that's not advocacy (it's a service).
- You organize and agitate to get a proportion of apartments in a new development designated as low to moderate income housing--**that's advocacy**.
- You spend your Saturday's helping sort out goods at the recycling center--that's not advocacy (it's a service).
- You hear that land used for the recycling center is going to be closed down and you band together with many others to get the city to preserve this site, or find you a new one. Some of you even think about blocking the bulldozers, if necessary - **that's advocacy**.

Several ingredients make for effective advocacy, including:

- The rightness of the cause
- The power of the advocates (i.e., more of them is much better than less)
- The thoroughness with which the advocates researched the issues, the opposition, and the climate of opinion about the issue in the community
- Their skill in using the advocacy tools available (including the media)
- Above all, the selection of effective strategies and tactics

*Adapted from The Community Tool Box: ctb.ku.edu*

## Dare to Dream

**Inspire. Galvanize. Connect.** Key elements for leading a movement that will make change happen. A leader **inspires** action by having a dream and being able to clearly describe it. Through an advocacy plan action heroes in the movement are **galvanized** into taking action and **Connections** are made that support the action and extend its impact.

### Exercise:

**What is your Dream?** - *Jot it down on a post-it note and stick it on the dream wall.*

## What is an Advocacy Strategy?

Chapter Seven in the **Troublemaker's Teaparty** is an overview of the components of Strategic Action. Take a few minutes to read through this. It will set up your thinking for this session and will also be a good reference for your group as you move into action.

There is an old saying, "If you don't know where you're going, any road will take you there." Too often, community groups working for change start out on the road without a clear sense of where they are going, and without a shared understanding of the best route for getting there.

A strategy is simply a road map for getting to your destination or achieving your goal. Just like a map you might get for taking a family vacation in your car, an advocacy plan takes into account what you might need or want to do along the way. On a car trip, you take into account places to stop for meals, gas, lodging, and to see friends. You also decide whether you want to travel by the shortest route or take alternate roads to visit attractions or avoid highway construction and congested areas. Through your mapped actions you ensure you have the financial resources to pay for gas, food or lodging that you may require.

In a similar way, developing an advocacy plan for reaching a goal of your group involves considering a number of factors other than your ultimate destination. An advocacy plan helps the group understand how to put its own values into action in practical ways. It helps the group obtain the resources it will need to make the trip without running out of energy before you get there. With a shared plan of action understood by the whole group, hopefully you will be able to achieve the outcome you want on the issue you are working on. But even if you don't, a good plan will leave the group stronger and larger than it was when it first started out, and ready to try to reach its goal, or set new ones, with more resources than it had originally.

Basically, a useful plan makes it possible to do four things at once:

1. Clearly define an issue and its possible solutions;
2. Make it easy to get more people involved;
3. Bring the people who have the power to bring about the solutions you want directly into contact with your group;
4. Raise the money or other resources you need to carry out the work you plan to do.

Adapted from [www.npaction.org](http://www.npaction.org)

### **An Advocacy Plan is:**

- **A Change agent**

Your group wants something changed e.g. a “complete street” policy for your town, finally a playground for your child’s school. The key decision-makers can’t read your mind. You need to ask for this. Putting together your plan help you to determine what action you will take.

- **Big picture**

This is the time to describe your dream. It’s the big picture thinking. Details will come later.

- **Proactive**

This is the time to lead rather than wait until your group is in a reactive position.

- **Long-term**

Change doesn’t happen overnight. But it will never happen if you don’t have a plan and then put it into action.

- **Driven by passion**

Passion is the fuel and gives you “ask” power.

- **Individual or group**

By yourself? With a group? Whatever it takes.

- **Big or small**

Small changes often are easier to bite off and give your group experience in taking on bigger issues.

- **Needs a plan to be successful**

Some might not agree, but for most of us the simple act of taking the time to plan actions moves us closer to achieving our goals.

From Seth Godin's blog:

Most of us are afraid of strategy, because we don't feel confident outlining one unless we're sure it's going to work. And the 'work' part is all tactical, so we focus on that. (Tactics are easy to outline, because we say, "I'm going to post this." If we post it, we succeed. Strategy is scary to outline, because we describe results, not actions, and that means opportunity for failure.)

"Building a permission asset so we can grow our influence with our best customers over time" is a strategy. Using email, twitter or RSS along with newsletters, contests and a human voice are all tactics. *In my experience, people get obsessed about tactical detail before they embrace a strategy...* and as a result, when a tactic fails, they begin to question the strategy that they never really embraced in the first place.

**Exercise:** Think of an example of an advocacy strategy or plan you have been part of and share it with your group.

### **What do you want?**

**Exercise:** Identify an issue that you or your group wants to prepare an advocacy plan to take action on.

### **What are you going to ask for?**

**Exercise:** You've identified your issue – now determine what is your "ask"? Be Specific.

## Planning for Advocacy

You have a dream. You've identified specifically what you want and that "ask" fits the requisites for advocacy. Now it's time to plan. **Why?**

**Planning + Action = Change**

### **Exercise:**

*Based on the issue you have selected - identify three or four reasons your group would benefit from planning for taking advocacy action.*

## Ten Steps to an Effective Advocacy Plan

Edited from Seth Godin's blog:

### **Achievable opportunities**

That's what your team wants. They're willing to put in the time and the energy and the work if they think:

1. The outcome might be an avalanche of attention, and
2. Their work makes that outcome achievable, even likely.

If you are vague about the outcome, or if the steps are too complex, or involve sacrificing a goat or waiting for lightning to hit, it's going to be very difficult to get the group excited. People are far more likely to embrace a smaller goal that feels likely than they are to devote themselves day and night to the amorphous jackpot. The specific jackpot, sure we'll sign up for that, but *amorphous and ethereal* is largely beyond our ability to imagine and sacrifice for.

The following ten steps will serve as your roadmap to getting you to your advocacy destination.

Remember that a map is a guide to your destination. You may go off on a road you discover that isn't on the map, you may run into someone who sends you in a different direction, you may want to stop and stay a few more days than you planned, you may have a fender bender and have to delay the trip for a while, or your original travel companions might abandon this trip, but others may jump on board. If you care passionately about this journey and are prepared to commit the time and resources to it then you will get there!

- 1. Capacity: Identify your strengths and weaknesses**
- 2. Determine the Ask: What change do you want?**
- 3. Your Target: Who is it?**
- 4. The Message: What will we ask them?**
- 5. Making the case: the research**
- 6. The Action: How will we ask them?**
- 7. Key influencers: Who are they?**
- 8. Your Allies: Be creative with your list.**
- 9. Resources: Human and financial**
- 10. The Action Plan: Simple with timelines**

The next section will expand on each of these steps but before let's spend a few moments on SMART goals. The process of goal-setting will help keep you and your group on task and moving forward.

**Exercise:**

*What does SMART e stand for? Have you ever used this process to determine goal-setting?*

**Step #1: Capacity: Identify your strengths and weaknesses**

Your group has decided that they are prepared to take action on the issue that has been identified. Cataloguing your strengths and weaknesses, opportunities and threats is the first step in the analysis of the capacity for taking this on. You will learn more about the members of the group and the environments that you all function in. It will set the stage for all the other steps. A SWOT matrix is a simple tool to use to do this and has a long track record of effectiveness.

What is a SWOT? The name says it: **Strength, Weakness, Opportunity, and Threat**. A SWOT analysis guides you to identify the positives and negatives inside your group (S-W) and outside of it, in the external environment (O-T). Developing a full awareness of your situation can help with both strategic planning and decision-making.

The SWOT method (which is sometimes called TOWS) was originally developed for business and industry, but it is equally useful in the work of community health and development, education, and even personal growth.

The template looks like this.

An excellent SWOT how-to can be found at [ctb.ku.edu](http://ctb.ku.edu): search SWOT.

<b>Strengths</b>	<b>Opportunities</b>
<b>Weaknesses</b>	<b>Threats</b>

## **Step 2: Determine the “Ask”**

What is the change you want? This step is the **absolute key** to an effective advocacy action, and it’s remarkable how many times we forget to put this piece up front and centre! Your “ask” needs to be simple and realistic. It will be the foundation of all of your communication efforts.

Exercise:

*Determine the “ask” for your issue. Try to get it into a one or two sentence statement.*

### Step 3: Your Target: Who is it?

Time to do the research. Your target may or may not be obvious. For example your “ask” is a new play structure in your community park. When you start you may think that the Mayor is your target: the key decision-maker that has to be influenced. However with research you find that if you can get the Director of Planning on board then your project has a better chance of success. This Director has the influence to draft policy changes regarding play structures in all municipal parks for Council’s consideration. With your group as support and a community voice this staff person can have far-reaching influence.

It will be important to find out who in your group has a connection with the target and to gather information about them through your network.

#### Exercise:

*In conversation with a partner determine the key target for your issue/ask.*

### Step 4: The Message: What will we say to them?

You’ve identified your issue, know what your “ask” is and who you will target. Now what will you say to them? You don’t have the funds to pay thousands of dollars for a communications consultant, but you’re passionate about your issue and you know about your target. Talk about what will capture their attention and inspire them to action.

- Be passionate
- Keep it simple
- Use plain language
- Make it **stick**

The challenge for physical activity advocates and others is to ask for a change that they believe will contribute to the dream and actually make it **STICK**. In **Made to Stick** by Chip Heath and Dan Heath the definition of Sticky = understandable, memorable and effective in changing thought or behavior.

Investing time in drafting two-three key messages that everyone in your group will feel comfortable using is crucial. Test them out on friends or family that aren't familiar with your issue and ask them for their feedback. Do you have someone in your network that has communications experience? If so, check your messages with them too.

Check Chapter 9.2 in the Troublemakers Tea party and your Saskatchewan *in motion* Communications Template for additional information and perspectives.

**Exercise:** *Craft one key message for your issue.*

### **Step 5: Making the Case: the research**

You have a key message, but do you have the additional information that supports it? Your data: both **Emotional**-stories and pictures and **Intellectual**: facts and figures substantiates your "ask". But what data do you use? Consider:

- **Pros:** Benefits of doing what you ask
- **Cons:** Risks of not doing what you ask
- **Barriers:** "Even if I wanted to I can't because..." ( this is what a key decision-maker often says)

**Exercise:** *List two pros and two cons for your issue.*

### **Step 6: The Action: How will we ask them?**

Brainstorm tactics with your group.

**WHO** will ask them?

**WHEN** will they do it?

**WHERE** will it happen?

**HOW** will the message(s) be delivered?

Resist the urge to complicate the action. **SIMPLE** and **STRATEGIC** must be your guiding principles. Easy to say...hard to do!

## **Step 7: Key influencers: Who are they?**

Every target has key influencers for different issues: people that they trust, respect, have connections to the community, knowledge, expertise, wisdom and common sense. Learn who these influencers are relative to your issue and what they can and cannot do for you. For example if your target is the Director of Planning and you learn that he respects the opinion of the Chair of the Planning Advisory Committee it would be important to collaborate with the director and the chair to inform each of them and even recruit them to your network of support. This would be a viable strategy.

### **Exercise:**

*Who do you think are your target's key influencers? List two.*

## **Step 8: Your Allies: be creative with your list.**

Allies that can support your issue are crucial to a successful advocacy campaign. We often go to our “usual suspects”: people that share the same sphere of interest as we do. For physical activity that often means recreation, health and education colleagues. Our issues generally appear on the sports or lifestyle pages of our local media. But can you look beyond those “friends” of your issue and find some new, creative connections?

What will be important is to be able to articulate “What’s in it for them”. Why would the RCMP Unit speak out for a play structure in your community park? Why would the local lumber store owner be an ally?

**Exercise:** *List some allies that you may not have thought of for your issue.*

## **Step 9: Resources: Human and financial**

What resources do you need as a group to carry out your advocacy plan? Chapter Six in the Troublemakers Teaparty talks about Grass Roots Wilt. Be realistic about what you can do with what you have, otherwise your plan may stall. Think through who can help you, what help you will ask for and when would be the optimum time to engage them.

**Exercise:** *Note three key resources that you will need to take action on your issue and where you think they could come from.*

## **Step 10: The Action Plan**

This is the time to roll up your sleeves and craft your advocacy plan. The thinking that you and your group have done as you've worked through the previous nine steps will supply the content for your plan. To be most effective the action plan has three key elements:

- ✓ **Simple**
- ✓ **Comprehensive**
- ✓ **Includes timelines**

Time invested in doing a detailed action plan will help you and your group identify and achieve the possible. If you have realistic timelines, clear and doable tasks with names beside them you will have a plan that lives. Understand that your plan is dynamic, a blueprint; that it may change depending on the results of your actions.

The **Action Plan Template** in Appendix 2 will assist you to pull together all your information. Just the act of doing this as a group will move your advocacy work giant steps forward. Bring it to every meeting. Review it regularly with the group. Use it to bring new recruits up to speed. Let it help with developing new key messages. Don't hide it under a bushel.

## **Celebrate!!**

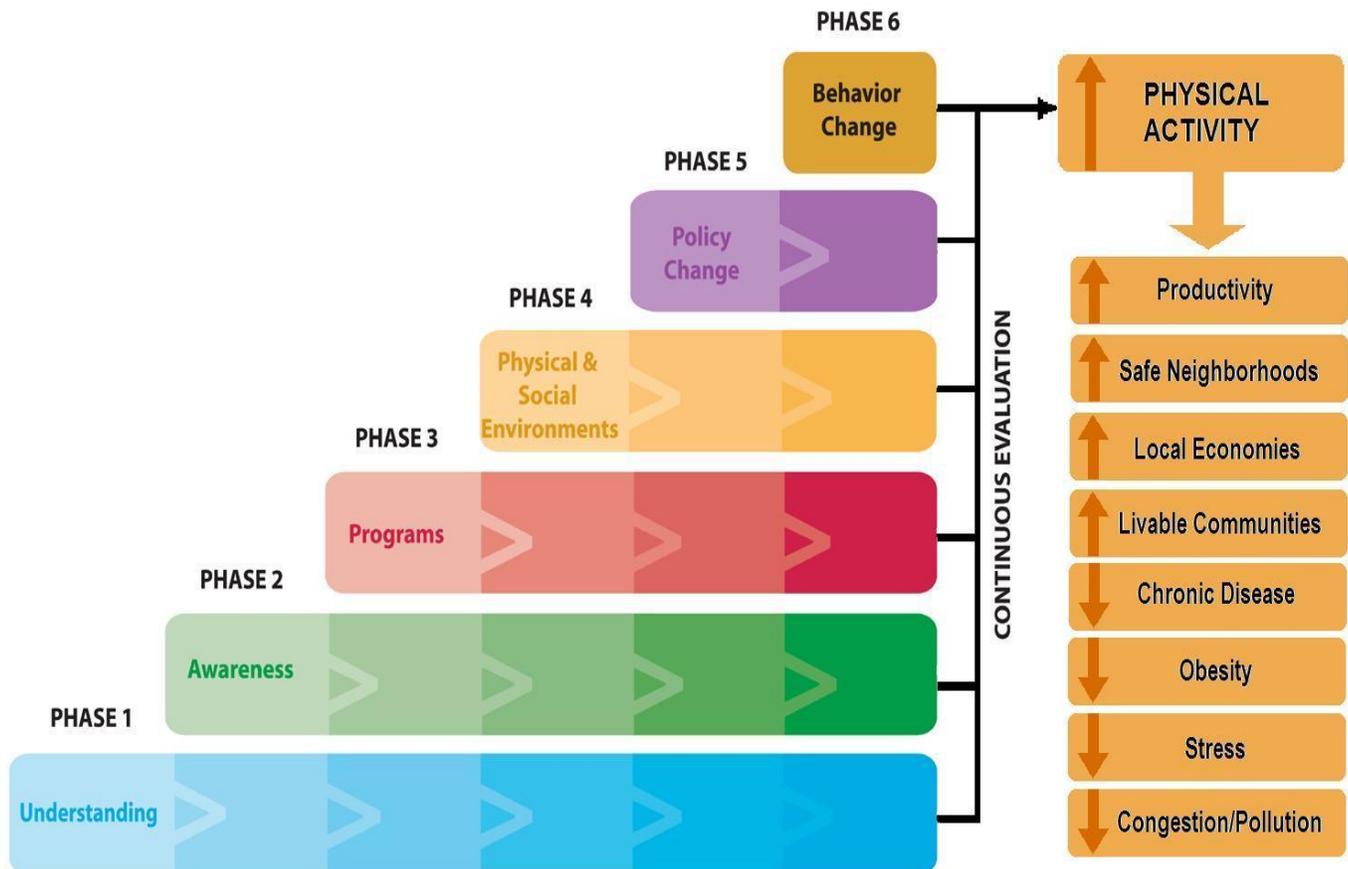
Throughout the process of your advocacy campaign remember to celebrate the milestones, no matter how big or how small!! Go for coffee, bring balloons or a plate of chocolate chip cookies, send a member of your group for training, keep a scrapbook. Above all, take the time to hear the stories and laugh up a storm.

**YOU CAN DO IT!!**

## Appendix 1:

### Saskatchewan *in motion* Community Engagement Model

One of the most important key learning's over the initial three-year phase of Saskatchewan *in motion*, was the process by which communities, schools and workplaces became engaged in *in motion* activities. Saskatchewan *in motion* has formalized this process and has adopted it as a framework to guide a phased approach to the development of all *in motion* strategies at the provincial, regional/district and community level.



**Understanding:** As a first step, leaders need to understand the issue and their potential role in developing and implementing *in motion* strategies. Leaders will provide information to decision makers who influence their ability to implement and maintain strategies.

**Awareness:** The next step is for leaders to create a “movement” or critical mass of understanding among their constituents (residents, students, employees). This is done through public awareness campaigns, promotions, challenges etc.

**Programs:** An easy next step is to offer new program opportunities that begin to address barriers and provide motivation to “try it”.

**Physical and Social Environments:** As community strategies begin to strive for more sustainable and meaningful action, they will begin to consider initiatives that influence the physical and social environments required to support regular physical activity.

**Policy Change:** Successful strategies become sustainable by ensuring they become part of the culture and fabric of their community, school, workplace or organization. Adopting policy to ensure long-term sustainable action will result in increased investment and opportunities for action.

**Behavior Change:** As communities work through all phases of their *in motion* strategy they will begin to see long term behavior change.

The skills and processes that you will uncover in *Planning for Getting What You Want* can be applied in any of the phases; however research indicates that until policies that support physical activity are in place, it is unlikely that we will have change that sticks.