

Session 1

Introduction to the Workshop: Developing Policy Advocacy Strategies

Purpose

Welcome the participants to the workshop; review expectations, the agenda, and ground rules; and set the tone for the remainder of the workshop.

Objectives

By the end of this session, participants will:

- Identify their expectations for the Developing Policy Advocacy Strategies Workshop
- Recall the ground rules that all participants agree to abide by during the workshop
- Share their impressions of what “policy advocacy” is

Total time: 1.5 hours

Session Preparations

Logistics:

- Refer to Preparing for the Workshop guidance in the facilitator’s manual and follow carefully

Materials Needed:

- Participant sign-in form/attendance register
- Pretest; answer key located in Annex 6 of the introduction to the facilitator’s manual
- Prewrite responses
- Session1_Introduction_PowerPoint file
- Agenda and Learning Objectives handouts (Annexes 5 and 2 of the introduction to the facilitator’s manual)
- Ball of yarn or string
- Flip chart paper and markers
- Prepared flip charts with these titles:
 - Ground Rules
 - Parking Lot
 - Agenda Day 1
 - Expectations
 - Daily Recaps and Energizers Sign-Up (include sign-up times and instructions)
 - Advocacy Words

Set-Up:

- Small groups at tables or theater style
- Open space for icebreaker activity

Welcome/Sign-in/Pretest—30 minutes

1. As each participant arrives:

- Welcome each person, inform participants that the workshop will begin shortly, and ask if they have any questions.
- Ask each participant to sign the attendance register and to write legibly (signature required on Day 1; initials only Days 2–5).
- Give each person a pretest and ask them to complete it while other participants are arriving.



- Project slide 1 on screen while participants are entering the room.

**Introductions/Opening Remarks/Ground Rules—
60 minutes**

2. Use the speaker notes, questions, and probes provided to encourage participant interaction during the session.

Show slide 2.

Explain: *I am very pleased to welcome you here today. I am <give your name, title, and brief biography> and this is <give co-facilitator name, title, and brief biography>. This workshop will provide a hands-on opportunity to work with colleagues to develop an advocacy strategy that you can use to advocate for changes to policies around issues of interest to you and your organization.*

3. Show slide 3.

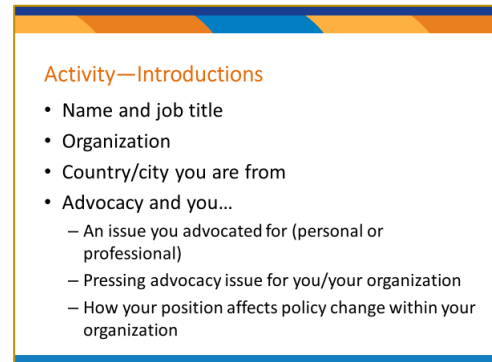
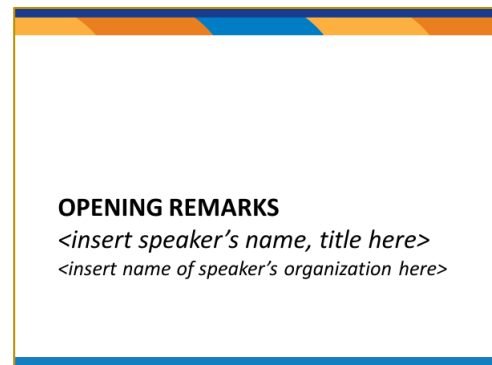
Say: *I am very pleased to introduce our speaker <give speaker's name, title, brief biography, and rationale for the speaker's interest in the workshop>.*

Thank the speaker(s) after they conclude their remarks.

4. Show slide 4.

Explain: *Now that you know a little about us, we would like to give all of you an opportunity to introduce yourselves. Please tell us your name, job title, organization, where you are from, and a little something about why you are interested in advocacy. This might include describing an issue that you advocated for either personally or in a professional role, a pressing advocacy issue for you or your organization, or how you have an impact on policy change within your organization.*

Encourage participants to be brief, attentive, and to have some fun during the introductions. Use a creative way to determine the order for the introductions (e.g., by birth month, alphabetical by first names).



Note: Facilitator should demonstrate the appropriate length of a typical introduction. If participants begin delivering long speeches, remind them to keep it brief.

5. Show slide 5.

Post the prepared flip chart titled Ground Rules.

Ask: **What ground rules would you like to suggest for how we conduct ourselves during the workshop?**

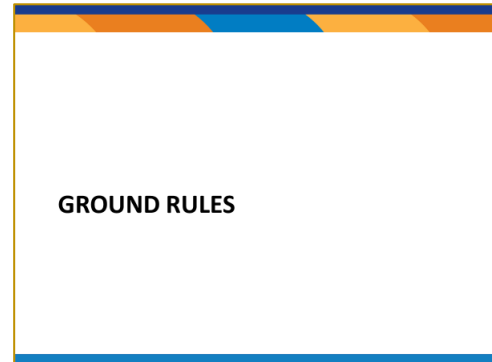
Probe for: be on time, turn off cell phones, respect others' opinions, agree to disagree, offer constructive criticism, one conversation at a time, ask questions, commit to participate fully, speak in a common language or provide translation.

Write the participants' suggestions on the prepared flip chart. Be succinct and limit the number of rules.

Ask: **Can everyone agree to follow these ground rules?**

Ask for a show of hands from participants.

Post the final rules so participants can refer to them during the workshop. Say: **Remember that anyone should feel comfortable reminding others to follow the rules—it is not just the job of the facilitators.**

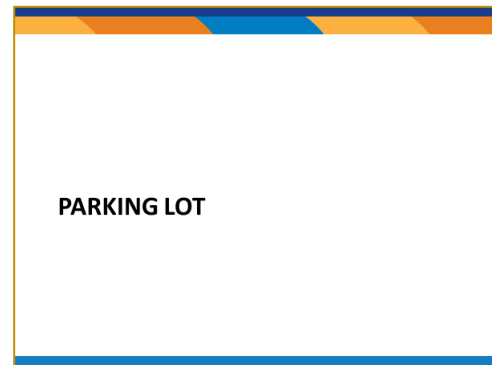


Parking Lot—5 minutes

6. Show slide 6.

Post the prepared flip chart titled Parking Lot.

Explain: **The parking lot flip chart is a place where both facilitators and participants can “park” issues/questions that will be addressed later in the workshop or are not specifically related to workshop topics. This flip chart will be posted throughout the workshop so that we can come back to it and address the issues/questions that get “parked” here. In some instances, issues in the parking lot will not be addressed during the workshop, but facilitators may be able to provide other resources or references.**



Expectations—5 minutes

7. Show slide 7.

Post the prepared flip chart titled Expectations.

Ask: **What specific skills/knowledge related to policy advocacy strategy development do you hope to gain?**

Probe for specific knowledge and skills that the participants hope to gain related to the goals and objectives of the workshop.

Write the expectations mentioned by participants on the flip chart; be succinct. If multiple participants have similar expectations, keep a tally next to the item.

If participants mention topics that are outside the scope of the workshop, write those topics on the Parking Lot flip chart.

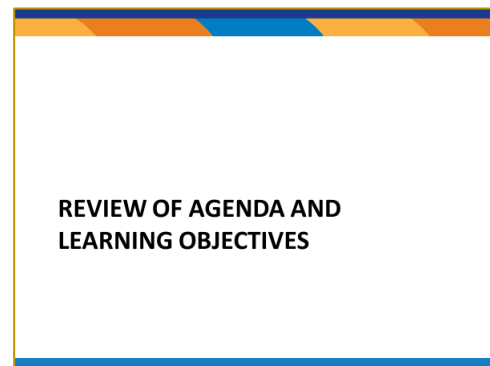
**Agenda/Learning Objectives—20 minutes**

8. Show slide 8.

Distribute copies of the key learning objectives and agenda handout (or direct participants to the page number in their manual), and post a flip chart showing a condensed version of the agenda for the day.

Explain: **We have a very full agenda for the next couple of days. As you can see, we have lots of interactive sessions planned to give you opportunities to learn a proven step-by-step process for developing a policy advocacy strategy and practice using some strategy development tools. The first day of the workshop will be more theoretical and will provide the foundation for the more practical days to follow <provide a brief overview of each day>. Ultimately, we would like you to leave the workshop with a strong foundation in strategy development and the beginnings of a strategy that you can finalize and implement.**

Post a prepared flip chart of the Day 1 agenda so that you can refer to it during the day.



9. Show slides 9, 10, 11 while summarizing.

Summarize the goals and key learning objectives for the workshop and encourage participants to follow along on their handout.

Ask: **What questions do you have about the learning objectives?**

Workshop Goals/Learning Objectives

- Define key concepts such as policy, advocacy, and policy change and differentiate between policy advocacy and other similar concepts.
- Describe the basic steps of policy development and highlight when advocacy activities may be incorporated to influence the process.
- Define a policy issue to explore during the workshop and determine the most appropriate policy solution using root cause analysis.
- Review the differences between goals and objectives and develop appropriate goals and objectives for a draft advocacy strategy.

Workshop Goals/Learning Objectives
(continued)

- Define primary and secondary target audiences, use a power map to illustrate stakeholders and their positions related to a policy advocacy objective, identify target audiences, and apply audience analysis techniques to specific target audiences.
- Describe the reasons to form partnerships and the various types of partnerships available for conducting policy advocacy; identify potential partnerships for the draft policy advocacy strategy.
- Identify the steps required to develop and deliver an effective advocacy message and create an advocacy message based on the draft strategy.

Workshop Goals/Learning Objectives
(continued)

- Describe the types of activities that can be used to support advocacy objectives and identify specific activities to support an objective in the draft advocacy strategy.
- Identify types of resources needed to implement an advocacy strategy and plan how to obtain the necessary resources.
- Describe basic principles of monitoring and evaluation (M&E) and the use of M&E to demonstrate progress toward accomplishing advocacy goals and objectives.
- Create and present the draft advocacy strategy developed during the workshop and provide constructive feedback to other participants.



10. Show slide 12.

Share the sign-up sheet or post the prepared flip chart titled Daily Recaps and Energizers.

Explain: **Each morning we will begin with a recap of the key things we learned the day before. Periodically, we will also decide as a group that we need an energizer—a group activity that provides a fun break after an intense work session. If you would like to volunteer to conduct one of these, please write your name in one of the time slots on this flip chart during the break. If you need ideas for energizers, we can suggest some.**

DAILY RECAPS AND ENERGIZERS



Group Activity/Discussion—25 minutes

11. Show slide 13.

Post the prepared flip chart titled Advocacy Words.

Ask the participants to stand and form a large circle.

Tell participants to think about words or short phrases that come to mind when they hear the term “advocacy.” Possible words include defending, sensitizing, change, persuasion, exposure, communication, provide a solution, influence, intervene, decision-making, sell an idea, lobbying, attract attention.

Encourage participants to be creative and not repeat words.

Demonstrate the activity by stating your advocacy word, holding onto the end of the string, and tossing the ball of string to a participant across the circle. Photos showing the typical results of this activity are included at the end of this session plan.

The co-facilitator will write each advocacy word/phrase on the flip chart as participants take turns saying words and tossing the ball of string until everyone has had a turn.

12. Show slide 14.

Reflect on the activity by conducting a discussion using the questions on the slide. After the group discusses a question, advance the slide to show the next question:

- **What have we formed with the string?**
Probe for: a net, web, network, circle
- **What can this formation signify?**
Probe for: ideas being linked, working together
- **What happens if someone drops his or her end of the string?**
Probe for: the links are broken, the network or web is not as strong

Close the activity by saying: **Advocacy requires several different skill sets and people working together to accomplish a common goal. People working together as a network are often stronger than people working alone. Many of the words listed here are things that we will explore during this workshop, because they are**

Activity—Advocacy Words

- Form a circle.
- What one word do you think of when you hear “advocacy”?
- Share your word when the ball of string is tossed to you.
- Hold your point on the string, state your word, and toss the ball to someone across the circle.

Source: A2 Advocacy Training Manual, Analysis and Advocacy (A2) Project, 2007.

**Discussion Questions**

- What have we formed with the string?
- What can this formation signify?
- What happens if someone drops his or her end of the string?



part of the steps that contribute to reaching an advocacy goal.

Thank the participants for sharing their ideas/words and ask them to return to their seats.

Wrap-Up—5 minutes

13. Show slide 15.

Conclude the session by reviewing the learning objectives, summarizing the key points, and clarifying any participant questions.

Remind participants to sign up for recaps and energizers during the break.

Collect the pretest, if completed.

Discussion Questions

- What have we formed with the string?
- What can this formation signify?
- What happens if someone drops his or her end of the string?

Examples of a typical web created during the Advocacy Words group activity



Photo credit: Siriporn Jaroenchaikun (for FHI 360)



Photo credit: Amita Mehrotra (FHI 360)

Pretest: Developing Policy Advocacy Strategies Workshop

Instructions: Answer the questions below.

1) Define policy and policy advocacy.

Policy: _____

Policy advocacy: _____

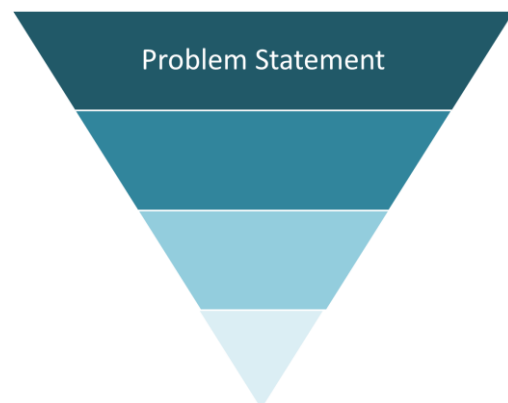
2) Which of these steps are not included in the steps for developing a policy (policy development process)? *Strike through the items that are not part of the process.*

- a. Problem identification
- b. Root cause analysis
- c. Policy formulation
- d. Placement on the policy agenda
- e. Policy analysis
- f. Adoption of policy change
- g. Lobbying
- h. Policy implementation
- i. Outcome monitoring and evaluation
- j. Policy monitoring

3) What components need to be included in a problem statement?

4) What is a policy solution?

5) What are the relationships of a goal, objectives, and activities relative to the problem statement? Label the segments of the graphic by writing goal, objectives, and activities in the segment of the graphic where they belong.



6) What is the difference between a primary and secondary target audience?

7) List two or three strategic reasons to work with partners to reach an advocacy goal.

8) What are the stages in the advocacy communication model?

9) Name one advocacy activity or product under each heading that could be done as part of an advocacy strategy.

Materials/publications: _____

Media/communications: _____

Meetings/events: _____

Generating data/evidence for advocacy: _____

10) What is a resource? _____

Provide examples of two resources that may be required to implement an advocacy strategy.

11) Name two or three methods used to evaluate advocacy.

Sign-in Sheet: Developing Policy Advocacy Strategies Workshop

Dates: / / through / / Page /

| Name | Organization | Email | Signature—Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
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