

2. *Advocacy Planning Techniques*

In *The Art of War*, Sun Tzu instructs that “if you know others and know yourself, you will not be imperiled in a hundred battles.” He also observes that “the ability to gain victory by changing and adapting according to the opponent is called genius.”

Yet, knowledge of one's team and network, and one's primary audience, is often taken for granted in advocacy planning. There is great temptation to focus advanced advocacy planning on **tactics** rather than on gaining a comprehensive, strategic understanding of the terrain and investing in political mapping of one's own advocacy **capacity** and advocacy **targets**. Donors, who rightly want to document a causal relationship between their investment in an advocacy project and its intended impact, often expect to see a long-term battle plan at a project's onset. Much of the advanced project planning for ACTION, for example, initially focused on establishing measurable indicators for proven tactics, such as the number of media placements generated and meetings with policymakers.

As the ACTION project moved forward, however, it was evident that it needed to become more flexible to take advantage of unforeseen opportunities that could not have been anticipated in the project planning stages. To ensure team members remained focused on the end goal and would be opportunistic in finding the best means to achieve it, the project developed a long-term strategic planning template for each country to complete. ACTION project team members then participated in a lengthy process of hard-headed trouble shooting to further refine each other's country strategies.

In preparing to achieve specific advocacy objectives, effective advocates must “know” themselves, their allies and opposition, and the terrain upon which they will engage. Establishing process indicators and benchmarks is useful in focusing attention on proven tactics and strategies, yet insufficient for developing the political insight, instincts and flexibility required to achieve stated objectives.

Strategic Planning Template for Advocacy (Donor Countries)

1. Funding sources. In donor countries, identify all potential sources for significant funding. Assess which are the most accessible “pots of money” and, given baseline spending, establish a resource mobilization target.

a. **Initial funding baseline:** b. **Funding target:**

2. Main decision makers. Identify the key government players directly involved in authorizing increases in funding. Which policymakers (and indeed, who among their staff) have the greatest influence over how that money is spent? What do you know about their agenda?

	Bilateral	Multilateral
Main decision makers		
Current allies/champions		
Current detractors		
Important influencers		
Key individuals to engage		

3. Key dates. Note all important dates relevant to these funding sources.

4. Obstacles & opportunities. Identify major political/social potential opportunities and obstacles relevant to influencing funding sources, e.g. emerging issues, social/cultural trends, political initiatives, events, etc.

5. Influencers. Identify all non-government individuals and organizations that can influence these policy making processes. Which will have the most influence on the behavior of the main decision makers?

	Existing contacts	New outreach
Advocacy partners		
Other businesses/agencies		
Experts/activists		
Media		

6. Strategic options. What potential tactical options does this assessment so far suggest? Describe in narrative potential advocacy strategies and/or various strategic options.

7. Capacity implications. Do you possess the right advocacy capacity and skills to rapidly adapt to identify and address new opportunities or constraints, based on this current assessment? Note any implications these strategies might have on your capacity (e.g. new skills, info required, training/budgetary implications, etc.).