



Step 2: Setting Goals

The first step in any advocacy is to clearly define what you want to achieve. Successful campaigns not only win concrete improvements in people's lives (advocacy goals), they build a stronger organization (organizational goals). These goals need to be realistic, concrete, and measurable. For example, Jubilee USA Network set out the following goals in 2001:

Advocacy goals:

- **Immediate (one year):** Raise the issue of multilateral debt in addition to bilateral and private debts among all relevant social movements and policymakers.
- **Medium (two years):** Cancel the multilateral debts of 12 impoverished countries.
- **Long (five years):** Cancel 100 percent of all debts including the multilateral debts of all impoverished countries without mandating harmful economic conditions.

Organizational goals:

- **Immediate (one year):** Recruit 1,000 new subscribers to Jubilee USA Network's email lists while maintaining existing subscribers garnered through Jubilee 2000 campaign.
- **Medium (two years):** Strengthen grassroots contacts in a dozen key cities/regions who can call members of Congress and/or other policymakers.
- **Long (five years):** Have more than a dozen local grassroots committees active (defined as taking two actions per year) around the country and increase the number of Jubilee congregations.

Step 3: Lay of the Land

📌 *If you think you are too small to make a difference, try sleeping with a mosquito.”*
– Unattributed

The next step is to survey the lay of the land. What are your organizational strengths and weaknesses? How many supporters do you have? How many leaders? What capacity do you have to reach out to the media? To produce events?

Similarly, who are your allies and opponents? Who are likely supporters of what you will be doing? Students? Nurses? Returned Peace Corps volunteers or others who have traveled or lived abroad? It is important to think creatively here.

Did Jubilee Meet Their Goals?

Advocacy Outcome: Jubilee networks and social movements around the world were able to pressure the Group of Eight (G8) to agree to cancel the multilateral debts of 18 countries, most of them in Africa, in July 2005.

Organizational Outcome: As of October 2005, Jubilee USA Network had over 70 Network Council members, with several thousand individuals subscribed to the email lists, along with a dozen local grassroots committees formed. In addition, there are almost 70 Jubilee Congregations.



The importance of making these goals measurable cannot be underestimated. These measures are how you will evaluate your campaign, both as you go along and at the end. Having clear measures of success makes it easier to determine if your campaign is working and that helps you gain new supporters and funders along the way.



Jayne Thomisee of the National Peace Corps Association speaks about trade justice.

Credit: National Peace Corps Association



For example, in their campaign to Make Trade Fair and end agricultural subsidies, Oxfam America works with small farmers in the U.S. This not only increases their support base, it helps drive home their point: the U.S. government pays huge subsidies to industrial farms and agriculture corporations that hurt family farmers both here and abroad.

Step 4: Identify your Targets

Who is the decision maker(s) who has the power to achieve your advocacy goals? Be specific: give names.

For example, one of RESULTS' advocacy goals is to increase funding for microcredit programs. Who are the largest potential funders of microcredit programs that U.S. citizens can influence? One is the U.S. government. The other is the World Bank. Therefore RESULTS chose the Congress as their target for this campaign – both because they have the power to increase U.S. funding for microcredit programs through USAID – and because Congress, in turn, has the ability to influence World Bank spending priorities. Specifically, they are targeting Members of Congress who have the most power over funding (the members of the appropriation committees) and the members with the most influence over the World Bank (the members of the House International Relations Committee and the Senate Foreign Relations Committee).

▾ *Working with unusual allies can help change the balance of power so that your campaign can succeed.*

When targeting decision-making bodies with multiple members, it is important to determine who is on your side, who is not on your side, and who is the persuadable middle. For example, campaigns that support candidates for public office frequently canvass all registered voters (their target decision-making body) to determine how each citizen plans to vote on Election Day. Their answers are characterized as:

- 1 = strongly supports
- 2 = leaning in favor
- 3 = undecided
- 4 = leaning against
- 5 = strongly against

Voters in categories two through four (the persuadable middle) are then contacted with arguments crafted to persuade them to support the candidate. Voters in category one are contacted to see if they would be interested in supporting the campaign by placing a sign in their yard, donating





Washington State activists after a meeting with Senator Patty Murray.

Credit: RESULTS

or volunteering. There is no need to waste time speaking to those (category five) who will never support the candidate.

After identifying your targets, you need to learn everything you can about them and how they make decisions.

Influencing elected officials frequently requires public pressure. No organization or coalition has the capacity to persuade everyone, so be specific: what segments of the public will you persuade to support you?

A Note on Lobbying

**What if my targets are Members of Congress?
Can my organization lobby?**

Nonprofit organizations can legally lobby but there are restrictions on this activity. For more information contact the Center for Lobbying in the Public Interest at: <http://www.clpi.org>.

One brilliant example of this comes from SeaWeb and the Natural Resources Defense Council that wanted to put in place a strong swordfish fishery management plan:

▣▣ *The U.S. Secretary of Commerce, who oversees the National Marine Fisheries Service, is responsible for fishery planning. How does one put pressure on the Secretary? A group could get masses of U.S. consumers to agree not to eat the fish, but that would take a long time. Action was needed within two years....Who makes decisions about food for consumers? Chefs, among others. SeaWeb and the Natural Resources Defense Council, the groups behind the “Give Swordfish a Break” campaign, targeted chefs as the second-most important audience for their campaign (the Secretary of Commerce being most important). And they didn’t need every chef in the country, they needed famous chefs, the trendsetters, the ones who regularly appear in the media. The audience target has been refined from massive to manageable, e.g., from the general public to famous chefs. Now the campaign can create messages, materials and outreach programs to reach this very specific audience. This was much easier, and a far more strategic thing to do, than trying to reach the general public. In the end, “Give Swordfish a Break” had more than 750 chefs not serving swordfish. This captured the attention of the press, and, ultimately, of the Secretary of Commerce. (Now Hear This, Fenton Communications)*

▣▣ *Defining a narrow target audience and finding a good messenger were key to the success of the “Give Swordfish a Break” campaign.*





You may want to consider the following audiences, which have been found through extensive polling and focus group research to be sympathetic to increased international cooperation but not been convinced or engaged yet:

- women;
- youth (for an excellent report on why this is the case, go to NetAid's report Learning for Change online at: http://www.netaid.org/documents/netaid-research/learning_for_change.pdf);
- faith-based communities; and
- civically-engaged 35 to 55 year-olds.

For more information on these polls and focus groups, contact InterAction's Communications Department at: (202) 667-8227.

Step 5: Crafting your Campaign Communications

“*The only way I know how to organize people is to talk to one person, then talk to another person, then talk to another person.*
– Cesar Chávez, the late president of the United Farm Workers

Campaigns are successful only if they motivate your target audience to take action. This means communicating with your target audience with a message that resonates with them.

The first step in this process is to look at how a story is told -- also called its frame. One example of reframing an issue is using the word “rainforest” instead of “jungle.” While both refer to the same piece of real estate, “rainforest” immediately evokes precious flora and fauna, and the need to save the last of our natural resources. The word “jungle,” on the other hand, may evoke images of chaos and danger.



↘ *Environmentalists decided to advocate for saving the rain forest not saving the jungle because of the importance of how stories are told*

How stories are told is equally important for international issues. The Rockefeller Brothers Fund and the Global Interdependence Initiative at the Aspen Institute have collaborated with a wide variety of people including development advocates, energy and environmental organizers, nonproliferation and arms-control experts, foreign policy scholars, youth activists, and faith-based leaders to research how Americans think about global issues. They found that the story most Americans know about international issues is one of “global mayhem.”

A majority, including most well-educated, civically-engaged Americans, get their news from the local TV news stations, not the national network news nor public TV or radio. The tiny amount of time dedicated to international issues during the local TV news program does not paint a positive picture of what is happening in the world. The world as portrayed on local news is a chaotic, riotous, natural disaster and accident-prone place: today a bus goes over a cliff in Peru; tomorrow a riot occurs in Algeria. Americans are shown delivering aid, but tomorrow the same type of stories reappear: an earthquake in Turkey; a ferryboat capsizing in Bangladesh.



From this oft-repeated type of story, Americans conclude that:

- it seems only bad things happen in the world;
- Americans are the only ones responding;
- nothing we do solves these problems effectively, so the problems will always exist; and
- other people and countries are not capable of helping themselves.

Given that this is the most common narrative Americans hear about the U.S. role abroad, it is amazing Americans support cooperative U.S. engagement in the world at all. But they do, and this has been even more true recently, after the terrorist attacks on September 11 and events such as the December 2004 tsunami. Americans' support for cooperative engagement is even stronger when a different story is told.

There is another story that already exists in people's minds as well. It is not repeated as often, but it is there. You can tap into it:

This story is about our increasingly interconnected world - about how what happens overseas matters here at home and how we are all in this together. Combining this story with "big ideas" in which Americans already believe creates a powerful case for global cooperation:

- **Pragmatic/smart/effective/realistic.** Americans tend to like things that work.
- **Far-sighted.** Americans like plans that look to the long-term and build a better future for our children
- **"Can-do."** Americans achieve the unachievable. We have ingenuity, perseverance, and optimism.



📌 *Pictures of earth from space remind us that we are all interconnected and that we are all in this together.*

Credit: NASA

- **Collaborative.** Americans welcome the idea of partnerships and working with others. Many hands make light work.
- **The right thing to do/principled/trustworthy.** People want the U.S. to do the right thing and to reflect the principles that Americans hold dear: fairness, justice, common decency, respect for others.

This frame and its big ideas provide a scaffolding for your own organization's messaging. Your specific messages can then tap into these larger arguments, linking your work to that of other organizations tapping the same "big ideas."

The Interconnected World Frame

The ONE Campaign Declaration is one example of how to incorporate the interconnected world frame, values and some of the other big ideas recommended by the Global Interdependence Initiative's *U.S. in the World* guide into your communications:

ONE THE CAMPAIGN
TO MAKE
POVERTY HISTORY



WE BELIEVE that in the best American tradition of helping others help themselves, now is the time to join with other countries in a historic pact for compassion and justice to help the poorest people of the world overcome AIDS and extreme poverty.

WE RECOGNIZE that a pact including such measures as fair trade, debt relief, fighting corruption and directing additional resources for basic needs – education, health, clean water, food, and care for orphans – would transform the futures and hopes of an entire generation in the poorest countries, at a cost equal to just one percent more of the U.S. budget.

WE COMMIT ourselves - one person, one voice, one vote at a time - to make a better, safer world for all.



For a more thorough explanation or for specific messaging advice, attend a training of the Global Interdependence Initiative or visit the website of their messaging guide, U.S. in the World, at <http://www.usintheworld.org>.

▣ *This guide, produced by the Global Interdependence Initiative of the Aspen Institute, helps you talk global issues with Americans.*

The second step in creating your campaign communications is to create the messages specific to your campaign. Effective messages move your target audience to take the action you want. There are a few key elements to effective messaging: know your audience, repeat yourself, be clear about what you want people to do, and explain why it is urgent.

Know your Audience

The message that moves your target audience is often not the message that appeals to the people who already support you. Nor is it the message that often appeals to you and other people who work on this issue full-time. Knowing what moves your target audience can only be determined by research. Assumptions will not do.

When the federal government created its Just Say No campaign, no one researched



▣ *TheTruth.com asked their target audience, children and teens, to help create their messaging with powerful results. The bright orange arrow points out “Big Tobacco” practices that are “not always so easy to see.” This one reads, “In 1995, a major tobacco company planned to boost cigarette sales by targeting homeless people. They called their plan, ‘Project SCUM: Sub Culture Urban Marketing.’”*

whether a message intended for younger children would work for teens. And the government did not study whether or not teens would listen to Nancy Reagan telling them what to do. As a result, Just Say No was not as successful at changing behavior as it could have been. TheTruth.com did not make the same mistake. It asked kids to help create their messaging -- with powerful results. TheTruth.com focuses their campaign on the fact that big tobacco companies have purposely and knowingly marketed and sold deadly products to children and teens.

Similarly, relief and development organizations are finding that pictures of mothers, fathers, grandparents, and children, for example, doing every day activities that Americans can relate to – going to the market, bathing their children, or commuting to work – are more effective in building support for their organizations than are pictures of misery and hardship.

Make sure you do at least some very basic research about your target audience to see their reactions to your messages. How many of them take the action you want them to?

Repetition

Every campaign needs a single message that captures the essence of your campaign. “Drop the Debt” or “Make Trade Fair” are good examples of effective messages. Every communication you send out – be it an action alert, a press release, or a report – should include this message.

As David Axelrod, a political consultant, says, “Here is the rule we follow with our clients: when the campaign staff and the reporters become physically ill over the repetition of the message, only then have you begun to penetrate the public consciousness.”

Include an Action

Successful communications must also be clear about what you are asking your target audience to do. “Make Trade Fair” is a great campaign slogan but is not enough. People have no idea how to do that. You must also specify the action you want them to take today: “add Fair Trade Certi-



fied™ products to your shopping list” and ask your grocery store to “please carry more Fair Trade Certified™ products.”

➤ All communications should be clear about what you want people to do. This Oxfam America recipe card asks people to contact their grocer and ask them to carry Fair Trade Certified™ products.

FAIR TRADE CERTIFIED

LOOK FOR THE LABEL.
The Fair Trade Certified™ label (left) guarantees that farmers can earn a decent living from their crops. Want to learn more about Fair Trade? Oxfam America can help. Visit www.oxfamamerica.org/coffee supermarket for more information.

Coffee Banana Bread from the kitchen of Oxfam America

> Directions

- 1 Preheat oven to 350 degrees Fahrenheit.
- 2 Whisk together all dry ingredients.
- 3 With a fork, mash the bananas very well.
- 4 Mix all wet ingredients into dry ingredients until just combined.
- 5 Grease bottom of a 9x5x3 inch loaf pan.
- 6 Pour the batter into the pan, and top with coffee/sugar mixture.
- 7 Bake 1-1½ hours until an inserted skewer comes out clean.
- 8 Let stand in pan for 5 minutes.
- 9 Remove from pan and finish cooling on a wire rack.

Dear _____
Fill in the name of your supermarket here.

More than 25 million coffee-growing families are struggling because of instabilities in the coffee market. I'm a regular customer at your store and I buy Fair Trade Certified™ products. The Fair Trade Certified™ label guarantees that farmers can earn a decent living from their crops. Please carry more Fair Trade Certified™ products—coffee, tea, chocolate, cocoa, bananas, and other fresh fruit. Put them on prominent shelves. And tell your customers what you're doing.

Sincerely,
(Please print clearly.)

Name: _____ email: _____
Street address: _____
City/State/Zip: _____

Other ways to get involved with Oxfam:
 Please send me more information. I would like to get involved in my community.

→ Mail this postcard to Oxfam America. We'll deliver it along with thousands of others to your supermarket.


Urgency

All communications must answer the question of why now? Why should I put aside time at this moment to take this action? Without instilling a proper sense of urgency, people might agree with what you're asking them to do but postpone doing it, or worse, never do it at all.

For a more in-depth look at how to use strategic communications to advance your campaign, see Smart Chart 2.0, a tool produced by Spitfire Strategies and available online at: http://www.spitfirestrategies.com/pdfs/smart_chart_2.pdf.

➤ Spitfire Strategies Smart Chart helps you plan your communications strategically.




Pictures of global mayhem may raise more fundraising dollars in the short-run. But reinforcing the idea that we are all connected and that we are all in this together will lead to the type of sustained support for increased U.S. engagement that is necessary to fight global poverty and respond effectively to humanitarian crises over the long term. Reinforcing the “global mayhem” story undermines the ability of this community to build a domestic constituency for international engagement.”
–David Devlin-Foltz, Director of the Global Interdependence Initiative at the Aspen Institute

Citing Past Successes

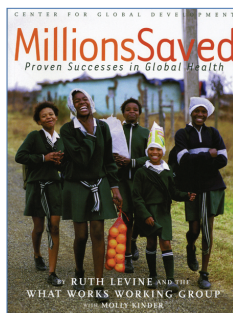
No matter what you are arguing, your case will be stronger if you can draw on positive examples from the past. This is especially necessary when arguing in favor of increased global engagement because of the negative perceptions that are repeated so often on television. Here are just a few examples of past successes you can cite on international issues:

- After World War II, the U.S. gave loans and aid to Europe and Japan through the Marshall Plan. It helped put these countries back on their feet and today they are some of our most trusted allies.
- In the 1990s, citizens, nongovernmental organizations, and governments all worked together to successfully write and pass an international treaty that bans landmines.
- Thanks to the work of religious groups, activists, and rock stars, some of the debt of the world's poorest nations was canceled in 2000.
- Over the past 40 years, life expectancy at birth in developing countries has increased by 20 years -- about as much as was achieved in all of human history before the middle of the 20th century. (*2002 World Development Indicators*, World Bank)
- A massive global effort spearheaded by the World Health Organization eradicated smallpox in 1977 and inspired the creation of the Expanded Program on Immunization, which continues today. (*Millions Saved: Proven Successes in Global Health*, Ruth Levine)



For more success stories go to:

- InterAction's success stories which are drawn from InterAction member organizations' field work are available at: <http://interaction.org/campaign/>
- Millions Saved by Ruth Levine, a publication of the Center for Global Development
- The Center for U.S. Global Engagement's Acting Globally, Working Locally details success stories from the U.S. international affairs budget, available at: <http://www.usglobalengagement.org/stories.html>



Success stories like these help people understand that ordinary people can, and have, made a difference in the world. Challenges remain, but when people and nations work together it is amazing what can be achieved.

Step 6: Tactics and Timeline

👍 *The laziest thing people do is go right to tactics.*
—Jon Haber, Fleishman-Hillard, a public relations consulting firm.

A campaign is a series of planned actions targeted to achieve a particular objective. A campaign is not frantic activity. It is only possible to know what will be effective after you have chosen and researched your issue, determined your campaign goals, examined the lay of the land, identified your targets, and planned your communications – steps 1 through 5 in this guide.

Once you have completed these steps, it is time to start brainstorming the tactics, or actions and events, that will make your plan a reality. The

more creative you are in this stage the better. There is no limit to the number of possible tactics. Here are just some examples to help start your ideas flowing:

- U.S. Lutherans met and exceeded their '90-Ton Challenge,' a challenge they launched to double the amount of fairly traded coffee Lutherans purchased. More than 4,300 Lutheran parishes and organizations and countless households from coast to coast participated. As Lutheran World Relief says, "Our fair trade cup runneth over."



Pour Justice to the Brim

Credit: Citizens for Global Solutions

- In 2004, Citizens for Global Solutions held a competition for the best web-based video on a global problem with a global solution. They narrowed down the entries to the top 10, and then had their e-mail subscribers vote for the first (\$1000), second (\$500), and third (\$250) place winners. The results, both in terms of the videos produced and the exposure for the organization, were amazing. And now Global Solutions has a number of video clips on a variety of issues that it can use to educate and involve others.




 United Kingdom Department for international development rough guide to a better world available online at: <http://www.dfid.gov.uk/pubs/files/rough-guide/better-world.pdf>



- The UK Department for International Development collaborated with Rough Guides, producers of a popular travel guide series, to create the Rough Guide to a Better World and How You Can Make a Difference. Available free throughout the UK, the guide explains that development works, who is making a difference, and how you can join them in changing the world.
- Launched in the fall of 2005, Rx for Child Survival brings together the humanitarian organizations CARE and Save the Children with the Global Health Council, UNICEF, WGBH Educational Foundation, and Vulcan Productions to offer Americans a broad range of opportunities to help children live longer, healthier lives. In addition to a multimedia project anchored by a six part PBS documentary series, the campaign provides tools for speaking out, for volunteering time, and for donating to programs that make a difference.
- Celebrities including Alanis Morissette, Chris Martin, and Antonio Banderas agree to be dumped on – with corn, wheat, and rice – as part of an interactive and ongoing, traveling “roadshow” that educates and involves people in Oxfam’s Make Trade Fair campaign.
- Every year, the Catholic Relief Services “Africa Rising! Hope and Healing” campaign sponsors at least one speaker from Africa to travel to the United States and visit dioceses, parishes, universities, high schools, Catholic Relief Services donors, and others to talk about the issues confronting Africa and the courage and hope of its peoples.

There are many possibilities for tactics, some will move you towards your goal more directly than others. It is important to evaluate potential actions for their impact on your goals. So after you have brainstormed a list of tactics, go back through them placing the most effective ones into a timeline. Make sure that your final action plan reflects the three phases of a campaign:

1. making your goals publicly clear;
2. asking for them to be met; and
3. if they are not met, gradually turning up the public pressure until they are.

Your campaign should also be comprised of a good mix of tactics, including some that:

- inform your target audiences;
- give supporters opportunities to be involved in a variety of ways (donate, volunteer, contact Congress, spread the word); and
- hold your elected officials accountable.

Turning up the Public Pressure.

The Congressional Management Foundation stresses the importance of using a mix of tactics to effectively pressure public officials. A single letter or an isolated visit from a lobbyist will not put your issue on the agenda of a Member of Congress. But a slew of emails from constituents the same week a few large donors request a meeting on the topic will get the attention of the Member's staff.

Your timeline should include not just what is happening when, but also who is responsible for each item. Completing this step frequently involves revisiting earlier steps to refine your goals, targets, and audiences in light of what is feasible. That is okay, creating a good campaign plan usually requires moving up and down through these steps multiple times. This will happen not just during the planning process, but throughout the campaign as well. This is because campaigns need to re-evaluate and respond quickly to changing circumstances.



Step 7: Resource Management

Estimate how much each of your tactics will cost in terms of time and money. Does your organization have the capacity to raise the resources required to make your plan a reality? Do not underestimate the power of your supporters to help you achieve your campaign goals.

In 2002, MoveOn urged the U.S. government – through calls and e-mails – to “let the inspections work” before declaring war on Iraq. When this failed to change the Administration’s course of action, they came up with another way to get their message heard: they placed an ad in The New York Times.

They asked their supporters for the money to make this happen. They needed \$35,000 but raised an astonishing \$400,000 within just a few days. This allowed them to take out television, radio, and billboard ads in addition to The New York Times ad. And the ads did indeed raise quite a stir, giving them free media exposure in outlets across the country.

In addition to raising money to make sure their voices are heard, MoveOn supporters have opened their homes to survivors of Hurricane Katrina, gone door-to-door in their neighborhoods, and held phone parties to call



📌 *As a MoveOn ad demonstrates on the previous page, your supporters bring critical resources to your campaign. Involve them!*

Credit: Moveon.org

voters in swing states. According to Ben Brandzel, Campaign Director of MoveOn.org, the success of MoveOn comes from relating to their “members as citizens, and not just wallets.” MoveOn members get involved because they are passionate about specific issues. Raising money is merely one tool for trying to move an issue.

Step 8: Evaluation

Periodically – every six months or once a year – take a step back with everyone involved in creating the campaign and evaluate how you are doing. Are you on track to meet the concrete, time-bound measurable goals you set in step two? If not, why not? Should you change what you are doing? Did you set unrealistic goals? Starting again at step one and proceeding through step eight, review your campaign plan and ask, “Is this still the best way forward?”

For more information on how to evaluate your advocacy, read this informative article in Foundation News and Commentary: <http://www.foundationnews.org/CME/article.cfm?ID=3545>. And for more information on what made campaigns successful, see the report that the Global Interdependence Initiative (GII) commissioned from the Center for Nonprofit Strategies: *Advocacy for Impact: Lessons from Six Successful Campaigns* on the GII website at <http://www.gii-exchange.org/web/librarydetail.php?mod=resource&id=13>.

Conclusion

Advocacy is as much art as it is science. We invite you to use this toolkit as a jumping-off point. Then join InterAction’s ongoing conversations and trainings in the Outreach and Communications Working Group to share, learn, and move forward together. InterAction is always here as a resource for you in this process. Contact the Public Policy Unit at (202) 667-8227.



For More Information

Advocacy for Social Justice, David Cohen, Rosa de la Vega, Gabrielle Watson, Oxfam and the Advocacy Institute 2001. Available for purchase from Kumarian Press.

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About InterAction

InterAction is the largest alliance of U.S.-based international development and humanitarian nongovernmental organizations. With more than 160 members operating in every developing country, we work to overcome poverty, exclusion and suffering by advancing social justice and basic dignity for all.

InterAction is greater than the sum of its parts, a force multiplier that gives each member the collective power of all members to speak and act on issues of common concern. InterAction convenes and coordinates its members so in unison, they can influence policy and debate on issues affecting tens of millions of people worldwide and improve their own practices.

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