LEGISLATIVE ADVOCACY TOOLKIT

Facilitators' Guide

How we work

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Saving lives, changing minds.

Strategy 2020 voices the collective determination of the IFRC to move forward in tackling the major challenges that confront humanity in the next decade. Informed by the needs and vulnerabilities of the diverse communities with whom we work, as well as the basic rights and freedoms to which all are entitled, this strategy seeks to benefit all who look to Red Cross Red Crescent to help to build a more humane, dignified, and peaceful world.

Over the next ten years, the collective focus of the IFRC will be on achieving the following strategic aims:

1. Save lives, protect livelihoods, and strengthen recovery from disasters and crises
2. Enable healthy and safe living
3. Promote social inclusion and a culture of non-violence and peace

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Acknowledgements

Introduction

The Legislative Advocacy Toolkit has been designed for use by the IFRC and National Societies to strengthen their legislative advocacy knowledge and skills, and as a resource for conducting legislative advocacy trainings. This legislative advocacy training package focuses on the "how to", and provides a step by step guide on how to initiate discussions on advocacy, develop and implement a National Society owned advocacy strategy in a systematic, coherent and engaging way. It is anticipated that this toolkit will be a useful resource to support a range of advocacy initiatives: not only those led by the IFRC's Disaster Law Programme (DLP), but by other programmes and departments too.

The IFRC's DLP has been working with National Red Cross and Red Crescent Societies and key partners for over a decade to advocate, influence and support tangible legal and policy change. With DLP teams based in the Americas, Asia Pacific, Africa, and at the global level in Geneva, the IFRC has contributed to the development and adoption of disaster law procedures in over 30 countries, three regional treaties, and has been active in over 100 countries.

National Red Cross and Red Crescent Societies are well-placed in their unique role as 'auxiliary' to their public authorities in the humanitarian sphere to carry out advocacy activities in the interests of the most vulnerable. The term 'auxiliary role' (meaning to complement, supplement or support) will be unpacked as part of this legislative advocacy toolkit. It is a crucial element of National Societies' positioning, status and ability to influence law and policy processes in the national context, yet it is a term which still requires de-mystification and a stronger understanding among National Societies and their partners, to fully realize and utilize the potential and responsibility. that comes with it.

The components of the Legislative Advocacy Toolkit, including this Facilitators' Guide, were developed by an independent consultant, Jonathan Ellis, with technical support and inputs from the global IFRC DLP team. The new toolkit was trialed at a pilot Legislative Advocacy training in Nepal in November 2017, of which the learning, challenges and best practices have been addressed and incorporated into the final toolkit.

Course objectives

By the end of the workshop participants will be able to:

- Define advocacy
- Explain the auxiliary role and how it can be leveraged to support National Society (NS) advocacy
- Navigate their external policy and advocacy environment, including identification of targets, coalitions and partners, and how to address / minimize the opposition.
- Develop an advocacy message
- Apply a variety of advocacy tools to develop their advocacy strategy
- Commence discussions and development of an advocacy strategy
- Understand how they can review their advocacy and sustain momentum
- Share this learning with colleagues

What this course does

This course sets out a practical definition of legislative advocacy in the context of the Red Cross / Red Crescent Movement, and offers a variety of practical tools to help develop an advocacy strategy. There is a strong emphasis during the course on the importance of basing advocacy planning on the reality of the external environment and country context.

Throughout the course there are opportunities for participants to apply the advocacy tools on the priority issues identified by their National Societies, and within their own country context. At the end of the course there is then the opportunity to consolidate the different approaches and to begin to forge an advocacy strategy.

This course will be more effective if participants can come to it with a clear issue upon which they want to construct an advocacy strategy. If this is the case, after each advocacy tool is introduced, participants should be encouraged to apply this tool to their own issue. It may be helpful to consider an additional day of training before this workshop to spend time on a selecting and defining a specific thematic issue.

The advocacy strategy grid for the course offers participants a road map for developing their strategy and they will be able to record their progress throughout the course as they engage with each of the advocacy tools. The idea behind this course is that over its entirety, the participants are adding additional building blocks to their advocacy knowledge and skills, and then at the end of the course they review these building blocks and pull them together into one cohesive action plan to then take forward, including the development of an advocacy strategy which may start taking shape during the course and be strengthened afterwards.

What this course does not do

This course will not tell participants which issues to advocate on, or which approaches they should adopt for their advocacy. Rather, the course will assist participants on how to define their own external environment, how to select their issue, and then based on those choices how to construct an advocacy strategy.

This course also does not assume that the National Society will use all the advocacy tools. Rather, the toolkit sets out an advocacy approach, and National Societies are invited to select which of these tools they see as relevant and helpful in their own national context.

Who should do this course

This course is targeted for National Society staff at the leadership and technical levels. It can be tailored depending on the level and capacity of the training audience. Ideally, participants should be the staff or volunteers who are involved in the promotion of policy change, with a mix of leadership, and the relevant technical teams, depending on the course (e.g. whether it is disaster law or another thematic area). Ideally the course participants should not exceed 20-25 people.

Pre-requisites for this course

Participants will have read the workshop material contained in the Participants' Handbook and any relevant background reading. Either as volunteers or staff, they will have a good understanding of the work of their National Society and their operational and policy priorities.

Above all else they will come to the workshop with an idea of an issue which is confronting their National Society and for which they would like to construct an advocacy strategy to promote a solution to address their issue and the associated ask.

Establishment of an Advocacy Champions Group

It is recommended that an informal "Advocacy Champions Group" is established prior to the training. Champions should be enthusiastic about advocacy and represent key departments at the National Society, such as communications, legal, international relations, National Society development and relevant operational or programme teams. The group should be convened before the training to assist with the organisation of the training, take leadership for dissemination and capacity initiatives as well for follow up after the course. Ideally, they should meet periodically to review progress on advocacy initiatives. During the training, there may be others who are inspired to join the advocacy champions group and their membership should also be encouraged. In the long term, this group could be formally established within the National Society organigram. A Terms of Reference for this group is available together with the other training materials, which could be shared with the National Society before, during or after the course.

Using this facilitators' guide

This guide offers a step-by-step approach to facilitate a legislative advocacy training course, and to help participants develop their own advocacy strategy, messages and skills.

Experience running this training strongly suggests that there is a real need for flexibility. This guide sets out the ideal content for such a course but be fully conscious that it may well not be possible for all this content to be delivered.

As a facilitator, a key element for success will be your flexibility and your willingness to respond to the needs of the workshop. For ease, the essential content "$*$" is indicated so that the facilitator knows the basic content that needs to be covered on the workshop.

Each module consists of the following parts:

- **Learning outcomes** – what the participant should learn from this session
- **Session content** – the key content that you will be asked to convey to the participants. This content will be outlined on the session PowerPoint slides, but this guide will offer insights to help you communicate the key learning points.
- **Examples** – in most modules, practical examples will be included on the various advocacy tools to help bring the learning to life for the participants.
- **Exercises** – all the advocacy tools will have a practical exercise(s) to help the participants to apply their learning on their own issue and within their own context such as group work and role plays

- **Stumbling blocks** –Stumbling blocks are often unavoidable along the way, and some potential stumbling blocks to learning are highlighted together with some strategies for overcoming these obstacles.
- **Materials** – if there are additional materials available for participants at the workshop these will be included here.
- **Further reference** – links to additional material from within the Red Cross Red Crescent Movement or on advocacy more generally will be listed here, particularly if they can be accessed online.

In particular, the materials produced by the *Global Road Safety Campaign Partnership* are often referenced. The trainer may find it is helpful to refer to these materials at relevant parts of the training to help participants who are looking for more detail on the subject or who will find more information in writing helpful to them. It is suggested that these materials should be used by participants, in their own time at the end of the workshop, and as a useful element to consolidate learning.

Advance preparation for the trainer

Study of this facilitators' guide is highly recommended, together with the accompanying presentations and exercises, which will guide the sessions. In addition, the trainer is encouraged to reflect on the course content and where possible seek to identify their own examples to add more depth and texture to the training. The presentations use an 'advocacy checklist' to steer the facilitator through the various modules and themes throughout the training.

Establishment of an Advocacy Champions Group to work with the facilitator in the lead up to the training (see above), to assist with selection of participants from across the National Society, as well as to identify a common advocacy issue which can be used during the training, should ideally be established prior to the course. The Advocacy Champions Group will work with the facilitator to identify suitable external facilitators as necessary.

Where participants are able to come to the workshop with a clear focus for their advocacy issue, the facilitator will find that participants get far more benefit out of this training. If the National Society is struggling to identify an advocacy issue to use for the training course, the facilitator can make suggestions prior to the course to determine what might be a priority issue for the National Society involved. If it is possible, the facilitator is encouraged to discuss with the National Society which issue(s) might be relevant to focus on for the training. It is highly advisable for the training to have a real focus and for each advocacy tool to be applied to this issue.

You may want to suggest the following selection criteria to the National Society to help them begin to prioritize their issues:

- Experience and evidence
- Clear solution
- 'Win-ability' – how achievable do you think your goal is?
- Views of service users
- Interest from the target for your advocacy

If it is not possible to agree an issue in advance, do try to push for a short list of issues. The facilitator will need to make some time early in the workshop to agree on the National Society advocacy priority. Be warned – this needs to be tightly managed as a discussion over priorities could take over the whole workshop! But you do need to allow time to agree on an advocacy priority so that the workshop has a solid focus.

If the facilitator is using a foreign language that is not widely understood among the National Society participants, it is crucial to have the services of simultaneous translation. If there is such support then the facilitator should meet with the translator in advance of the workshop to explain the goals of the workshop and to be clear on the definition of advocacy, which very often can be a difficult word to translate.

For the exercise below on the 'gallery walk' the facilitator will need to source different photos of people whom the National society may wish to influence for the elevator pitch session, and this should be considered in the advanced preparation.

Training agendas

In annex B you will find model agendas for this course to run over three, two, or one day, or a half day, and within one hour. The sessions will need to be adapted from the full three-day programme according to the time available for the training, and the model agendas provide suggestions for this. It should be noted that for the one hour 'taster' agenda, this will only allow time to introduce the various concepts and exercises, rather than to work through them in detail.

Concept note

In annex A you will find a model concept note for this workshop.

Notes to prepare for the workshop

1. Seating should be arranged 'cabaret style', with group tables allowing for 4 to 6 people to be seated at each table. This is the recommended seating plan, to enable small group discussions and facilitate active dialogue throughout the course.
2. It is recommended creating a list of participants, ideally no more than 20-25 people, organised into groups of 4 to 6 people.
3. Name cards should be made available – participants can be asked to write their names on the cards but their writing should be clear and visible. The name cards should be used throughout the training as this will help the facilitator learn the participants' names. The name cards should have the participants' first name, or at least clearly differentiate between their first name and surname if the context is more formal.
4. The facilitator should give priority to learning the participants' names as early on as possible in the workshop.
5. Before the workshop, determine what the advocacy issue is and who will be part of the advocacy champions group to take forward the advocacy strategy [and give this group ownership / leadership during the training].
6. Have the '12 steps' (explained below) printed out on large poster paper at the front of the room titled 'Advocacy Strategy Grid'.

7. Have printed copies of the Advocacy Strategy Grid (A4) for each participant and one big copy (A3) per table (preferably in another colour to denote importance of this document). Each session will end with 5 minutes self-reflection to reflect and write down any learning against this grid.

8. A PowerPoint presentation has been prepared to facilitate this training course. The PowerPoint is available as one consolidated presentation, and in separate ('modular') form. At the beginning of each module description in this facilitator's guide, it indicates the slide numbers that correspond to that session.

Modules

DAY 1

Module 1 (a)
What is advocacy?

Total time 60 minutes | Slides: 1 – 20

Learning outcome

This introductory session seeks to demystify legislative advocacy and offer clarity around definitions. It also seeks to explain the full spectrum of advocacy, the different use of language and where the Red Cross and Red Crescent sits on this spectrum.

Ice-breaker

A good ice-breaker is to ask the participants what **word and activity they associate when they hear the word 'advocacy'.** This is a useful exercise to understand where the group is in their understanding of advocacy. It can be useful to record the words on a flip chart, and to group them into types of advocacy, as they will be a useful reference point in the later discussion on language.

This should be followed by a pre-training **"advocacy thermometer"** to test for comfort levels on advocacy at beginning of the training and the end of the training. It will measure how well the training has supported participants to be more confident advocates. This thermometer should be drawn on flip chart paper and participants encouraged to mark their levels at the beginning and the end of the training.

Advocacy thermometer

Pre-Training   **Post Training**

High Advocacy
Comfort Level

Low Advocacy
Comfort Level
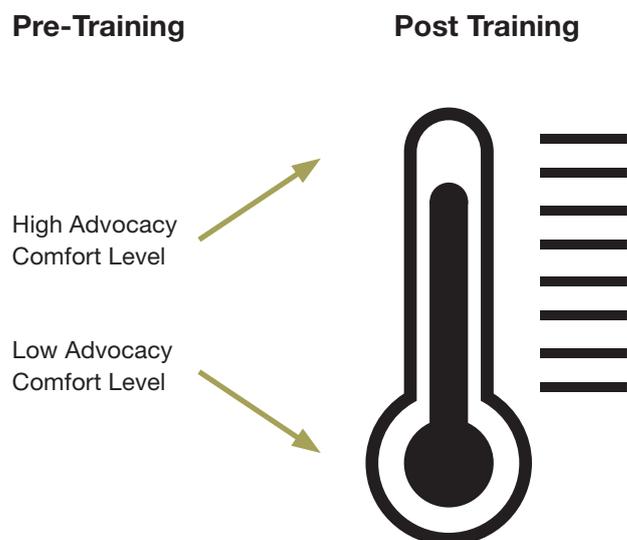
Session content

The first session seeks to define advocacy but also invites participants to think about why advocacy is important to them. It is worth telling participants that this session is the most content heavy session of the whole workshop, but it needs to be so in order to set the definition and framework for the sessions ahead. Assure them future sessions will be more interactive!

Very early on it will be good to open a discussion on language. Slide 4 offers different words for advocacy and it can be helpful to discuss these words and what the participants mean by them. It can also be helpful to include the words humanitarian diplomacy and explain that is how the Movement has described advocacy in the past. Reference can also be made to the 2009 humanitarian diplomacy policy and how this can be considered a form of 'quiet advocacy'. Some National Societies might already be familiar with the terminology of 'humanitarian diplomacy', so it should therefore be acknowledged but do not dwell on the different terminologies too much. Do move quickly onto the dictionary definition on slide 5 to 'recommend or support by argument a policy or a cause'. A helpful summary is that it does not matter what you call it, but that you are seeking policy or practice change.

Stress that advocacy is not a new concept for the RCRC Movement, and this workshop is building on an established tradition of seeking legal or policy change, just as Henri Dunant and the founders of the Red Cross Movement did while developing and advocating for the Geneva Conventions.

It will also be helpful for you to define legislative advocacy, which is what this workshop is focused on:

> *Legislative advocacy is focused on achieving legal and policy change*
> *at the national and local level*

The advocacy spectrum on slide 6 can then show participants the different approaches to promoting change, and you can invite a discussion as to where the Red Cross and Red Crescent fits on this spectrum. But try not to spend too long here and move on to the three bullet points on 'what is advocacy'. These points are a summary for the whole course and it can be helpful to put them on a flip chart for ongoing reference throughout the workshop.

The next slide includes the vital point that advocacy seeks to improve the lives of significant numbers of people. Again, it is worth repeating this point where you can throughout the course. Advocacy seeks not just to create legislative change, but to meaningfully improve the lives of people.

The twin track approach is helpful for National Societies to show that services and advocacy need each other – it is not either but both. This is an important point for National Societies, which are far more comfortable in a service provider mode.

The insider / outsider slide (slide 10) sets the parameters for advocacy and it will be helpful to explain that the **insider route** is the default setting for National Society advocacy (i.e. 'quiet diplomacy') – but to keep the door open where it is possible for the outsider route.

The 'what makes for good advocacy' slides are a useful opener for discussion. Do you need injustice? If not, what will be the spark for your advocacy? And emphasize momentum – we'll come back to this point later with the theory of change.

The advocacy mechanisms offer an overview of the different advocacy tools. Again, we will think about how and when we will use them in the theory of change discussion. But it can be helpful to encourage people to think of these mechanisms (except for public campaigning) in their heads as we continue our advocacy journey.

The 'six theories' (slides 15-18) will help people who want more of an academic framework. The research paper is freely available to download on the internet, and offers a lengthy reading list too. It is helpful to include examples for the 6 theories:

1. **Large leap** – release of Nelson Mandela in 1991 that led to the first multi-racial elections in South Africa.
2. **Coalition theory / alliances** – the wide alliance of organizations in EU counties campaigning for a ban on public smoking. Red Cross example: The Action on Human Trafficking network run across Europe by NS with partners.
3. **Policy windows** – government stopping the detention of children and then using this opportunity to advocate to end indefinite detention for adults.
4. **Messaging and frameworks** – how the public smoking ban campaign was re-framed as a health and safety at work issue for bar / restaurant staff. Red Cross example: promoting First Aid as an important way to reduce inappropriate admissions at casualty departments.
5. **Power politics** – where a National Society has used their ability to meet with those in power to achieve a change. Red Cross example: Sudan Red Crescent using their influence to persuade the government to develop a strategy on migration.
6. **Community organizing** – British Red Cross asking supporters to call on their MPs to promote the importance of First Aid being taught in schools.

Be ready with the warning that many organizations get comfortable with just one theory. However, to be effective in advocacy you must be open at least in principle to most of these theories and then assess which is the most relevant for your issue at that particular time.

The qualities list on slides 19-20 is a good place to finish what has been a lengthy session. It is important to make the case about enjoying advocacy but then to invite any comments. Do people agree with this list?

Examples

The cookie story:

A good definition of advocacy was explained by a man called Mark Latimer at a conference many years ago. After being asked how he would define advocacy, he invited the audience to picture the scene of a small girl at home in her kitchen with her mother.

The little girl had a problem: she was hungry. But she knew the solution to her problem: she wanted a cookie from her mother's cookie jar on the top shelf. She also knew that her mother had the power to give her one.

At first, she tried the direct approach and said, "Mum, Mum, can I have a cookie?" Her mother said, "No".

She then said, "You gave me a cookie yesterday", so she was using historic precedent – she was a clever girl. Her mother still said, "No".

She then said, "You gave my little brother a cookie." Her mother again repeated, "The answer is no."

She then thought for a while and ran next door to the lounge where her father was watching television, and said, "Dad, Dad – Mum won't give me a cookie."

And that story is the most basic yet effective definition of advocacy I have ever heard. The little girl was:

- *clear on the **problem,***
- *she was very clear on the **solution** to that problem,*
- *she was also very clear who had the **power** to make the change she wanted to see*
- *and she then sought to **influence** that person.*

Critical to this story is her focus and persistence – she didn't give up despite her initial failure.

Reflection (Module 1 (a) – 5 mins)

At the end of this session introduce participants to the 12 Step Advocacy Grid or Road Map, describing that "advocacy is a journey and every journey needs a map" and refer to the page in their participants handbook. Stress that this is an important document and will serve as their "learning journal" for each session. Participants will be invited at the end of each session for individual self-reflection of their personal learning from the session and to write the key points down.

After this time for self-reflection there can be a group discussion (per table) and some of the key points could be included in the collective roadmap on each table. This is a discretionary element within the workshop and should be done only if time allows for this exercise. Furthermore, the facilitator may also invite comments from participants and where appropriate log these comments on a flipchart.

Exercise

It can be helpful to ask people when or if they have seen any of these theories used in their own context or experience and, if they haven't seen them used, to think about which theories could be the most relevant.

There are also six scenarios offered in a handout (below) and participants can be invited to discuss which theory relates to which scenario.

Potential stumbling blocks

Preparation is required for this session by the facilitator to identify how comfortable participants are with the concept of advocacy. If they are comfortable with it, then this session can be completed more quickly to allow movement onto the practical advocacy tools.

Language for advocacy can be a real stumbling block for learning. Try to get this issue out in the open right from the start. Explain that what you call it (i.e. the terminology) is not important – it is what you are trying to do. Some National Societies will also reject advocacy as 'not for them' as they don't feel comfortable advocating externally. Place a strong value on the advocacy spectrum and that all approaches are important, and above all stress the three points and the fact that advocacy is about promoting a solution to a problem to the person with the power to make the necessary change – and not giving up!

Materials / handouts

Handout 1: Six theories on how policy change happens

Scenario discussion

Reflecting on the six theories on how policy change happens in your group, discuss which theory relates to each scenario below:

- The government announces an end to the detention of children for immigration purposes, but the detention of adults remains in place
- The relaxation of travel restrictions in East Berlin leading to the collapse of the Berlin Wall
- Contract cleaners working together to put pressure on their employer to pay them a decent living wage
- The National Society is invited to meet the Government Minister to make the case for a new Red Cross Law
- Organizations come together from across Civil Society to make the case for First Aid to be taught in schools
- The National Society begins to consider whether its public messages on the need for policies to strengthen resilience are really understood by the government

Handout 2: Legislative Advocacy Strategy Planning Grid

Legislative Advocacy Strategy Planning Grid

1. What is advocacy and why is it important to you?	
2. What is your issue? But why is it an issue?	
3. Is there a common understanding of your external environment?	
4. What evidence have you got or do you need?	
5. What is your advocacy message? What are you trying to change?	
6. Can you do the elevator pitch?	
7. How credible are you and what are the risks?	
8. Do you know who your target is and how to reach them? Which partners / allies / coalitions could you work with?	
9. How are you using the opposition to help you?	
10. Have you got a theory of change?	
11. Have you got a plan for success?	
12. When and how are you going to review progress?	

Handout 3:

Legislative Advocacy Strategy Template

Introduction

This template for building a legislative advocacy strategy gives you the framework for the strategy and suggests the key questions that you will need to answer. This template is designed to complement the Legislative Advocacy toolkit and follows the same structure and contains the same exercises and tools.

1. Defining advocacy for your National Society

What does advocacy mean for your National Society and what is the link with the auxiliary role?

2. Defining your advocacy issue

What is your issue?

Be clear about why you have selected your issue. Think about:
- *Experience and evidence*
- *Clear solution*
- *'Win-ability'*
- *Views of service users*
- *Interest from target*
- *But why is it an issue?*

3. The external environment for advocacy

What is your common understanding of your external environment?

Think about:
- *How does change happen in your society?*
- *Where does power lie in your society? And with regard to your issue?*

4. The evidence for advocacy

What evidence have you got or do you need?

Think *about:*
- *What evidence of your problem do you have?*
- *What do the 'but why' questions tell you that you need for evidence?*
- *Does the evidence already exist?*
- *Rapid and revealing – ideally macro and micro – numbers and human stories*
- *Who is going to do it – you / an ally / or someone independent?*

5. Defining your advocacy message

What is your advocacy message?

Remember the three-stage approach:

- *Firstly, your message needs to engage and capture the interest of your target*
- *Secondly, you need to show your target that change is possible and that they can do something to make this change*
- *And finally, you need to make a request or an 'ask' of them*

6. The elevator pitch for your advocacy message

What is your elevator pitch? (Use the elevator pitch handout, provided in Module 5 below.)

Think about:

- *Your introduction*
- *How you describe the issue*
- *How you describe your solution*
- *What your ask is*

7. Your credibility and the potential risks with your advocacy

How credible are you and what gives you the legitimacy to advocate on your issue?

What are the risks? (Use the risk register template)

8. Your advocacy target

Do you know who your target is, how to reach them and who influences them? Which partners / allies / coalitions could you work with? (Use the influence tree template)

9. The opposition to your advocacy

How are you using opposition to help you? (Use the opposition matrix template)

10. Developing a theory of change for your advocacy

Have you got a theory of change? (Use the theory of change template)

Think about the immediate small steps you need to take, and also the bigger steps over time to help you reach your goal.

11. Plan for success

What is your plan for dealing with your advocacy success?

12. Reviewing your advocacy strategy

When and how are you going to review progress?

Further reference

2009 IFRC Humanitarian Diplomacy policy

DAY 1

Module 1 (b)
Understanding and capitalizing on the auxiliary role

Total time 90 minutes | Slides: 21 – 29

Learning outcome

For participants to gain a deeper understanding of their auxiliary role, what it means and the associated roles and responsibilities. Participants should feel comfortable explaining the auxiliary role and how to harness it to undertake legislative advocacy.

Session content

This section needs to be based around the three questions below and to have this explicitly stated on slides to encourage discussion from the outset. The facilitator should record answers on the flip chart / whiteboard.

If there is no discussion / limited understanding, then you can show the other slides on the auxiliary role

1. What is your understanding for the auxiliary role in your country?
2. Where has it / or has it not been applied, and why?
3. How is the auxiliary role perceived externally in your country?

If time permits, a checklist on the auxiliary role could be distributed and participants could use the time to complete the questionnaire in groups, followed by a plenary discussion. The checklist is available in English, French and Spanish. The Guide to the auxiliary role for each region is also a helpful document, which can be shared with the relevant public officials and other key partners who might want more information about it.

The slides will guide participants through the auxiliary role from the definition to an awareness that the auxiliary role will be shaped in different ways in different countries by several factors.

Participants should be reminded that their role as auxiliary to the national authorities should always be shaped by the Fundamental Principles. As the Red Cross Red Crescent, National Societies should undertake advocacy within the confines of the Fundamental Principles, such as humanity, neutrality and impartiality, and in the interests of the community which they serve. National Societies are well positioned, in their auxiliary role, to act as a bridge or a link between the local and community level, and national level law and policy making processes. *Further information about the Fundamental Principles is available on the IFRC website.*

The critical point here, is that the auxiliary role defines the relationship between the government and National Society and establishes it as the space for dialogue and for a two-way relationship. In essence, the auxiliary role is the backbone for legislative advocacy as it gives National Societies unique positioning and a seat at the table, keeping in mind the framework of the Fundamental Principles. The challenge is: how can we best utilize and harness this position for the purposes of legislative advocacy – that is the question that we will seek to address over this workshop.

It is important to leave enough time in this session to make sure that the participants feel comfortable and confident on this point. The participants' response to the role play exercise below will show you their level of comfort on this issue.

It is also recommended to encourage participates to take this learning and use it to explain and promote an understanding of the auxiliary role internally, and also when attending official meetings, in the opening of workshops, and where relevant opportunities arise.

Examples

It can helpful to ask participants to reflect on their National Society and to think of times when it has utilized its auxiliary role. You may need to prompt participants to think about situations when the National Society has stepped up into their auxiliary role in support of their national authorities. You could highlight examples of good practice from other countries or regions to illustrate this point. It would also be good to highlight where National Societies may have worked in partnership with other actors or as part of coalitions or alliances to influence decision-makers (as will be further explored in module 8), and where they may have used their auxiliary role to position themselves as a 'partner of choice'.

Exercise

Speed debating – get the participants to stand in two lines facing each other. The group will be given statements and one side will be asked to argue in the affirmative, the other will be asked to argue in the negative.

Statements

1. RCRC is supposed to be Neutral, therefore we can't undertake advocacy.
2. Working in partnership (coalition) is dangerous, as it will risk our Independence.
3. RCRC is well-positioned to give a voice to the most vulnerable, so we must advocate in their interests!

The Principle of Neutrality

In order to continue to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

The Principle of Independence

The Movement is independent. The National Societies, while auxiliaries to public authorities in the humanitarian sphere and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able to act in accordance with the principles of the Movement.

After each speed debate ask the participants what some of the arguments were from each side. Ask if someone can define the Principle of Neutrality or Independence and discuss how advocacy can still be undertaken within the framework of the Fundamental Principles.

Some key considerations:

- The principle of Neutrality which prohibits the Movement from engaging at any time in controversies of a political, racial, religious or ideological nature can be perceived as a challenge to advocacy – but it shouldn't be. We advocate to prevent and alleviate human suffering wherever it may be found, to protect life and health and to ensure respect for the human being (Humanity) guided solely by their needs, and to give priority to the most urgent cases of distress (Impartiality).

- For Independence, we must ensure that we maintain our autonomy so that we can resist pressure to say or do something to further another agenda which may not align with the Fundamental Principles. However, this does not mean that we cannot work in partnership. As long as National Societies maintain their autonomy and act in accordance with the Fundamental Principles, as well as assess the risk of either breaking or perceived to be breaking any Fundamental Principles by partnering with new or existing person / organization / company, we should recognize that partnerships can be very useful and productive to influence legal and policy change.

The critical learning point here is that National Societies can indeed undertake advocacy within the confines of the Fundamental Principles.

Exercise

Role play: Divide the participants into pairs and tell them that in five minutes they are going to meet a skeptical Member of Parliament (MP), who is going to ask them – 'what is the auxiliary role all about?' They need to prepare their answer to this challenge.

Then join each pair with another pair into a group of four. Ask one pair to play the role of the MP and an adviser, and to pose the question on the auxiliary role. The other pair need to be able to answer it. Then after a few minutes, ask the pairs to switch roles. This activity will be conducted in groups of four, simultaneously.

The critical learning point here is that it is not easy to respond directly to such a question – and you need to practice out loud so that you are always ready to respond with ease and to be able to clearly articulate what the auxiliary role means. At the end of the session the facilitator highlights some of the good answers offered in this exercise in plenary to all participants.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

Many National Societies will know about the auxiliary role but may not feel comfortable or confident explaining it to others. This session is all about de-mystifying this concept, but importantly giving participants the time and space to probe and ask questions to clarify their own thinking and therefore their own ability to explain the auxiliary role.

Further reference

31st International Conference of the Red Cross and Red Crescent background report:

Furthering the auxiliary role: Partnership for stronger National Societies and volunteering development

30th International conference of the Red Cross and Red Crescent background document:

The specific nature of the Red Cross and Red Crescent Movement in action and partnerships and the role of National Societies as auxiliaries to the public authorities in the humanitarian field.

IFRC Fundamental Principles leaflet

DAY 1

Module 2
Defining your issue

Total time 30 minutes | Slides: 30 – 34

Note to facilitator: If the common advocacy issue is pre-determined, then you don't need to spend too much time on this session. However, it could be useful in this session to create a 'parking lot' of other advocacy issues that the National Society is interested in. Participants could also be invited to write down other advocacy issues during the workshop and given the option to work on their "individual" advocacy issues as part of the advocacy grid, in addition to the group work on the common advocacy issues. However, if the issue is pre-determined you as the facilitator will not want to draw too much attention away from working on the main issue.

Learning outcome

This session seeks to help participants to select their advocacy issue and then introduces a tool to help them understand their problem and make sure that they are aware of the root cause of the problem – not just the superficial cause.

Session content

* It is vital to start the session by emphasizing the importance of having a <u>focus</u> in advocacy. *The enemy of effective advocacy is a lack of focus.*

The slide on 'selecting an issue' highlights the importance of selection criteria. When thinking about selecting an issue for advocacy, it is important to be clear on *how* and *why* you selected your issue. The list of criteria is just a suggestion. This is not the answer. But invite participants to think of their criteria, and how such criteria might be applied to their issue.

Then move onto the 'but why?' technique. Explain that this can be the most irritating tool and that it is best done with someone who has no knowledge of your issue. By continually asking 'but why?', you get to the real cause of the problem.

It will also show you whether you are ready to do advocacy on your issue, and is a great tool to prepare to meet a representative from government, politician or do a media interview. Politicians and journalists are very adept at asking 'but why?' – so be prepared.

Examples

Explain that the example in the presentation is made up simple – but it is designed to easily explain why this technique is important.

Exercise

Divide the group into pairs and ask one in each pair to pick a problem. The other one in the pair asks, 'but why?', to solicit an answer, before asking 'but why?' and so on.

It can get a bit painful so don't let this exercise run too long – 5 minutes should be enough. And then get the pairs to swap roles and repeat the exercise.

At the end of the exercise it is a good idea not to ask people to report back on their 'but why?' answers, but rather to ask them how the exercise felt and then to ask if they had begun to see anything differently about their issue.

Sometimes people can have a 'light bulb' moment about their issue and it is good to make time to share any insights.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

Sometimes people will say that they get stuck and say: 'maybe this and maybe that' in answer to the question 'but why?' question. When that happens, it shows they need to do more research to understand their issue better.

On the other hand, sometimes people can go to the other extreme and come up with explanations like 'changing the global capitalist economy'. Congratulate their ambition but urge them to focus on their earlier answers where they might be able to make more of a difference!

Also invite them to cherish all the answers- When working in a coalition or partnership, different members might address different answers in the 'but why?' exercise. The critical point is where you feel your National Society can make a real difference on the issue and tackle a real cause of the problem.

Further reference

Setting policy priorities – Global Road Safety Campaign
(A detailed step by step guide for prioritizing your issues and developing your advocacy message)

DAY 1

Module 3
The external environment

Total time 60 minutes | Slides: 35 – 36

Learning outcome

For participants to explore the realities of their own external environment and country context, and to share assumptions and to come to a common understanding of the external environment as the context for their advocacy. Participants will understand the central importance of rooting their advocacy in the realities of their own external environment.

Session content

It is recommended to start this session with the PowerPoint slides, and then ask the participants in groups to map / draw where power lies in their society as per the instructions below (10 mins). If you are using an external facilitator to explain the external environment, then their presentation could be included after this session.

There are four key elements to this module: to think about how change happens in society, where power lies, how things have been changed in the past, and for the participants to reflect on what they know about their external environment.

If you are using an external facilitator you need to be explicit about the **profile of the external person,** as well as the **key questions for** the facilitator to answer. It would be good for the external facilitator to also offer some reflections on the external perception of the National Society, if possible.

The external speakers ideally will address the following points in the context of the relevant country:

• Where does power lie? Both in general and regarding the advocacy issue.
• How does change happen in society? Provide tangible examples of how change has happened in the past.
• How does one go out finding out about power and influence? What are the key sources of information (both formal and informal)?

After the session by external facilitator, participants could reflect on their "power mapping" exercise (explained below) to see how this sits with the remarks made by the external facilitator

Explain to participants that the importance of this exercise is to formulate a realistic foundation for their advocacy. Not doing this exercise risks developing 'fantasy advocacy' – great plans but with no basis in the reality of their outside world.

Examples

Unlike the other modules, offering examples as part of this session can actually be unhelpful, as participants can have a tendency to copy or imitate the examples offered. Instead, it is advisable to ask the questions above and invite the participants to reflect on the answers in their own context.

It will, however, be important to stress that there is no right or wrong answer, and if there are participants from the same National Society, they may well have different answers to these questions. Welcome this diversity and emphasize that this exercise is about discussing assumptions about the outside world so that we can develop a realistic understanding and basis for advocacy.

Exercise: power mapping

A useful exercise is to encourage participants either individually or in a group to draw a poster that signifies and demonstrates where power lies in their society. It can be helpful not to give too many requirements for this exercise, but rather encourage the participants to be creative through images or words to illustrate their external environment.

An additional exercise, if there is more than one country represented in the room, is to conduct the above exercise in country groups and then spend time looking at each of the posters. One of the participants from each country should stay by the poster to explain what the poster is conveying about the external environment. Even if all the participants are from the same country, this exercise can still be useful so that each group can share and view the other posters. This can be a very effective way of exposing differences in thinking, and encouraging participants to understand different points of view and consolidate their thinking about the external environment.

At the end of the exercise, pin the posters around the room as they will be useful reference point as we continue our journey, and for you to continue to question whether the proposed advocacy is consistent with this external assessment.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

A common stumbling block, especially among participants from more developed countries, is their insistence that they already know about their external environment. Experience shows that whilst they may know on an individual level, it is incredibly helpful to share their assumptions with colleagues and to challenge and discuss each other's' understanding of the external environment.

It should also be clear that the outside world is always changing. Encourage participants to see this exercise as a starting point, and that they should be discussing their analysis with their partners and allies to test their thinking and to develop their own understanding to improve the foundations for their advocacy.

Further reference

Political mapping 'How to' Guide – Global Road Safety Campaign (A detailed framework for producing a political map for your advocacy)

DAY 1

Module 4
Evidence for advocacy

Total time 30 minutes | Slides: 37 – 38

Learning outcome

The critical element is to convey the importance of evidence to support advocacy, with the warning that research can be a 'handbrake' on dynamic advocacy. To help participants think about their evidence needs, there are key questions to drive evidence for advocacy, as shown on the slides.

Session content

The concept of evidence for advocacy needs to be clearly conveyed – we're not talking about a three-year research programme but rather rapid and revealing research.

The key questions on the slides are designed to help the participants think through what they may need in terms of evidence but also challenges them to assess whether the evidence already exists within or outside their organization.

There may well be two outcomes for this session. Participants will either be able to identify a relevant source of evidence for their advocacy on the chosen issue, or participants will reveal that there is little or no available evidence, and then move onto group work to assess what might be practical to achieve in terms of evidence for their advocacy.

It will be important to stress that evidence is not just about having lengthy, glossy reports. Evidence can be a collection of short case studies, a video or an interview i.e. information that conveys the problem from a humanitarian perspective.

Further reference

British Red Cross, *Not so straightforward (2015).*
(A review of the impact of the withdrawal of publicly funded legal support for refugee family reunion in the UK).

Exercise

If there is time, it can be helpful to divide the group in pairs and invite them to think of an advocacy issue and try to answer the questions on evidence featured on the slide. At the end of the exercise it is helpful to ask the participants if they have reached any conclusions.

Potential stumbling blocks

Where participants are struggling to think of an issue, and you are not working on a specific issue at the workshop, you may want to suggest a scenario and invite them to think about how they might construct an evidence base. Encourage participants to be 'rapid and revealing' in their approach and stress the value of human case studies to highlight a humanitarian problem.

For many National Societies, research may be a distant dream because of a lack of available resources, or they may be weary of research after being involved in numerous research projects. If so, encourage them to take small steps. Any evidence that gathers together human stories even in small numbers can be a useful catalyst for advocacy. Something is better than nothing, especially if it can show the humanitarian impact. So, a focus on individual case studies can be a very powerful evidence for advocacy.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

DAY 1

Module 5
Developing your advocacy message

Total time 30 minutes | Slides: 39 – 43

Learning outcome

For participants to understand how to construct an advocacy message, focusing on the problem and the solution.

Session content

* The first slide focuses on how to construct an advocacy message and the importance of focus and clarity. Advocacy messages should not be ambiguous.

It is also helpful to discuss the distinctive RC / RC approach to developing an advocacy message. Where possible, we like to use the language of 'we' and not 'you'. In our auxiliary role to government, we will see a problem and say to government – 'we have a problem here and we would like to work together to deal with it', rather than 'pointing the finger'.

The second slide covers the three-stage approach to developing a message. It may be helpful when covering this material to suggest that this technique be used in everyday life when we seek to influence someone at work or outside work, for example. We look for a connection with them, we seek to encourage them to see that change is possible, and then we ask something of them. It can be very helpful, especially for National Societies that are new to advocacy, to encourage them to see that they are already using this technique – they are just not calling it advocacy!

The final slide looks at the 'ask' or request, and suggests that there is a golden rule of starting small and building up once you have some engagement and interest.

Note: You may wish to involve colleagues from the Communications Department in this session, especially those who have been involved in external advocacy and developing advocacy messages either for the National Society or the IFRC. The participants may benefit from hearing from their experience, or simply to have a communication expert on hand to co-facilitate the session.

Examples

In this session, the exercise below will give participants examples of advocacy messages and the opportunity to discuss whether they are effective or not.

Exercise

The critical exercise will be in the next session, when the participants begin to develop their own 'elevator pitch', which is essentially a shortened version of their advocacy message.

At this stage, participants can ask to look at the **handout on good / bad advocacy messages,** and be asked either in plenary or in groups to give their opinion on whether the examples are effective or not. It will be important for them to reflect on what makes for an effective advocacy message.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

The big stumbling block here is the perceived need for complexity in an advocacy message. Some National Societies will want to convey the complexity of the issue, and their understanding of it, in their message.

The critical point here is that the advocacy message developed for the elevator pitch exercise is just a start: it is a summary, or an overarching statement, which defines what the message is about. From here, you can develop more complex policies and statements. But as you start off with your message you need clarity, focus and clear, concise message.

If you see the participants are struggling with this exercise, which may be the case (especially if the workshop does not have a pre-defined advocacy issue to work on), as the facilitator you could provide some examples or assumptions.

Remind participants that the enemy of effective advocacy is a lack of focus!

Materials / handouts:

Handout 4: Good or Bad advocacy messages

Reflect on the following advocacy messages, intended for the relevant public authorities; do you think that they are examples of good or bad practice in developing an advocacy message?

- We are concerned that only one in five students get a chance to learn first aid in schools. We want to see a generation of life-savers come through our nation's schools. Will you meet with us to discuss how we might work together to make that happen?
- We think the country is ill prepared for a natural disaster. We want to know what you are going to do to make us all better prepared?
- We are concerned that refugees are struggling to be re-united with their families due to the lack of legal support. We know that these cases are complex and they can only be re-united with legal support. Would you read our report that shows how the RCRC can work with you to ensure more people can be re-united with their families?

- We are worried about the high levels of conflict in our society. We cannot afford to do nothing – future generations are relying on us. What are you going to do to tackle this issue?
- Poverty is at record levels in our country – it is just not sustainable. We need real action and not just words. What are you going to do to tackle this issue?
- The RCRC is uniquely placed to assist public authorities to respond to crises though our auxiliary role. However, many officials that we work with don't know about the auxiliary role. Would you meet with me to discuss how we might champion the need for a new RCRC Act so that we have a legal base for our work and in order to support the public authorities?

Further reference

Talking with policy makers – Global Road Safety Campaign (Useful practical advice before, during and after meeting policy makers)

Guide to the Auxiliary role of Red Cross Red Crescent National Societies, available for the *Africa*, *Americas*, *Asia Pacific*, *Middle East and North Africa regions.*

Module 6 (a)
Elevator pitch

DAY 1

Total time 45 minutes | Slides: 44 – 51

Learning outcome

For participants to be able to construct a 15 to 30 second pitch which conveys the essence of their advocacy message including both their problem and their solution. The facilitator needs to be explicit that this is not the final advocacy pitch, and that there are further exercises to be worked through

Session content

*A hypothetical scenario is explained whereby you step into a lift or elevator, and the politician that you have been waiting months to speak to steps into the lift with you. You encourage the participants to think about how they would use that time with the politician for maximum effect. You might want to encourage participants to think about how they would introduce themselves, how they would explain the problem and the solution succinctly, and then how to make an 'ask'. The 'ask' could be as simple as finding out whether the politician would meet with them or read one of their reports.

It is important to stress here that this is not a 'normal' activity, and that the elevator pitch can be difficult to achieve. Stress the importance of practicing your elevator pitch message out loud, so that you never miss an opportunity to convey your pitch if you do happen to have access to the relevant government official.

Also stress that the elevator pitch is a work in progress and that participants will be encouraged to reflect on their elevator pitch throughout the workshop. This is just to start the process and articulating their message out loud. In the subsequent session on the opposition matrix, it will be important to encourage participants to think about the effectiveness of their elevator pitch.

Examples

Hi! I'm X from the Red Cross. We are concerned that only one in five schools teach their children basic first aid techniques. We don't think that's enough. We'd like to see every child given the chance to learn first aid so that we see a generation of lifesavers. Would you meet with me to discuss how we might make this happen?

Exercise

Distribute the Elevator Pitch Template for each participant to formulate the pitch (see below)

Problem?	**Solution**	**Ask**
What is the problem? Why is it a problem?	**What is the solution? How do you know it will work?**	**What is your ask?**

Give participants up to 10 minutes on their own to construct their individual elevator pitch. Encourage participants to write down their pitch on paper. Then invite the participants to stand up and approach another participant that they haven't spoken to that day, and deliver their pitches to one another. If participants are reluctant to approach one another, then pair them off yourself.

Potential stumbling blocks

Very often participants will resist the tight restriction of the 15 to 30 seconds. Whilst the elevator pitch is designed to have a bit of fun, you also need to make sure the participants respect the restriction in order to be concise in their messaging. This exercise is about learning to make an immediate impact and conveying the essence of your advocacy message.

It is important to emphasize that the elevator pitch is a foundation for their advocacy message, and that they should also be ready to convey the message quickly and concisely should they have an opportunity to meet with a politician, a journalist or a potential ally.

At the end of the first day, it can be helpful to invite participants to reflect on their own pitch and to think about how they might look to improve it and tighten it up overnight.

Materials / handouts:

Handout 5: Elevator pitch template

Key points to consider:

As you begin to construct your succinct elevator pitch, think about the following questions:

1. How will you introduce yourself?

2. How will you set out your advocacy problem?

3. How will you explain your desired solution?

4. What do you want from your target – what is your immediate ask?

Module 6 (b)
Elevator pitch in action

DAY 2

Total time 30 minutes

Learning outcome

For participants to feel more confident in constructing and delivering their elevator pitch on their chosen issue.

Session content

Recap on the key learning from the earlier session on the elevator pitch and any comments or feedback from participants.

Emphasize to participants that building an Advocacy Strategy is like building a house, and your advocacy message is at the foundation of the house.

It may also be helpful at this stage to encourage the participants to think about how they might modify their pitches for different audiences. Ask them – do you think you would use the same pitch regardless of the target?

Examples

Consider different target audiences and ask the participants how they might modify their pitch if they were speaking to the following audiences:

- **Government minister** – you know that they have the power and influence, so your aim is to get their interest and understanding as to why they should get involved in your issue.
- **Opposition politician** – they will not have the power but they might be helpful in raising the issue from another perspective.
- **Potential ally or partner organization / allianc**e – you will want to interest them and show them how their support would be useful to your advocacy work, and why this would be of interest or benefit to them e.g. it may be relevant to a related project or priority area of work.
- **The business leader** – if you could get their interest, s/he could be a surprising ally for your advocacy. You need to be thinking – how is my issue relevant to their agenda?

Exercise

Use gallery walk (pictures posted around the room) with the different faces of representatives of each of the target audiences identified above, to demonstrate to participants that they need to modify the pitch according to who they are speaking with.

For example, you could have a picture depicting senior politicians in that country, members of the opposition relevant ministers, a RCRC Secretary General, NGO representative, local mayor, business person etc.

Participants, working in pairs, are to select a picture and each make the pitch to that character, invite feedback from their partner, and then move on to the next character.

After each pair of participant have worked their way around the room, bring the plenary together for a short discussion and feedback on the exercise, and then self-reflection time.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

Once the participants have all had the chance to practice their pitches to different characters / audiences in the gallery walk, call them back to the full group. It can be helpful to ask them how they felt delivering their pitch. They may be finding it more difficult or easier as they go along. Stress how important it is to practice out loud to make the advocacy message clearer, and to be able to target it to different audiences.

Even if they seem reluctant. encourage participants to share their experience with the group in plenary, as this can be very effective to embed the learning. Likewise, if you hear good pitches as you listen in to the groups, it can be helpful to offer a summary of some of the pitches.

A critical learning point here is that there needs to be **flexibility** when it comes to these pitches. Never be wedded to just one approach or style, and it is important to listen and watch your target's reaction. Be ready to change course mid-pitch if you feel it is not working – be responsive! The later session on opposition will help participants think of the other arguments at their disposal when delivering their pitch.

Module 7
Credibility and risk

DAY 2

Total time 60 minutes | Slides: 52 – 55

Learning outcome

For participants to reflect on what gives their National Society credibility to speak out on a particular issue, on the risks associated with advocacy and what can be done to reduce those risks. Above all, for participants to be able to embrace risk as an essential part of the management of their advocacy. This may also be a good session in which to engage colleagues from the Communication Department who have experience with managing reputational risk.

Session content

The first part of the session looks at credibility for National Society advocacy. Participants will be invited to consider what gives their National Society credibility to speak out and where they get their mandate from. While this may seem straightforward, confidence to speak out on particular issue is a concern and sometimes a limitation for National Society advocacy. It is highly important to encourage participants to think about the issue of credibility and risk, and to ensure that there is a common understanding across the National Society.

They key questions for participants to consider are:

- What makes you credible to speak out on your issue?
- What gives you the right to speak out?
- Where do you get your mandate from?

The second part of the session looks at risk and encourages participants to see risk as a central part of undertaking advocacy. Too often risk can be owned by the senior managers or the governing board; it is vital for those people leading on the advocacy to own the risk and see it as an integral part of their work.

The concept of a risk register for advocacy is introduced with four key elements: the nature of the risk; the likelihood of the risk happening; the impact of that risk; and the action that could be taken to mitigate the risk. When developing an advocacy strategy, participants should be reminded of the importance of including a risk register in their strategy and for this risk register to be reviewed on a regular basis.

Examples

At the British Red Cross, they are clear that their credibility to speak out on refugee issues came from their operational experience on the ground supporting refugees in 60 locations across the UK; they maintained that this operational footprint and their interactions with their service users all gave them a mandate to speak out.

An example of a risk register for advocacy:

Risk	Likelihood (1 low – 4high)	Impact (1 low – 4 high)	Action to reduce the risk
Advocacy issue is embraced by just one political party	2	4	Ensure there is engagement with all the political parties
Lack of support from own supporters for advocacy issue	1	3	Ensure regular communication with supporters in run-up to launch and then on-going responses to any concerns
Attack in the media about the advocacy	2	4	Develop good network of allies who will be ready to speak out publicly in defence of the campaign
Breach or perceived breach of Fundamental Principles	2	4	Ensure mandate and role of the NS to speak out on the advocacy issue is clear, and that allies and target audiences know and understand this. Ensure advocacy messages are clearly based on the NS mandate and position.

Materials / handouts:

Handout 6: Risk register template (as above)

Exercise

1. Having introduced the session content and shared the risk register template, open a discussion either in the whole group or in small groups of any risks experienced by participants. Encourage them to think about the action that was taken (or could be taken) to mitigate against those risks. Encourage them to begin to complete a risk register for their issue.

2. Role play: tell the group that they are about to give a radio interview on their advocacy issue, and give them five minutes to prepare their key: messages. Then divide the group into pairs one person being the interviewer, the other the RCRC spokesperson. The key question from the interviewer is 'what gives you the credibility to speak out?' or 'why is the Red Cross getting involved in this issue?' Let the participants discuss in their pair, then after a few minutes, switch roles.

Do not allow too much time for this exercise – just enough to give the participants a sense of how it feels to be under pressure and potentially questioned on their legitimacy to speak out. The critical learning point here is that you need to be ready for this challenge.

Some of the more confident participants could then be invited to present their role play to the whole group. This additional element can be entertaining but also help to embed key lessons about the need for preparation and the need to 'expect the unexpected' when it comes to advocacy!

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

The issue of risk is a very important one. Yet for some National Societies the perceived risks of advocacy will be very much in the forefront of their mind and there is a danger that the session may create the sense that advocacy is too risky for them.

It is vital to emphasize that risk is a part of everyday life and that all activities of daily life have risks. The critical element is being able to identify the risks, assess the impact and most importantly to see what action can be done to reduce the risks.

You should also be clear to the National Society that there are also risks in not advocating and failing to speak out on important issues.

Further reference

Managing risk – Global Road Safety Campaign (A detailed framework for managing risks and dealing with crises)

DAY 2

Module 8
Who is your target and how to reach them: the influence tree, working in partnerships and coalitions.

Total time 90 minutes | Slides: 56 – 60

Learning outcome

For participants to learn the importance of focusing on a target who has the power to make the desired change, to appreciate the importance of the direct approach, and to value the creative thinking process about identifying possible roots and channels to influence the target via the 'influence tree' exercise. This module will also consider the importance of working in partnerships, alliances and / or coalitions, and how this can strengthen an advocacy approach.

Note to Facilitator

As you work through the content below and the 'influence tree' exercise, encourage participants to think about who might be the best messenger at different points both within and outside the National Society. It is good to encourage them to think about the respective benefits of influencing leaders and decision makers, as well as technical experts, and that very often you need a combination of both for maximum impact in your influencing work. Encourage them to consider who they might want to work with through either a partnership (be it formal or informal), alliance, or coalition. These can be useful modalities for achieving a common advocacy goal.

Session content

* The key advocacy concept here is the influence tree. It is helpful to see the influence tree as the roadmap for the advocacy journey. In the box at the top of the influence tree you place the target, who has the power to make the change you want to see. It is important to invite discussion as to whom the target might be, to ensure you are targeting the right person with the necessary level of authority.

Stress the importance of the 'direct approach' in advocacy. Where possible, it is important to try and go directly to the person with power to convey your advocacy message. In their auxiliary role, National Societies we can certainly try the direct route with public authorities or the relevant actor, before trying other approaches to seek influence.

The other aspect of the influence tree is the different channels to seek influence. To be able to fill in these boxes, it is imperative that you know a bit about the target and what influences the target. Undertaking the influence tree exercise highlights that one needs to know a bit about their target in order to find out what actually influences them. Sometimes a secondary channel is necessary to reach the primary target. For example, you may want to meet with a less senior official in order to reach the minister.

It is important to highlight that the influence tree presents the different routes and channels available to you as you seek to advocate your message. It is the roadmap for your advocacy. This is also an opportunity for participants to consider who they might want to work with (individuals, organizations etc.) and which external partners might have a common advocacy goal. Often, working in partnerships, alliances or coalitions can be very effective in achieving influence and tangible legal or policy change. Encourage participants to consider this, and note down which partners or coalitions they may want to involve or approach along the advocacy route as part of the influence tree exercise.

> It will also be helpful to point out to participants that the influence tree will also be helpful to them in their internal advocacy. There will be some occasions where people in a National Society will see a problem and a desire to advocate for a solution but they realize that they will need to advocate to gain internal support within the National Society before undertaking their external advocacy. Here, participants will apply the same principles as outlined above, but with an internal target and channels.
>
> Remind participants that they should not take internal support for granted and the influence tree is a good way of outlining how to build internal as well as external support.

It can also be good to open a discussion about formal and informal routes to influencing, and what is appropriate in the external context for National Societies. Sometimes informal routes offer new entry points, such as friends and family of the target, but sometimes using such routes can be risky and unwelcome. Emphasize that the important route is that which will have the most positive impact on your target (and the least risk!).

Examples

In the model presentation there is an example of an influence tree where the target is the Minister for Home Affairs. In this example, in addition to the direct approach there are several different channels outlined such as Members of Parliament, a doctors' association, the local government association and a private company, the Body Shop. The critical point here is to be thinking of different channels of influence, and why the Body Shop is an interesting element is it shows how a surprising ally or partner can be a useful addition to advocacy.

It is important in this exercise to stress the relevance of cultural aspects to influence; for example, in some countries the importance of religion, professional associations and so on. This is a case where you are constructing your influence tree based upon your earlier assessment of the external environment. Remind participants of the previous discussion on external environment and what their analysis was.

Exercise

Distribute A3 Paper / Flip Charts to Participants

Participants are instructed to complete their own influence tree. This is an exercise best done in a group and ideally the subject matter and the target will be decided by the group. It is important to stress that no idea is wrong, and to encourage people's creativity.

At the end of the exercise there should be a few flipcharts with influence trees. Time permitting, you can invite the groups to report back on their influence tree as this can be one of the best ways to make this tool come to life.

Remember to post the influence trees on the walls if you can, as they will be a useful reference point during the remainder of the workshop.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

Generally speaking, participants respond quite well to this exercise, but the challenge is to encourage thinking beyond the usual suspects. Therefore, try and mix the groups so that participants with consider different audiences to influence, and perhaps different ideas about partners and alliances or coalitions.

Encourage the participants to consider what they already know about their target. Who influences their target? How can they be persuaded?

An influence tree cannot be built, nor a theory of change constructed, unless you have a good understanding of who and what influences your target.

It is also important when reflecting on the influence tree exercise to encourage participants to **assign responsibility** for working on these different channels. Also encourage them to think that it may not always be the National Society to contact these channels. Sometimes when you are working on an influence tree it might be your **allies, coalitions and other partners** who may have stronger or more direct connections with those whom you are trying to influence. Therefore, consider utilizing these channels and partnerships to contact your target. Think about who is best placed to do this?

Materials / handouts:

Handout 7: Influence Tree template

Influence tree in theory
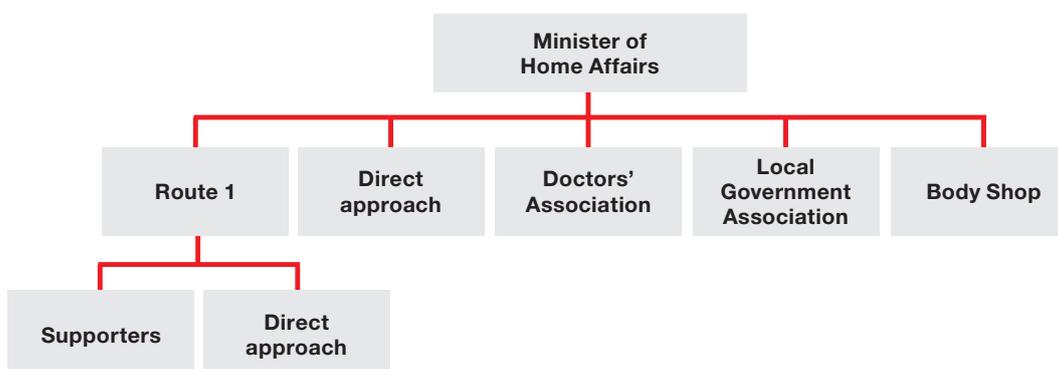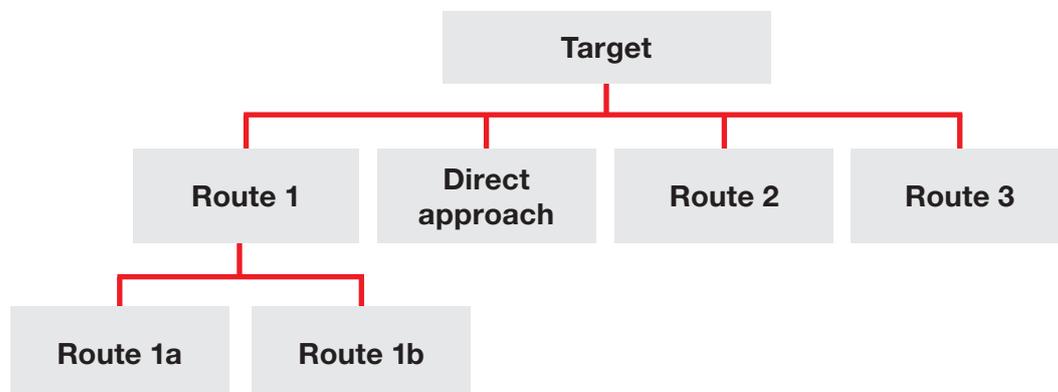
Further reference

Building advocacy partnerships – Global Road Safety Campaign (Practical advice on how to undertake a self-assessment for your National society and how to identify potential stakeholders.)

DAY 2

Module 9
Using the opposition

Total time 90 minutes | Slides: 61 – 71

Learning outcome

For participants to appreciate the importance of the opposition to their advocacy and to understand how a clear understanding of this opposition can help them to select the most appropriate and effective advocacy message. At the same time, the importance of working with and understanding more 'neutral' audiences or those who have not formed a specific opinion will also be considered.

Session content

* This session is focused on another advocacy tool: the opposition matrix. The slides guide the participants through the process of setting up an opposition matrix, which basically involves taking a blank sheet of paper, drawing a line down the middle, and on the left side listing all the arguments against your message. On the right-side, list all the arguments in support of your advocacy. It can be helpful to construct such a matrix yourself using a flipchart. Participants may also want to include a column down the middle to consider the actors and arguments that might be considered more 'neutral' or undecided when it comes to the advocacy issue in questions.

It should be emphasized that this is an exercise best done in a group, and keep in mind that it can be difficult to spend time thinking about opposition to an issue that is considered as a priority for the participants.

It can be helpful to move through the slides quite quickly and to get to a practical example so that participants can see the opposition matrix in practice. You can start by focusing on and discussing the key advocacy messages, before then turning to the key opposing arguments. It is good to be prepared to understand what the opposing or 'counter-arguments' to the advocacy message might be, in order to defend and strengthen the advocacy message.

The critical point here is that when we are conducting advocacy, we choose the messages that motivate us, and not necessarily the messages that will help to build support or deal with the opposition, or persuade actors who are undecided or 'on the fence'.

This is a highly useful tool in choosing your advocacy message, but also in preparing for a meeting with, for example, a government minister or indeed preparing for a media interview where you may face challenges to your advocacy message.

The slides on meeting with policy makers can be a good way to bring the module to a close, encouraging participants to reflect on the logistics of such meetings.

Examples

The example of advocating for the entitlement to work for asylum seekers is included in the PowerPoint presentation. The critical learning point here is that looking for additional arguments opens up the possibility of using the argument that, if asylum seekers could work, then they would pay taxes, thereby contributing to the economy. This argument allowed the advocates to begin to build more support on this issue.

Note that this example can be changed for a more relevant example, depending on the country context where the training is being held.

Exercise

Part 1: Participants can be asked to work in small groups to develop their own opposition matrix. Sometimes it can be helpful to keep the same group from the influence tree exercise, so that they are sticking with the same issue and the same target but they are now seeing the issue from the other side.

Note that the exercise lends itself to a flipchart presentation where participants can convey their opposition matrix.

When it comes to feedback on this exercise, it can be helpful to pose the question: what did you learn or what surprised you about this exercise? Very often this exercise will challenge participants in their thinking on their issue, and it is valuable to spend time reflecting on how the exercise might have enabled participants to strengthen their advocacy message.

Here it can be useful to use the same photos from the gallery walk exercise, to encourage participants to reflect on any potential opposition or neutral arguments from these people.

Part 2: Divide the participants into groups of three. Using their earlier work on the opposition matrix, invite one student to be the advocacy target (i.e.: a Government Minister), one to be the advocate, and one to be an observer (or the neural / undecided actor). Then invite the advocate to make their pitch, and for the target to respond with some counter-arguments or counter-positions on the issue. At the end of a brief exchange, the observer offers some reflections, and can explain if they have been convinced or swayed either way. If there is time, then get the group members to swap roles. If you feel the group is that not that confident, do away with the observer role and possibly have groups of four – with two targets and two advocates.

The critical learning point here is that it takes practice to respond to opposition or to convince those who are undecided on your issue – all of which works towards strengthening your advocacy message and skills.

Time permitting, some participants may wish to present their role play in front of the group and reflect in plenary on the importance of being able to respond to opposition or neutral arguments, and hence the need to prepare for such meetings.

Note that this exercise can be adapted to the context of the training. The characters do not have to be advocated to government or public authorities, it could be a case of

advocating to a National Society Secretary General, with the neutral character being a key technical or management colleague that the participants need to convince of their advocacy message. The role play can be adapted to suit the training context.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

The critical problem here is that participants might find this exercise a very bleak exercise and that they list far more opposition arguments than the arguments than they can muster in support of the issue. It is important that the facilitator remains close to the groups during this exercise and can handle any potential depression. In many respects, the opposition matrix is conveying the reality of trying to advocate on this particular issue, and that there will likely be people who are either opposed or undecided on the issue that may need to be convinced. It is important to emphasize that sometimes this exercise shows that far more work is needed on the advocacy messaging before you are ready to go 'live', as such. The aim is to ensure the National Society is thoroughly prepared to conduct their advocacy and have done all the preparatory work.

This exercise can also be very useful for dealing with internal opposition. As with the influence tree above, the opposition matrix can be used for National Society staff to think about how they might respond to internal opposition to undertaking advocacy on a particular issue. Without getting immersed in the internal politics of a National Society, it is important to encourage the participants to see the value of this tool within the organization, to sharpen their messages to be able to respond effectively to concerns about the proposed advocacy which may come from senior management, governance, or even technical or programme colleagues. It will be an important learning point that not all advocacy will be done externally and that they should never take internal support for granted.

Materials / handouts:

Handout 8: The opposition matrix template

The opposituin matrix

Argument against issue	Argument for issue

Module 10
Theory of change

DAY 2

Total time 90 minutes | Slides: 72 – 76

Learning outcome

For participants to understand the importance of having a 'theory of change' for their advocacy, and to appreciate the importance of reviewing it on a regular basis.

Session content

* This session seeks to define a theory of change by getting the participants to consider the importance of building (and maintaining) momentum in advocacy.

Participants can be quite daunted by the term 'theory of change', so it might help to refer to the session where we conducted the 'so that' exercise, or talk about a 'future story'. 'Future story' simply means or 'what is the change that you want to see in the future on your advocacy issue' and how do you want to see this 'story' evolve. How is the change that you desire going to happen? Try different approaches and see what combinations resonate most with the participants.

The critical point here is that participants understand they are developing a chain of events and actions rooted in their understanding of the external environment, which they think they can influence and build momentum on their advocacy issue. It is important that the theory of change is rooted in external environmental analysis because, if not, it may become little more than 'fantasy advocacy'. It may also be helpful to refer back to the 'six theories' of how policy change happens, so that participants can take a broad view of their potential theory of change.

Having introduced the concept of a 'so that' chain, it is helpful to move quickly onto a practical example of this, and talk participants through the construction of a theory of change using the connecting words 'so that'.

It can also be helpful to introduce the concept of big and small steps in a theory of change. The big steps are the major milestones needed to reach the ultimate goal, whereas the small steps show the immediate progress that can be taken while reaching the longer-term goals.

It is worth noting that some participants find a retrospective approach to the theory of change more helpful. This means basically starting at the end position and working backwards. I.e. thinking about what the desired policy and practice change is, and then working backwards from how that was achieved.

It is helpful to offer participants both perspectives because different participants will respond well to different approaches. A combination of approaches could also be a good way to run the session, depending on the context of the training.

The best way to finish this session is by emphasizing to participants the vital importance of reviewing their theory of change on a regular basis, so that it can be strengthened and adapted to any changes in the environment.

Exercise

Participants can be encouraged to work in small groups to develop a theory of change using the theory of change template as a handout. Continuity from the influence tree discussion can also be helpful, because the influence tree will have presented a whole array of different options and advocacy routes and it is the theory of change that will consolidate and align these options and to decide in which order they should be undertaken.

Time permitting, an interesting way to finish the exercise can be to invite the groups to report back on their theory of change to an imaginary 'governing board'. You could also conduct a role play whereby other members in the audience act as the governing board. As they are listening to the presentation from a governance perspective, ask them if they are convinced by the theory of change presentation.

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

Participants will sometimes be overwhelmed by the seeming enormity of the theory of change task because it represents the entirety of the advocacy work.

Rather than focusing too much on the bigger picture, what can be useful is to focus on the first five or six steps in the theory of change, and what is needed to get the advocacy process rolling. It is also worth adding that many of the early steps may focus on internal advocacy within the National Society, in order to get evidence for the advocacy and to garner internal support.

It is also a good idea to begin to construct a theory of change with the whole group, taking a relevant problem and solution with a clear target. Participants need to be encouraged to think of the step-by-step approach and using the 'so that' exercise to bridge between the advocacy activities that are mapped out as part of the theory of change.

As with the influence tree exercise, it will be important to encourage participants to think about assigning responsibility to the different stages of the theory of change. Who is going to conduct each activity? Encourage participants to think again about their allies and potential partners / coalitions – who are they best placed to be working with, both within and external to the National Society? Which partners might they want to engage? Clarity on who is going to 'what' and 'when' is essential to have an effective theory of change.

Materials / handouts:

Handout 9: Theory of Change template

Template to build a theory of change

Advocacy goal:

Advocacy target:

> **First action**

So that

> **Second action**

So that

> **Third action**

So that

> **Fourth action**

So that

> **Fifth action**

So that

> **Sixth action**

So that

> **Seventh action**

Further reference

Strategic planning – Global Road Safet y Campaign

Elements of an advocacy campaign – Global Road Safety Campaign
(Both documents will give participants who are looking for more detail a good overview and summary of the key parts of an advocacy campaign)

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Module 11
Planning for success

DAY 3

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Total time 60 minutes | Slides: 77 – 79

Learning outcome

For participants to understand the importance of having a 'plan for success' for their advocacy, and to be clear on their next steps and the roles and responsibilities for taking the theory of change and advocacy strategy forward.

Session content

At this stage of the training, it is important for participants to be considering what action will need to be taken if their advocacy is successful and what the steps would be if their target (be it a government minister, parliamentarian, etc.) agrees to make the change they have been advocating for. It is worth encouraging participants to think about what they will do when the target finally agrees, even if only in principle. Will they look to engage with government on the details? Who will they work with and who will be responsible for managing this? How will they keep their partners and supporters interested?

Exercise

The point of this session is to highlight to participants that, while most of their time will be spent planning their advocacy, it is worth dedicating time to consider what they will do if / when they succeed. The exercise for this session may be as simple as inviting questions and discussions in plenary to see what the participants think about a 'plan for success', if their advocacy ask is met. Will there be an implementation process? (e.g. if a new law or policy is adopted)? What will the National Society's role be in this process? Should they be partnering with another organization or ally to support or implement the change?

> **Advocacy Grid – Self-reflection (5 minutes), followed by group discussions to populate the common messages in the collective Advocacy Grid (to be completed per group) (10 minutes).**

Potential stumbling blocks

For many National Societies, the need to have a 'plan for success' may seem like something very distant, given the amount of advocacy planning that needs to be done before they even get to the result. Nevertheless, it is helpful to be prepared and at the very least flag the necessity to consider a plan for success – this may even be something that is asked along the way by those whom you are trying to advocate to (i.e. what is your plan for success? What will you do if the changes are made?). Don't dwell too long on this exercise, but encourage participants to think about a plan for success once their advocacy work concludes.

DAY 3

Module
11

Further reference

Guide to Implementation Framework – Global Road Safety Campaign
(A very helpful summary of what you need to think about when your target has agreed in principle with you and now you need to implement the policy to achieve real change.)

Concluding an advocacy campaign – Global Road Safety Campaign
(A useful checklist of things to think about when looking to bring your advocacy to an end)

Module 12 (a)
Development of an advocacy strategy

DAY 3

Total time 120 minutes

Learning outcome

For participants to pull together all their learning over the course of the training workshop, together with their practical experience applying the various advocacy tools to their own issue. This module will allow for the initial development of a practical advocacy strategy to drive forward the advocacy agenda.

Session content

As part of this session, use the slides on the advocacy cycle and the advocacy checklist to give participants a refresher of all the ground they have covered during the course up until this point.

It is important to stress that participants are not starting from scratch during this session, and should look back at each of the exercises they have worked on, and how this has been building towards the development of the strategy itself.

The key material for this session will be the advocacy strategy planning grid. Participants should use this template to go over all their earlier work throughout the workshop, and to review the outcomes of the various exercises. Do they still agree with their earlier work? Have they changed their minds about anything?

Participants should be encouraged to review and agree upon the following:

- Their advocacy message
- Their influence tree
- Their opposition matrix

Having done these reviews, participants should then reflect on their theory of change. They should be encouraged to develop a theory of change which considers both the 'big steps' and the 'small steps' towards the final milestone. Participants should be encouraged to do the following, especially for the immediate (or 'small') steps:

- assign responsibility for each activity
- agree timelines for each activity
- identify resource needs

DAY 3

Module
12 (a)

Exercise

The participants should be broken up into groups to review their work and develop their final advocacy strategy based on theories of change. Where possible, groups should be mixed up to introduce some fresh thinking into the process. Participants should use the ideas already noted in their advocacy strategy grid, and start inputting ideas in the legislative advocacy strategy template.

The facilitator should be listening and intervening to challenge or complement thinking, especially where there appears to be a lack of logic in the planning or where you suspect little reference is being made to the external environment.

Potential stumbling blocks

Having covered a lot of ground on this course, participants sometimes find this final 'consolidation' stage a bit overwhelming. It is important to convey to them that most of the work has been done, and that they simply need to review it and then agree on their plan collectively so that they can take it forward after the training workshop.

Encourage them to think what will be the first step they need to take to act upon the beginning of the advocacy strategy that come out of the workshop, and what action needs to be taken when they return to the office.

Also, be wary of lazy thinking – there is again the risk of 'fantasy advocacy'. The participants may well have used the advocacy tools and learning from the workshop, but their implementation might bear no relation to the reality of their external environment. Remind them to go back to their external environmental analysis from the start of the workshop and ask them if their plan is true to this reality.

It can also be helpful to open a discussion about who will do the advocacy in the National Society. Is it the responsibility of the leadership? The technical staff? This is where it is critical to establish focal points and the 'advocacy champions group' comprising people from across the National Society.

Materials / handouts:

Handout 10: The legislative advocacy strategy template
(see handout 3)

Module 12 (b)
Advocacy presentations, feedback and next steps

DAY 3

Total time 60 minutes

Learning outcome

For participants to have the opportunity to pitch their advocacy strategy and demonstrate their learnings from the workshop and how they are going to apply this learning in practice. Also for participants to be challenged on how they plan to review and monitor their advocacy strategy on a regular basis.

Session content

The groups are invited to present their advocacy strategies and then respond to questions or comments.

As the main facilitator, encourage the participants to consider the following questions (or ask them directly, if necessary):

- Is there a strong, clear advocacy message?
- Does the target really have the power to make the necessary change?
- Are there any other allies or partners that might be able to attract wider support?
- Have their messages really addressed the key opposing arguments?
- Is there a logical sequence to the theory of change? Are there any gaps or assumptions of action being made?
- When are they next going to review their plan?
- What will be the process for finalizing their advocacy strategy within the National Society?
- What is their plan for success?
- What are they going to do monitor their plan?

If you are working with a National Society that has been working on one thematic issue for their advocacy, it will be helpful to make some time during this session to reflect on the different presentations and explore how one comprehensive strategy might be developed for the National Society. While they will not be able to finalize such a strategy at the workshop, it **will be essential to finish the workshop with at least a structure or draft strategy for the National Society to take forward**, as opposed to leaving them with several different strategies from the different working groups. It will also be critical to establish the champions group, who can later work on a formal Terms of Reference for the group and concrete activities (e.g. finalizing the strategy, replicating this training workshop at branch level, etc.):

DAY 3

Module 12 (b)

Using the way forward slide, this discussion should be led and owned by the National Society (e.g. the advocacy champions group) to discuss and confirm the way forward and who is going to take forward the continued development of the advocacy strategy after the workshop.

Potential stumbling blocks

You will need to emphasize to participants that this is the beginning of the process of building their advocacy skills and the advocacy strategy. They will need to keep reviewing and amending their strategy and ensure action is taken after the workshop to finalize the strategy and translate it into action.

Remind the participants to also be mindful of changes to the external environment, and their advocacy strategy needs to be a live document that can be reviewed and adapted as necessary.

Module 13
Summary and reflections

DAY 3

Total time 30 minutes | Slides: 80 – 82

Learning outcome

For participants to be offered time to reflect on the presentations and key learning points, and invited to offer their feedback and thoughts on the workshop.

Session content

This final session needs to be light and relaxed. The participants will have covered a lot of ground and have had the courage to make their presentations and to then receive feedback. You may want to re-introduce the advocacy thermometer at this stage and ask how confident participants are feeling about advocacy now that they are at the end of the training.

As you listen to the feedback, take some notes so that you can make some general points of things to be aware of as the participants take their advocacy forward. You may find the list used for the previous session helpful when looking for general points to comment on:

• Is there a strong advocacy message?

• Does the target really have the power to make the necessary change?

• Are there any other allies that might be able to attract wider support?

• Have their messages really addressed the key opposing arguments?

• Is there a logical sequence to the theory of change? Are there any gaps or assumptions of action being made?

• When are they next going to review their plan?

• What is their plan for success?

• What are they going to do monitor their plan?

Above all, as the facilitator you should congratulate the participants for the progress that they have made and remind them that this is the start of the journey.

Explain that their plans need focus and regular review so that momentum continues to build after the workshop. Now having the knowledge and tools to take forth their advocacy, participants need to focus on building momentum on their issue – internally and externally. This will be a critical factor for the success of their advocacy. Also remind them that they need to enjoy their advocacy!

DAY 3

Module
13

A good way to end the workshop is to invite participants to offer their reflections on the workshop. Many communities around the world have a tradition of a 'talking stick'. It can work well to get a stick (or a pen or another object) and pass it around the group. The participant who is holding the 'talking stick' will have the chance to offer some reflections or to just pass it on to the person next to them. It is an easy way to solicit feedback without forcing people to do so.

Also take the time to reflect back on the 'advocacy thermometer' that was introduced at the beginning of Module One, and to see if participants' comfort levels and understanding of advocacy have improved since the first advocacy thermometer test. Ask them to mark where their comfort levels are at, and if there have been changes and improvements. This can be a good, light way to finish the workshop, before you finally thank the participants for their time and their engagement, and wish them all the very best for their advocacy!

Make sure to hand out the evaluation form for participants to complete before they leave – this is an important feedback tool! (available in annex C).
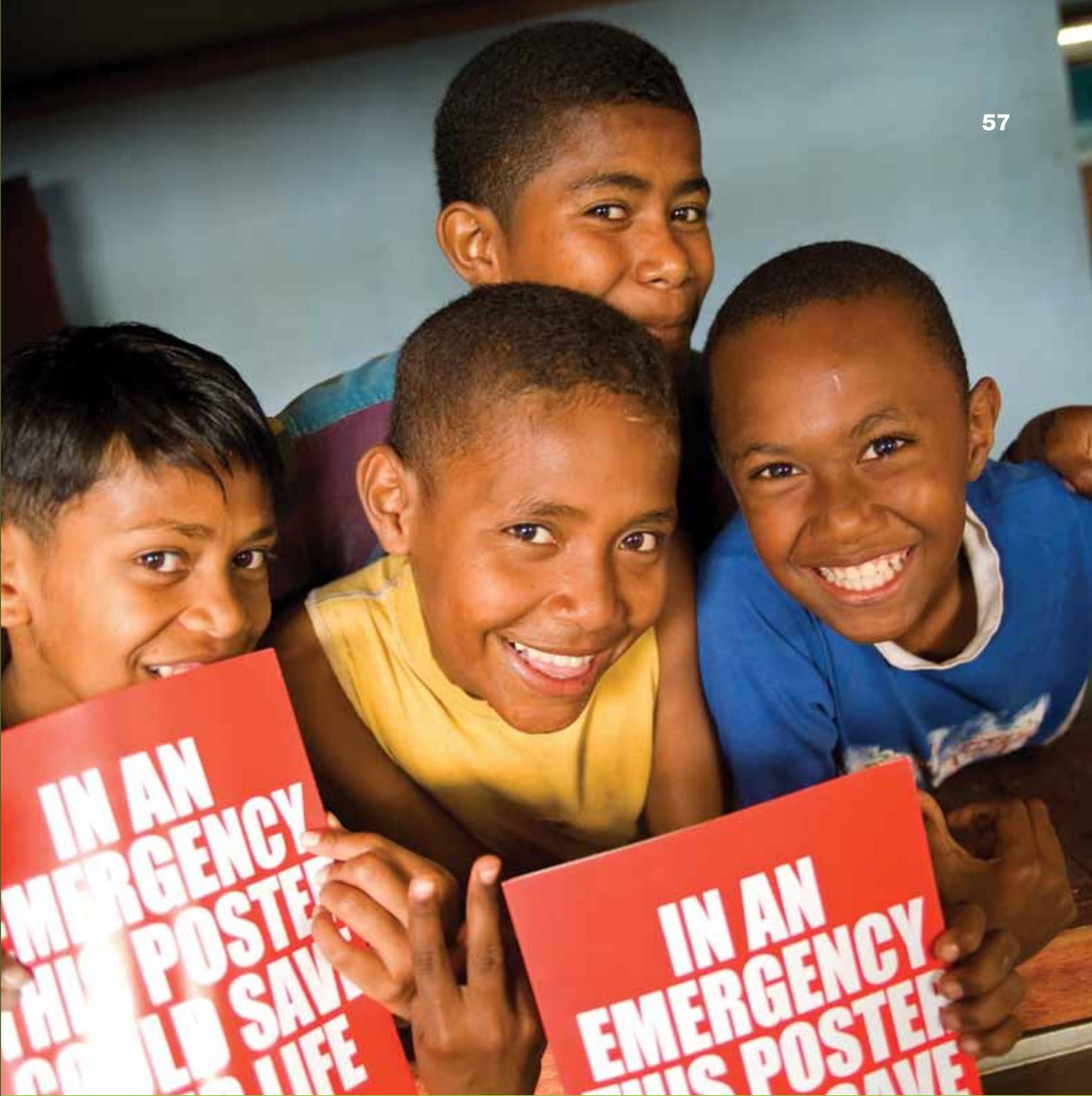
Annexes

Annex A: Model Concept Note

Legislative Advocacy Training Workshop

Concept Note

Background:

As auxiliary to public authorities, National Societies play a unique and important role in the humanitarian field within their country contexts. The auxiliary role is permanent and part of the legal basis of many National Societies, often enshrined in a national law or decree. Within the framework of the Fundamental Principles, it is crucial for National Societies to fully understand and promote their auxiliary role.

Legislative advocacy is a method by which National Societies can harness their auxiliary status to advocate and utilize their relationship with public authorities to overcome key issues of humanitarian concern. The decision to engage in legislative advocacy flows from the privileged access enjoyed by National Societies as auxiliaries to their public authorities.

The Humanitarian Diplomacy Policy, adopted in 2009 by the Governing Board, includes advocacy, negotiation, communication, formal agreements and other measures, and legislative advocacy is method which build upon and forms a core part of our humanitarian diplomacy approach.

This workshop aims to assist the National Society to advocate for stronger legislation to make communities safer, ensure timely and effective humanitarian relief, and to respond to other humanitarian challenges.

The workshop will provide an introductory training to enhance the capacity for National Societies to more systematically and confidently advocate for better laws, regulations and policies for disaster risk management and priority areas of focus. This will include the presentation of definitions of legislative advocacy, practical tools for legislative advocacy and reflection on the current status of their auxiliary role and their National Society's relationship with key stakeholders.

To ensure sustained follow-up from the training, the National Society will be asked to undertake various activities during the training, which will lay the foundations for developing a legislative advocacy strategy tailored to their national context. Additionally, there is the expectation that the National Society will utilise the learning from this training to share amongst their staff and volunteers and to take forward their legislative advocacy work, which may include the establishment of a multi-disciplinary Legislative Advocacy Champions Group.

Participant's profile:

A mix of leadership, and the relevant technical teams, depending on the theme of the training (e.g. whether its disaster law or another thematic area).

Length: 3 days
Tentative date: TBC
Facilitators: TBC

Objectives:

- Improve understanding of legislative advocacy and the auxiliary role.
- Implement practical tools for legislative advocacy in the context of the National Society.
- Commence developing a legislative advocacy strategy.
- Develop a plan to disseminate the learning from the workshop and take the advocacy strategy development forward.

Expected results:

- A clear understanding of legislative advocacy and the link with the auxiliary role
- A draft legislative advocacy strategy
- Further training within the National Society on legislative advocacy

Topics to cover:

- A definition of legislative advocacy and associated language
- Auxiliary role and the link with legislative advocacy and humanitarian diplomacy
- Advocacy message development
- The external environment for legislative advocacy
- Credibility and risk
- Building influence
- Dealing with opposition
- Theory of change
- Planning for legislative advocacy success

Annex B: Training agenda templates

Workshop agenda templates for:

- Three days
- Two days
- One day
- Half day
- One hour

Three-day workshop agenda

Day one	
9.00am	Welcome and introductions
9.30am	Module 1a. Introduction to advocacy • Definition of advocacy and outline of the different approaches to advocacy • A discussion on language for advocacy
10.30am	Module 1b. The auxiliary role and advocacy for RC / RC NS • Consideration of the auxiliary role and the potential for NS advocacy
11.00am	Break
11.30am	Module 1b. Discussion and questions on the auxiliary role • Opportunity for questions and clarification on the opportunities
12.30pm	Lunch
1.30pm	Module 2. Defining your issue • Selecting your advocacy issue and understanding your problem
2.00pm	Module 3. The external environment • Defining the external context and limiting factors for advocacy
3.00pm	Module 4. Evidence for advocacy • The key questions to answer when developing evidence for advocacy
3.30pm	Break
4.00pm	Module 5. Developing your advocacy message • How to construct an effective advocacy message
4.30pm	Module 6a. The elevator pitch • An advocacy tool to help develop and refine your advocacy message
5.15pm	Summary
5.30pm	Close

Day two	
9.00am	Reflections from day one
9.30am	Module 6b. The elevator pitch in action • An opportunity to practice the elevator pitch
10.00am	Module 7. Credibility and risk • What gives your National Society the credibility and mandate to speak on certain issues? • How can you manage the risks associated with advocacy?

11.00am	Break
11.30am	**Module 8. Who is your target and how to reach them: The influence tree, working in partnerships and coalitions** • The influence tree – an advocacy tool focused on your target for advocacy and the potential routes for influe**nce**
12.30pm	**Module 8. Influence tree presentations** • An opportunity to present applications of the influence tree
1.00pm	Lunch
2.00pm	**Module 9. Using opposition to help your advocacy** • How you can use opposition messages on your issue to strengthen your advocacy message
3.00pm	**Module 9. Opposition matrix presentations** • An opportunity to present how the opposition matrix might be used
3.30pm	Break
4.00pm	**Module 10. Theory of change** • An advocacy tool to help you build direction and momentum on your advocacy issue
5.00pm	**Summary**
5.30pm	**Close**

Day three	
9.00am	**Reflections from day one**
9.30am	**Module 10. Theory of change presentations** • An opportunity to present how a theory of change might look
10.00am	**Module 11. Planning for success** • A chance to reflect on the plan for when you achieve your advocacy goal
11.00am	Break
11.30am	**Questions**
12.00pm	**Module 12a. Development of advocacy strategy (group work)** • Time in groups to begin to pull together all the advocacy tools and the exercises over the last two days into the beginning of an advocacy strategy
1.00pm	Lunch
2.00pm	**Module 12.a Development of advocacy strategy continued (group work)**
3.00pm	**Module 12b. Advocacy presentations, feedback and next steps** • An opportunity to present advocacy strategies for implementation
4.00pm	**Module 13: Summary and reflections** • Reflecting on the group presentations, what are the common strands and areas of agreement to be built into the advocacy strategy
5.00pm	**Close**

Two-day workshop agenda

Day one	
9.00am	Welcome and introductions
9.30am	Module 1. Introduction to advocacy including the importance of the auxiliary role
10.30am	Module 2. What is your issue?
11.00am	Break
11.30am	Module 3. Defining your external environment
12.30pm	Lunch
1.30pm	Module 4. Evidence for advocacy
2.00pm	Module 5. Developing your message
2.30pm	Module 6. The elevator pitch
3.00pm	Break
3.30pm	Module 7. Credibility and risk
4.00pm	Module 8. Who is your target and how to reach them: The influence tree, working in partnerships and coalitions
5.00pm	Summary
5.30pm	Close

Day two	
9.00am	Reflections from day one
9.30am	Module 9. Using opposition to help your advocacy
10.30am	Module 9. Presentations and discussion
11.00am	Break
11.30am	Module 10. Theory of change
12.30pm	Lunch
1.30pm	Module 11. Planning for success
2.00pm	Module 12. Development of advocacy strategy
3.30pm	Break
4.00pm	Module 12. Advocacy presentations
5.00pm	Module 13. Summary
5.30pm	Close

One-day workshop agenda

9.00am	Welcome and introductions
9.30am	Module 1. Introduction to advocacy including the importance of the auxiliary role
10.30am	Module 2. What is your issue?
11.00am	Break
11.30am	Module 3. Defining your external environment
12.00pm	Module 4. Evidence for advocacy
12.30pm	Module 5. Developing your message
1.00pm	Lunch
2.00pm	Module 6. The elevator pitch
2.30pm	Module 7. Credibility and risk
3.00pm	Module 8. Who is your target and how to reach them: The influence tree, working in partnerships and coalitions
3.30pm	Break
4.00pm	Module 9. Using opposition to help your advocacy
4.30pm	Module 10. Theory of change
5.00pm	Module 13. Summary
5.30pm	Close

Half-day workshop agenda

9.00am	Welcome and introductions
9.15am	Module 1. Introduction to advocacy including the importance of the auxiliary role
10.15am	Break
10.45am	Modules 6 / 8 / 9 / 10. An introduction to some practical tools for advocacy including elevator pitch, influence tree, opposition matrix and theory of change
11.30pm	Group work to begin to use a selection of the advocacy tools
12.30pm	Presentations and feedback
1.00pm	Close

One hour 'taster' workshop agenda

12.00pm	Module 1. Defining advocacy and the connection with the auxiliary role and humanitarian diplomacy
12.10pm	Module 6. The Elevator Pitch
12.20pm	Module 8. The influence tree
12.30pm	Module 9. The opposition matrix
12.40pm	Module 10. The theory of change
12.50pm	Questions
1.00pm	Close

Annex C: Model evaluation form

Legislative Advocacy Workshop Evaluation form

Name:

Organization:

Please tick the appropriate box below:

1. How comfortable do you feel defining advocacy?

Not comfortable	Not sure	Comfortable	Very comfortable

2. How comfortable do you feel explaining the auxiliary role?

Not comfortable	Not sure	Comfortable	Very comfortable

3. Do you feel able to develop an advocacy message?

Not able	Not sure	Able	Very able

4. Do you feel ready to apply a variety of advocacy tools to develop your advocacy strategy?

Not ready	Not sure	Ready	Very ready

5. Do you understand how you can review and sustain momentum for your advocacy?

No	Not sure	I understand	I understand very well

6. Do you feel ready to share this learning with your colleagues?

No	Not sure	I feel ready	I feel very ready

7. Any general comments or feedback?

The Fundamental Principles of the International Red Cross and Red Crescent Movement

Humanity The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

Impartiality It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.

For further information, please contact:

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