

**GUIDE**

# **COMMUNICATING FOR CHANGE**

Effective Advocacy Communications for  
Non-Profit Organisations

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Non-Profit Organisations

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# 1. HOW TO USE THIS DOCUMENT

## 1.1 INTRODUCTION

At Health Action International, we're on a mission to advance policies that enable access to medicines and rational medicine use for people around the world. We use research and advocacy to get the job done. But the power of communications is essential for us to realise our mission.

Over the years, we've amassed an immense amount of communications expertise—breaking down the complexities often involved in communicating our work to educate, raise awareness and expand our thought leadership to shift attitudes and political action. We want to share this expertise with other civil society organisations, particularly those that are also working on medicines policy issues, so they, too, can build greater awareness of their work and make the world a better place.

## 1.2 TOOLKIT CONTENT

This guide offers you the tools, checklists and introductions to key concepts to provide you with the information and resources you need to take a planned approach to effective advocacy communications. Taking a planned approach means being able to define your advocacy goals, know the concepts that will help you reach these goals, prioritise them, and then use this knowledge to systematically transform the world. Since learning effective advocacy communications is a hands-on job, this toolkit is highly interactive in nature, providing you with many checklists and worksheets. The completion of these interactive pieces helps form the core elements of your communications plan, advocacy messaging and dissemination strategies. We hope you'll find it useful.

## 1.3 HOW TO BEST USE THIS GUIDE

This guide can be used by people and organisations with different levels of experience in advocacy. It's designed to be used in a flexible manner. For example, some users may want to read and use this guide from beginning to end as an A-Z guide to effective advocacy communications. Others may decide to use a selection of chapters, or only certain worksheets and checklists. This latter approach is useful when you have questions related to specific communications elements, such as creating messages with impact and drafting media releases, to planning your first press conference. In this sense, this guide can serve as a reference document when a question comes up about advocacy communications.

After reading, thinking about and implementing the guidelines found in this toolkit, we invite you to modify its contents to fit what you've learned from your own experiences. We encourage you to make this document your own, using its content as a base, because creating change through advocacy isn't a 'one-size-fits-all' process. It takes flexibility, combined with sincerity of purpose and the ability to constantly re-evaluate approaches and tactics. So, with these words, we leave you to explore this guide and expand your ability to get the most out of your advocacy efforts.



## 2. INTRODUCTION TO ADVOCACY COMMUNICATIONS

### 2.1. WHAT IS ADVOCACY?

Advocacy has many definitions and can come in many different forms, but simply put, advocacy is a set of targeted actions directed at decision- and opinion-makers in support of a specific policy issue. Advocacy aims to influence policy, laws, regulations, programmes, or funding decisions made at the upper-most levels of the community, public sector or private sector.

This means that advocacy represents the strategies you come up with, actions you take, and solutions you propose to influence decision-making at the local, regional, state/provincial, national, or international level to create positive change for people and their

environment. At Health Action International, we define advocacy as, ‘An organised attempt to change policy, practice, and/or attitudes by presenting evidence and arguments for how and why change should happen.’ Below are some additional definitions of advocacy. Notice how all of them centre on taking action to create change in policies and attitudes. Keep this in mind as you read this toolkit.



### TOP TIP

It's great when your organisation agrees upon a common definition for advocacy that everyone feels best reflects the work and goals of your individual organisation. This is good for internal alignment, which contributes to consistent and impactful external communications.

**Table 1. Common Advocacy Definitions**

Source	Definition
David Cohen, Advocacy for Social Justice	<i>‘Advocacy is the pursuit of influencing outcomes—including public policy and resource allocation decisions within political, economic, and social systems and institutions—that directly affect people’s lives.’</i>
Oxfam	<i>‘Advocacy can take place at a variety of levels from local communities through to international institutions, and include a variety of methods including lobbying, media work, popular campaigning, and changing public attitudes.’</i>
Save the Children	<i>‘Advocacy is the work we do to influence the policies and actions of governments, international institutions and the private sector, in order to achieve positive changes in children’s lives.’</i>

## 2.2. WHAT IS NOT ADVOCACY?

Advocacy relates to influencing decisions of policy-makers and other key influencers. Generally, this does NOT mean:

- Information, education and communication;
- Informing the government about your organisation;
- Raising public awareness about your organisation and its programmes;
- Fundraising; or

- Lobbying or attempting to influence legislation or a legislator at the local, regional, state/provincial, national or international level. (Lobbying is one type of advocacy, but not all advocacy is lobbying.)

For example, advocacy is not tutoring students in an after-school programme. But advocacy is gathering signatures from members of your community for a petition to alter public education practices that are harmful or disadvantageous to students.

**Table 2. Defining Communications and Advocacy Communications**

Defining Communications	Defining Advocacy Communications
<p>Search 'communications' on your web browser and the results you'll see will range from anything regarding telecommunications to interpersonal communication skills. Similarly, if you look through dictionaries, you'll find several definitions, such as: "The art and technique of using words effectively to impart information or ideas" (<i>American Heritage Dictionary of the English Language: Fourth Edition, 2000</i>). While that's true, basically everything you do—or don't do—communicates a message to your audience, whether it's those you serve, your volunteers, donors, staff, the media or the government.</p>	<p>What defines advocacy communications is that it focuses on influencing specific audiences and using specific messages in order to deliver changes in policy or practice. In general, successful advocacy communications requires clear objectives, knowledge of the intended audience, language appropriate for that audience, and content that is short and specific.</p>

### 2.2.1 WHAT'S THE LINK BETWEEN ADVOCACY COMMUNICATIONS AND GENERAL COMMUNICATIONS?

Advocacy is all about influencing and persuading individuals and institutions to change. Simply put, this will not happen unless you're able to communicate your ideas and proposals effectively. Good advocacy communications requires many of the same elements and skills that should be used in all communications work.

Still, communications for advocacy purposes are not the same as more general communications practices, like newsletters, fundraising materials, or general information about your work. Although some of these tools may be used to disseminate your advocacy message, advocacy communications is still something more specific than just communications.



## 2.3. ADVOCACY COMMUNICATIONS AND LEGITIMACY

Legitimacy and credibility are two crucial components of effective advocacy. Aside from doing research into your issue—including policy, opposition and other research—it's also crucial to consider and plan for the involvement of those affected by an advocacy issue at an early stage.

Why is it important to involve those directly affected by the advocacy issue?

- They'll have an expert and specific knowledge of the issue or problem.
- They can suggest workable solutions based on their direct experience of the problem.
- They can view a problem from a different perspective.
- They're often highly motivated, because they're directly affected by the issue.
- Through inclusion, affected individuals and groups will gain more skills and confidence to advocate on their own behalf

(Source: International AIDS Alliance).

Involving those affected by an issue too late in the advocacy process, only superficially (also known as 'tokenism'), or not at all, can result in the following negative consequences:

- Identifying and advocating for or against irrelevant or minor issues.
- Suggesting inappropriate solutions or solutions that either don't solve the problem or worsen the issue.
- The loss of credibility for the organisations and individuals involved in such advocacy.
- Unfortunately, this can lead to increased stigma and legitimised exclusion and non-involvement of those affected by the problem or issue.
- As a result, this can also disempower those affected

(Source: International AIDS Alliance)

Much heartache and wasted effort can be avoided if, at the outset, you map your potential audiences and conduct adequate background research to carry out evidence-based advocacy. For more on these topics, refer to Chapter 4.

## 2.4. COMMON CHARACTERISTICS OF ADVOCACY COMMUNICATIONS

Advocacy communications is a dynamic process, so there is no single recipe for success. However, most advocacy communications share the following elements:

- Goal setting (one/multiple or shifting goalposts);
- Gathering policy and political information;
- Assessing risk (e.g., opponents);
- Building strategic relationships;
- Establishing your credibility as an advocate;
- Linking advocacy to your business priorities; and
- Maintaining focus. (Advocacy requires a long-term, ongoing effort; it's not a one-off occurrence.)

Developing a successful advocacy campaign and other advocacy communications requires clarity about the goals you seek, available strategies and resources, and potential allies and opponents. Although some of the same ingredients (see list above) go into a successful advocacy campaign or effort, there are many different ways of doing advocacy. Ultimately, how you put together the 'recipe for success' is up to the specifics of what your organisation wants to achieve.

These are some decisions regarding how best to 'do' advocacy related to:

- **Form:**  
Advocacy can take many different forms. For example, it can be written, spoken, sung or acted.
- **Timing:**  
It can vary in terms of the time it takes to plan and execute—from several hours to several years.

- **Partners:**  
We can do advocacy work on our own or with others in partnership (anything from peer or professional advocacy to political advocacy).
- **Actors:**  
Involving people affected by the advocacy issue in question (and gaining their permission to legitimately advocate for, or represent, them). Note: Some of the most powerful advocacy methods are led by people affected by the problem or issue, or directly involve them.
- **Proactive versus reactive:**  
Some advocacy work can be proactive (to 'set the agenda' and use advocacy to create a positive environment or prevent a problem before it happens), or reactive (the problem or issue is already there, so we use advocacy to reduce the problem).



## POP-OUT

### 10 Simple Points to Better Understand Advocacy

Advocacy is about:

1. Taking action—overcoming obstacles to action.
2. Selecting your issue—identifying and drawing attention to an issue.
3. Understanding your political context—identifying the key people you need to influence.
4. Building your evidence base—doing your homework on the issue and mapping the potential roles of relevant players.
5. Engaging others—winning the support of key individuals/organisations.
6. Elaborating strategic plans—collectively identifying goals and objectives and best ways to achieve them.
7. Communicating messages and implementing plans—delivering your messages and counteracting the efforts of opposing interest groups.
8. Seizing opportunities—timing interventions and actions for maximum impact.
9. Being accountable—monitoring and evaluating process and impact.
10. Catalysing health development—building sustainable capacity throughout the process.

(Source: International Council of Nurses)

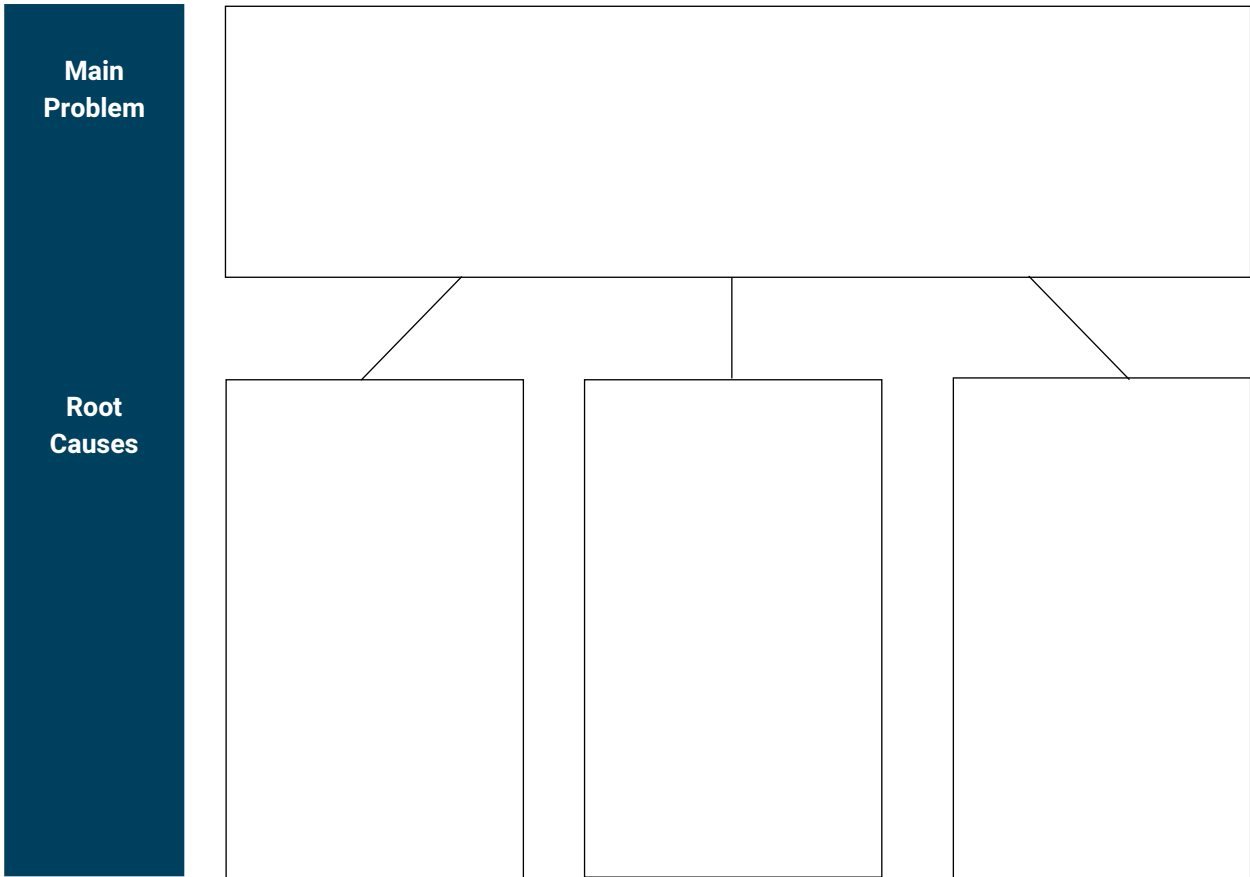
## 2.5. WORKSHEETS

Now that you've reached the end of this chapter, we encourage you to flip to the next page and begin working on the two advocacy-related worksheets. They were developed to help you identify potential advocacy issues and then choose one or two issues to pursue.

## 2.6. SURVIVAL SKILLS FOR ADVOCACY

After the worksheets, you'll find one final exercise to check your work (see page 12). Complete the checklist before moving on. You can also consider re-using this checklist to train other advocates.

**Worksheet 1. Identifying Your Advocacy Issue**



	<b>Y</b>	<b>N</b>	<b>Y</b>	<b>N</b>	<b>Y</b>	<b>N</b>
Can a change in policy help improve the problems?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your organisation have programmatic experience with this problem?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any evidence that this is a problem?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can the problem be reasonably (if not completely) addressed in three to five years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Potential Issues for Advocacy:**

## Worksheet 2. Choosing Your Advocacy Issue

Rate each advocacy issue using the criteria below. Then, total the number of highs, mediums and lows. Select the issue that's best to target.

Criteria	Issue 1	Issue 2
The selected issue is specific and clear.	<input type="checkbox"/> High (very specific/clear) <input type="checkbox"/> Medium (fairly clear/specific) <input type="checkbox"/> Low (unclear/unspecific)	<input type="checkbox"/> High (very specific/clear) <input type="checkbox"/> Medium (fairly clear/specific) <input type="checkbox"/> Low (unclear/unspecific)
Qualitative or quantitative data exists to prove it is an issue.	<input type="checkbox"/> High (strong evidence) <input type="checkbox"/> Medium (some evidence) <input type="checkbox"/> Low (no/weak evidence)	<input type="checkbox"/> High (strong evidence) <input type="checkbox"/> Medium (some evidence) <input type="checkbox"/> Low (no/weak evidence)
Partnership potential exists among influential organisers, leaders and stakeholders.	<input type="checkbox"/> High (many partners) <input type="checkbox"/> Medium (some partners) <input type="checkbox"/> Low (no partners)	<input type="checkbox"/> High (many partners) <input type="checkbox"/> Medium (some partners) <input type="checkbox"/> Low (no partners)
Political will exists to address the issue.	<input type="checkbox"/> High (supportive) <input type="checkbox"/> Medium (neutral) <input type="checkbox"/> Low (opposed)	<input type="checkbox"/> High (supportive) <input type="checkbox"/> Medium (neutral) <input type="checkbox"/> Low (opposed)
Your organisation has a unique experience or expertise to contribute.	<input type="checkbox"/> High (very unique role) <input type="checkbox"/> Medium (some resources) <input type="checkbox"/> Low (many others have this)	<input type="checkbox"/> High (very unique role) <input type="checkbox"/> Medium (some resources) <input type="checkbox"/> Low (many others have this)
Your organisation has advocacy resources to address this issue.	<input type="checkbox"/> High (many resources) <input type="checkbox"/> Medium (some resources) <input type="checkbox"/> Low (no resources)	<input type="checkbox"/> High (many resources) <input type="checkbox"/> Medium (some resources) <input type="checkbox"/> Low (no resources)

**Worksheet 2. (continued)**

The goal carries no or little risk for your organisation.	<input type="checkbox"/> High (no risk) <input type="checkbox"/> Medium (possible risk) <input type="checkbox"/> Low (significant risk)	<input type="checkbox"/> High (no risk) <input type="checkbox"/> Medium (possible risk) <input type="checkbox"/> Low (significant risk)
Policy change is likely to have significant impact on the issue.	<input type="checkbox"/> High (significant impact) <input type="checkbox"/> Medium (some impact) <input type="checkbox"/> Low (no impact)	<input type="checkbox"/> High (significant impact) <input type="checkbox"/> Medium (some impact) <input type="checkbox"/> Low (no impact)
Success is feasible in three to five years.	<input type="checkbox"/> High (very likely) <input type="checkbox"/> Medium (likely/maybe) <input type="checkbox"/> Low (unlikely)	<input type="checkbox"/> High (very likely) <input type="checkbox"/> Medium (likely/maybe) <input type="checkbox"/> Low (unlikely)
<b>Totals</b>	<b># of Highs _____</b> <b># of Mediums _____</b> <b># of Lows _____</b>	<b># of Highs _____</b> <b># of Mediums _____</b> <b># of Lows _____</b>
<b>Final advocacy issue:</b>		

Check as many survival skills below that currently apply to your advocacy approach. Before moving forward, discuss how you can adapt your current work to tick off a few more survival skills.



## CHECKLIST

### Survival Skills for Advocacy

- Where possible, emphasise the positive.
- Emphasise your organisation's accomplishments to the community.
- Plan for small wins.
- Present the issues in the way you want others to see them
- Develop your own public identity.
- Check your facts. Evidence-based advocacy is key.
- Keep it simple.
- Be passionate and persistent.
- Be prepared to compromise.
- Be opportunistic and creative.
- Stay your course and keep your eyes on the prize.
- Make issues local and relevant to your audiences.
- Work towards obtaining broad-based support from the start.
- Work within the competency base and budget of your group.
- Try to work outside the experiences of your opponents.
- Tie your advocacy group's efforts to related events in the news or community.

## 3. BUILDING YOUR BRAND

### 3.1. BRANDING

#### 3.1.1. WHAT IS A BRAND?

This may seem like a big question, but defining what a brand is comes down to one simple thing: It's what people think and feel about your organisation. What do people feel when they think about your non-profit? What types of thoughts come up?

So, a brand doesn't have much to do with what you think your organisation is. Instead, it's what others say and feel about it. Think of it this way: A brand is what other people tell their friends about your organisation.

Since a brand deals with emotions and impressions, everything you do as an organisation contributes towards communicating how people feel about it. For example, the way you or your staff handles phone calls regarding questions about services, or how your website looks and reads, all give people impressions about who you are as an organisation.

These impressions and feelings—your brand—are extremely important because they're what makes you different from other organisations. Your brand helps set you apart—it's one of the reasons people work with, or turn to, your organisation for information, services and expertise.

#### 3.1.2. WHY BRANDING MATTERS FOR ADVOCACY AND WHY YOU SHOULD BUILD YOUR BRAND

Branding matters for advocacy purposes because if you have a strong brand that's communicated in a clear and consistent manner, you can be more effective in advancing your advocacy goals. This is the case because, bit by bit, the general public, government bodies and other organisations will see you as an authority, which, in turn, enhances your reputation.

Some of these organisations, decision-makers and influencers will also want to partner with you on projects, campaigns and other advocacy efforts. When you're valued as an authority in your field, your messages will be received better and taken up, and it will be easier to attract funding.

To recap, these are benefits to building a strong brand:

- Enhances reputation and credibility;
- Greater uptake of messaging;
- Easier to attract funding; and
- Easier to attract partners.

### 3.2. HOW TO BUILD YOUR BRAND

Now that we've reviewed what a brand is and the advantages of building a strong brand, it's time to look into how, exactly, to build your brand. In the previous section, we talked about how your brand is what people feel when they think about your organisation. Given this, a good place to start in terms of figuring out who you are is by defining your mission and vision.

#### 3.2.1. MISSION AND VISION

A mission is simply the reason(s) your organisation exists. This is important because effective advocacy is built around having strong reasons for doing what you do. People tend to follow and commit to have a clear sense of purpose. So, you have to think about what your organisation believes in.

A mission also takes into account what your organisation does: What does it offer? It's easier to advocate when we have clear ideas of what we're advocating for, and our organisation comes off as stronger when we know why we're doing it.

A vision is what you want your organisation or initiative to accomplish in the future. What will its success look like, say, in five to 10 years? What are the long-term changes you want to see from your organisation's work? Having a clear vision is about

inspiring both employees and the outside world, and is important for determining how people feel and think about your organisation because it influences what types of actions you take in your advocacy.

Your organisation's vision and mission are usually communicated in statements. And it's important to keep them short and impactful, so people remember what your organisation does and why they do it.



## POP-OUT

### Mission Statement Examples

#### **Health Action International**

*'Through research and advocacy, we advance policies that enable access to medicines and rational medicine use for all people around the world.'*

This captures why we exist as an organisation, powerfully communicates our purpose, and tells the world what we do.

#### **Global Fund for Women**

*'We are a global champion for the human rights of women and girls. We use our powerful networks to find, fund, and amplify the courageous work of women who are building social movements and challenging the status quo. By shining a spotlight on critical issues, we rally communities of advocates who take action and invest money to empower women.'*

This text describes what type of future world the organisation wants to create through its work, and we can't help but be inspired and pulled into an organisation that makes such a bold statement.

#### **War Child**

*'War Child makes a lasting impact by protecting children from violence and offering psychosocial support and education. We unleash children's inner strength with our creative and involving approach and inspire as many people as we can to participate in our cause.'*

This is a straight-forward, high-impact mission that uses powerful language to paint the picture of the organisation's purpose.



### 3.2.1.1. QUESTIONS FOR DEVELOPING YOUR MISSION AND VISION

Answering these questions in developing your mission and vision will help you with advocacy because it will:

- Give it direction;
- Give advocacy messages a standard to adhere to;

- Let your audiences know who you are and what you stand for;
- Create a space for your advocacy; and
- Give people an opportunity to connect with what you do.



## POP-OUT

### How to Re-Evaluate Your Brand Identity

Take out a piece of paper and divide it into four columns:

- In column one, list what your organisation does (the services you provide, the audiences you serve) No judgments or adjectives—just the facts about your work.
- In column two, list the words that describe how your organisation approaches these issues and serves your constituents. Are you established and collaborative, new and confrontational, multidisciplinary or single-focused? List the adjectives that your audiences would use to describe you.
- In column three, translate these adjectives into colours, textures, typefaces and photographic styles. At this stage, it might be useful to look at samples (design books or even magazines can help) so that you can point to particular shades, fonts or photos that embody your organisation's personality.
- In column four, list all of your communications tools, from simple postcards to television public service announcements. Now consider how the list in column three can guide the design of each of your communications vehicles so that all of your materials consistently reflect your image.

(Source: Cause Communications)

If you need more questions to consider when thinking about your brand's mission and vision—what it does, why it does it, and its vision for the future, try the following:

- Think of your organisation as a person—what are its characteristics? What would people like about it and why? How does it help other people?
- Consider what problem(s) your organisation solves.
- Ask your employees, constituencies and target audiences what they think your organisation does and why it does it.
- Write all thoughts and feedback down and look for the commonalities among them.

### 3.2.2. BRAND ESSENTIALS

Since we've discussed how to define your brand through establishing your mission and vision, it's time to move on to tackling the questions and concerns you should be thinking about when building a strong brand.

These are a few important elements that make up strong brands:

- Delivering consistency in messaging and materials;
- Making sure your brand is relevant to your target audiences;
- Consistency in how your employees and volunteers represent your organisation;
- Consistently following through on what your organisation promises;
- Having your board and leadership agree on the importance of having a strong brand; and
- Dedicating time and money to brand-building.

At this point, you've defined your brand by asking questions about why your organisation exists, what it does, for whom, and what it wants in the future. Now that your brand is identified, it's time to look into how to best communicate your brand.

### 3.2.3. KEY MESSAGES

As is probably obvious by now, an important part of building your brand, and its mission and vision statements, are words. Words form messages that people can identify with, so it's important that the language you use connects with people using language they understand.

People connect with messages. But more precisely, a message is a persuasive and crisp statement about your advocacy that identifies:

- Your goal(s);
- Why you think these goals are important;
- How you'll achieve your goals;
- What actions you want your audiences to take.

You've probably noticed that good advocacy messaging has a lot of the same things in common

as strong mission and vision statements in that it communicates what you want to achieve and why this is important. Figuring out messaging is important because it forms the basis for your advocacy. One strong basic message can be changed for different audiences. (For more on messages and audiences, see Chapter 4.) Next, we'll give you some pointers on how to go about creating strong messages through framing.

### 3.2.4. DEVICES USED TO COMMUNICATE YOUR BRAND

Now that we've reviewed what a brand is and how to figure out how to build your brand, we can move onto the three major ways your brand will be communicated: Your organisation's identity, name and logo. We'll start by briefly explaining what an identity is, then take you through what are usually the first contact points with your organisation: Your name and logo. Here, we'll also lay out tips for how to create strong names and logos.

#### 3.2.4.1. IDENTITY

What is your identity? Simply put, your identity is a combination of the things that communicate your brand to the outside world. And what types of things communicate your identity? What people see. So, everything from logos, to fonts, to pictures, to businesses cards, messaging and other written content.

If you want to create a strong brand, then all of these points need to look and feel the same. When all of these visual materials have the same look and feel, it helps you stand out from the crowd.

#### 3.2.4.2. NAME

The name you choose for your organisation or initiative is important because it's usually the first thing a person sees or gets to know about your cause. From it, people will get an initial impression of your organisation or initiative, what it does and its brand. A name can allow your organisation to grow or miss opportunities if it fails to adequately represent your brand.

To talk more about the power of a name, let's take a look at the following list of well-known actors and singers that have changed their names. Examining the name changes of celebrities is a good way to understand the power of name. It's important to note that people often view brands as having human characteristics and make emotional attachments to them.

Cherilyn Sarkisian	→	Cher
Richard Starkey	→	Ringo Starr
Norma Jeane Mortenson	→	Marilyn Monroe
Ralph Lifshitz	→	Ralph Lauren
Prince Rogers Nelson	→	Prince

What do all the names on the right have in common?

- They're short;
- Simple;
- Easy to spell and pronounce;
- Memorable;
- Unique—they stand out; and
- Say something about the identity of the person—they're descriptive.

Looking at the contrast between the names on the left and right, we can easily see, especially in the examples of Ralph Lauren and Cher, that simplicity is important in choosing a name. Additionally, a good name, in combination with a solid legacy of work, creates emotional attachment. Just think of how many people associate Ralph Lauren and his polo brand with quality clothing and will gladly speak highly of it.

Now that we've explained the power of names, it's easier to see why non-profits, like Greenpeace, Doctors Without Borders and Clinton Health Access Initiative, are good names. Each one is short, descriptive, simple, easy to spell, pronounce and remember, and is unique.

In addition, the names are also:

- Positive;
- Relevant to target audiences; and
- Broad enough to give the organisations room to grow, yet specific enough to provide meaning.

### How to Choose a Good Name

Now that we've gone over what makes a good name, we can get to the big question: How do you choose one? To get started with choosing a name, use the following prompts and write down your answers in lists:

- My organisation does...  
Here, you should write down action words that describe what your organisation does, such as teach, advocate, rescue, feed.
- My organisation helps...  
Here, think about what groups your services seek to help, such as patients, consumers, the environment.
- Are we a member-based organisation?  
Some organisations, like Health Action International, conduct advocacy with members. Others deliver services through members, such as Médecins Sans Frontières or Mothers Against Drunk Driving, which are made up of doctors and mothers, respectively. If your non-profit does have a specific type of member group, it may be a good idea to include it in your name.

Now that you've made your lists, start matching and playing with the words in them, and don't be afraid to combine terms to create new words like many famous companies have done (e.g., Greenpeace).

Once you've come up with a group of good names, you should do the following (in this order):

- Choose three to five good names based on the guidelines in the above section;
- Ask for feedback from your target audiences, fellow organisations or donors;
- Integrate feedback;

- Check with business registration authorities if desired names haven't already been taken;
- Check website domain availability for names; and
- Choose and register the name with relevant authorities, such as the chamber of commerce.

We'll now move on to the other aspect of your brand that gives a first impression: Your logo.

### 3.2.4.3. LOGO

A logo is a symbol, flag, mark, or signature that identifies an organisation or initiative. Your logo is a very unique representation of who you are as an organisation, meaning it should be instantly recognisable.

However, a logo doesn't necessarily describe what your organisation or initiative does, so much as it gets its meaning from the quality of your organisation. In essence, what a logo means is more important than how it looks. A logo, then, reinforces your overall brand, which is the larger essence of your organisation.

#### What Makes for a Good Logo?

A good logo is important because images often speak louder than words.

A good logo is:

- Simple;
- Memorable;
- Timeless;
- Multipurpose; and
- Appropriate.

If a logo is simple, it's easily recognisable and not complicated. Simple logos can typically be used for more than one purpose and are memorable. For example, the Health Action International logo, as well as the American Red Cross logo, are recognisable, simple and could be used for print, online, or even on the side of a building or bus station.



(Source: Health Action International)



(Source: American Red Cross)

Imagine someone quickly riding past a bus stop, or another person looking through a stack of letters from non-profits. In both cases, these logos, although simple in their approach, stand out and are memorable.

If a logo is timeless, it will still look relevant well into the future. In making a timeless logo, you should want to stand out, not necessarily follow the latest trends. A good example of this is the Levi's logo because it has barely changed since the founding of the company in 1837:



(Source: Levi's)

If a logo is multi-purpose, it means it's versatile. For example, we mentioned that our logo and the American Red Cross logo could be used for print, online, or on the side of a bus stop. When designing versatile logos, you may want to start in black and white. Why? Because it's the simplest form of a logo and colour can distract from the overall design development.

Versatile logos can:

- Be printed big or small;
- Appear on both horizontal and vertical formats; and
- Be printed in reverse (a light logo on a dark background).

An appropriate logo is one that fits its intended purpose. For example, if we're designing a logo for a law firm, we might not use the bright colours or playful fonts found in a logo for a toy store because it would make the law firm look childish. That said, the logo for the World Wildlife Fund (WWF) is appropriate, both in colour and subject matter:



(Source: World Wildlife Fund)

It's important to again note that a logo doesn't have to be taken literally, directly showing what services your organisation provides. The WWF logo above is a good example of this because it clearly identifies the non-profit in a simple, memorable, timeless and appropriate way that can be used on everything from letterhead and social media banners to big billboards on the side of buildings.

### How to Design a Good Logo

Designing a good logo can be summarised into the following steps:

- Knowing the definition of a logo and what it represents;
- Knowing what goes into a good logo;
- Understanding colour;
- Looking at other logos and learning from the good (and bad) ones; and
- Finding logo design software or pro bono design support to make your logo look professional.

We began this section on logos by defining what it was: A symbol, flag, mark, or signature that identifies an organisation or initiative (and conveys some wider meanings about it). It's a representation of the brand using shapes, fonts, words and colour—even images. Aside from knowing what a logo should do, you should know what makes a good logo, namely: Simplicity, effectiveness, timelessness, multipurpose in nature and appropriateness.

Above, we suggested you begin by focusing on the design's form rather than its colour. Still, we know that most logos have colour, and if you're considering colour, you should consider the following associations in many (but not all) contexts:

- **Red:**  
Frequently symbolises energy, sex appeal and boldness.
- **Orange:**  
Frequently symbolises creativity, youthfulness and friendliness.
- **Yellow:**  
Frequently symbolises optimism and inventiveness.
- **Green:**  
Frequently symbolises growth, organic matter and can be instructional.
- **Blue:**  
Frequently symbolises professionalism, matters pertaining to medicine, tranquility and trustworthiness.
- **Purple:**  
Frequently symbolises spirituality, wisdom and is evocative.
- **Black:**  
Frequently symbolises credibility and power (but also sometimes death).
- **White:**  
Frequently symbolises purity and simplicity.
- **Brown:**  
Frequently symbolises rural settings, history and being steadfast.



## TOP TIP

Try to limit yourself to two to three primary colours (excluding black and white). If necessary, because of the extent of your projects and programmes, you can consider adding a small set of secondary colours. The idea is not to overdo it, though. That means selecting complementary colour palettes and not using too many colours. There are many pre-fabricated colour palette suggestions available on the web to inspire you.

After clarifying what a logo does, what makes a good logo and learning about colour, take a look at logos that work and the ones that don't. With logos, as with many things in life, we can learn a lot from mistakes. Doing an Internet search for logos of poor quality is a way to get a feel for why certain logos don't work, like those below:



(Source: Logo Design Blog)



(Source: Logo Design Blog)

Having learned about what makes a good logo, along with what to avoid, you can now begin the design process. Try using free design software to make your logo (e.g., [LogoMakr](#), [Free Logo Design](#), [LogotypeMaker](#), [Logo Garden](#) and [Designimo](#)). Once you have a design or two that you like, be sure to test it to ensure it reduces well (so it's clean and legible) and works in black and white (you won't always reproduce your logo in colour).

### 3.2.4.4. STYLE GUIDE

A style guide, or 'style sheet', is a manual detailing the house style of your organisation or initiative. It's a template and resource file that clearly lays out fonts, layouts, colours, picture usage policies and other stylistic elements. Style guides are important because, once developed, they represent easy ways to make sure all internal staff and partner organisations know how to present your brand in its advocacy communications. This helps achieve something crucial in your advocacy communications: Consistency.

While a style guide doesn't need to be lengthy, it should include the following eight elements:

- Guidelines for the use of your logos.
- Your organisation's 'house style' for writing that relates to capitalisation, punctuation, abbreviations and other features.
- Any house style for web, e-mails and/or social media.
- A referencing system (e.g., Associated Press, Chicago Manual of Style).
- Proper names for programmes, projects and facilities.
- A glossary of terms specific to your organisation or its sector.
- Frequently misspelled or misused words.
- Optional: Links to downloadable templates for brochures, annual reports and presentations.

While this may seem low priority when compared to the other advocacy tasks at hand, taking the time to write down these preferences for your organisation or initiative saves a lot of time down the line. Imagine if you had to explain to every single person involved in a particular advocacy action not to abbreviate the name of your organisation or change the logo colours. It's important to also consider uploading this style guide onto an employee intranet, if you have one, or making it into an easily shareable PDF file.

### 3.2.4.5. PRINT MATERIALS AND TEMPLATES

For more on this topic, please refer to Chapter 5 on tools and tactics. There is an entire subsection devoted to this topic.

# 4. COMMUNICATIONS PLANNING FOR ADVOCACY

## 4.1. THE 'WHAT' AND 'WHY' OF COMMUNICATIONS PLANNING

A communications plan is a focused, brief plan that guides the communications for a particular project, event, or initiative. (For more on communications strategy, jump to page 31.) A communications plan follows the basic structure of a larger communications strategy, but presents less analytical detail and more specific information on implementation planning (e.g., the listing of objectives, tasks, goals, target audiences, messages, communications tools, timelines and budgeting).

Why plan? If you know where you're going and what you hope to accomplish for your organisation through your communications efforts, it becomes much easier to plan the most

efficient and appropriate route. But how do you begin? Start at the end: Consider what success looks like for your organisation, then work backwards to develop a plan of action to get you there.

While each communication plan should be tailored to the specifics of your organisation and its goals, most communications contain the same elements:

- Summary/overview of plan;
- Goals (general);
- Objectives (specific);
- Target audiences;
- Key messages;
- Strategies (approaches);
- Tools and tactics;
- Timeline;
- Budget; and
- Evaluation (what success would look like and has that been achieved).

At first, that can seem like a long and intimidating list, but when you look at things slightly differently, you realise communications planning is simply answering a series of basic 'who, what, where, when, why and how' questions about your advocacy communications.



## POP-OUT

### Communications Planning: Who, What, Where, When, Why and How?

<b>Who?</b>	What audience(s) are we trying to reach? What do we know about them and their understanding, their information needs and their preferences? What secondary audiences are we also trying to reach?
<b>Why?</b>	What purpose do we have in mind? What are we trying to achieve? What do we want to audiences to do? What are our objectives?
<b>What?</b>	What information or messages—what content—do we want to convey in order to achieve our objectives and to motivate and mobilise the audience(s)?
<b>How?</b>	What communication channels or media will be most effective in doing this? What combination of channels will work best?
<b>When?</b>	What critical timing is involved? Are there key windows of opportunity? Are there key dates by which something needs to happen?
<b>Where?</b>	In what settings will our communication be used? Do we need to adapt our approach for different settings?
<b>What's happening?</b>	Is the communication working? Is it achieving what we hoped it would? What feedback are we getting from our audience(s)? How can we improve the feedback to ensure that the communication is working?

(Source: Medicines Transparency Alliance)

Remember: Without a plan, your advocacy communication efforts will either not be realised, or will be less effective than they should be.

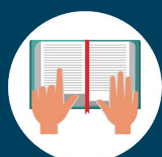
Given our focus on advocacy communications, we discuss evidence-based campaigns before providing more in-depth information about the elements of a communications plan introduced above.

## 4.2. EVIDENCE-BASED ADVOCACY AND CAMPAIGNS

In order to persuade legislators or other officials to change laws and policies, to provoke an official investigation, or to sway public opinion, you'll need information and evidence. Evidence-based advocacy is a process based on data and information. Needs are measured with a view to advocating for improving current efforts, as well as identifying gaps. The process integrates otherwise independent data from different



sectors—research and academia, policy, action groups, clinicians, practitioners and others—into a single analysis to inform advocacy. There is widespread recognition that policy-making and advocacy aimed at policy change should be based on evidence. At Health Action International, we believe that successful advocacy campaigns require the gathering of ‘evidence’ through foundational research.



## TOP TIP

Always double check information and source it properly! It's better not to rely upon data that is open to a variety of interpretations and always be ready to challenge claims by opponents with the arguments that support the aims of your campaign.

### 4.2.1. WHY DOES THIS APPROACH WORK?

The advantages of whatever you're advocating for may seem obvious to you, but that doesn't mean they're obvious to others. You'll have to show them that your ideas will significantly benefit the community. Conducting foundational research to find such evidence can help you achieve this because:

- Evidence gives your advocacy substance. Your research adds facts and statistics to your belief and passion. The latter two are important, but they won't convince too many people who disagree with you while hard evidence might.
- Evidence gathering produces new information to help make your case. Often, your research will turn up powerful information that even you didn't know about. It will also help you judge the amount of funding needed, approximately how long it will take to see results and the likely consequences of doing nothing.

- Evidence can show you what's most likely to address your issue successfully. As an advocate, you have to know exactly what to advocate for. What have others done that's worked? What affects the issue in an experimental situation? The answers to these will put you in a position to choose and advocate for strategies that are likely to be effective.

- Evidence gathering can provide you with anecdotes and examples to use. While statistics are most convincing in certain situations, one actual, real-life example is often more powerful than reams of data. Why? This makes the issue much more immediate and real. An anecdote doesn't prove a case, but it can make it easier for people to understand exactly what the issue is about. Hearing someone else's story makes people realise, "That could be me," and gives politicians a way to explain to voters why they favour a policy or bill.

- Evidence allows you to make cost-benefit arguments. Here's an example: If you know that a branded medicine costs 90 percent more than its generic equivalent, which contains exactly the same active ingredient, you can easily do the math on which medicine is most cost-effective in treating patients.

- Evidence gives you credibility. If you do your research well, it identifies you as a serious advocate who does the groundwork before you try to convince people of your position. It will make people more willing to listen to you and believe what they hear. With this kind of careful research and evidence gathering, you're also better able to deal with the opposition because you should already have the information to answer their questions and disprove their claims.

Advocacy based on inaccurate information or false claims is unethical, can be potentially injurious and represents a wasted effort—even the best-intentioned and valid campaigns can easily be discredited by opponents if it relies upon faulty data.

**Table 3. Getting Started: Fact-Finding and Research**

Different kinds of questions require different kinds of answers. Knowing what you need is the first step.

Type of Question	Example	Sourcing the Answer
If the answer you're looking for is one of known fact...	What is oxytocin? How does it prevent postpartum hemorrhage?	Find it by looking through books or Internet articles, or by consulting an expert.
If you're seeking reinforcement for your advocacy for a particular intervention...	How high are the prices of oxytocin in my country? How do these prices compare to similar countries?	You may have to conduct a study of some sort, or sift through existing records.
If you're trying to find facts that will help you convince policy-makers to move in a particular direction...	How many women in my country have died from postpartum hemorrhage in the past five years?	You may find yourself studying hospital records or census data.
If you're searching for evidence of harmful and/or illegal action on the part of a corporation or government agency...	Is that pharmaceutical company dumping waste directly into the river again?	You may have to do some actual detective work: Searching through documents, taking pictures, analysing samples of river water, talking to employees.



## TOP TIP

Looking for data or other information about insulin, specifically? Check out the results of Health Action International's ACCISS Study. The online ACCISS Toolkit provides easy-to-find research reports, fact sheets, an interactive map of insulin prices around the world, and much more. Go to [www.accisstoolkit.haiweb.org](http://www.accisstoolkit.haiweb.org).

Furthermore, evidence-based advocacy is particularly valuable when you're trying to get legislation passed. In this situation, you need research to produce evidence for two reasons:

- To show the need for the legislation. For example, federal funding for AIDS research in the United States increased when advocates were able to demonstrate that the disease had reached epidemic proportions, and that it affected not only gay men, but other segments of the population, as well.
- To show public support for proposed legislation. When legislators know that their constituents really want them to vote for a bill, or to address a particular issue, they'll generally do it, especially in an election year. If you can demonstrate—through surveys, interviews, or other means—that the public backs your effort, it puts you in a much stronger position.

Remember to match the kind of research you do with the kind of evidence you want to uncover.

### 4.2.2. TIPS FOR EFFECTIVE EVIDENCE-BASED ADVOCACY

- Ask for help: You don't necessarily have to do everything yourself. There may be many possibilities for assistance, so don't be afraid to ask other activists, academics and experts,

librarians and/or journalists for help in carrying out your research.

- Try to find out if someone's already done the research you're planning so you don't duplicate efforts: There may already be studies relating to the issue you're concerned with, or someone else in the community may already have spent weeks finding the information you're looking for. Don't make life any more difficult than it has to be: Look around before you begin. This can also save a lot of time.
- Learn the basics about your issue, including relevant laws and policies. Know them inside and out, backwards and forwards.
- Know what you're going to use the information for in advance.
- Be sceptical about your sources and check all your facts twice.
- It's useful to research the history of your issue and initiative and what has happened since.
- Issue-related evidence should include local, national and international impact data whenever possible.
- Evidence should also take into account other known interventions or possible solutions and their outcomes, as well as obstacles to action. Assessing the current places where similar advocacy communications are taking place is also an important form of evidence gathering.
- It's useful to analyse, even briefly, how your issue is being discussed (e.g., using what images, by and to whom). You might also include a quick media audit to the activities already outlined as part of your fact-finding and formative research.

Remember, evidence on its own does not persuade: It's what you do with the evidence that matters. In the coming sections, we'll further describe how to use the evidence you've collected.

## 4.3. ELEMENTS OF COMMUNICATIONS PLANNING

In this section, we return to the elements that typically go into communications planning. Each sub-section details a particular step in the planning process and is accompanied by tips and interactive elements to help you in your own communications planning.

We strongly urge you to use Worksheet 3: Communications Planning Template (page 46) as you work through each section of this chapter—completing each column after you read about the corresponding section.

### 4.3.1. START WITH A SWOT ANALYSIS

A SWOT analysis is a study undertaken by an organisation to identify its internal strengths and weaknesses, as well as its external opportunities and threats. Put differently, SWOT is a simple tool to analyse your uniqueness. SWOT stands for ‘strengths, weaknesses, opportunities and threats’. Ultimately, this helps you focus on your strengths

and minimise threats while taking the greatest possible advantage of opportunities available to your organisation. Including SWOT in strategic planning helps provide a good all-around view of the organisation’s current and forward-looking situation.

Go ahead and get started. Flip to page 47 at the end of this chapter to Worksheet 4: SWOT Analysis. This typically takes about 15 minutes to complete.

#### 4.3.2.1. MOVING FROM SWOT TO STRATEGY

Once you have your list of strengths, weaknesses, opportunities and threats, you’ll need to take the exercise one step further to create strategies for your advocacy communications. Ask and answer the questions in Table 5.

**Table 4. SWOT Analysis**

<b>Strengths</b>	Things we’re good at or that work in our favour. We must keep these, build upon them, and use these strengths to our advantage (e.g., when you have good scientific evidence).
<b>Weaknesses</b>	Things we’re not good at or will work against our interests. We work to avoid or get rid of these weaknesses (e.g., not having enough communications resources).
<b>Opportunities</b>	Things that might work in our favour if we identify and capitalise upon them (e.g., knowing a prominent journalist).
<b>Threats</b>	Things that might hurt us or hamper our work. We need to identify and manage these issues (e.g., hostile industry groups).

**Table 5. Questions for Creating Strategies for Advocacy Communications**

	Opportunities (external, positive)	Threats (external, negative)
Strengths (internal, positive)	Which strengths can be used to maximise identified opportunities?	How can you use your strengths to minimise identified threats?
Weaknesses (internal, negative)	What action(s) can be taken to minimise weaknesses given identified opportunities?	How can you minimise weaknesses in order avoid the threats you've identified?

As you answer these questions, you'll start to create actionable strategies. For example, if one of your strengths is having an experienced grant writer on your team, you should put that person in charge of applying for new federal grant opportunities. That's a strategy that you can implement immediately. We'll address strategies a bit further on, but feel free to jump to page 31 to read more about them.

#### 4.3.2. GOALS

Putting together any communications plan, both on the strategic and implementation levels, requires the clear articulation of goals. A goal is aspirational—your ambitions for where you want to be or the future of your advocacy issue. While we discuss objectives in greater detail in the next

section, it's important to differentiate between the two terms. Objectives, on the other hand, specify the step one must take to reach their goals.

If you're asked what the goal of your advocacy campaign or group is, your answer may come out in the form of your mission statement: 'Our aim is to ensure that people living with type 1 diabetes in Mali can access insulin.' However, for planning purposes, goals should be split into much more specific steps. Rather than trying to cover too much ground, it's important to keep your focus on a relatively narrow, manageable group of issues. It's also important to split up the goals according to your timeframe. To obtain long-term results, we need to have mid-term and short-term goals that will lead to the outcomes we desire.



## EXAMPLE

### Setting Goals

<b>Mission</b>	<i>'Our aim is to ensure that people living with type 1 diabetes in Mali can access insulin.'</i>
<b>Long-term goal</b>	<p><i>'Five years from now, 100 percent of healthcare facilities in Mali will be able to procure insulin.'</i></p> <p>This goal spells out where you want to be by the end of your advocacy campaign or initiative.</p>
<b>Mid-term goal</b>	<p><i>'In two years, the Government of Mali will clarify the insulin tendering process.'</i></p> <ul style="list-style-type: none"> <li>• Focuses on community and system changes—new or modified programmes, policies and practices in the local community or the broader system.</li> <li>• Provides concrete building blocks towards the ultimate goal while helping the group feel that it's accomplishing something in the meantime.</li> <li>• They provide earlier benchmarks to measure your progress against.</li> </ul>
<b>Short-term goal</b>	<p><i>'By January, we'll finish mapping 'insulin need' at every healthcare facility in Mali.'</i></p> <ul style="list-style-type: none"> <li>• Like intermediate goals, a short-term goal helps keep a group motivated, providing more immediate benchmarks in the form of action steps.</li> </ul>

### 4.3.3. OBJECTIVES

Developing objectives is an important step in your planning process because this is where you start laying out the steps you take to reach your goals. Objectives are the specific measurable results of a particular initiative. An organisation's objectives

offer specifics of how much and of what will be accomplished by when. This is the time when your organisation begins to make clear what, exactly, it's going to get done in order to achieve your advocacy initiative.



## EXAMPLE

### Example of an Objective

One of several objectives for a community initiative to promote caring for the elderly might include: By 2040 (by when), to decrease by 80 percent (how much) the number of people living with type 1 diabetes who report rationing insulin because of the cost (of what).

Developing objectives helps your organisation create specific and realistic ways in which to carry out your mission, as well as set priorities for its goals.

Remember that completed, SMART objectives can serve as a marker of what you've accomplished and may be something partners, funders and other collaborators want to see.

### 4.3.3.1. GETTING STARTED: DETERMINE THE CHANGES THAT NEED TO BE MADE

The writing-up of realistic objectives is a process of learning what changes need to happen in order to fulfil your mission. Remember, objectives refer to specific measurable results. These changes in behaviour, outcome and process must be able to be tracked and measured in such a way to show that a change has occurred.

Once your objectives are finished and satisfactory to members of your organisation and important people outside of your group, you're ready to move on to identifying your audiences and developing successful strategies.

### 4.3.4. AUDIENCES

Ask yourself: To whom do I want to communicate? While just about everyone may benefit from hearing your message, you're unlikely to have the time or resources to adequately achieve this. That's why it's important to concentrate your efforts where they will have the greatest impact.

**Table 6. Common Characteristics: SMART Objectives**

<b>S</b>	Specific	They tell how much (e.g., 40 percent) of what is to be achieved (e.g., what behaviour of whom or what outcome) by when (e.g., by 2040).
<b>M</b>	Measurable	Information concerning the objective can be collected, detected or obtained from records (at least potentially).
<b>A</b>	Achievable	Not only are the objectives themselves possible, it's likely that your organisation will be able to pull them off.
<b>R</b>	Relevant	Relevant to the mission—your organisation has a clear understanding of how these objectives fit in with the overall vision and mission.
<b>T</b>	Timed	Your organisation has developed a timeline (a portion of which is made clear in the objectives) by which they will be achieved.


Some target audiences to consider:

- Those most directly affected by the issue;
- Leaders of institutions (e.g., schools, places of worship, service organisations, the media, the government and so on); and
- Other community leaders.

Begin by making a list of one to four specific groups or people to address from each subcategory listed above.

#### 4.3.4.1. AUDIENCE TYPES

There are many different ways to look at and categorise your audiences. For instance, there may be different (primary and secondary) target audiences for each objective. Understanding these target groups—knowing, for example, how they function, what media influence them, their weak spots—will help advocates develop appropriate messaging and channels of communication.



## DEFINITION

**Primary target audience(s):** Individuals and/or institutions with decision-making authority.

**Secondary target audience(s):** Individuals and institutions that can influence decision-makers.

Effective planning for any advocacy also requires knowledge and understanding of both your supporters and your opponents. Advocates need to be able to anticipate the reaction of adversaries and continuously improve and reformulate arguments about their particular issue to account for new developments over time. It's also crucial to know your peer institutions. You'll have conducted much of this formative research at the beginning your evidence-based advocacy efforts.

#### 4.3.4.2. SELECTING YOUR AUDIENCES

While differentiating between audience types can help you uncover certain characteristics of your target audiences, the process of selecting specific target audiences can be made easier by working through the following steps:

1. For each objective, define your target audience: To do this, you'll need a satisfactory understanding of the decision-making system. Once the decision-making process is clear, it may become evident that a key target decision-maker is not directly accessible. In such cases, it may be necessary to work through others to reach the key decision-maker.
2. For each target, identify individuals or groups (i.e., influencers) who can deliver the message to that target. The messenger you select should be someone who is at ease at communicating in public, convincing and genuine. For example, with health advocacy, a prestigious doctor is likely to have the greatest influence on a health minister, whereas a top economist may be more convincing when approaching a finance minister.
3. Understand the target audience(s). Note that target audiences may be in favour of the change, undecided, or even opposed to it. Consider their motivation and interests, and the nature and format of information needed to persuade them. (For more on writing to persuade, see page 36.)

Once your audience is selected, you'll want to pre-test your messages with select members. Pre-testing is a way to cut through your own assumptions and make sure your advocacy message resonates with the intended audience. Doing a little pre-testing in advance can save your organisation a lot of time and heartache that may be felt if you proceed with untested and potentially ineffective messages.



Given all the elements involved in discovering your various audiences, including key supporters and opponents within them, we've included several worksheets at the end of this section to help you identify these target audiences.

If you haven't taken the time to map your various audiences and stakeholders, now is a great moment (jump to Worksheets 5, 6, and 7, starting on page 48).

### 4.3.5. STRATEGY

In a certain sense, advocacy is itself a strategy—it's the way you've decided to reach your particular goal because you can't get what you want without taking on some institutions and people who have power, and getting those power structures to change. That said, at this stage you'll need to develop specific strategies to help you reach your outlined goals.

#### 4.3.5.1. WHAT IS STRATEGY AND WHY IS IT IMPORTANT FOR MY ADVOCACY COMMUNICATIONS?

A strategy is a way of describing how you're going to get things done. It's less specific than an action plan (which tells the 'who-what-when') and broader than objectives. Instead, the strategy broadly asks and answers the question: How do we want to get from here to there (e.g., walk, fly, by train). In other words, it provides the overall direction (without dictating specifics, such as the particular mode of transport). Developing strategies is really a way to focus your efforts and figure out how you're going to get things done.

Many different actions fit under the definition of strategy, and they may incorporate many different styles that range from friendly persuasion to something slightly more confrontational (e.g., a march or boycott action). Your choice of style will depend to a great extent on your knowledge of the community and what will work (as well as your knowledge of your members and allies, and what they can do best and most comfortably). The people and institutions of a community are connected in

complicated ways, and people may see their own interests threatened if certain institutions seem to be under attack. Yes, you can change people's attitudes, but this may take time and certainly careful planning.

A good strategy will take into account existing barriers and resources (e.g., people, money, power, materials). It will also stay with the overall vision, mission and goals of the initiative. Often, an initiative will use many different strategies, such as providing information, enhancing support, removing barriers, providing resources and lobbying policy-makers, to achieve its goals.

Your strategy will also work to create a shared understanding of what you're trying to achieve within your organisation and provide a foundation for consistent communications across all units. It should also improve internal awareness of your issue and allow non-advocacy and communications staff to be more involved in advocacy. In addition, a strategy will encourage efficient use of resources and time.

#### Some Criteria for Developing a Good Strategy

Does the strategy:

- Give overall direction?  
A strategy, such as enhancing experience and skill, or increasing resources and opportunities, should point out the overall path without dictating a particular narrow approach (e.g., using a specific skills training program).
- Fit resources and opportunities?  
A good strategy takes advantage of current resources and assets, such as people's willingness to act or volunteer their time.
- Minimise resistance and barriers?  
When initiatives set out to accomplish important things, resistance (even opposition) is inevitable. However, strategies need not provide a reason for opponents to attack the initiative. Good strategies attract allies and deter opponents.

- **Reach those affected?**  
To address the issue or problem, strategies must connect the intervention with those it should benefit. For example, if the mission of the initiative is to get patients to stop demanding antibiotics from their doctor for a cold or flu, do the strategies (such as increasing awareness and providing education) reach those patients?
- **Advance the mission?**  
Taken together, are the strategies you've outlined likely to have a positive influence on achieving the goals and mission?

Remember, strategies are the broad strokes: They don't spell out specifically how something will get done. That's the job of the objectives and tools and tactics (or action steps) that you choose, which comes next in the planning process.

Before moving on, check your strategies for completeness, accuracy and whether they contribute to the mission. To assist in this, complete Worksheet 8 on page 51.

#### 4.3.6. KEY MESSAGES

Your message will form the basis of all your advocacy communications—from stories, to media releases, to social media posts. It will help you to stay on track and remind you what you set out to achieve and why. Importantly, having a message also enables everyone in your organisation to understand what you're trying to achieve so they can speak to others about it with confidence.

##### 4.3.6.1. WHAT'S A KEY MESSAGE?

We know that identifying key messaging and crafting messages for impact are important, but what exactly is a message? A message is a concise and persuasive statement about your advocacy objective that captures the following four elements:

- What you want to achieve (e.g., access to safe, effective and affordable insulin).

- Why you want to achieve it, or the positive consequences of action (including better health, while no action will result in negative consequences, such as people continuing to die unnecessarily).
- How you propose to achieve it (e.g., by getting the government to prioritise insulin manufacturing and procurement in the budget).
- What action you want the audience to take (e.g. writing to their political representatives).

Messages should encapsulate everything you need to say, but they're not the same as slogans or sound bites. A quality message can be adapted and tailored to fit specific audiences. Even when a key message is modified using different words (but the central meaning remains the same), the repetition of your message improves the likelihood that decision-makers and other key advocacy targets will remember it.

#### Characteristics of an Effective Message

Messages should be:

- **Single-minded and focused:**  
Conveying just one idea at a time.
- **Meaningful:**  
Connect with your audience.
- **Important:**  
Useful and significant.
- **Direct:**  
Be straightforward.
- **Clear:**  
Written in simple, non-technical language. Where possible pre-test language.
- **Brief:**  
None of these four sections should be more than 40 words long (160 words in total).

- **Inspiring:**  
Be clear what will be the difference (e.g., disease rates will be reduced by 30 percent) by highlighting the positive side of what you're doing without misleading.
- **Credible:**  
Honest and support with evidence.
- **Giving people something to do:**  
The message should not only persuade through valid data and sound logic, but should also describe the action the audience is being encouraged to take.
- **Memorable:**  
Focus on the main points. (You don't need to get into detail.)

Before moving on, please complete Worksheet 9: Crafting Your Advocacy Message that's included at the end of this chapter (page 52).



## POP-OUT

### Framing Your Messages

As advocates, we're passionate and believe in what we do, but this doesn't mean we know how to frame a message so we get the desired response. Framing is when you take parts of a perceived reality and clarify them towards the end of promoting a particular way of seeing things. When we frame issues in messages, we put them into a context using words because the way an issue is delivered influences the way it's received and how people respond to it.

For example, if we're trying to get policy-makers to make good on their commitments to increase access to contraceptives, we might frame the issue in political terms, reminding them of their responsibilities to the Sustainable Development Goals, and how supporting them can transform the country.

#### 4.3.6.2. STORYTELLING

Storytelling is a powerful way to communicate information and share ideas. When a story is told well, both readers and listeners will use their own imaginations to picture the situation. They make mental leaps forward to visualise implications that go far beyond what is said in the story itself. The connection created between the reader or listener and the story is emotional as well as intellectual, which means the story will be remembered for longer.

##### What Makes a Good Story?

The basic elements of any story are pretty simple: Who, what, where, when, why and how? But your story will be competing for media attention with many others, so it needs to be

crafted in such a way that it stands out or cuts through all the other communications noise your audiences navigate daily. To attract attention and get readers, your story must be relevant, timely, engaging and original.

Often, a good story includes a human-interest angle (the aspect of a story in the media that interests people because it describes the experiences or emotions of individuals to which others can relate) to evoke an emotional response.

Ask yourself:

- Is some or all of the story new or recent?
- Does it link to other stories already in the news?
- Does it have a 'human face'?

- Does it challenge commonly held assumptions?
- Does the subject of the story have a potential impact on a large number of people?
- Will readers identify with the issue?

If the first paragraph of your story does not meet two or more of the criteria above, then you should try to look for a new angle (e.g., instead of talking about the impact of poor access to insulin and life expectancy, try linking to production levels and highlight its economic costs).

### Template for a Good Advocacy Story

In this subsection, we provide a short template to follow when storytelling:

**Synopsis/Introduction:** A first paragraph that summarises in a few simple words, the key messages you want to get across; why the issue is important; who is involved or affected, and where; why it's significant right now; how the situation has arisen and what needs to happen.



## TOP TIP

Arrange your story so the most important facts appear at the beginning. The first paragraph should contain enough information to give the reader an overview of the whole story. The rest of the story then expands on this part.

The next one to two paragraphs need to establish:

- **The Setting:**  
Give your audience a sense of place (e.g., urban, rural, or suburban; technology-rich or barely equipped?). Help others imagine the situation and place you're talking about.

- **The Key Characters:**  
Who's important to the story—a particular individual, a local council, mothers, service providers or the government? Introduce us to your lead characters. Ask yourself: Who are the heroes? Who are the villains? Help us imagine them.

- **Closing:**  
Wrap-up by reiterating the main points and their potential impact on vulnerable communities and wider society. Don't forget to include a 'call to action'.

Finish by reviewing and editing your stories—the aim of this is to sharpen your story even further.

Six questions to sharpen your stories:

- Who is the protagonist ('good guy')?
- Where's the conflict?
- What keeps it interesting?
- What's the hook?
- Have you included some specific details?
- Is the meaning of everything of clear?

If you can easily answer all six, you're ready!



## DEFINITION

**'Call to action':** A call to action (usually abbreviated as CTA) is an image or line of text that prompts your readers to take action. It's, quite literally, a 'call' to take an 'action'. The action you encourage people to take can be in many forms: Call their legislator, download an e-book, sign up for a webinar, or attend an event. A CTA can be placed anywhere in your marketing—on your website, in news articles, stories and social media posts



## EXAMPLE

### Effective CTAs

Amplify their message; Attack; Back down; Back off; Beef up; Block; Boldly show; Break the silence; Change this; Crank up; Defend; Demand that X acts; Dial up; Don't sit in silence; Don't stop now; End this; Expand; Expose; Fight back; Fix this; Keep going; Launch a blitz; Make a push; Pressure X to do Y; Prevent; Protect; Push back; Put an end to this; Rein in; Rise up; Safeguard; Secure; Seize the momentum; Show that we will not stop fighting; Speak as one; Speak loud and clear; Speak out; Stand strong against; Stand up for; Stand with; Step in; Step up; Stop; Take a stand; Take back; Tell; Urge; and Won't tolerate.

### Giving Your Stories a 'Human Face'

There are multiple ways to accomplish this—from writing in a humane, accessible way to including quotes and storytelling about individuals.



## TOP TIP

### Tips for Using Quotes

Use quotes! Get and use quotes about the things going on in your story and make sure you have their full name, age, position and organisation, so you can use this with the quote. Quotes can come from people affected, government ministers or local politicians, celebrities, the head of your organisation, or any other relevant person. Why? Quotes liven up the text and make what you say seem more personal. Try to find new and interesting sources for your quotes rather than relying on the same people all the time.

Six questions to ask when telling a story about someone:

- Are there any potential privacy and/or security issues involved for either party?
- Could the story cause them harm or embarrassment?

- Have you asked the person's or group's permission?
- What reward or incentive does this person or group have for sharing their personal experiences with a larger audience?
- How would it feel if someone was telling a similar story about you?
- Can I collect an image of the person or group to use with the quote (with permission)?



## CHECKLIST

### Your Story Should...

- Engage, persuade (for more, see page 33) and motivate readers.
- Create awareness.
- Paint a picture.
- Use everyday language and authentic details.
- Make an emotional connection.
- Be something that someone will likely remember and repeat.
- Create a sense of injustice in order to mobilise support.
- Gain the endorsement or interest of the media.
- Have impact and stand out from other so-called 'communications clutter'.

### 4.3.6.3. MESSAGES THAT STICK

You may want to develop messages for specific audiences, campaigns, programmes and projects. But keep in mind that all messages should relate back to your brand, be memorable, and be relevant to your target audience. They should include a strong call to action and support your organisation's mission. It's also a good idea to develop standard language to describe key programmes and projects for use in speeches, letters and proposals; not only does it enhance consistency, but it can save you time.

Here are five tips for crafting messages that stick:

- Make use of analogies (a comparison between one thing and another);
- Do something unexpected (a short circuit between two mental frames);
- Use specific and concrete language and details;
- Tap into positive or negative emotions;
- Feature real people in your stories, especially those from affected communities;
- Use the principles of persuasion.

### Principles of Persuasion

Principles of persuasion can be used to increase community interest in your topic and win people over, both fairly and ethically, to your way of thinking.

A persuasive message is more likely to be effective if it:

- Gets the audience's attention. To grab someone's attention, try some of these techniques: Use novelty; contrast with other stimuli (so it stands out); use the element of surprise; and maximise aesthetic qualities to better capture attention.
- Is repeated. Research strongly suggests that, in most cases, the more often a message is repeated, the more readily it's believed and remembered.

- Offers benefits or rewards to your intended audience. In short, people can be persuaded if there's something in it for them (i.e., minimise projected/perceived costs and emphasise the benefits).
- Is endorsed by others in authority or of high status in the community and/or in your group. (Rely on your formative research to identify allies and other influences inside and outside your organisation.)
- Suggests that a benefit offered is scarce or limited (e.g., 'we don't have many left', or 'limited time offer', or 'deadline expires 1 November').
- Is consistent with past behaviour or expectations of the audience. People resist believing or acting in ways inconsistent with their previous beliefs or actions.
- Appeals to the norms or your audience or your target group.

While your specific persuasive tactics will vary from occasion to occasion, there are some general guidelines that will apply to a large number of persuasion situations, both written and oral. They include: Knowing and mastering your facts (so they're at the tip of your tongue); using opinion leaders; making a strong opening (that is both attention grabbing and supported by evidence); and getting directly and quickly to the point.

### 4.3.6.4. ELIMINATING JARGON

Jargon is specialised language only understood by a particular group of people, such as members of a particular profession. Medical jargon is common in the health field. It's best to avoid words that you think are jargon and instead use everyday words that most people are familiar with and understand.

For example, the sentence, “T1D and T2D are projected to become the seventh leading cause of global mortality by 2030,” could be expressed as, “By 2030, diabetes could be the world’s #7 killer.”

Tips for eliminating jargon and other unclear usages:

- If you need to use a word that you think is unfamiliar to people, make sure you explain what it means as simply as possible when you first use it. Using examples can help people understand new terms.
- Spell out acronyms when you use them the first time in a publication, with the shortened version following in brackets. Do not assume that people will know what an acronym stands for, even if you consider it to be in common use.
- Make sure the meaning of words is clear. If you use a pronoun like ‘she’, ‘he’, or ‘it’ (instead of a noun like ‘Alice’ or ‘medicine’) make sure it’s clear who or what is being referred to.

#### 4.3.6.5. CONSIDERING VULNERABILITIES AND SENSITIVITIES

Culture is a strong part of people’s lives. It influences their views, their values, their humour, their hopes, their loyalties, and their worries and fears about the future. So, when you’re working with people, communicating and building relationships with them, it helps to have some perspective and understanding of their culture and identity. Gaining this type of cultural perspective involves an open mind and the ability to withhold judgement.

Considering cultural context also enriches our communications because it lets people know that we’re thoughtful, respectful and sensitive to different ways of moving throughout the world. Additionally, from our work to understand where

another person is coming from, we begin to see our own world differently, which gives us new perspectives for advocacy. It also signals internally and externally that your organisation or initiative strive to be both empathetic and inclusive.

Besides individuals from different cultures, we must also be aware of those from vulnerable populations, such as children, pregnant women, the elderly, and ensure the way we talk about issues surrounding them does not contribute to increasing their plight. Here, as was the case with individuals from different cultures other than our own, we should learn about the reasons for their vulnerability and the circumstances that create it. Learning about these things not only creates a better and safer working environment, but gives our advocacy communications a boost because it will be able to communicate ideas in language that the groups, themselves, can recognise and understand.

#### 4.3.7. INTRODUCTION TO TOOLS AND TACTICS

This is the stage of the planning process where you consider the appropriate tools and tactics to realise the objectives and messages you outlined. Some people call this step the ‘action plan’. No matter its name, here is where you decide what media, channels and methods are the best fit for your goals. Given the number of options, matching the right tools to the right job requires some planning. It’s about finding the most effective ways of reaching your target audiences in a timely and cost-efficient way.

We delve into this topic more deeply in Chapter 5, which is devoted just to tools and tactics. But the following cost-benefit analysis chart gives some introductory ideas about the cost, reach and best uses of various mediums that should be taken into consideration when deciding what tools and tactics are most appropriate.

**Table 7. Cost-benefit Analysis Chart**

Vehicle	Reach	Cost	Best Use
Annual report	Targeted	High	Steward and attract donors, foundations, partners and others
Donor or membership newsletter	Targeted	Low to mid	Steward and attract donors/constituents
Magazine	Targeted	Mid to high	Build awareness/steward and attract partners and media
Event (major, like black-tie, fundraiser, or conference)	Targeted	High	Steward and attract donors, partners and media
Event (minor, like open house, or lecture)	Targeted/ general population	Low	Attract new constituents, donors
Case for support	Targeted	High	Attract donors and prospects
Direct-mail appeal	Targeted	Low to high	Attract donors
Website	General population	Low to high	Promotional/informational
E-newsletter	Media/ general population	Low	Reach constituents and donors
Viral marketing	General population	Low	Reach new supporters and constituents



**Table 7. (Continued)**

National media distribution	Media/ general population	Low to mid	Build awareness/reach new audiences
Video news release	General population	Mid	Build awareness (for small- to mid-sized markets)
Public opinion poll	General population	Mid to high	Benchmarking/testing
Advertising (print)	General population (unless specialty publication)	Mid to high	Build awareness/reach new audiences
Advertising (TV)	General population	High	Build awareness/reach new audiences
Advertising (cable)	More targeted than broadcast	Mid to high	Build awareness/reach new audiences
Advertising (radio)	General population	Mid	Build awareness/reach new audiences
Window displays, bumper stickers	General population	Low	Build awareness/reach new audiences

(Source: Cause Communications)

#### 4.3.8. TIMELINE

Creating a timeframe is another key component of communications planning. Your audience has to physically hear (or see) the message before being persuaded by it. Otherwise, nothing else can happen. Attention to the message must come first and planning and timing that is key. Try planning your advocacy actions at key moments—when people are usually online, in a public space to see a demonstration, or before a big legislative vote.

Advocacy is generally not a one-off activity; therefore, it's important to decide when you'll first share certain messages and how you'll continue sharing them over the course of weeks or months. Consider how often you want your audiences to hear this message and that repetition helps them understand the message and adopt it as their own.

Realise that this time frame is tentative and may need to be modified as you implement your strategic communications plan. It's crucial to remain flexible. Unforeseen events will arise, which means that you should think through

alternative situations when your initial plans don't work out. Of course, you can't predict everything, but thinking through alternatives and having back up plans or modifications ready will strengthen your communications planning.

#### **4.3.9. BUDGETING: LOW BUDGET, HIGH IMPACT**

In this section, you'll discover why you need a communications budget and how to use this information to plan accordingly. Budgeting is especially important when you have limited funds because you need to maximise how each dollar is spent.

A good budget does the following:

- Clearly outlines costs and expectations in your budget for a certain timeframe.
- Is realistic and specific about what things actually cost.
- Identifies the areas and levels of expertise you're missing before hiring staff, interns, or consultants.
- Considers how partnering with like-minded organisations can maximise the effectiveness and reach of your advocacy communications.
- Demonstrates to board members and others the return they'll receive from investing in communications (e.g., increased revenues, advancing the mission, or reputation building).

A few additional details to consider when putting together your budget:

- Know the cost per piece of the materials you produce, but don't make your decisions based on cost alone. Sometimes a higher cost per piece will also have a correspondingly higher level of readership or engagement than those that cost less.
- Get competitive bids for every project. Ask for bids offering the same level of quality to compare prices. At the same time, also ask for client references and portfolios so you have all the necessary information to make an informed decision.
- No matter what kind of communications tactic or tool, know exactly what you're getting for your money.
- Don't forget to include the small details: Design, print and photography estimates often don't include sales tax.
- Double check that the images you use are royalty-free, or that you've negotiated any necessary usage rights that you need.

##### **4.3.9.1. ADDING COMMUNICATIONS TO ALL GRANT REQUESTS**

One way to systematically improve the availability of funds your organisation has for its advocacy communications efforts is to add communications to all grant requests. Allocating funds in advance for communications, and making clear the return on investment to potential donors for these activities, ensures each project or programme has its own communications budget so these funds don't need to come out of general expenses or operating costs.



## POP-OUT

### Free Communications Resources

There are tons of communications resources out there. Below, we'll give you some of the best free tools for finding pictures, graphic design, scheduling media, analysing media and more:

- [Canva](#) – graphic design platform
- [Pixlr](#) – image editing platform
- [GIMP](#) – downloadable, open-source image editor
- [Creative Commons Images](#) – images you can use for media
- [Unsplash](#) – high-quality images
- [Flickr](#) – image hosting
- [Hootsuite](#) – social media management platform
- [Buffer](#) – social media management platform
- [Google docs](#) – web-based word processing platform
- [Bitly](#) – shortens links
- [Google Analytics](#) – web analytics
- [Slack](#) – a messaging tool that allows teams to collaborate
- [Trello](#) – project management application that allows you to share campaign materials
- [Animoto](#) – video creation platform

To stretch out limited funds, follow these six tips:

- When resources are limited, it's even more important that you reach the right audience with the right message. One of the best investments you can make is to research your audience before investing in any communications vehicle. Remember, research doesn't have to be expensive or cost a lot of hours.
- Take advantage of the latest electronic communications tools, which are of low or no cost.
- With publications, it can be relatively easy to save costs without sacrificing quality by making a few minor adjustments in your print specifications. For example, you might reduce the number of pages per publication. A simple change in paper stock (the paper's thickness or finish) can also have an enormous impact on the price.
- Hire a designer to create templates that you can fill in for subsequent issues rather than requiring an entirely new professional design (e.g., develop newsletter, brochure, PowerPoint templates). This ensures a professional design at a reduced cost.
- If you need to produce dual-language communications and publications, instead of publishing two different pieces, it can be cost-effective to print the two languages side-by-side or on the front and back of the same paper.
- Source content on a budget by: Asking influencers and long-time supporters to write a guest blog post, undergo an interview, or post a short video; gathering and incorporating positive testimonials from workshops, other events and social media; and covering your events by taking pictures, gathering testimonials and quotes, paraphrasing speeches, or sharing presentation slides (all with permission).

## 4.3.10. MONITORING AND EVALUATION

The monitoring and evaluation of advocacy campaigns and related activities is important because you want to get the most out of your efforts. We know you may not have a lot of human or financial resources, so it's critical to ensure you're using both efficiently. First, we'll give some definitions for monitoring and evaluation and then go through some of the different ways to evaluate and monitor your general campaigns, as well as digital campaigns. However, no matter what type of campaign, we recommend following one simple rule: Keep everything as simple as possible and use common sense.

### 4.3.10.1. EVALUATING ADVOCACY CAMPAIGNS

As we mentioned in the introduction to this section, the best ways to monitor and evaluate your campaigns is to keep everything as simple as possible. Having said that, the best way to make sure monitoring and evaluation go smoothly is to have clearly defined goals from the outset of your campaign or initiative. When you have clear objectives and goals, you have a standard to measure your progress or your overall effectiveness. On the following page, you'll find some of the topics you should think about when it comes to doing a campaign evaluation.



## DEFINITION

**Monitoring:** When we monitor something, we continuously review and manage its activities, and we use the insights from what we notice along the way to improve. For example, when we monitor a health promotion campaign, we might ask the following questions: What's going on in the implementation of my promotion plan? How is it affecting my target groups?

**Evaluation:** On the other hand, evaluation relates to determining whether or not your campaign was successful. For example, when we evaluate a health promotion campaign, we might ask the following questions: What percentage of the target group(s) changed their behaviour? What was the overall impact of the campaign on the health of my target groups? What happened as a result of my initiative?



## POP-OUT

### Advocacy Campaign Evaluation Template

#### **How much did you spend?**

Look at the budget and itemise everything, including staff hours. Keep an eye on hidden costs, such as the extra telephone time, travel or reprinting costs and so on. Remember that costs can continue to add up for a long time after a campaign launch.

#### **Don't only look at external factors when you evaluate.**

Bring the campaign team together for a debriefing. Talk about the effort they put in. Did people have to work late to get the materials ready? Were there extra costs that you didn't expect? Write up a short report based on the information you gather and use it to inform the planning stage of your next campaign.

#### **Measure public awareness of the issues before and after a campaign.**

This can be both complicated and expensive. Partnership with academic, public opinion, media, or market research organisations can help. Persuade a newspaper to run a reader poll about your main message; give them some exclusive part of your campaign, and get them to run the poll again in the days after a launch. Or try to get a polling agency to add some questions to one of its regular public opinion polls—this 'piggy-backing' can be cost-effective if you have invested a lot in a campaign.

#### **Have you succeeded in shifting the focus of the debate?**

If you have been aiming at 'reframing' your issue, are policy-makers now debating on your terms?

#### **Were you able to implement your 'follow-up' strategy?**

If someone saw an article or TV show, or heard a radio programme about the campaign, and made contact with you, were you able to answer their questions and provide them with accessible information, or refer them to appropriate authorities? Did you log these enquiries and ask these people if they would like to stay on a mailing list?

#### **Have you found out what your target groups thought about the campaign or initiative?**

Follow-up with the people who called you for information a few weeks later: Ask them what made them call you and what they thought of the information you sent them. What positive action have they taken as a result? Make a note of their replies and use them in future campaigns, or to inform your planning. Another option is to organise a focus group of people to give you feedback—not only on what they thought of the look of the materials and the messages in them, but whether they found materials relevant and useful.

(Source: *Working with the Media*, World Health Communication Associates, 2005)

## The Dos of Effective Monitoring and Evaluation

In monitoring and evaluation, there are a few general guidelines you should follow to help organise your efforts:

- Decide targets in advance, including target audiences;
- Be creative in how you measure progress;
- Consistently review and adjust your approach;
- If something you're doing doesn't work, change it; and
- If something you're doing does work, do more of it.

As we've said earlier, keeping track of your progress and evaluating the effectiveness of your communications advocacy gets much easier when you know what your goals are and who your target audiences are before you begin an advocacy campaign.



### EXAMPLE Getting Creative

If you're placing news articles in the print publications that decision-makers frequently read, you could measure the success of this campaign by counting the column inches, or the number of articles you've had published. But a better standard would be to track how many of these decision-makers sought out your organisation after reading the article to talk to you about your advocacy issues. Did any of them seek your non-profit out to advise them on this issue? Did the presence of your article force them to deal with the issue? These are better indications of impact because the people who can make changes are making the effort to engage your organisation, instead of reading your material and then forgetting about it.

As with many things in life, if we're going to improve, we have to be willing to change. This calls for consistently taking an honest look at what we're doing in our advocacy communications. The path to change is rarely straight, which means that we'll have to adjust our approach along the way to fit reality, and that means stopping some of our activities when they don't work out. Similarly, when something works, we should replicate the action and record it as a best practice.

### 4.3.10.2. TOOLS FOR MONITORING AND EVALUATION

Now that we've covered some of the basics about monitoring and evaluation, we'll explain some ideas that can help you monitor and evaluate your advocacy communications campaigns by delivering a couple examples of specific types of advocacy communications.

#### Publications

If you publish your own materials, you can use readership surveys to determine what your audience thinks about your work. Potential questions include: Do readers suggest these materials to others? Do your publications motivate readers to act? What was their favourite topic? Questions like these will give you great feedback on how people interact with your materials. At the very least, you can monitor the number of times a publication is downloaded from your website, or cited by other authors.


#### Media Relations

As we mentioned in the above 'Dos' section, you can, for example, measure your communications advocacy goals by counting the number of articles published in major media outlets. This does not give you a lot of information about the actual impact of your message. If one of your goals is changing the way the media talk about your issue, then you can monitor if they're repeating your key messages and talking points, which are in, for example, your media releases or what your media spokesperson has said on TV.

## Digital Evaluation

Doing online advocacy seems unavoidable in most contexts given the penetration of the Internet and social media across all corners of the globe. Websites and social media are great ways to reach a large number of people in a targeted way. Even better, they often come with built-in analytics to measure how much attention is being given to your website or social media platform (or even certain pages and posts within those platforms). In this section, we'll review the basics of using digital means to monitor and evaluate your advocacy communications.

Website and social media have given us a lot of ways to both reach people and monitor the material we have posted. Website clicks, click-through rates, open rates, shares and retweets are all a part of the terminology that goes along with being in digital spaces, but just as was the case with media relations above, clicks and hits don't tell the whole picture.



## DEFINITION

**Reach:** How many people see your content.

**Impressions:** How many times your content is displayed.

**Engagement:** How many times people interact with your content. For example, how many times someone clicks on a Twitter post, or how many likes you have on a Facebook post.

Imagine that your website is getting a lot of hits, and everyone is excited because this means people are coming to your site. But what do these clicks truly tell you? These high numbers of clicks

could signal that your website isn't well organised and information on it is hard to find. Moreover, how long are people staying on your site? And what are they looking at? You also have a donation button; are they clicking this? If you have a blog that's especially for advocacy, how many people are sharing it? Are its contents being quoted by major media outlets or key influencers in your field?



## POP-OUT

### Additional Web and Social Media Analytics Resources

Web and social media analytics are big fields. So, below are a few resources to supplement the information in this section and give you what you need to use analytics to aid your advocacy:

- [The Social Media Analytics Compass: What and How to Measure](#)
- [7 Social Media Analytics and Reporting Tips for Becoming a Data-Savvy Marketer](#)
- [Web Analytics Basics](#)
- [Guide to Web Analytics—An Introduction](#)

To recap, we learned the following about monitoring and evaluation in this section:

- The best way to monitor and evaluate is to keep it simple;
- Setting goals before will result in the best results; and
- Tracing interaction is key to successful monitoring and evaluation.

**Worksheet 3: Communications Planning Template**

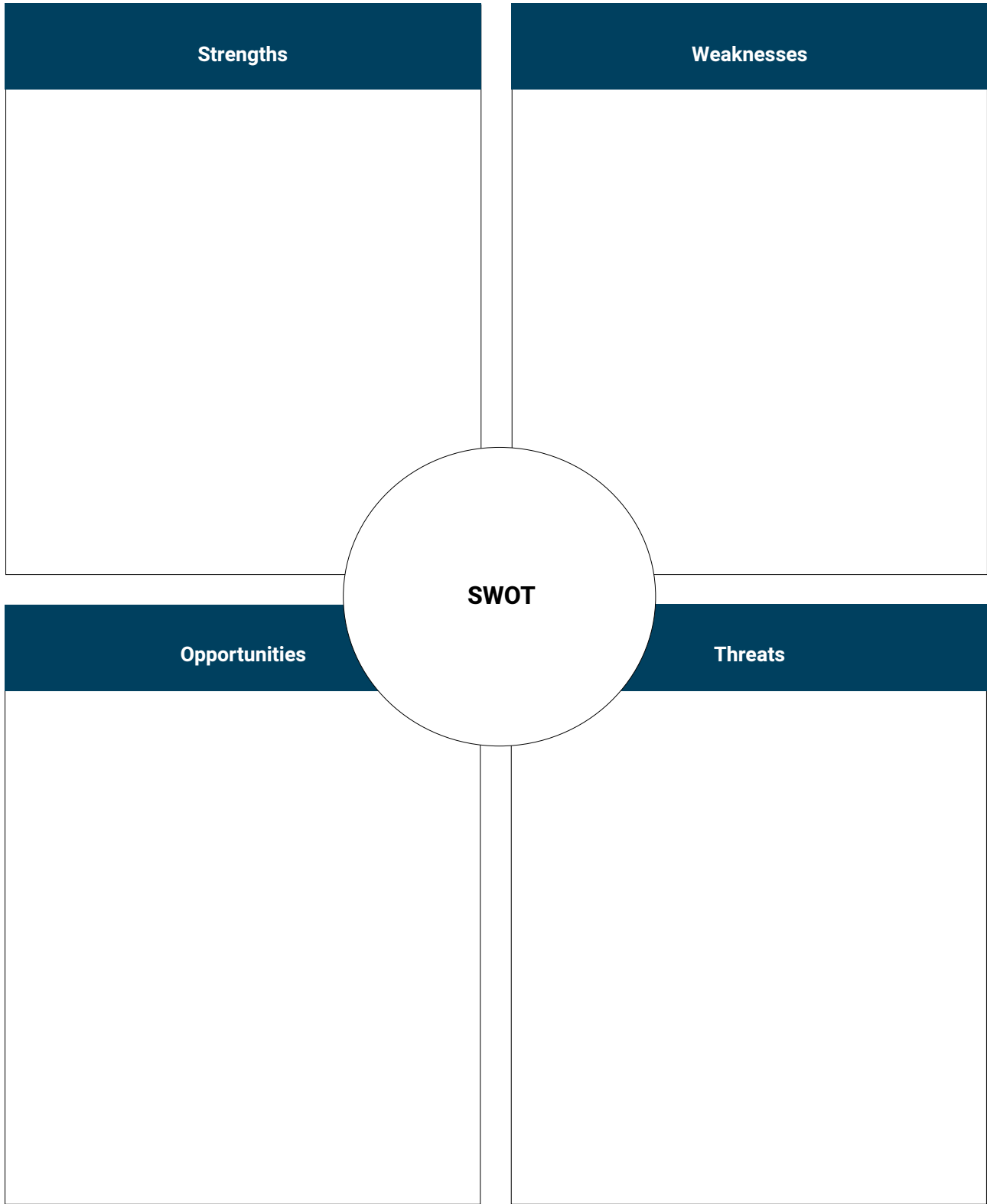
**Communications plan for:**

**Overall communications objective:**

Audience	Communication Objective	Message	Channel	Timing



**Worksheet 4: SWOT Analysis**



## Worksheet 5: Identifying Key Decision-makers and Influencers

Starting in column B, list the specific names of three to four key decision-makers for your advocacy goal. If you don't have the particular person's name, list the specific title or role until you're able to do additional research. In column A, record the connections you or your organisation have to these decision-makers. Then list one to two key influencers for each decision-maker in column C. Record the connections you or your organisation have to these influencers in column D.

	A. Connections to Decision-maker	B. Key Decision-maker	C. Key Influencer	D. Connections to Influencers
1.				
2.				
3.				
4.				

## Worksheet 6: Identifying Decision-makers' Interests

In the first column, list your key decision-makers. Rate the awareness and position of each decision-maker on your issue using the checklists in columns A and B. Then identify two key interests of that decision-maker and list that in column C.

Key Decision-makers	Awareness of Issue	Current Position on Issue	Decision-maker's Key Interests
	<input type="checkbox"/> Unaware <input type="checkbox"/> Aware, uninformed <input type="checkbox"/> Aware, inaccurately informed <input type="checkbox"/> Aware, accurately informed	<input type="checkbox"/> Champion <input type="checkbox"/> Supportive <input type="checkbox"/> Opposed <input type="checkbox"/> Undecided	1.    2.
	<input type="checkbox"/> Unaware <input type="checkbox"/> Aware, uninformed <input type="checkbox"/> Aware, inaccurately informed <input type="checkbox"/> Aware, accurately informed	<input type="checkbox"/> Champion <input type="checkbox"/> Supportive <input type="checkbox"/> Opposed <input type="checkbox"/> Undecided	1.    2.
	<input type="checkbox"/> Unaware <input type="checkbox"/> Aware, uninformed <input type="checkbox"/> Aware, inaccurately informed <input type="checkbox"/> Aware, accurately informed	<input type="checkbox"/> Champion <input type="checkbox"/> Supportive <input type="checkbox"/> Opposed <input type="checkbox"/> Undecided	1.    2.

## Worksheet 7: Addressing Opposition

In column A, list two to four potential opponents to your advocacy goal (these can be individuals or groups). In column B, list the reasons they may have for opposing you. In column C, rank the level of influence this opposition might have on your key decision-makers. In column D, note any arguments or tactics the opposition may use to promote their views. Finally, in column E, list ways you might lessen the influence your opponents have with key decision-makers.

A. Opponents	B. Reason for Opposition	C. Influence on Decision- makers	D. Known Arguments and Tactics of Opposition	E. Ways to Lessen Their Influence
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low		
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low		
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low		
		<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low		

Research needed:

## Worksheet 8: Reviewing Your Draft Strategy

Strategy	Does it:	Yes or No
1.	Help us reach our goals? Use our allies? Minimise our opposition? Suit our style?	
2.	Help us reach our goals? Use our allies? Minimise our opposition? Suit our style?	
3.	Help us reach our goals? Use our allies? Minimise our opposition? Suit our style?	
4.	Help us reach our goals? Use our allies? Minimise our opposition? Suit our style?	
5.	Help us reach our goals? Use our allies? Minimise our opposition? Suit our style?	

## Worksheet 9: Crafting Your Advocacy Message

Complete the worksheet and repeat as many times as necessary.

Decision-maker	Key Interest
1. What is the issue?	2. Why should the decision-maker care about the issue?
3. What is the proposed solution and its likely impact on the problem?	4. What do you want the decision-maker to specifically do?
5. Combine the four parts into a compelling and concise advocacy message.	

## 5. TOOLS & TACTICS FOR ADVOCACY COMMUNICATIONS

As mentioned in Chapter 4, there are many tools and tactics out there to achieve your advocacy communications goals. It's important to understand the nature of each option before selecting the appropriate mix for your organisation.

### 5.1. ADVERTISING

Advertising is the purchase of 'air time' on a radio or television channel, or page space in a newspaper, magazine, or online. While advertising can generally include any sort of public promotion done by your group that must be paid for, we'll mainly focus on broadcast (radio and television) and print advertising (newspaper, magazines) while also touching upon other forms of advertising, like online adverts.

Many of the reasons for using paid advertising are the same as reasons you might have for seeking other types of publicity for your advocacy communications: To increase awareness about your organisation's advocacy initiatives, or to broaden the number of people your message reaches.

#### 5.1.1. TYPES OF ADVERTISING

##### 5.1.1.1. BROADCAST ADVERTISING

Advertising time is offered in standard blocks on all commercial television and radio stations. Typically, 10-, 20-, 30- and 60-second spots can be purchased. Rates can be somewhat negotiable

in certain contexts and will vary widely depending on when you decide to run your ad (e.g., peak times for all viewers versus peak times for your target demographics, although the two may overlap). Most radio and television stations offer production services, so they can also produce your ad—which means doing everything needed, such as writing, finding actors or announcers, filming or recording, editing, and reporting back on its reach—at an additional fee.

##### 5.1.1.2. PRINT ADVERTISING

Most newspapers and magazines measure ads in inches or centimetres and the rates vary according to the publication's size and reach. Ad sizes are referred to in terms of the page layout—¼ page, ½ page, full page and so on (but be sure you check on the size specifications of each for the particular publication as paper/print sizes may vary).



### TOP TIP

Many papers and news outlets give discounts to non-profit organisations, so it never hurts to ask when inquiring about pricing.

##### 5.1.1.3. OTHER MEDIA

Aside from these two main categories, you can also pay for advertising on websites, search engines and social media sites, along with other less traditional media.

**Table 8. Types of Advertising**

Type of Advertising	Notes
Web advertising	There are a number of different types of web advertisements (e.g., banner and sidebar ads, animation, videos, floaters, pop-up windows) and a number of ways to use and pay for them. Some are surprisingly affordable. Although they're generally not as effective as print and broadcast ads, in some instances, and with some audiences, they may prove to be a cost-effective option. Added bonus: An increased ability to target certain groups by gender, age, interests, location and other aspects on paid social media adverts also make this an attractive option.
Outdoor advertising	Examples include billboards, ads on public transportation (such as buses and bus benches) and rooftop balloons. Tip: Check with local transportation agencies for the name of the agency that handles the negotiations for public transit ads—this will likely be an outside contractor.
Advertising in private spaces	Examples include: Ads in elevators, restrooms and bank (or automated teller) machines. These can reach surprisingly large numbers of people. Start by checking with specialty advertising agencies in your area for more information.
Direct mail adverts	These are especially used in the run-up to elections or policy referendums.

### 5.1.2. WHEN SHOULD YOU PAY TO ADVERTISE?

Once you've exhausted all public service announcements and whatever other free or cheap methods of publicising your cause, you may consider paid advertising. Paid advertising is particularly useful if you're on a tight timeline, or when you need to react quickly when a unique opportunity arises. Below are a set of points to help you decide whether paid advertising is appropriate for your needs:

1. Assess what you want to accomplish with your ad and if paid advertising is the only way to effectively achieve this. Can your goal best be accomplished with mix of freebies, public events, public service announcements, and adverts?
2. Next, consider whether you can do enough advertising to accomplish your goal. For example, if you only have the budget for a single television spot or newspaper advert, then your overall reach may not justify the high cost of a TV spot. Instead, you could consider cheaper options, like web and social media paid advertising, or cut costs by writing-up the script or designing your advert within your own organisation. Remember, not all news and media outlets cost the same.
3. Consider whether you can use your advertising to react and respond to current events. In this way, you can demonstrate your commitment to your issue(s), turn away or respond to opponents' criticism, relate your issue to breaking news, or correct misconceptions about your organisation's mission and/or advocacy goals.



4. Make evidence-based advocacy statistics and facts interesting with advertising. Compare, contrast and put into context—rewrite dry, incomprehensible statistics that don't impress people into eye-catching messages that make someone who sees it think.
5. Consider in what ways you can use your advertising to publicly thank your supporters, which lends your organisation credibility and brings prestige to those who help you. This can make helping your organisation look much more attractive to those who might support you in the future.



## DEFINITION

**Earned Publicity:** Unexpected publicity that you get from a paid ad or a specific story you lined up. For example, the controversy created by an ad you bought might earn you a story in tomorrow's newspaper. And that publicity is free! In light of the high cost of advertising and the speed with which news changes these days, earned publicity becomes extremely valuable.

### 5.1.3. CHOOSING A MEDIUM

STOP! Before proceeding, ask yourself if you've exhausted other methods, namely those capable of producing similar results from free or cheap resources.

Remember, you may also decide to use some combination of two or more media depending upon your goals, budget and timeline. Below you'll find an overview of different media and their attributes to take into consideration when choosing where to advertise. One commonality for all ads is deciding how often and when the ad should run. Don't forget these elements in your planning and budgeting.

#### 5.1.3.1. RADIO

- Radio tends to be most effective at encouraging audiences to act (e.g., calling a phone number for more information or attending a rally for human rights).
- Almost all radio stations will produce your commercials for you, although pre-produced ads are also accepted.
- Check with the station's advertising department for details on their services, requirements, fees and possible non-profit discounts.

#### 5.1.3.2. TELEVISION

- Television is more expensive to make, so producing television commercials costs more than radio or print.
- Most local television stations can produce your commercials for you, but bringing in pre-produced commercials from an advertising agency is also okay.
- Check with the station's advertising department for details on their services, requirements, fees and possible non-profit discounts.

#### 5.1.3.3. PRINT

- When it comes to print advertising—that is, newspapers and magazines—you have display ads or classified ads to choose from. Display ads are the regular ads found throughout the newspaper.
- Classifieds are the text only 'wanted ads' in their own section (normally towards the back of the newspaper). They're sorted by type and are sometimes free. Classified ads are commonly used to advertise job openings and announce meetings.
- You may wish to choose specialty publications (e.g., church publications, newsletters for community organisations) to reach targeted audiences.

- Check with the newspaper or magazine's advertising department for details on their services, requirements, fees and possible non-profit discounts.

#### 5.1.3.4. ONLINE

- Almost everyone is online, so it's a good place to advertise, and there are many ways to do it (e.g., search engine ads, website banners, and sponsored social media posts).

#### 5.1.3.5. FOR EVENTS

- In a weekly paper: Try posting an advert three weeks prior to the event and again during the week of the event (at least 1-2 days before to the event itself).
- In a daily paper: Try posting an advert two times a week for two weeks prior to the event and again the day of the event.
- Think about using web and social media targeting to locate potential event guests in proximity to the event and/or based on their interests.



### POP-OUT

#### Benefits of Paid Advertising

- Enormous control over your media message, because you've paid for your ad. Paid advertising can help you tell your stories in a way that truly reflects your brand and organisational values.
- Unexpected publicity from sources who either picked up or reported on your effective ad because it's worthy of news coverage in and of itself.
- Letting people see and hear your name on TV, in the newspaper and/or on social media improves the chances of long-term name recognition.

## 5.1.4. COST-CUTTING TIPS FOR PAID ADVERTISING

Budgeting is a crucial step. You need to plan how much your advertisement, whether it's a single ad or an entire campaign, will cost. Remember to plan for both the development and content (including any necessary audience or market research), as well as the publication and evaluation of your ad.

### 5.1.4.1. RADIO AND TV

Did you know that in some countries, most radio and TV stations, as a condition of their licences, are required to broadcast a certain number of public service announcements (PSAs) per week? (For more information, see the pop-out on page 103 in Chapter 6.) Unlike paid advertising, with PSAs you have less (or no) control over when your message airs, but as a trade-off, there's no charge for airing it. Also, some stations may be willing to help you out with production of PSAs.

### 5.1.4.2. PRINT AND ONLINE

If you're hoping to do some print or online advertising, you may be able to find an advertising agency or graphic design firm that is willing to do some free ('pro-bono') work for you.

### 5.1.4.3. GET YOUR ADS SPONSORED

Another possibility is to get local corporations, businesses, or other organisations to pay for some or all of your paid advertising. When approaching organisations about sponsorship, it's already important to have an idea of the goals, look, and feel of the advert to give them a clearer picture of what they're sponsoring and why.

To summarise, publicising your advocacy initiative or programme is an important step in making sure that your services or messages have a wide reach. Many free or less expensive methods exist, but you may have to resort to using paid advertising in order to get the word out at the right time and to the right people. With proper planning and timing, paid advertising can be a vital method of promoting your cause.

## 5.2. LETTER WRITING

Despite technological advances and the dominance of e-mail, letters and personal meetings remain two of the most effective means of communicating with elected officials and other key influencers.

Letter writing is a direct way to persuade legislators and other key influencers to support your position. Officials receive an enormous amount of mail each day, so to ensure your letter or letter writing campaign stands out, it's important to know what works and what doesn't.

### 5.2.1. ABOUT FORM AND CONTENT

Your letters should not exceed one page (at most, two sides of A4 paper) and your information and request should be clearly structured. Begin your letter by saying who you are and what your concerns are. Be sure to address the person you're writing to with their formal title and business address. If you know the legislator or influencer, make that clear in the first paragraph. This will alert the person opening the mail to give the letter special attention.

It's important to use your own words and cover only one issue per letter. In the first paragraph, ask for the action you want the legislator to take. Identify the legislation clearly by name and number and clearly define the advocacy issues and desired change. Make sure to cover all basic points in this first paragraph.

Go on to explain why you're writing, preferably giving examples and facts. Be sure to connect your request to the decision-maker's interests. When possible, try to link your letter to something that they or their institution have

recently said and state this early on in the letter. Be sure to restate what you want in the last paragraph and always conclude by asking for a response.

Please note that many legislators think less of a letter if it's obviously part of a letter writing campaign because it simply copies and pastes the same wording onto a new letterhead. Therefore, avoid form letters—use them for inspiration only and always adapt it to your own purposes and experiences by using your own words. It's important to make your letter as personal as possible. Additionally, most officials are aware of potential political fallout for not supporting or voting for a particular issue, so you don't have to mention this in your letter.

#### 5.2.1.1. EXCEPTIONS: SHORT ON TIME? THEN E-MAIL OR CALL INSTEAD

That said, there are always exceptions to every rule, so there may be times when it's appropriate to use e-mail. For example, if a vote on an issue is scheduled for tomorrow, then an e-mail or phone call to an elected official would be the quickest way to communicate. Also, if you're running short on time, an e-mail is better than no communication at all. If you choose to e-mail your elected officials, you basically follow the same content and best practices as letters sent via post. Here, to make sure that your e-mail is read, keep your message brief and to the point.



## CHECKLIST

### Letter Writing

Once you have written the first draft of your letter, go through this checklist to double check and improve its content before you send it.

- The letter is printed on personal or business letterhead with a return address on both the letter and the envelope.
- The letter should be about only one piece of legislation and should identify the bill by its number and author.
- Make sure you tell the legislator or influencer how you want them to vote.
- You can borrow formats, but make sure each letter is individual. Don't just sign and send a pre-printed letter—they're proven to be less effective.
- Stress how a particular issue would affect people in the official's district or community.
- The letter is one page, but also bears in mind that the reader may not be very familiar with the subject matter (therefore, it's briefly, but well explained).
- There's nothing included that you or your organisation wouldn't mind being repeated or quoted on the evening news.
- You've asked the official to respond to your letter, either clearly indicating their position, or how they will vote.
- It's always best to sign off the letter by hand with your signature in ink.
- As in most communication, timing is key: Be certain your legislator receives the letter before a vote (or consider e-mail if it's short-notice).
- Thank legislators who support your positions and let legislators who don't know about your disapproval.
- Alongside any great letter-writing campaign is a mailing list—a database where you keep all your contact information and indicate the last time you contacted them.

## 5.3. EVENTS

The first step to planning any event is knowing what you want to accomplish. Still, events can be expensive, so it's important to know the potential cost and alternatives for achieving the same goals. If you decide an event is indeed the best way to achieve your goals, then you need to choose your speakers strategically and plan well in advance for maximum publicity (before, during and after the event). Events are labour-intensive activities and paying attention to the small details really matters. For example, despite excellent speakers, your guests may remember the cold coffee, or that they couldn't hear speakers properly without a microphone.

### 5.3.1. EVENT PLANNING TIPS

- Make your expectations clear to all vendors and caterers beforehand.
- Do a stage rehearsal to make sure all sound and audio-visual equipment is working
- Send out invitations six to eight weeks in advance to help ensure maximum attendance and that invitees don't think they were last-minute additions.
- Consider sending 'save the date' cards or e-mail invites out about 12 weeks in advance to help boost attendance.
- Brief your Executive Director, fellow staff members and key volunteers on what you hope to accomplish and their role.

- Arrange your seating plan strategically: Who should sit next to whom? Where should VIPs be seated? And journalists?
- Use your key messages to develop talking points.
- If the event is newsworthy, pitch the story to key media contacts.
- Be sure to plan for event follow-up—attendees like to hear from you afterwards (e.g., send them a thank you note for attending, share photos or videos, and speech reprints).

### 5.3.1.1. LECTURES

Organising or hosting lectures can be a useful tool to spark interest in your work, get people involved in your projects, or even donate. The purpose of a lecture is to present information on a specific topic and is therefore used to inform the listening audience. They're a great opportunity to dig deeper and raise audiences' general knowledge levels, especially if you invite guests with a relevant expertise. If you know of another organisation that gives lectures, you might consider collaborating on a lecture series about a particular topic, or group of topics, together. Additionally, when you look for speakers, don't hesitate to contact local universities or schools. Lectures are a good way to establish your organisation as a knowledge or thought leader on your advocacy issues—and one that is willing to pass on its knowledge. Lastly, lectures are also a source of content for your organisation, so it's a good idea for someone to cover the event by collecting quotes, taking photos and writing it up in a news article or blog.

### 5.3.1.2. FORUMS

A forum is a public event where topics are debated and/or discussed by two or more people. These types of events are useful because they showcase different opinions and can allow for debate. As such, forums are a good way to highlight the work of multiple organisations or initiatives at once and signal that your organisation is willing to share in the creation of knowledge through debate. Forums can be

attended by the general public, or by more targeted or knowledgeable audiences. You can also cover these types of events online and via social media to include those who cannot attend in person.

### 5.3.1.3. MEETINGS

There will be times when you need to hold face-to-face meetings with key influencers or policy-makers. Face-to-meetings meeting are useful when you need to understand where your policy-maker or influencer is positioned in a debate. Here you'll learn, first-hand, their thoughts and opinions.

Additionally, these external meetings can be extremely effective in getting your messages across and should be used particularly when you want to have a more in-depth and persuasive discussion. This also serves a great opportunity to really connect on a 'human' and/or 'emotional' level that is missing in briefings and e-mails.

### Setting Up the Meeting

Doing your homework is key—and hopefully, by now, you have already covered some of this research when considering your target audiences. Make sure that you have researched why this meeting should take place and outline the points you will make so that the person will want to meet with you. Next, outline this in a brief letter. State why you're targeting them and when you would like the meeting to take place. End by offering to follow up with their office for a meeting. Be sure to follow up with their office to set a date and time. Consider confirming the appointment one to two days prior to the scheduled date.



## TOP TIP

**NOTE:** Remember that if the politician you're approaching is an elected official, in many instances, you, as a constituent, have a right to be considered for a meeting. However, politicians are extremely busy. You may be offered a meeting with a civil servant from their office instead, in which case, always accept. If you really want to meet with the politician or key influencer in question, consider taking a joint approach where more than one organisation comes together to make an appeal, which might be more influential and considered a better use of the politician's time. If you adopt this approach, ensure the letter you send is signed by each organisation.

anything)? What evidence for the problem (both facts and stories) can you share? What action do you want the policy-maker to take?

- Write a briefing paper for attendees from organisations to study: Include everything you know about the issue and make sure your brief clearly states what outcome you would like from the meeting (e.g., a follow-up meeting, policy change, or verbal commitment). It's also worthwhile to share the proposed meeting agenda in a briefing so participants know more about what to expect. When possible, hold a pre-meeting with the attendees so you can rehearse who might speak to which point and to ensure all points are covered.
- Choose the right messenger: The messenger can be as important as the message. Someone directly affected by the issue may be able to personalise the issue and get the policy-maker's attention. When choosing someone, make sure to consider they have enough background information and public speaking skills.

### Preparing for the Meeting

Four simple suggestions for prepping for your meeting:

- We can't stress this enough: Know your target! Make sure you know as much as possible about the policy-maker—their feelings on the issues, their voting history, their advisors and so on.
- As always, focus your message: Choose your main objective and develop a simple message from it. Ask yourself: What do you want to achieve and why (benefits of taking action and/or the negative effects of not doing

### During the Meeting

Be on time, dress professionally and act politely at all times. In most cases, the people requesting the meeting should first outline their aims and goals. During the meeting, make sure all parties have the opportunity to speak freely, respond and make their case. When met by confusion or resistance, ask open-ended questions (e.g., 'Could you explain more about your stance on this issue?') and listen for understanding. Before ending, ask for some concrete advice or thoughts on the way forward. Never leave without clarity about the status of the meeting—if it's confidential, that must be respected or trust will be broken and future advocacy efforts can be damaged.

## After the Meeting

Make sure you debrief internal staff and other key stakeholders who might be interested in the outcome of the meeting. If necessary, update your communications strategy or position as a result of the meeting. It's also very important to write back to the person you just met, thanking them for the meeting.

In this follow-up thank you letter, you can also briefly repeat your key points and any supporting comments made by the policy-maker, especially any promises of action. Inform the policy-maker

what you plan to do next, promise to keep him or her informed and express the hope that you will be able to work together in the future.

## 5.3.2. PRESS CONFERENCES AND OTHER MEDIA EVENTS

(See Chapter 6, Press Conferences, on page 99 for more).

Depending on the type, scale and scope of the event you're holding, use the following checklist as a starting point to ensure you have all aspects covered.



## CHECKLIST

### Event Planning

- |   |  |
|---|--|
| <input type="checkbox"/> Fundraising goal                             | <input type="checkbox"/> Rentals (tables, chairs, linens, stage, equipment, umbrellas, generator, tents)           |
| <input type="checkbox"/> Budget                                       | <input type="checkbox"/> Audio/visual and other technical equipment (e.g., lights, sound, two-way radios, webcast) |
| <input type="checkbox"/> Audience (e.g., invite-only, general public) | <input type="checkbox"/> Stage/podium  |
| <input type="checkbox"/> Venue  | <input type="checkbox"/> Parking/valet   |
| <input type="checkbox"/> Number of attendees                          | <input type="checkbox"/> Security/fire marshal   |
| <input type="checkbox"/> Type of invitation (formal vs. simple)       | <input type="checkbox"/> Transportation for VIPs   |
| <input type="checkbox"/> Admission (ticket, free)                     | <input type="checkbox"/> Guests/speakers   |
| <input type="checkbox"/> Sponsorships                                 | <input type="checkbox"/> Signs/banners   |
| <input type="checkbox"/> Photographer/videographer                    | <input type="checkbox"/> Décor   |
| <input type="checkbox"/> Save-the-date card                           | <input type="checkbox"/> Florist   |
| <input type="checkbox"/> Printed programme                            | <input type="checkbox"/> Caterer   |
| <input type="checkbox"/> Publicity                                    | <input type="checkbox"/> Check-in tables/coat check  |
| <input type="checkbox"/> Staffing                                     | <input type="checkbox"/> Handouts/gifts  |
| <input type="checkbox"/> Schedule of activities                       | <input type="checkbox"/> Clean-up crew   |
| <input type="checkbox"/> Seating plans/table schematics               |  |

## 5.4. WEBSITES

The use of the Internet and social media expands each year and having a web presence is vital for those of us who do advocacy. Because of its speed and simplicity, those who regularly use the Internet often turn to it before other forms of media to gather information, learn about events, or become knowledgeable about a community

issue. That means that creating a website—any collection of one or more web pages of varying lengths—for your organisation or initiative can greatly improve your ability to communicate with your members, the wider public and key influencers. Nowadays, many people view having an organisational or campaign website as a source of legitimacy and credibility; without one, your cause can come across as less professional.

## 5.4.1. REASONS TO CREATE A WEBSITE

### 5.4.1.1. LEGITIMACY

- Going to where your audiences are: In many countries, younger people—those who've grown up with computers, or used them in schools—turn to the web for almost everything. They read newspapers, college catalogues and even books online, and use the web and social media for almost all their information-gathering (as well as shopping, travel planning) and a good portion of their communications needs. Any organisation without a website or other online presence simply doesn't exist for many of them.
- Your website can be part of an overall media campaign and it can help establish what sort of image or perception you want people to have of your initiative or organisation.

### 5.4.1.2. ACCESSIBILITY

- Whatever information you put up on your website is immediately available to anyone who wants it 24 hours a day, seven days a week. Additionally, any correction, addition, or revision you make to your website will be immediately available to those who access it.
- The web is a good way to reach people who have difficulty getting information through more traditional means, such as people who are unable to leave their homes due to disability, lack of transportation, illness, or other reasons. It's also a good way to reach people who may be ashamed or embarrassed to pick up a brochure in public or visit your office.
- If you have a website, it can be found easily whenever people search the web for groups or services like your own. This can be helpful to people who live in your area but have never heard of you, or for people who are planning to move to, or visit, your town.

## 5.4.1.3. INFORMATION MANAGEMENT

- You can put an enormous amount of information on a website—far more than can fit into a single brochure or public service announcement or social media post. You can include your website address in your brochures, advertisements, social media, or other promotional materials to encourage people to visit it and find out more information and engage further with your initiative.
- A website is an effective way to get information out very quickly, which is great when information is changing rapidly. For example, if you're involved in a local political campaign in which things are happening often that require quick responses, or you just want to keep people up-to-the-minute on what's happening with your fundraising drive, you can post this information on your website.
- Having a website with e-mail links for contacting people in your organisation provides an easy way for people to contact you.

### 5.4.1.4. COMMUNITY BUILDING

- Beyond just informing, websites can be used to motivate your members, volunteers, supporters and sympathisers into action.
- Depending upon your goals and resources, you can also make your website a hub for your efforts by offering the ability to comment on updates, share news items via their personal social media accounts, provide a place to upload/share their own story, and so on.



## 5.4.2. CREATING A WEBSITE IN SEVEN EASY STEPS

Step 1: Decide who will create the site and delegate related activities.

There are several options to explore in terms of who can build your website: Internally (using the skills of your organisation), a volunteer or student intern, or an outside party, like an agency. When selecting an individual or organisation to handle development, design and production of your website, make sure it's someone who has an adequate know-how of things like HTML, PHP and CSS. It's always good to ask them to show you other websites they've designed and developed. At this point, you need to decide if this person will also keep the website updated and trouble-shoot problems when they arise or if your organisation will handle this after initial development. If you opt for someone else to manage the website, make sure you're able to get a long-term commitment in writing.

That said, there are many low-cost options for building websites that are extremely user friendly—they look like a word processing document in that you type what you want and it appears on the screen, which means you can post things without knowing HTML, PHP, CSS, or other coding. Still, you may opt for someone to help set up your website, but then you may opt to take on administrative and updating responsibilities internally. You can consider adding website responsibilities to the job description of one or more staff members, or create an official volunteer position for this work.

Step 2: Decide how much you can afford to spend on your website.

The cost of setting up a website can vary widely and largely depending on what web hosting service you use and how elaborate (how much information/how many functions) you want your site to contain. You probably won't be able to come up with an exact budget at this point, but you should at least have a rough idea of what you can spend before you start looking at web hosting

and web design services. You may well be able to find a free service, but keep in mind that these frequently limit you in terms of how much you can do (think design and functionality) or put onto your site (think content).

Step 3: Select a web hosting service.

Unless your organisation is part of a university or some other larger institution that already has web servers available for your use, you'll need to choose a web service provider. Service providers are businesses that have servers and allow individuals and organisations to set up web pages on those servers. Some charge a fee, others allow you to set up a website for free in exchange for allowing them to put an advertisement on the pages, while others you purchase commercially. Search for 'web hosting' on any major web search engine and you'll find plenty of results to begin comparing various packages and prices.

Step 4: Register your domain.

A domain name, also known as a URL, is a unique name that identifies a particular website. For example, HAI's domain is: www.haiweb.org. There is a fee for registering a new domain name and prices vary, but many web hosting services include the price of one domain in their monthly service charges. That said, you may consider registering more than one URL to prevent other organisations from taking it.

Step 5: Choosing what information (or 'content') to include on your website.

Your website can be fairly minimal if you don't want to spend a whole lot of time, budget and energy on it, or your initiative is just starting off. However, there are almost no limits to what you can put up on your site. The following page contains recommendations for what information you should, at minimum, include on your website. Next to that, you can find a list of other possibilities for your website. This latter list is meant to inspire you and may contain elements you would like to add to your site at a later, second stage of development.



## POP-OUT

### Website Content to Include

<p>Your group's mission</p>	<p>Should appear fairly prominently on the main front page of your site. Although you may wish to have an additional page with this information in more detail, as well as additional information about your goals and objectives.</p>	<p>Add 'action alerts' with information on how people who visit your website can take action on an issue related to your organisation (e.g., People for the Ethical Treatment of Animals).</p>
<p>All contact information, including physical/ mailing address, phone number, e-mail address</p>	<p>The main contact information should be easy to find on, or from, the main page of your site. You may also wish to have an additional contact page for individual staff members, departments, or programmes.</p>	<p>List your staff members, board members and/or volunteers. This 'humanises' your site. You may also decide to add job listings as your initiative grows.</p>
<p>Information about your advocacy efforts, including some evidence and a 'how you can help' section</p>	<p>Be sure to have information on how interested parties can get involved, volunteer, or make donations (e.g., an online member or volunteer application form, or list of policy-makers' e-mail or mailing addresses).</p>	<p>A 'frequently asked questions' (FAQ) page or section where you can post answers to questions that people ask most often about your organisation or initiative. Having an FAQ for people to read can protect you from having to answer many of those same questions over and over again.</p>
<p>News, calendar, upcoming events section</p>	<p>Your site should be updated periodically with news about what's going on with your organisation. Do you have an important fundraiser or other event coming up? Make information about it available on your website. It helps those interested feel involved.</p>	<p>A page about your organisation's history and/or development. This includes how your group started, important landmarks in your past, what sort of obstacles and accomplishments have happened along the way and the general present state of things.</p>

Website Content to Include (Continued)		
Resources and links for further information	Consider sending people who visit your website to other sites with relevant information (e.g., if you're a local or regional effort, you could link your reader to national and international resources. After all, the best type of advocate is an informed advocate.	An online photo or video gallery. Here you can share photos and videos from recent events. An online gallery can serve to inspire and draw people who might not otherwise have visited your site.
Information about your organisation's funders and partners	This is a nice way to show your appreciation to funders and other supporters. Plus, it shows you're transparent and have nothing to hide about where your resources come from.	A site map can be very helpful for visitors, especially if your site is fairly large. A site map is a single page that lists everything that can be found on your site so users don't have to look through the pages to find the information they want. Alternately, you could add search functionality to your site.

As this demonstrates, there's almost no limit to what information you can add to your website. That said, as you begin to grow your website, be sure that it doesn't merely become an 'information dump' and that it remains easy for users to find the information they want and need in just a few clicks. We encourage you to start small and build onto the types of content as your capacity and organisational resources allow.

#### Step 6: Building the website.

Next comes the website build, in cooperation and coordination with your web designer and developer. Depending on how extensive you want your site to be, this can end up being the longest part of the process. The extent to which you will

need to be heavily involved with this part of the project can also vary (e.g., working closely with the designer and developer and reviewing draft pages as they're being constructed versus simply getting progress updates).

Once a draft of your entire website is up and running, select and invite a few objective people inside and outside your organisation to give their feedback on what works well and what does not. Some questions to consider asking in the feedback process: Does the website load quickly? Does the website function on a mobile device or smartphone? Is the information arranged in a logical and easy-to-find manner? Is the website visually attractive and easy to read?



## POP-OUT

### Additional Website Resources

[A Guide to Web Hosting for Nonprofits](#) is a comprehensive guide that covers the basics of the Internet, websites and creating your own website.

[HTML and CSS Tutorials](#) is a website for beginners that gives concise, step-by-step instructions on building web pages.

Step 7: Publicising your website.

Once you hit publish, you're not quite finished. You still need let others know about your website. How?

- Send e-mail messages announcing your site to relevant e-mail lists.
- Submit your site for inclusion on the major web search engine sites and directories.
- Let any local 'community guide' websites that cover your geographic area know about the site and ask that they include a link to it on their own pages, if possible.
- Let other groups and professionals in your area know about your site (e.g., post on LinkedIn and other social media accounts if you have them).
- Find out which agencies or organisations publish community or social service directories and request that your website be included in the next one.
- Include your site's URL in your regular media campaigns (e.g., posters and flyers, media releases, public service announcements, paid advertisements, your organisation's next print newsletter).



## POP-OUT

### On What Not to Do With Your Website

Once you've started building your site, how do you keep it from becoming ugly, difficult to use, or just downright unpleasant for people to visit? There are several sites and pages on what not to do with your website that can help you design a more attractive and user-friendly site.

- [Top 10 Mistakes in Web Design](#)
- [The Top 15 Mistakes of First Time Web Design](#)

## 5.5. BLOGS

A blog, much like a website, is a great advocacy tool because it allows any individual with an Internet connection to launch a campaign for change with a potentially global reach. It gives ordinary citizens incredible power to question authority, act as alternative sources of information, organise supporters and lobby those in power. Many people start an advocacy blog because it's a cheap and easy way to create a web site and/or web content that addresses a particular issue.

A blog is a regularly updated website (or web page on a larger website) that is typically run by an individual or small group. Blogs are written in an informal or conversational style and are important because they can help showcase your expertise and build trust with your audiences. By regularly creating interesting content and publishing it via your website's blog, you create authentic content to share on your various social media channels (all the while driving visitors back to your website where they can learn more about your initiative).

Consistency and quality are key here—much more—so than word length (400- to 800-word posts are fine to mix in along with longer-form content). Also, by regularly creating fresh content on your website, you have yet another reason to share the link back to it on your social media channels. Blogging also boosts your website’s search engine optimisation (SEO).

### 5.5.1. TIPS FOR BLOGGING

- Be consistent! If you want readers to come back, you must stick to some sort of posting schedule. Consider how often your organisation can produce original and creative content. Every week? Every two weeks? Every month? You should be able to reach your target posting goal most of the time.
- Promote your blog and new content via social media and your e-newsletter.
- Write about newsworthy topics and trends in your field.
- Include images and/or videos, even on short blog posts.
- Offer your readers something helpful (e.g., information and resources) for free.
- Ask questions, but then be prepared to answer or reply to all comments.
- Share or comment on other blogs in your niche.
- Consider writing a guest blog for a reputable site and then promoting that site on your website (and social media, too).



## POP-OUT Popular Blogging Platforms

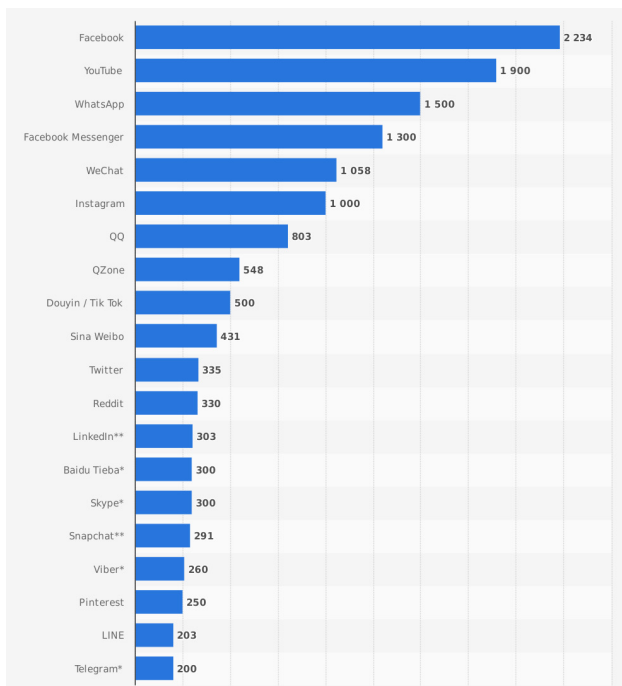
Many of these blogging platforms have pre-existing templates that give the blog a professional feel. You can either start a blog on one of these sites (especially if you do not yet have a website of your own), or embed a blogging feature into your existing website. Most of the platforms listed below are also fairly easy to personalise with your own header graphic, colours and fonts. Many are also free.

- Blogger
- Moveable Type
- Typepad
- WordPress
- Medium

## 5.6. SOCIAL MEDIA

Social media, like Facebook, Instagram, Pinterest, Twitter, LinkedIn, Weibo, Snapchat and more, are almost unavoidable these days. Almost everybody and every organisation maintains some level of social media presence. Social media is best understood as a group of new kinds of online media, which share most or all of the following characteristics: Participation, openness, conversation, community, and connectedness. As social media continues to take over the web, virtual communities notable for their connectivity and interactivity, are growing and great resources to tap into for your advocacy work.

**Figure 1. Popularity of Major Social Media Sites in 2018 by Active Users (in Millions)**



(Source Statista.com)



## DEFINITION

**Reach:** The number of unique accounts that have seen any of your posts.

**Impression:** The total number of times that all of your posts have been seen.

**Engagement:** Measure the public shares, likes and comments.

### 5.6.1. CHOOSING YOUR PLATFORMS

Given all the options out there, how do you assess which social media platforms may work for your organisation and its advocacy communications goals? Start by studying the characteristics and requirements of each channel. We begin by first presenting some of the pros and cons of using of the organisational use of social media.



## POP-OUT KPIs

Above, we mentioned metrics and something known as KPIs (key performance indicators). This is just a fancy way of saying you need to measure the success and impact of your social media activities. We do this on social media by using analytics to assess how far we've come in achieving our stated objects. For example, if your objective is to increase your Facebook likes by 10 percent in the coming year, then the KPI you would use to measure this is the number of new page likes. While this is a perfectly okay objective, we recommend using objectives and KPIs that more stringently focus on engagement with corresponding KPIs—those that focus on, for example, sharing, comments, profile visits and/or brand mentions. Why focus on engagement numbers? Having a large 'reach' (number of accounts viewing your social media content) with low engagement is a bad sign because it shows that your content or messages aren't resonating with the intended audiences. Reaching millions of accounts means little when they're not interested in your organisation or initiative.

**Table 9. Pros and Cons of Social Media Usage**

Pros	Cons
A good tool to use to publicise your work.	Potential risk of identity theft and fraud.
Costs very little money to set up online.	Your message can be caught up in overall 'noise'.
Easy to create groups and form communities of interest.	Harder to gauge participation and commitment.
Online participation can be easier than face to face.	Not as effective as a face-to-face conversation.
Cross border collaboration can be facilitated.	Potential for user drop out over time.
May also be used for educational purposes.	Hits and likes do not necessarily indicate attitude change or commitment.
Constant flows of information from updates and real-time communication.	
Breaks down barriers for people who want to stay in touch with other people.	
Organisations can obtain information about their demographics	
Provide added context and value to knowledge.	

We've left a few spaces above blank so that you can fill them in with organisation-specific pros and cons to social media usage for your advocacy communications.

**Table 10. Popular Social Media Platforms**

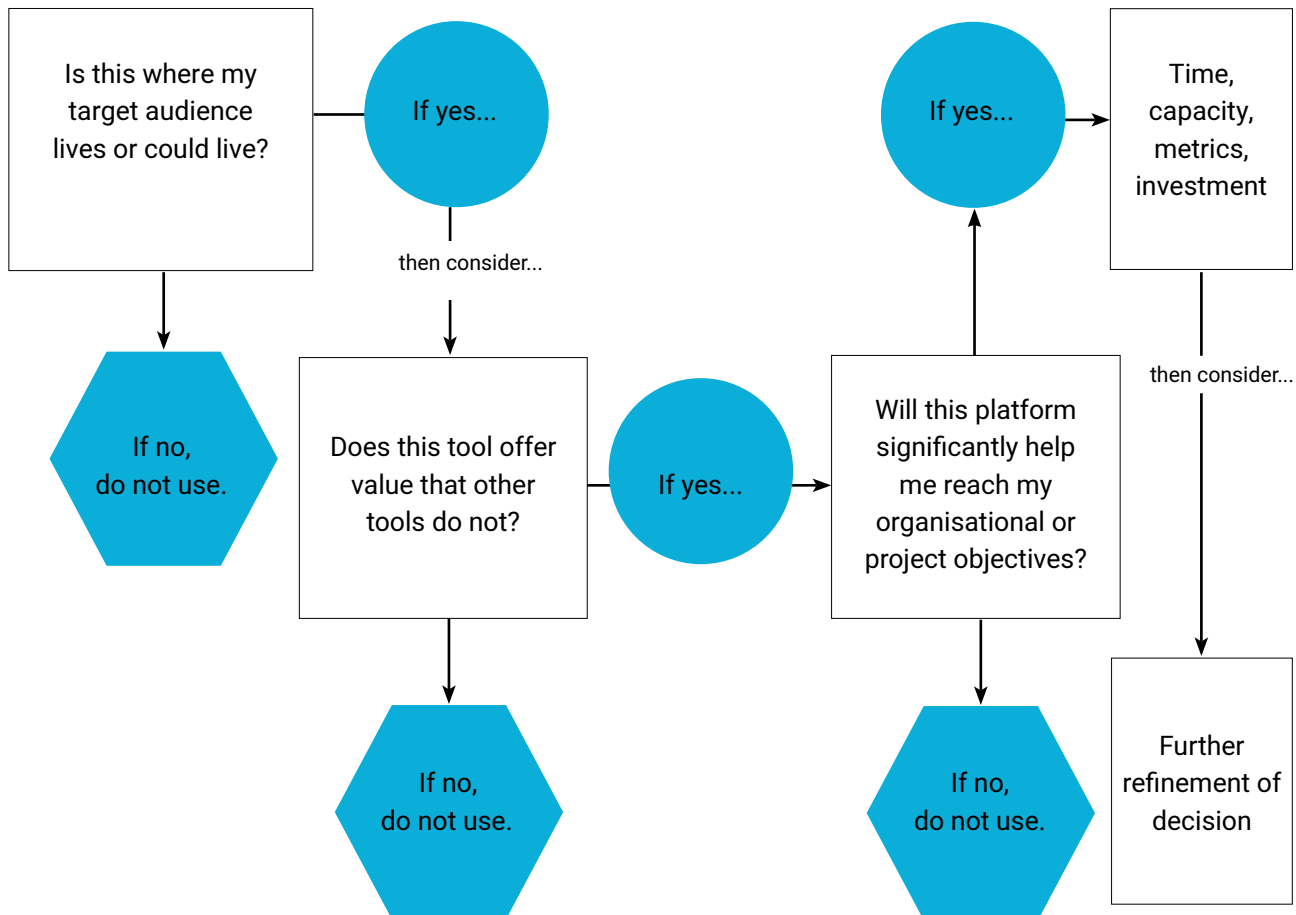
Platform	Description	Applications
Facebook	Social sharing site with over 1 billion active users. Users share 1 million links every 15 seconds.	Organisations or initiatives will want to set up a Facebook Page. This is a public page that's created and managed via designated personal accounts. This means to set up a Page, you must first have a personal Facebook account.
Twitter	A microblogging social site that limits each post to 280 characters of text plus links and/or images. Approximately 5,700 tweets are happening every second.	Create an organisation or initiative account. Many of the same tips for blogging apply here, only on a micro-scale given the small amount of allotted space for text.
LinkedIn	Business-oriented social networking site primarily used for developing professional connections with approximately 500 million members.	You can opt for a Company Page (to tell your organisation's story), or a LinkedIn Group (forum for professionals in the sector or with the same interests, such as health advocacy).
YouTube	A video-sharing website with over 1 billion users. It allows users to upload videos and share them publicly or privately.	Many organisations use YouTube to upload all video content, such as ads, documentaries, interviews, brand videos, in one place. Then you can easily create and copy links to use in other social media channels and on web pages.
Pinterest	A social site with around 20 million users, typically used for: Décor, health, fashion, crafting and cooking. Audiences are overwhelmingly female on this platform (over 80 percent women in most instances).	As of now, this is not a very popular platform for advocacy communications. However, you might consider using this to generate ideas and brainstorm about organisational visuals. Also, if you create a lot of quality infographic and other informative visuals you might set up an account to promote the sharing of these images.
Instagram	Social sharing site all about pictures and short videos with over 300 million active users who are on the younger side. Use of #hashtags is key. (Many organisations and initiatives even create their own hashtags.)	This medium is primarily about the visual—so goes the old saying that 'a picture is worth a thousand words'. Make sure to develop a consistent visual style and make use of in-app and free photo editing software for a professional look. Consider disseminating a visual campaign with a related hashtag this way.



To be effective with social media, you need to have the time and resources to do a combination of networking building, active engagement and content targeting. Getting this right takes time and experience, so we recommend starting small with just one or two platforms. Once you learn more about your audiences and what does and doesn't work, then consider expanding onto more platforms. Next, use this decision tree below to guide you through some crucial questions to ask and answer when finalising your platform choice.

If you've opted for two or more social media platforms, and if you have multiple contributions to one or more platforms, we suggest you use a free or low-cost social media management software, like Hootsuite or buffer. They allow users to integrate Twitter, Facebook, LinkedIn, Instagram, and other social media platforms into a single 'dashboard'. This means you can craft, edit, schedule and manage posts for all your platforms in just one place.

**Figure 2. Social Media Decision Tree**



(Source: Adapted from CommunityOrganizer20 blog.)

## 5.6.2. DEVELOPING CONTENT FOR SOCIAL MEDIA

Once you've selected your platform(s), you must consider what type of content to share. Quality content is key to your success on social media. The original content you design and share, or the curation and sharing of other user's valuable and relevant content, is what helps to attract and keep audiences interested and engaged. So what kind of content should you share? Some ideas include:

- Website updates and links to specific sub-sections beyond the homepage;
- New blog posts, news articles, opinion-editorials, research, publications, policy brief, fact sheets, petitions;
- Photos, videos, graphics, gifs, infographics; and
- Stories, case studies, quotes, data, or results.

While you can decide on your own context mix, one way to get started is by aiming to post 25 percent your own content, 25 percent about topical content, 25 percent dialogue, and 25 percent shares (from reputable news outlets and/or partner organisations).

That said, knowing what to share doesn't mean you automatically know how to make that content social media worthy. Some general characteristics of quality social media content include:

- Adds value;
- Tailored to the target audience(s);
- Helpful, useful, practical, informative, entertaining, or actionable;
- Includes or invites comment or conversation;
- Exclusivity (provides a 'behind the scenes' look into your organisation or issue);
- Is highly visual (although the interplay between text and image remains important) and properly formatted for the specific platform;
- Is well-written, error free and short/brief;
- Is timed for maximum effectiveness; and
- Addresses audiences' needs and encourages them to take action.

Best practices in terms of content will likely evolve through time, so be sure to stay up-to-date on current trends and tactics. (A quick Internet search should do the trick.)

## 5.6.3. TIPS FOR CULTIVATING SOCIAL MEDIA ENGAGEMENT

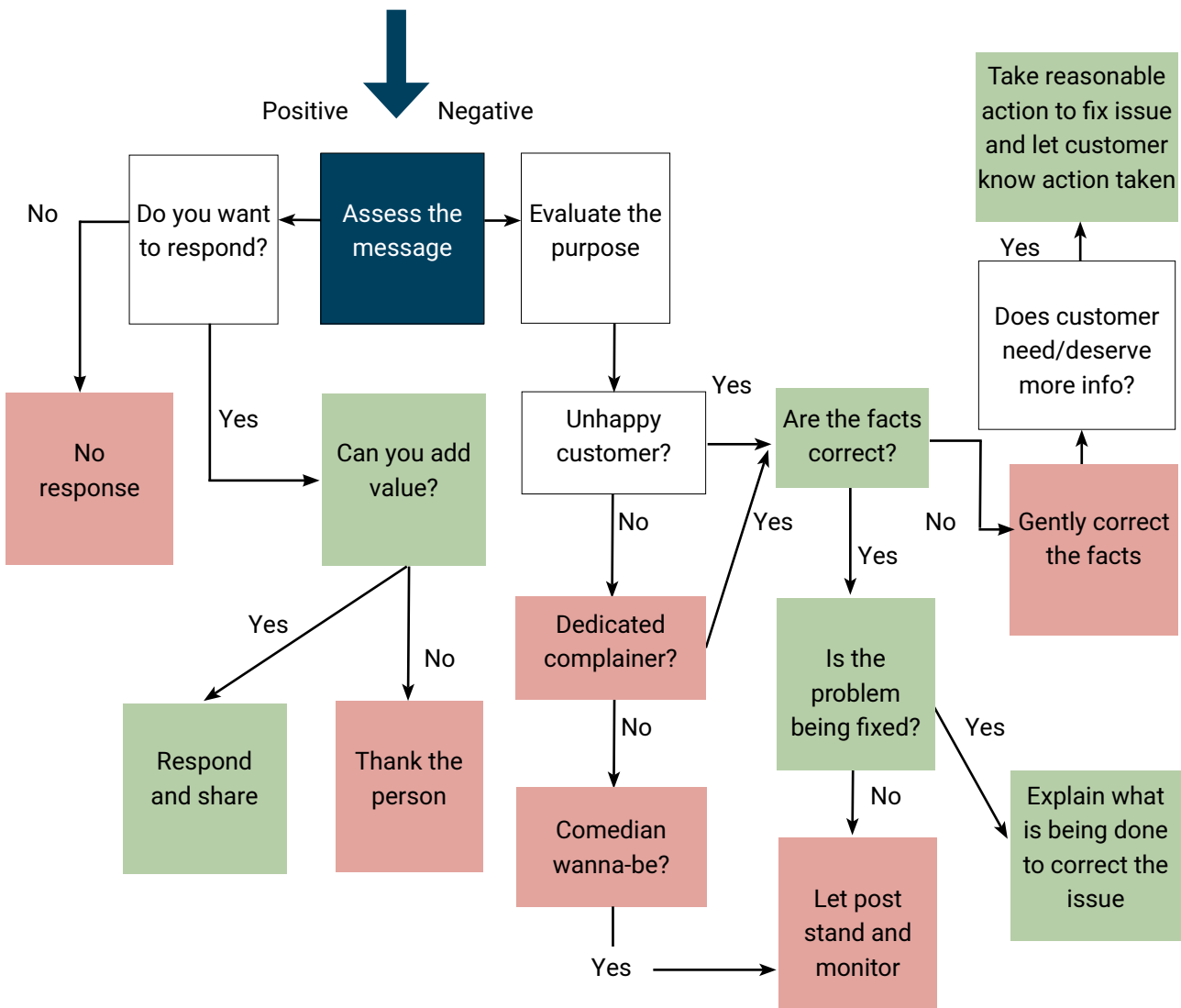
1. Create a strategy, system and schedule for social media posts that consistently shows your organisation's 'personality' (e.g., its brand value, unique selling points): Consistency is key—creating and getting quality content to your followers, partners and key decision-makers when they're most likely to be on social media. Believe it not, simply using a strategy and content planning will increase your channels' engagement.
2. Engage with your followers (you have to give what you want to get): This is extremely important! If you want to have an engaged and enthusiastic audience, then you need to actively participate in the conversation. Remember to treat your followers how you want to be treated. If you were to personally comment on a post or page and then never get a reply, how likely are you to comment again? This can be time consuming, but is worth it. This also means thinking through a strategy for when your organisation likes, comments upon, follows-back, or tags other users and content.
3. Make your content shareable: Focus on the type of content that social media users, especially your followers, get very excited about and immediately want to share with all of their friends. Consider asking some trusted members and/or partners to become 'brand ambassadors'.
4. Make your content valuable: Whether it's a video tutorial or a simple how-to, share what you know and share it often. While it's important to create a fun atmosphere, it's also critical that you provide value.

- 5. Use your fans' content on occasion: Social media is a sharing economy. Sharing is how we build relationships with fans and influencers—and a way to share important news with our followers.

Don't hesitate to share relevant and useful content from members, partners, or influencers posting in your niche area. At the very least, leave a gracious comment about content you really appreciate seeing.

# POP-OUT

## How to Handle Negative Social Media Comments



(Source: Rignite)

- Use a call-to-action: It's important to structure captions in a way that encourages users to both like and comment. Calls to action, such as, 'What would you name this cute puppy?', or 'Which pair of sneakers would you buy?', allow engagement with followers to be more seamless and kick off the conversation between the post and followers. At the very least, you can ask your audience to like photos, tag two friends, or share a comment.

If you actively use these strategies on your social media platforms, you'll see engagement rise. But with that may come some negative feedback or other online criticisms. In the pop-out on the

previous page, we provide a decision-tree to help you navigate how to best handle certain (negative) comments online.

While we've only covered the basics of social media for advocacy in this section, we want to point out that this is a rapidly growing field as both Internet and social media use expands and technology keeps developing. Before moving on, complete the Checklist: Social Media for Advocacy (page 75) to review what we've covered in this section and components of setting up and using social media for advocacy communications. Below, you'll find some cutting-edge digital advocacy tools that will complement your social media usage.



## POP-OUT

### Three Digital Advocacy Tools

**Twibbon:** Twibbon helps you launch campaigns that let supporters change their profile picture in support of your cause. Navigate to 'Find a Campaign' to see dozens of examples of how organisations are running these campaigns.

**Phone2Action:** Phone2Action is a suite of advocacy tools that helps organisations and campaigns connect supporters directly to decision-makers. Tools include embedding a text call-to-action in radio, TV and banner ads; matching advocates to officials' Twitter and Facebook walls to leave comments; and patch-through calling to officials.

**Change.org and Care2:** Change.org and Care2 are two companies that help organisations mobilise grassroots advocates by providing petition and pledge services.



## CHECKLIST

### Social Media for Advocacy

#### Conduct a brief strategic review:

- Be clear about your main goal—what direct action are you trying to prompt?
- Evaluate where your supporters are most likely to be online.
- Evaluate the time and resources available to you and your team.
- Determine how you'll measure success. (Check out these monitoring sites, some of which may help you establish metrics: Google Analytics, Google Alerts, Technorati, Addictomatic, Twazzup, Social Mention, Workstreamer, HootSuite, Klout, Web2express Monitoring, BoardTracker and Monitter.)

#### Sign up for social media accounts:

- Create a central platform (most likely a web or blog site or Facebook cause page).
- Choose social media tools that will help you communicate with supporters and potential supporters (e.g., Facebook, Twitter, Instagram, Pinterest, Foursquare, online petition sites).
- Sign up for accounts and enter profile information.

#### Become familiar with the tools:

- Listen and monitor activity.
- Engage in conversations.
- Develop a voice that is authentic, transparent and contagiously enthusiastic.
- Request the action you're seeking in a clear and direct way.
- Build in metrics for evaluating progress.

#### Develop systems for managing your digital advocacy efforts:

- Develop a single content plan/calendar of topics to post, which outlines timing of advocacy requests and desired outcomes.
- Integrate and streamline social media efforts while retaining an authentic presence on each platform.
- Integrate online and offline efforts for maximum success.
- Use established metrics to evaluate your progress.
- Keep listening to your supporters.
- Encourage and support the most active participants—they can become evangelists for your cause.
- Review other social media tools that support your cause and add them to the mix as needed.
- If you stop using a social media tool, take the content down, or redirect supporters to an area where there is active engagement.
- Evaluate and revise strategies as necessary.

## 5.7. E-MAIL BLASTS

With technology, it's easy to stay connected with the people who matter most to your organisation and the key decision-makers you wish to target through your advocacy communications. An e-mail blast (or e-blast) is a form of direct marketing that is carried out via e-mail. In many corners of the world, e-mail blast has a negative meaning and the term used for this type of outreach is simply e-mail marketing.

Nowadays, most people check their e-mail daily from a computer or a mobile device. Thus, e-mail marketing and outreach is easier, cheaper and faster than traditional direct mail campaigns. Furthermore, it has the added benefit of 'shareability' in that it's easier for your supporters to spread the word on your behalf about your initiative with friends and family with a just a few clicks. Yet, approaching e-mail marketing and outreach without a strategy means your e-mail may remain unopened or simply ignored.

It's important to note the definitions for e-mail blast and e-newsletter are slightly different, but for the most part, they're used in the same way and they try to engage potential consumers using many of the same tools.

Nowadays you can even use the same free online programmes (e.g., MailChimp) to manage your subscriber lists, design templates and so forth for both e-mail marketing and e-newsletters. As such, although we have separated e-mail blasts and e-newsletter into two separate categories, many of the tools and tips can be used interchangeably between this section and the section below.

### 5.7.1. E-MAIL MARKETING BASICS

Ultimately, your e-mail marketing works to reach the right people at the right time with the right message. Keep it simple and stick to: Who; what; where; when; and why.

Who:

This is all about delivering the right message to the right person through segmentation. The good news is that e-mail is one of the most effective ways to communicate with different audiences in a personal way.

Suggestions for e-mail/e-newsletter segmentation include:

- Volunteers;
- Blog subscribers;
- Corporate sponsors;
- Legislators that support our issues;
- Legislators that oppose our issues;
- Interested journalists;
- Donors, but grouped by amount given or date given; and/or
- Social media power users.

As your e-mail, newsletter and general mailing lists grow, it's important to use segmentation. Why? It helps prevent supporters from feeling spammed with irrelevant information. For example, journalists and legislators are not necessarily interested in, nor do they need, the same kind of information as your volunteers or members.

What:

This is the message you wish to relay to your target audiences via the e-mail blast or other e-mail marketing outreach. Please refer to the section in this guide about crafting messages on page 32.

Where do I send my readers?

It's crucial to give your reader an idea of what to do next; a clear call to action that will ultimately have the reader further engage with your online content. All e-mail marketing should do more than just inform: It should drive people to further explore a new blog, article or donation form on your website.

When:

Just like determining when to send e-newsletters, that depends largely on your audiences and when they're active online. For instance, are you trying to reach executives

during office hours, or want to reach out to your volunteers when they're likely to have more spare time, like on weekends? Remember that sometimes the best time for open rates is not the same as the best time for click-through rates (see below for definitions). Start experimenting and learn the best practices for your individual situation. Here, analytics from your website, or free services like MailChimp's newsletters and e-mail options, can help you hone in on user demographics and behaviours.



## DEFINITION

**Open Rate:** Did or didn't a recipient open the e-mail? The open rate is highly influenced by the time of day and the e-mail subject line.

**Click Rate:** This tells you whether readers were engaged enough by your e-mail to take action.

Why:

This is obviously one of the most important questions to define before sending an e-newsletter or e-mail campaign. Stay purpose-driven in your e-mail marketing and remember to use calls to action to rally supporters.

### 5.7.2. E-MAIL MARKETING BEST PRACTICES

- Make your e-mails scannable (e.g., clear headlines, bullets, lists, images).
- Be strategic about your subject lines (if it's not opened, then the content doesn't matter).
- Have a primary call to action.
- Add links to all images (this is often overlooked).

- Personalise your messages as much as possible (e.g., use the recipients' name, use a relevant statistic, ask a question).
- Engage in storytelling instead of simply broadcasting your message.
- Inform, don't advertise: People read and subscribe to newsletters because they feel they're getting something from the content. If you overload an e-blast or e-newsletter with pitches to sell products and links to affiliate sites, readers will not open your e-mails—and may even unsubscribe.
- Keep it brief: The recipient of your e-mail blast is unlikely to commit a lot of time to reading what you send. Keep the content short and make easy to scan. Aim the content toward providing the reader with enough information to get them interested and then urge them to follow the links to learn more.
- Be sure to allow other people to sign on to your e-mail and e-newsletter lists by sharing a link on your website or social media linking directly to the sign-up page.



## TOP TIP

### Creating a Master Mailing List

If you don't have one already, create a master mailing list for digital and physical outreach as soon as possible. You might start with a simple spreadsheet, or more advanced donor management software. This list, for outreach purposes, should include names, e-mail addresses and postal addresses, along with other relevant demographic details. As you add more names to the list, you should consider segmenting the list by key groups (e.g., donors, volunteers, etc.). See above for more information. Be sure to store this information in compliance with your country's data protection laws.

## 5.8. E-NEWSLETTERS

Unlike social media or conference calls, e-mail newsletters (also commonly referred to as e-newsletters) move the conversation about your non-profit into a more personal, one-to-one setting that ensures greater impact with targeted audiences. Given the low associated cost, e-newsletters are an effective way to stay in regular contact with your subscribers and other targeted audiences. Organisations with 20 or more people on their mailing list should use one of the mainly free or low-cost e-mail newsletter services available online, such as MailChimp (free for subscriber lists below 2,000, or Constant Contact). Using a blind carbon copy (BCC) list and PDF attachment is largely considered unprofessional nowadays and should be avoided whenever possible.



### POP OUT Three Benefits of E-newsletters

1. Great way to complement campaigns and other advocacy and organisational initiatives.
2. Proven way to drive subscribers to your website or mobilise them to take action.
3. As a type of owned media (communication channels that are within one's control, you're easily able to control the message and content of your newsletter.

### 5.8.1. SIMPLIFYING THE PROCESS

Creating newsletters on a regular basis can be time intensive. So, here we outline several tricks to make this process faster and easier.

Consider investing in a custom-designed newsletter template (or purchase one online) that aligns with your brand style. This simplifies future newsletter building because the format remains the same, which works to build both brand recognition and consistency. Some organisations are moving towards a very simplistic, yet effective approach to their newsletters: One image (sums up the entire newsletter), plus one description (a couple of short paragraphs with a call to action), plus one button (so subscribers know where to go next). Some simply stop there (or use that format for an e-mail blast), while others repeat the formula several times.

When it comes to your e-newsletter design, keep it clean and simple, and use images strategically. It's important to note that most e-newsletters are now read on mobile devices and smartphones, so adapting its content design to this format will greatly increase your readership. While images shouldn't be avoided, they should be considered in their context—people usually expect to see more text in an e-newsletter than visuals. Furthermore, depending upon the platform, user settings and bandwidth limitations, images may not display for some users and will appear only as a large red X.

Integrating social share buttons into your e-newsletters is another great idea because it encourages audiences to engage with your organisation or initiative on social media. When you enable social sharing, you also want to allow readers to share individual articles or content, not just your entire e-newsletter. Another key aspect of the e-newsletter is the subject line. This is the first impression and should be both attention-getting and something that inspires people's curiosity to read further.





## POP-OUT

Effective E-mail Subject Lines (for e-mail blasts or e-newsletters)

ACT

Act Now

Add your name

Add your voice

PETITION

Please sign

SEND THIS MESSAGE

Sign now

Sign please

Sign the petition

Sign this

Signature needed

Take Action

TELL [X]

To recap, e-mail is a great way to reach many different audiences and inspire them to take action, and you can do it for free, or at a very little cost. With e-mails, you bring your organisation's advocacy directly to a digital space where many people spend a lot of time—their in-boxes. But since people's in-boxes sit full of e-mails to sort through and their time is limited, you should make your e-mail headlines attractive, relevant and clear, and make content to-the-point and concise.

## 5.9. IMAGES AND VIDEOS

Visuals, when used properly, can be so much more powerful than written words and have the ability to evoke strong emotional reactions. Images of all forms can increase the impact of a well-told story—whether in photo, video, or infographic form. Images, like most design elements, work to:

- Compliment the story or main message;
- Emphasise a point;
- Enhance retention;
- Strengthen the impact of the written word;
- Personalise the person or subject matter of the story by making it more real.

Like all other elements of your advocacy communications, the use of images, videos and other visual elements should be planned and strategic.

### 5.9.1. WHY ARE IMAGES AND VIDEOS IMPORTANT?

The impact of imagery and other visual assets, including videos, can best be illustrated by looking at how they help drive engagement on social media platforms. For instance, videos are shared roughly 12 times more than texts and links combined on Facebook. When it comes to photos on Facebook, posts with photos are liked twice as much than posts with only text. Not to mention that Instagram is a platform entirely driven by visuals. These kinds of trends are repeated across most social media platforms. That said, photos, videos and other images can and should not be limited to just social media. You can include photos or videos to enhance your storytelling in addition to social media:

- Photos with captions in direct mail letters and brochures;
- Link to videos or embedded photos or videos in e-mail marketing and e-newsletters;
- Annual reports;
- Media releases;
- Presentations;
- Websites;
- Advertisements;
- Print and photo on postcard or thank you letter;
- Blog posts; and/or
- Donor profiles.

Images, pictograms and photos (also videos) are great ways to reach out and engage people who cannot read (e.g., children and others with low literacy levels) who have a different native language than the one you communicate in.

## 5.9.2. TYPES OF GRAPHICS AND IMAGES

To give you a better idea of what we mean when we say images, graphics, or visual assets, we provide you with a brief overview of some of the most common types in Table 11, below.

### 5.9.2.1. OTHER TIPS FOR USING IMAGES

- Pick images and photos carefully: People often respond to pictures of people like themselves who are engaged in the activity you want to promote or encourage. If you're going to use that kind of image, the people involved should
- Consider purchasing a digital camera for your organisation or initiative's use at events, meetings and other moments you'd like to document visually for internal and external purposes.

be people the target audience can identify with.

- Think about working with celebrities, especially those with whom the target audience identifies, to command attention.
- In most cases, the image should fit the message. You usually have to make your message clear from the image because that's what people will see when they first look at your communications materials. If it isn't relevant and memorable, they won't look any further.

**Table 11. Most Common Graphics and Images**

Type	Description
Clip Art	Clip art is a form of 'canned' artwork designed for use in publications or web pages; it's usually free or very inexpensive, although you may be required to credit the creator somewhere on your poster. Using clip art can save time for designers and makes design both possible and affordable for non-designers (e.g., Microsoft Word comes with a sizable collection of clip art images).
Photos	Photos can be extremely effective, but they can be cost-prohibitive. Don't use photos unless your group can afford to pay for a good photographer and quality printing to make it look right. (On the other hand, there are literally millions of images on the web that can be used, with or—often—without permission, that might fit your needs perfectly. It's worth a search to see what you might turn up.)
Original Artwork	This can be very effective, but like photography, original artwork can get expensive. Ask around—it's possible that someone within your organisation has artistic talent and would love to design your poster, or that a local artist may donate some of his or her time. You might also think about holding a community-wide contest, if your area offers a large enough pool of talented artists to do so.
Other Graphics	This might include the use of infographics, calligraphy, abstract and background designs, graphs, charts and maps.

- When taking and using images of other people, make sure you have their permission. For more, please see the sample Authorisation and Release Form at the end of this section (page 83).
- Release data, statistics, or new findings via a highly-shareable infographic.

Like many other elements of your advocacy communications, your work can benefit by pre-testing images, photos and other graphic elements with test audiences before rolling them out on a larger scale or in print publications.

### 5.9.3. VIDEOS AND VIDEO PRODUCTION

This immediacy (you feel ‘right there’) and sensory appeal (sight and sound) are keys to creating emotional resonance and is, in part, why videos are so popular and so effective. Making videos, especially these days, doesn’t have to be expensive and time-consuming. With the rise of live videos on social media (and the prevalence of smartphones to capture them), nowadays many viewers feel more connected to organisations that don’t follow the cookie-cutter models of video production. By reading through our tips and recommendations, it’s quite easy to create your own meaningful, timely and relevant video content to share on social media, via your website, or in e-mail marketing and e-newsletter efforts.

#### 5.9.3.1. WHY USE VIDEO?

Video provides authentic and compelling visuals and sound to convey a story. Viewers get a sense of ‘being there’ by being transported to the front lines of your organisation or initiative. Video can engage viewers both emotionally and intellectually in a short time span and greatly expand audience reach through online distribution. In addition to helping improve search engine optimisation and linkbacks, video is a key tool in building a loyal online community and helps shape your organisation’s overall branding and identity.

#### 5.9.3.2. TYPES OF VIDEOS

- A video that informs people about the character of your organisation: This gives insight into what your organisation or initiative is about. It should clearly explain what you do, but also give some insight into the character of your organisation.
- A video that spreads awareness: This presents the advocacy issue that the organisation is focused on addressing. The goal here is to educate the audience about the scope of the wider problem.
- Other videos aim to inspire action: They urge and then facilitate viewers to take meaningful, but manageable, action.
- Videos where you let others tell the story of our organisation’s impact: These help key decision-makers feel, at an emotional level, the consequences of inaction.
- Videos with ‘behind the scenes footage’ (e.g., short videos of your interns or volunteers both hard at work and enjoying some fun together).
- Videos that announce launches or other key organisational milestones.

Once you select what type of video best matches your goals, then you decide what form the video may ultimately take (e.g., monologue, dialogue, interview, conference presentation, a compilation of still photos, an animation).

#### 5.9.3.3. ELEMENTS OF A STRONG VIDEO

- Videos should be informative, professional and short—avoid the tendency to overwhelm audiences with too much information. When it comes to drafting a storyline, or perhaps even some dialogue, begin by asking yourself: What’s the essence of the story I want to tell through the video? What’s the most economical way of telling it? Build your storyboard and other preparatory materials from there.

- Length is key, given the spread and pervasiveness of videos on social media, but this also means the ideal video range is between 35 seconds and 2 minutes; ideally in the 1 minute and 35 second range. This means you have a short amount of time to create emotional resonance with your viewers and, therefore, need to stay focused. Furthermore, the first five seconds is key to capturing your audience's attention; this is when they decide whether or not to continue watching something.
- Choose one behaviour goal: Remember that videos are part of your organisation's larger marketing strategy, so with each video, just choose one call to action (e.g., create awareness, generate online fans, secure donations, increase press coverage). As with all your communications, be knowledgeable about your audience.
- Focus on distribution by considering where and how audiences will interact with your video. Ask yourself: What channels are best suited for the message our organisation wishes to convey?
- Don't violate copyright laws. Make sure you have the rights or obtain permission from the source to use the images, words and music you've selected for your video footage.
- Consider your spokespeople carefully. Simply making your Executive Director or Programme Manager the default spokesperson doesn't help your cause unless they're gifted communicators and not shy in front of cameras and audiences.



## POP-OUT

### Digital Resource for Visual Storytelling

**Nonprofit Film School:** The solution for organisations that want to produce video stories, but don't have the internal know-how or budget to hire a production company. This is an online class that will show you everything you need to know to produce quality video content.

**Facebook Live and Instagram Stories:** Visual storytelling mediums to post live, unedited content directly on to their related social media platforms.



## POP-OUT

### Sample of an Authorisation and Release Form

I, the undersigned, consent to the use by \_\_\_\_\_ (name of organisation) of my name, biographical information, written statement, image and/or voice for educational, promotional, fundraising and/or any other lawful purposes. This includes, but is not limited to, printed publications, multi-media presentations, on websites, or in any other distributed media.

I agree that I will make no monetary or other claim against \_\_\_\_\_ (name of organisation) for the use of these materials. In addition, I waive any right to inspect or approve the finished product, including written copy in which these materials appear.

Description of video, photograph, audio recording, or written statement:

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Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

City, State/Province, Country: \_\_\_\_\_

Postal/Zip Code: \_\_\_\_\_

Telephone: \_\_\_\_\_

Date: \_\_\_\_\_

## 5.10. PRINT: FACT SHEETS, BROCHURES AND OTHER PUBLICATIONS

Posters, flyers and other print materials can be a remarkably effective way of getting your message out to the public, especially where Internet connectivity or affordability is limited. Whether you want to generate support for a project, raise awareness about an event, or inform the public or key influencers about a community issue, print materials help you communicate with your target audiences.

### 5.10.1. POSTERS AND FLYERS

A good poster can have staying power. You probably won't want to use the exact same content, but by using a coherent theme over the years (e.g., by using the same designer or re-using design elements), you make your group's posters easily recognisable. Flyers, on the other hand, are pretty inexpensive to produce in most contexts (and can even be printed in-house) and can be easily mailed or e-mailed to almost anyone.

Posters and flyers can be displayed almost anywhere they're legally permitted, but it's best to concentrate on places where you have a so-called captive audience:

- Examination and waiting rooms at clinics;
- Buses or other public transit;
- Community service organisation offices;
- Community bulletin boards in markets and laundromats;
- Windows of businesses in high-traffic areas;
- School classrooms (particularly when you're targeting younger children);
- Any place where people will be standing in line.

While you may want to jump ahead and start working on a cool image or a catchy slogan, we can't emphasise enough how important it is to clearly identify your communications objective from the start. If you ignore this step, your entire campaign could be ineffective. Like so many other of the communication tasks we've outlined, it's critical to first take time to define your objective and then decide on your target audience. Only then are you ready to design your concept.

**Table 12. Types of Printed Materials**

Type	Explanation	'How To' Additional Resources
Annual Report	Provides information on an organisation's mission and history and summarises the past year's activities and achievements. This can often be a donor requirement.	<a href="#">How to Write an Excellent Nonprofit Annual Report</a>
Fact Sheet	Introduces you and your issue in a short, easy-to-read format that is useful for busy people.	<a href="#">How to Create a Fact Sheet</a>
White Paper	An authoritative report or guide that informs readers concisely about a complex issue and presents the issuing body's philosophy on the matter. It's meant to help readers understand an issue, solve a problem, or make a decision.	<a href="#">How to Write White Papers</a>
Brochures	They come in all forms, shapes, sizes and formats. While a brochure can contain almost any information you wish, it's best to avoid generic organisational brochures and focus on a more targeted approach.	<a href="#">A Detailed Guide to Creating Good Organizational Brochures</a>

### 5.10.2. STEPS FOR DEVELOPING PRINTED MATERIALS

1. Determine your objective and target audience(s) first.
2. Sketch out some of your ideas—let your imagination run loose. Look at what you have and play with words and wordings. Puns, double meanings and other types of word play often work very well in poster and flyer campaigns. Feel free to involve others in these brainstorming processes and as you hone in on a few ideas, get feedback from a few trusted partners or allies.
3. Consider what (if any) pictures or graphics to include. According to *Adbusters*, a magazine run by a media activist organisation, called The Media Foundation, 70 percent of people only look at the graphic when viewing a print ad or poster, while 30 percent only read the headline. Therefore, the image you use is going to be the most important part of the process in making a poster. (For more on using images and other graphics, see pages 80–83).
4. Write your headline and any additional text. Remember that headlines should be short, snappy and compelling. Make sure any additional text communicates your objective by using compelling arguments and stating facts. If you have a longer text, be sure to use a lot of catchy headings and sub-headings to organise your information and make it more 'scannable' for readers.

5. Lay out the final poster or other printed material. There are many ways to go about this, but they should adhere to good principles of visual design (mentioned throughout this toolkit). For inspiration, look at the poster and flyers done by similar advocacy groups and seek suggestions and feedback from others within your group on the first layout. Tip: Your group's name and logo should be prominent enough for people to remember who put this poster or flyer out.
6. Distribute your final product. After all the effort you put into designing and printing these materials, you don't want them to

merely sit in a box or closet. To be effective, people must see your printed materials. It's good to make a distribution plan that includes methods (e.g., mailing, distributing at events, putting them in waiting rooms) and a list of staff/members who can help with this early on. Don't forget: The other great thing about printed materials is that they can always be e-mailed or shared digitally. However, it's important to consider the pros and cons of each option. No matter if you send the final product via e-mail or post, be sure to add a cover letter or note introducing what you're sending and why.



## POP-OUT

### Basic Tips for Poster, Flyer and Brochure Design

#### DOs

- Simplicity is key: Try not to have too many different elements competing for the reader's or viewer's attention.
- Use large, colourful images that will grab your viewer's attention. Lots of contrast helps, too.
- An unusual image is another good way to catch your audience's eye.
- Ensure readability and, for posters, readability at a distance.

#### DON'Ts

- Don't overwhelm with visual clutter: It's okay to have a lot of different elements on it, but not so many that it looks junky or chaotic.
- Don't use unclear or easily misunderstood wording or images. The goal is for the audience to get the general meaning in the first glance.
- Avoid typos or spelling errors. As with all printed materials, they need to be both professional and accurate. Ask for some external feedback and language support, if necessary.



**Table 13. Pros and Cons of Print and Web Materials**

Medium	Pros	Cons
Print	Control over look and feel; control over distribution; tangible/physical (you can hold it); more personal; compact and portable; preferred by readers	Expensive, time-consuming to produce; less flexible; difficult/expensive to change
Web	Can be created/posted quickly; can be changed/updated easily; interactive; unlimited space; relatively inexpensive	Less control of look/feel of display; audience must be made aware it exists; intangible; impersonal

Print still can be a great way to communicate with your audiences and support your advocacy. However, since much of the world is moving online, you have to carefully consider where and when print will meet your needs better than a digital solution.



## POP-OUT Additional Online Resources

- [Flyer/Poster Guidelines](#), by Three Rivers College, helps you keep track of the dos and don'ts when creating your own flyer/poster. It has a number of specific positive and negative layout examples.
- [Microsoft Design Gallery](#)
- [Vandelay Design](#) provides tutorials on poster design using Photoshop, for users with access to that programme.

## 5.11. GUERRILLA MARKETING

Guerrilla marketing uses fast, unconventional and, often, humorous or surprising methods to accomplish conventional communications and marketing goals. This alternative advertising style relies heavily on an unconventional marketing strategy, imagination, energy and is generally low cost. It's all about thinking up creative ways to get your message out to your target audiences and moving them to action (e.g., making a donation, signing a petition, attending an event).

Guerrilla marketing can be a good choice for smaller organisations that need to reach large audiences without spending much money. Why? It's both innovative and inexpensive. It's also great for advocacy, given its high impact. Because of the unique way messages are delivered, they stick with people and even generate buzz for your organisation or initiative, which, in turn, can create even more coverage, donations and actions. Still not sure what guerrilla marketing is? Below are some unique guerrilla marketing ideas and their descriptions to inspire you.

### 5.11.1. EXAMPLES OF GUERRILLA TACTICS

- Print your key messages and/or call-to-action on items, like t-shirts, buttons, banners, decks or cards.

- Turn vehicles into moving billboards with bumper stickers, car magnets, or hand-painted messages.
- Paint a mural or window display highlighting your initiative with a piece of thought-provoking art on your building or another approved space.
- Hold a contest.
- Create your own festival.
- Increase your visibility by speaking on behalf of your organisation at community meetings.
- Get 'tattooed': Use temporary tattoos with your branding, logos, or other artwork to help get noticed. Add another level of guerrilla marketing to this effort by including a 'quick response' (QR) code within the temporary tattoo so people can scan you to get more information.
- Go door-to-door: Take your message to the people on a one-on-one basis. Make sure your volunteers have a good script to follow and accurate advocacy information.
- Host a virtual party: Social media 'parties' use the power of real-life networking events and take them online. This is a good way to meet constituents, launch a new programme, or announce any recent news. You pick the date and time, use a hashtag and invite people into the conversation.

The best guerrilla marketing tactics not only reach your target audience(s), but also create buzz about your campaign, cause and organisation. Thus, like more traditional forms of communications and marketing, it's important you take a planned approach—one that considers your objectives, target audience and tailored concept or message—before jumping into the action plan for carrying out your guerrilla marketing tactics.

## 6. WORKING WITH THE MEDIA

Although media can be used as a bit of catch-all term these days, in this chapter, we focus on the main means of mass communication—broadcasting (TV and radio), publishing (news-papers and magazines) and the Internet. These media are fast ways to build awareness around your organisation or issue among mass audiences and obtain press coverage.

### 6.1. MEDIA AND ADVOCACY

While you're probably familiar with many, if not all, of these ways to transmit information mentioned above, using the media for advocacy is something slightly different in that it specifically:

- Encourages people, organisations and communities to get more involved in an issue;
- Informs the public about the contributing factors to the problem you're trying to address;
- Educates people, organisations and communities about solutions to problems; and/or
- Recasts issues in a new (and possibly urgent) light.

As mentioned above, one good reason to engage in media advocacy is because it's a fast way to reach a large audience with your message. Here are some other good reasons to engage in media advocacy:

- Using media can put policy-makers under pressure to change or create policies that impact your organisation's goals.
- Media can give your organisation a bigger spotlight, which gives the groups you advocate for a platform to tell their personal stories.
- Allows otherwise unheard voices to be heard, which can give communities the desire and power to change the policies that oppress them.
- Informs the media about what really causes a certain issue, which, in turn, informs the public and can result in behaviour change.
- New stories can give your organisation more credibility.
- New stories are free publicity.

That said, not all media are created equal and you need to select the best options to suit your goals and resources.

To summarise, using the media to help your advocacy effort is a great opportunity to spread knowledge, create awareness, reframe an issue and/or put pressure on decision-makers to enact change.

As you begin planning your media relations, like most other advocacy communications tasks, you need to identify what you want to accomplish and who you want to reach. You should also develop two or three messages that convey your position in a brief and compelling way (or highlight your organisation's strengths and accomplishments). Next, consider who can help your organisation achieve its goals? And what kinds of media do they consume (i.e., listen to, watch, or read)?

**Table 14. Different Kinds of Media**

	<b>Advantages</b>	<b>Disadvantages</b>	<b>What's Wanted</b>	<b>What's Not Wanted</b>
TV	<ul style="list-style-type: none"> <li>• Quick</li> <li>• Combines visuals and sound</li> <li>• Large reach</li> </ul>	<ul style="list-style-type: none"> <li>• Expensive and not accessible by all</li> <li>• Work to tight deadlines</li> </ul>	<ul style="list-style-type: none"> <li>• Availability for interviews</li> <li>• Visuals</li> <li>• Style</li> <li>• Controversy</li> <li>• Local interest</li> <li>• Strong soundbites</li> </ul>	<ul style="list-style-type: none"> <li>• Technical issues</li> <li>• Events that have already Happened</li> <li>• "Man gives speech" stories</li> </ul>
Radio	<ul style="list-style-type: none"> <li>• Portable</li> <li>• Capable of rapid reaction news broadcast immediately</li> <li>• Widely accessible and affordable</li> <li>• Local languages</li> <li>• Message can be repeated many times by presenters</li> </ul>	<ul style="list-style-type: none"> <li>• Sound only stories usually very short</li> <li>• Works to very tight deadlines</li> <li>• FM stations cover small areas, so costs can be high</li> </ul>	<ul style="list-style-type: none"> <li>• Availability for interviews</li> <li>• Style</li> <li>• Controversy</li> <li>• Local interest</li> <li>• Strong soundbites</li> </ul>	<ul style="list-style-type: none"> <li>• Visuals</li> <li>• Dry, long-winded interviews</li> <li>• Complex data and statistics</li> <li>• Events that have already happened</li> </ul>
Print	<ul style="list-style-type: none"> <li>• Reaches a broader audience</li> <li>• Accessible and affordable</li> <li>• In-depth coverage with more details</li> <li>• Dedicates more time to a story</li> <li>• Willing to follow a story over time</li> </ul>	<ul style="list-style-type: none"> <li>• Not as immediate as visuals or TV or radio</li> <li>• No sound or moving pictures</li> <li>• Stories decided morning before publication, deadlines afternoon before publication</li> <li>• Readers choose the article they wish to read</li> </ul>	<ul style="list-style-type: none"> <li>• Strong angle</li> <li>• Local interest</li> <li>• Human stories</li> <li>• Background information</li> <li>• Quotations</li> <li>• Facts and figures</li> <li>• Photographs</li> <li>• Colours</li> </ul>	<ul style="list-style-type: none"> <li>• Too many technical terms</li> <li>• No local or national angle</li> <li>• Stories already reported on TV or radio</li> </ul>

(Source: Anew)

## 6.2. HOW TO CHOOSE AND CREATE QUALITY MEDIA OPPORTUNITIES

Since media, by its nature, operates at an extremely quick pace, your organisation has to be pro-active in seeking out media coverage. This can seem like a difficult task because you might not know when your stories are valuable and what types of stories have value (and to whom). To give you a hand in figuring this out, what follows are instances in which your stories could be the most 'newsworthy'.

Events that have some connection to your organisation and the issues it represents are newsworthy. These events can be at the local, regional, national, or global levels. For example, if your organisation advocates for better access to insulin, you could spotlight the recent research you've done on financial challenges faced by insulin users during World Diabetes Day. The good thing about this is that many special dates are fixed and planned. This means you can investigate which days and events have relevance to your organisation and prepare material beforehand. This reduces pressure on staff to react to events as they come up.

Tips for coming up with stories when there's not an event, special date, or holiday to connect your story include:

- Look at your research: Are there any statistics? These can be turned into stories, and it's an especially great tie-in when they relate to current events.
- Do you have any programmes that need more funding? Consider creating a story around why the issue it represents is critical to everyday life, connecting it with greater societal well-being.
- Is a member of yours in the news? Have any members in the communities you serve, or people who have participated in your programmes, been in the news lately?

- When your organisation has made an important achievement.
- When one or more issues your organisation advocates for becomes a crisis that many people don't know about.
- When your activities link to what's going on in your local communities.
- When you're delivering a new project.

Exhausted the above options? Here are some tips for finding news angles that will be attractive to journalists:

- Breakthroughs;
- Seasonal stories;
- An uncovered injustice;
- Controversy;
- Milestones;
- Human interest stories;
- A celebrity-supported event or story; and
- Anniversaries.

Using the media for advocacy communications is all about creating and recognising opportunities and taking advantage of them. However, your organisation won't only need to know when it's a good time to place a story in the media, but also how to work with media.

## 6.3. HOW TO WORK WITH MEDIA

Working with the media can be tricky, so in this section, we'll show you how to establish relationships, provide guidelines for contacting the media, how to deliver the most newsworthy stories, how to respond to questions from the media, and how to both prepare for and give fantastic interviews.

### 6.3.1. RESEARCHING MEDIA OUTLETS

Developing good relationships with local media is important because they're your main avenues for stories. But which ones do you approach? And what do you do with this information? The list below will help you figure out who you should contact and how to manage this information:

- Read and watch media to figure out which outlets are relevant for you.

- Write down names of publications, journalists, reporters, editors and producers who cover issues relevant to you, or you think would be willing to be sympathetic to your advocacy.
- Keep track of journalists', reporters' and editors' interests so you can tailor your messages to them.
- Find out which media the decision-makers you want to reach consume. From this, develop a short list.
- Search the Internet for your local and foreign correspondents' associations to find out which foreign reporters are in your area.
- Contact similar organisations to yours and ask them which media outlets would be best for your needs and which journalists could help your efforts.
- Build a media database and update it regularly.
- Be reliable and trustworthy. You should always tell the truth and keep your promises.
- Tell your contacts about stories you've created that may interest them. For example, these could be stories about people you advocate for, a fundraising event, and new research on an issue, especially if there are statistics.
- Always be accurate. Answer questions to the best of your ability and prepare relevant information before you talk to your contact. If you don't have an answer, tell your contact you'll get back to them with the information. Make sure the sources you use are reliable.
- Familiarise yourself with the news outlets in which you want your stories to appear.

If you combine being available, reliable and trustworthy, taking the interests of your contact into consideration and being accurate, you build trust and assure your contact that you're a source for good, accurate news. This means they'll most likely come to you for information when they need it about a specific issue or set of issues, which, in turn, makes it much easier to advocate for your organisation.

When you build your media database, make sure to keep your lists up-to-date with the names of editors, reporters or producers you may plan to contact. Then dig deeper to learn the deadlines, working hours and preferred methods of communication with these journalists. Lastly, make sure your lists distinguish types of coverage (e.g., health, feature, editorial, calendars).

Approaching media outlets is based on doing your homework and finding those outlets and people relevant to your issues. After you've found appropriate outlets and people, you should put them in a database and regularly update it.

### 6.3.2. CREATING GOOD WORKING RELATIONSHIPS WITH THE MEDIA

Some guidelines for creating a good working relationship with someone in the media include:

- Be available for your contacts. For example, if you miss their call, return it as soon as you can. Give reporters your mobile number and tell them they can contact you 24/7.

### 6.3.3. TIPS FOR CONTACTING THE MEDIA

Part of every advocacy campaigner's goals should be becoming a contact for journalists. You can do this by calling a journalist whose stories and interests are relevant, telling them why you like their writing, and then talking to them about your organisation's areas of expertise. Now they know your issues and can contact you if something comes up. So, give them your contact details and be patient; journalists and reporters are very busy and have a lot of contacts.

When you're ready to contact someone in the media, besides having your story ready and making sure that all the facts are at the ready and checked, there are a few more things you need to keep in mind:

- Be aware that you'll be interrupting a busy person's day.
- Be reasonable when it comes to your requests.
- Seek out reporters who are already interested in what your organisation does.
- Always take time to maintain your relationships and credibility with the media.
- Continue pitching stories, even if reporters don't take them on.
- If calling, have a pitch script ready that is no longer than three sentences.
- If e-mailing, put the most important information at the top with the details below.
- Have interview subjects lined-up in advance.
- If the person you contact isn't interested in your story, ask them if they can refer you to another reporter.
- If you don't know who to contact at a newspaper, try the news or general assignment editors.



## POP-OUT

### Tips for Contacting Journalists and Reporters

After you contact a journalist or reporter for the first time, follow up with an e-mail that includes your contact information, what your organisation does, and why its advocacy work is relevant to their audience. This indicates that you're eager to be useful.

If a story on one of your issues is in the media, contact journalists and offer background information. This will help them write better, more accurate stories and they'll appreciate you taking the initiative. Remember: Journalists and reporters often expect their contacts to come to them with stories.

Another way of initiating contact with journalists is inviting them to be on the committee for your campaign, although this does undermine their partiality in terms of reporting. Having a prominent journalist on your campaign can give it a boost in credibility, which will make communicating your message easier.

As stated above, the ultimate goal for beginning relationships with the media is establishing long-term, mutually trustworthy relationships. Your time isn't wasted if it doesn't always result in stories because you're building those trustworthy, dependable relationships that will result in good coverage of your organisation and the issues it advocates for.

#### 6.3.4. PITCHING MEDIA STORIES

So, after you've followed the guidelines above for choosing and creating quality media opportunities, figured out what story you want to tell, and found a journalist to pitch it to, you have a problem: What do you say to them? How will

you be convincing enough so they'll take on your story? Below, we provide some further information and tips for pitching your stories to the media.

To position your organisation as a valued news source, it's essential to pitch only stories that are truly newsworthy and a good fit with the media outlet and journalist. Don't succumb to internal or external pressures to pitch stories that are not newsworthy (e.g., receiving a large gift or grant may be a big deal for your organisation, but it's not inherently newsworthy to larger audiences). Not only will the story be turned down, but you run the risk of damaging your relationship with the media outlet. When pitching, familiarise yourself thoroughly with the

media in which you want to appear and think creatively about potential news angles and hooks. Before proceeding, ask yourself: What makes your story worth telling now?

#### 6.3.4.1. TIPS FOR TELLING JOURNALISTS ABOUT YOUR STORY

- Make sure your story is newsworthy and well-written.
- Start by asking if they're on a deadline and if this is a good time to talk.
- Get to the point fast and keep to it—adapt your core message for this.
- Recount the human interest or visual part first.
- Be convincing, provide facts and figures to support your claims.
- Use a great sound bite—this is a brief sentence or phrase that, like a headline, summarises your case in a few easily remembered words
- Keep in mind the reporter's point of view. He or she is likely thinking: What's in this for us? Will our readers/listeners/viewers be interested? Will my boss think this is a good idea? How much trouble will it be for us to get this story on air/into print?

One of the most important things to remember when pitching stories to journalists is to look at your story from their perspective and think about what they'll get out of it.

#### 6.3.5. HOW TO RESPOND TO QUESTIONS FROM THE MEDIA

Working with the media involves knowing how to answer their questions about your work, so if you're going to submit stories to media, or deal with media in general, you should be prepared. What follows are eight points that will help to make sure you're ready for anything they can throw at you:

1. Know your message backwards and forwards: Your message is what makes you special, so write it down, practice saying it, and repeat until you know it by heart.
2. All your answers to their questions should refer back to your message: Your message is what's going to move people to act, and the more and varied ways people hear a message, the more likely they are to remember it. Remembering your message is the basis for acting.
3. Prepare possible questions in advance if an issue arises where media may contact your organisation for more information: It will look bad if you're not prepared to answer questions, so think ahead, write down possible questions and think of answers that refer back to your message.
4. Roleplay before interviews: Write down possible questions you may be asked, invite a colleague to play the reporter and practice going over answers, so when the real thing comes, you'll be a natural. (Also ask your colleague for feedback and integrate it into your preparation.)
5. Give them a factsheet of relevant information before the interview if you've initiated it: This increases the likelihood that, when it's time for the interview, you'll actually be able to cover the topics you want to cover. It also lets the interviewer know you value their time.
6. Give reporters any information you have for an upcoming story: Journalists and reporters are busy and appreciate if you contact them with information, which increase your chances of the public or your target audiences receiving your message the way you intended.
7. Be honest if you don't have the answer to something: If you don't know the answer to a question, you can point them to someone who does, tell them where to look to find the answer, or offer to find the answer and then get back to them with the information. This will build trust.
8. Always be responsive to efforts to contact you: If a reporter or journalist calls, call them back as soon as possible and be sure to ask



them when their deadline is, what they wanted to ask you, and who else they may have contacted. This means you're reliable and considerate.

### 6.3.6. HOW TO PREPARE FOR AND GIVE FANTASTIC INTERVIEWS

Now that we've gone over how to respond to questions from the media, we can look into how you give good interviews once the spotlight is on you. The following points will help you prepare for giving fantastic interviews:

- If at all possible, try to get agreement on what topics will be covered before the interview. Tell them about your campaign and ask what the first question will be.
- Always be well informed—be sure to read or watch the latest news.
- If it's a TV or radio interview, watch or listen to previous interviews the host has done to familiarise yourself with the interview style.
- Have no more than two or three talking points and a few facts for each point.
- Listen to what the interviews is saying and always give answers based in your main talking points.
- Never answer questions with only a 'yes' or 'no'—always explain why using your talking points.
- Never say 'no comment' because this makes you look guilty.
- Always maintain eye contact.
- In TV interviews, don't look at the camera.
- Always speak clearly.
- Never lose your temper with a reporter or journalist.
- Don't use jargon, speak in language that a person who is not an expert would understand.
- Always be friendly.
- Don't move around a lot or fiddle.
- Don't give personal opinions because you're representing your organisation.
- Dress appropriately. For example, stripes, checkers and white clothing don't show up well on TV and dangling jewellery can be distracting.
- Always assume the microphone is on.
- When you're on TV, always assume the cameras are rolling until they tell you otherwise.
- Always keep in mind that you know more than the reporter.
- If you can, get a copy of your interview, watch it, and use your mistakes to be better next time.
- Consider preparing beforehand by roleplaying possible questions.

We know there are a lot of points to remember, but as you gain more experience interviewing, you'll get better at keeping them all in mind, and you'll also probably be able to add quite a few points of your own from personal experience to this list.



## POP-OUT

### Dos and Don'ts for Working with the Media

#### DOs

- Make sure your story is newsworthy or, if it's a feature story, that it's interesting and appropriate to the outlet. Tailor your pitch to the specific reporter and publication.
- Be sure your spokespeople receive adequate media training.
- Develop an internal policy for how your organisation will respond to calls from the media and familiarise all staff and volunteers with the policy.
- Introduce yourself long before you need to pitch a big story.
- Return phone calls in a timely manner; reporters are usually on a tight deadline.
- Make it easy for the media to reach you.
- Be brief.
- Be on time.
- Avoid jargon.
- Ask for clarification if you don't understand a question.
- Be as helpful as possible, even if you must defer to another expert. Reporters will appreciate your assistance and will be more likely to call you in the future.
- If you don't know the answer, say you'll get back to them and be sure to follow up.
- Offer feedback when appropriate. If a story contains a major error, bring it to the reporter's attention. If you like a story, send a thank you note.

#### DON'Ts

- Don't ask to review or approve the story before it's published.
- Don't say 'no comment'. It makes you sound as though you have something to hide.
- Don't ask to speak off the record. Presume everything you say is on the record.
- Don't ignore a reporter's request for an interview.
- Don't mislead or lie to a reporter.
- Don't contact more than one reporter or editor at the same news organisation about the same story without letting them know.
- Don't have more than one person from your organisation pitch to the same media outlet.
- Don't schedule a press conference unless you have news that warrants significant coverage.

(Source: Cause Communications)

### 6.3.7. MONITORING AND EVALUATING COVERAGE

We've gone over many things regarding working with the media, but it's important to not forget to keep track of when your organisation is covered in the media. To track your coverage, you may need assistance in the collection of media

coverage, especially for Internet articles and broadcast pieces, as they can disappear quickly. Interns and volunteers can help, or you can look into using a clipping service.

## 6.4. TYPES OF MEDIA MATERIALS

Now that we've gone over the basics of dealing with journalists, we're going to discuss the different types of materials and ways of communicating with media. That's because the form or platform of communication you choose often depends on the information you're trying to communicate. In this section, we'll go over media releases, press conferences, a whole other host of materials and pitches.

### 6.4.1. MEDIA RELEASES

One of the most basic ways of conveying information is a media (or press or news) release. A media release is a short, usually one page, write-up of your organisation's news with the purpose of informing the media. Media releases are great because you have control over the initial message. However, once the media receive your media release, they may ignore it, adapt it or change it, so don't be surprised if someone uses your media release but it looks different than when you released it.

You should use a media release to:

- Bring attention to a new issue, or one that is being ignored.
- Give your point of view on a recent conference or event you attended.
- Inform media of your upcoming events and activities.
- Cover decisions and actions taken by key stakeholders in your areas of expertise.
- Give your perspective on a recent decision government has made regarding policy, or on something the government has done.
- Announce your upcoming advocacy plans.

While writing a media release, it's good to keep in mind that news agencies receive a mountain of media releases every day, so yours has to stick out. You make your media release stick out by having a catchy headline and ensuring it's well-written.

The important thing to remember is that you're writing for a busy person, so in order to entice them to know more, come at it thinking about what a person who didn't know anything about your topic would like to know, and what would make it interesting for them.

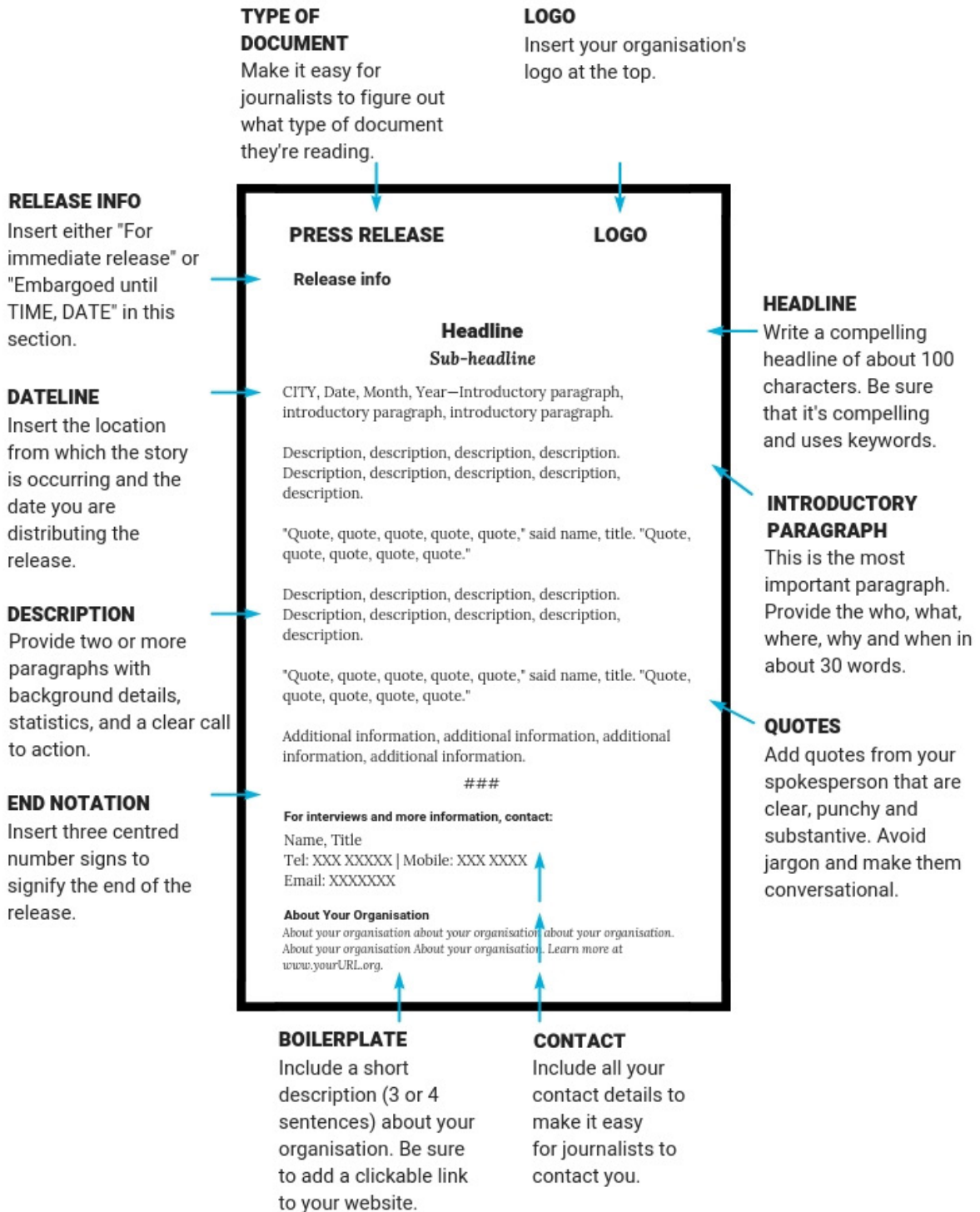
Before you distribute the media release, you should check the deadlines of media you want to carry your text to ensure your item is released on time. (In case of an event, it should be released before the event.) Additionally, media releases should:

- Have a first (lead) paragraph that's short, around 25 words, that tells the who, what, when, where, why and how.
- Always use short sentences of around 30 words that have clear language—no jargon.
- If you have to use special terms, explain them as briefly as you can.
- Make use of catchy language.
- Use quotes in the body of the text, preferably by someone with authority. Give the names of these people, their titles within their organisation and who they work for.
- If your activities are being carried out with partners, they should have a mention and/or quotes in your media release.
- Be consistent in language use.
- Use bullet points to list a series of facts or options, but don't number paragraphs.
- You can also follow up on your media release by calling outlets.
- In the event that you're holding a press conference, you can print it and hand it out here. In this scenario, it can stand alone, or as a part of a larger press pack. Here, you should also send it to other important media that aren't attending the press conference.



# POP-OUT

## Basic Template for Media Releases



## 6.4.2. PRESS CONFERENCES

If a press conference is done right, both the public and journalists come away with new information. So, what is a press conference? A press conference is a media gathering where you give a statement, which is usually about something you've achieved, or a particularly notable event. After your statement, the media asks questions. The media, if they find this newsworthy, can publish this and it can help your advocacy by giving you a platform to reach your target audiences.

As you might have guessed, press conferences are more work than media releases. Because of all the work involved in getting media to attend and setting everything up, it's important that you organise a press conference only when it's absolutely needed—not when a media release or a phone call would have done the same job.

### 6.4.2.1. WHY HOLD A PRESS CONFERENCE?

As mentioned, press conferences take a lot of effort to organise. They cost time and money, so you have to be really sure this is the best way to inform people. Hence, you should only hold a press conference when you have something truly special to offer, such as a ground-breaking news story, or true breakthrough. Another reason to hold a press conference is when there are many spokespeople contributing to the story (e.g., patient, doctor, policy advisor), or when media won't stop calling, e-mailing, and contacting you about a certain issue.

Additionally, if you can successfully organise a press conference that is well-attended by the media, it's a great way to build relationships with journalists and reporters. When inviting media to press conferences, ask yourself the following questions: When would be the most convenient time for journalists and reporters to attend? Is there anything else happening today, any other event, that would get in the way of reporters and journalists coming to my press conference? If you keep these two in mind, you'll have a better chance of organising a press conference that the media attends.

### 6.4.2.2. NINE STEPS FOR PLANNING AN ADVOCACY-BASED PRESS CONFERENCE

Deciding that a press conference is the best way to communicate your information takes a lot of consideration, but if you do decide that this is the best course of action, the following nine steps will help ensure it's a hit.

1. **Sanity check:** Double check to make sure this is the absolutely the best way to communicate your advocacy message. Is your story compelling? Are there other media who would attend, are there other things reporters and journalists can get out of your press conference? If your answers are no, or you're not sure, don't hold a press conference. Instead, send out a media release and then call a select group of reporters you want to report on your message.
2. **Objectives:** Figuring out objectives and success indicators is critical to the success of your press conference. Ask yourself what you want to achieve with the press conference and know that having the goal of general coverage is not enough—your messages have to reach your target audiences. You should be realistic in choosing your objectives and indicators of success (e.g., setting a particular number of journalists and reporters that will attend your press conference).
3. **Assembling a team:** You should pull together a team to help you because press conferences are a lot of work. This group should help prepare, organise, and run it once everything's in place. As always, who does what, when and how should be extremely clear to ensure that the event goes off without a problem.
4. **Save the date:** Establish a date and time for the press conference. As stated earlier, if there are other big events that conflict with your press conference, you should hold it at a different time. If you're planning your press conference for a public holiday, you should also re-schedule. In choosing a date, try to

choose a day where something is going on that is relevant to your press conference.

5. **Book a location:** In booking a venue for the press conference, you should always visit it beforehand. The venue should be appropriate for the purposes of your press conference, conveying the image of your organisation you want to communicate. You also have to consider if it has all the facilities you need—is it wheelchair accessible, are there enough parking spaces, is it easy to get to?

Also consider:

- Is there good mobile phone reception?
  - Is there enough room for TV cameras, microphones, cords, cables? Are there enough power outlets for them? Are there extension cables?
  - Is there good lighting in the room?
  - Is the room quiet? It's bad if people have to talk over the sound of heaters or air conditioners.
  - It's better to have a smaller room than one that is too big—a smaller room that's more crowded gives the impression that something important is about to happen.
6. **Prepare a media kit:** A media kit is a package of materials that gives all the information journalists and reporters need to know about your press conference. This should be handed out at your press conference and be available on your website. The contents of a media kit include: A media advisory; media release; fact sheets; short biographies of speakers; pamphlet or brochure about your organisation; and a business card of the media contact person at your organisation. You also may want to include photographs, charts, relevant reports, and any other materials you think may be of use.

7. **Choose your speakers:** The more recognisable your speakers are, the more attention your event will attract. At the least, the speaker should be the head of your programme area or organisation, or even someone from your board of trustees. Whoever is speaking should be briefed well in advance so they stick to the message. They should also be familiar with relevant reports. Before the press conference, you should roleplay the press conference, asking them potential questions so you can refine their answers to serve your overall messaging.



## TOP TIP

Always remember to ask speakers for brief biographies so the person introducing them at the press conference has the correct information and you have it for your media kit.

8. **Plan for what will happen:** When will it start, when will your speakers go on? This is all about establishing a schedule for when certain things will happen.
9. **Send out the media advisory:** Inform press at least one week in advance of your press conference by sending out a media advisory (see page 104). If you're inviting key reporters and journalists, follow up their invitation with a phone call on the day before the press conference. The invitations you send are essentially promoting your press conference, so make sure you spend time thinking about compelling reasons for why media would want to attend. All information should be accurate, and double check the information on the date, time and venue before you send the notices out.

For more information, please refer the Checklist: Press Conferences on page 106.



## POP-OUT

### Photo Opportunities

A picture is worth a thousand words, so goes the popular expression. This means photos are important and can have a profound impact on how your advocacy is received. As such, photo opportunities ('photo-ops') are pre-arranged opportunities to take pictures of people or events.

Here are few tips to follow for photo-ops:

- If you're planning a photo-op, add a 'visuals' section to your media advisory that communicates what will be available for media to photograph. Include directions to places to be photographed and phone numbers of staff that will be there.
- Photographers should be included in your media lists, so you know who to contact for photo-ops.
- When you plan your photo-up, you should already have the types of photos you want in mind.

### 6.4.3. MEDIA ADVISORIES, STATEMENTS, BACKGROUNDERS, OPINION-EDITORIALS, LETTERS TO THE EDITOR AND MORE

Besides media releases and press conferences, there are a number of other ways to communicate your messages using media. We'll go through those briefly in this section.

**Table 15. Ways to Communicate Your Messages Using Media**

<b>Media Advisories</b>	These are short announcements to media about an upcoming event, a news item, a press conference, or a briefing. Media advisories should be, like all written materials, simple and use clear language. Additionally, they should convey a sense of urgency and describe your topic generally, using less detail than you would in a media release. Hence, it should contain about one or two paragraphs that explain the event: Location; date; time; contact information; key participants, photo opportunities. Also, it should explain why the media should cover the event and have a headline. (Refer to the Worksheet on page 104 for more information.).
<b>Media Statements</b>	There's a subtle difference between a media release, described earlier in this chapter, and a media statement. An organisation generally issues a media statement to publicly react (support or disapprove) to a decision or an event. They are also used when your organisation is going through a crisis. Media statements are usually written in the first person and, similar to media releases, contain the most important information at the top, and contact information trailing at the bottom.

**Table 15. (Continued)**

<b>Backgrounders</b>	These are simply short articles that give background to the issues in media releases, so the information here goes into more detail about what's written in a media release. You can use a backgrounder when you want media to have all facts about your story. They can therefore be given to reporters along with media releases and media advisories. Backgrounders have the following parts: Summary of the story; issue history; summary of what's currently being done about the issue; and examples that show what's being done about the issue.
<b>Opinion Editorials (Op-eds)</b>	These are relatively short (700–800 words), to-the-point opinion pieces, which usually appear in newspapers. Written by anyone outside the newsroom with a point to make, op-eds can boost your advocacy efforts by putting an issue in front of the public, raising its profile. To bolster the chances of your op-ed getting published, make it newsworthy. For example, connect it to a current issue, appeal to readers' emotions, and explain the consequences of doing nothing. Don't just complain; offer solutions. And always use a catchy intro to capture readers' attention, no more than four points to support your argument, and a memorable ending that calls readers into action. (See page 105 for the Worksheet 11: Op-Ed Preparatory Q&A.)
<b>Letters to the Editor</b>	Letters to the editor are statements written by readers of a newspaper or magazine about issues that concern the publication's readers. Letters to the editor differ from op-eds in that they're opinion pieces that come from readers. This is another great way to get your advocacy messages in front of editors and a publication's readers. A publication values having pieces written by experts because their opinions can provide critical and needed perspectives on issues.
<b>Podcasts</b>	Podcasts are audio files that are recorded based on a given set of topics. Users can usually download these from your website, or a digital platform, like iTunes, and listen to them on their mobile devices or computers. Podcasts are a great way to communicate your advocacy issues due to the possible reach they have and your ability to control content. They allow you to claim space as a thought-leader and are a great way to create discussion. For more, see: <a href="http://www.digitaltrends.com/how-to/how-to-make-a-podcast/">www.digitaltrends.com/how-to/how-to-make-a-podcast/</a> .

#### 6.4.4. RADIO AND TV SPOTS

##### Radio:

Radio stations often look for local experts on topics to fill in their programming schedules, so it presents a good opportunity to communicate your advocacy messages. When on live radio shows, radio presenters are the centres of their shows, but they usually aren't experts on most

of the wide-ranging topics they address. That's where you come in, and if you find yourself on the radio, you should not be afraid to take control of the conversation, correct the host if they get something wrong, always be polite, and try to spontaneously interact with the host when possible.



## Television:

Television is a powerful visual media with which to communicate your advocacy. Being on TV can be an exciting experience and, besides knowing how to act while on screen, you should also be aware of how to dress for the occasion, what to bring with you, how to interact with a studio audience and, generally, how to handle yourself in a TV studio



## POP-OUT Advice for Going on TV

### What to Wear

- Casual, but smart is a good way to dress. If you dress too casual or too flamboyant your messages and organisation will not be taken seriously. Otherwise, consider professional business attire.
- Avoid jewellery that will reflect lots of light and may jingle throughout the show.

### What to Bring

- Always have a pencil and paper ready so you can write down notes. If you forget to bring these items, ask the staff in the studio if they can provide them.
- You should inform the producers well in advance of any visuals you'll use.

### How to Conduct Yourself in a TV Studio

- Don't show anger on screen.
- Listen to instructions about which camera to look at and, in general, you should engage in conversation and hold eye contact with people you're speaking with.
- Don't look at the monitors.

### How to Interact with a Studio Audience

- Acknowledge them and their support, but don't play up to them.



## POP-OUT Public Service Announcements

Public services announcements (PSAs) are awareness-raising ads about social issues in the form of messages geared towards the public. These ads try and foster changes in thinking, attitudes and behaviour, and can appear on radio or TV—and you don't have to pay for them. Hence, they're a great way to spread your message to a lot of people. Although the advertising space for the ads is free, creating a good PSA takes a lot of effort, involving research, script writing, recording, editing and more. If you want to learn more about PSAs and how to write one, [click here](#).

## 6.5. CONCLUSION

In this chapter, we've learned a lot about working with the media, and how to use media for your advocacy. In working with media, your primary questions should always be: Why should I use this particular media for my advocacy, is this the best way to get my message out, and what's in it for the outlets I want to carry my stories? These considerations are important because you have to maximise the use of your human and financial resources, which can be extremely limited, and not waste time on things that have reduced impact.

## Worksheet 10: How to Write a Media Advisory

A media advisory should be sent to any key contacts in the media a week before your event, and sent again two days before the event as a reminder to your contacts.

1. A media advisory functions as an FYI that alerts journalists to an upcoming event. It gives the basic information: Who, what, when and where.
2. A media advisory “what” is much like a news release headline. Clearly state the news here with a short description of the event and the issue.
3. List the speakers at your event. Explain who will speak and what they will discuss.
4. Tell when the event will take place. Include the date and time.
5. A media advisory “where” provides the location name and address. Directions may be necessary if the event is held in an obscure location.
6. The contact should be the person who will speak to the media or facilitate interviews. This person must be easily accessible. Place the contact information in the top right corner of your media advisory.
7. In the top left corner, type “Media Advisory.” Beneath that, type the date.
8. Include a short summary of your organisation in the last paragraph.
9. Mention “Photo Opportunity” if one exists and be sure to send it to the photo editors of local news outlets as well as to reporters—they don’t always share information with each other!
10. Type “###” at the end of your advisory. A media advisory should never be more than one page.
11. A media advisory should arrive three to five working days before the event. E-mail or tweet your advisory to the appropriate reporter, editor or producer at each news outlet on your press list.
12. ALWAYS make follow-up calls the day before your event and have the advisory ready to be sent.

(Source: Montana Advocacy and Communications)

## Worksheet 11: Op-ed Preparatory Q&A

Prior to writing an op-ed, answer the following list of questions to ensure that you make the necessary points for an effective piece.

1. What is the problem in the community that your organisation is solving?
2. How does your organisation help to solve this problem?
3. Describe your organisation. How does it work?
4. Why wasn't the problem solved before? What was the obstacle?
5. Is there a villain in the story?
6. What is the cost of the solution you propose?
7. How can you 'paint a picture' in someone's mind through your words?
8. Which community leaders, groups, or people in the community disagree with you? Why?
9. What is the urgency?
10. Who does this affect?
11. What is the history of this story? What has been done before? What was the process to get to this point? Was there a cliffhanger or suspenseful event?



## CHECKLIST

### Press Conferences

#### One week before your press conference:

- Arrange for a room that is not so large that it will look empty if attendance is light. Sites may include hotels, local press clubs, or public buildings near media offices.

#### Check on:

- Podium (stand alone)
  - Speaker system (if needed)
  - Microphone stand (on podium)
  - Backdrop (blue, if possible)
  - Chairs (theatre style, large centre aisle)
  - Easels (if needed)
  - Electricity (outlets for TV lights)
  - Table (for media sign-up and materials)
  - Water (for participants)
- Pick a convenient date and time. Tuesday, Wednesday or Thursday is best. Try not to schedule before 10:00 or after 14:00.

#### Send out written announcements by e-mail or Twitter to:

- Editors
  - Assignment desks
  - Reporters
  - Wire service daybooks
  - Weekly calendars
- Prepare written materials, including written statements and press kits

#### The day before:

- Formalise the order of speakers
- Call all prospective media and urge their attendance
- Double check the wire service day books
- Collate materials and make extras for follow up
- Walk through the site and review details
- Type up names and titles of spokespeople for media handout

#### That morning:

- Make last-minute calls to assignment desks and desk editors
- Double-check the room several hours before
- Walk through the press conference with principal speakers

#### During the press conference:

- Have a sign-in sheet for reporters' names and addresses
- Give out press kits
- Hand in a written list of participants
- Make opening introductions
- Arrange one-on-one interviews, if requested



