Making your case!

Advocacy toolkit
on **Development Education**
and **Awareness Raising**

Foreword by DEEEP

In times of increasing pressure on public spending and aid budgets, it can seem difficult to make the case for development education and awareness raising (DEAR). Some countries, including long standing "champion" in development education in Europe, have dramatically reduced funding for DEAR programmes, arguing that ODA money is better placed in supporting the world's poorest countries than spending it in Europe on global learning and awareness campaigns. Although this is, from a DEAR perspective, an untenable and shortsighted argument, it shows that strong arguments and consistent messages are needed to make the case for DEAR.

On the other hand, in a context of shifting development paradigms which question traditional aid policies, there seems to be a great opportunity to argue for a more integrated approach to global challenges, based on clear values and articulated around notions of global citizenship, participation and a concept of development as a joint responsibility, requiring efforts in all parts of the world. This can be reached with well planned advocacy strategies and achieving ever higher impact.

In this changing context, this toolkit aims to provide solid arguments and background information to sustain the case for reinforcing DEAR policies and strategies – towards institutional stakeholders, but also within civil society. It is meant as a practical tool for your work within your organisations and local, regional, national or international settings. We hope that you find it useful. We welcome suggestions, critique or questions on the toolkit, but also on specific advocacy challenges you might be facing!

DEEEP Secretariat   s

Acknowledgments

Contents

Why this toolkit?

Development Education and Awareness Raising (DEAR) have considerably gained recognition in the last decade: the issue is regularly treated at national and international level and an increasing number of stakeholders from civil society to governments commit to the topic in political statements and policy papers.

Public funding resources have increased (while still remaining insufficient) and more and more EU member states are adopting genuine national development education strategies.

Furthermore, the academic sector has discovered DE as a research issue and is analysing concepts, policies and practices. However, depending on the national political and economic context, it remains difficult to engage decision makers in setting up or maintaining ambitious DEAR policies, including appropriate funding instruments.

Moreover, within civil society, DEAR is still marginalised in some organisations, in particular in times of restricted funding, when some NGOs chose to downsize or even discontinue DEAR departments and/or programmes.

The CONCORD DARE Forum (DEAR working group of the European confederation of development NGOs) aims in its five year advocacy strategy framework (2010-2015) **to strengthen national DE policies and strategy processes and to strengthen DEAR strategically within European NGOs.**

In order to support its members – DEAR working groups and NGOs all over Europe – DEEEP (a CONCORD project in support of DEAR and the DARE Forum) has developed an "advocacy toolkit" in 2007. This toolkit was redesigned and updated in 2008. The DEEEP midterm review 2011 stated "the Forum is still too inward looking in its activities and insufficiently reaching out to new audiences and potential allies".

In order to help DARE Forum members and other actors to make the case for development education at a national, local or organisational level, DEEEP issues this new version of this toolkit taking into account results of an online questionnaire on the use of the existing toolkit among members of the DARE Forum.

The objectives of the toolkit

1. To provide solid arguments for making the case for DEAR towards various stakeholders (national governments, funders, CSOs etc.)

2. To provide hands-on planning and advocacy tools.

3. To gather, outline and discuss case studies and examples analysing and illustrating
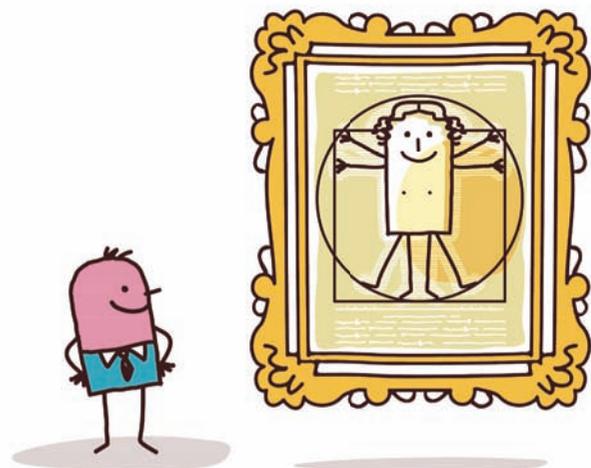
How is it organized?

The toolkit is an update of the previous version and it is built on a broad base of various recent publications, reports and positions by DEEEP or other stakeholders, a wide range of academic and practitioners' literature and respective examples and case studies.

The toolkit is structured in four chapters with concrete learning objectives.

▲ The first chapter "Explaining DEAR" aims at clarifying conceptually Development Education & Awareness Raising and outlining its main actors at European level.
▲ The second chapter "Making the case" analyses its importance, provides the arguments on why DEAR should be supported in this particular historical context and outlines the political commitments already made at national and European level.
▲ The third chapter "Advocacy: the basics" aims at introducing the concept of advocacy for those who are not familiar with it.
▲ The fourth chapter "How to develop a successful DEAR advocacy strategy" describes in detail the steps of a successful advocacy strategy plan combining theory, practical examples, tools, tips and case studies.

In all chapters, hyperlinks are used to give easy access to resources and further reading opportunities for those interested to get deeper to certain issues.
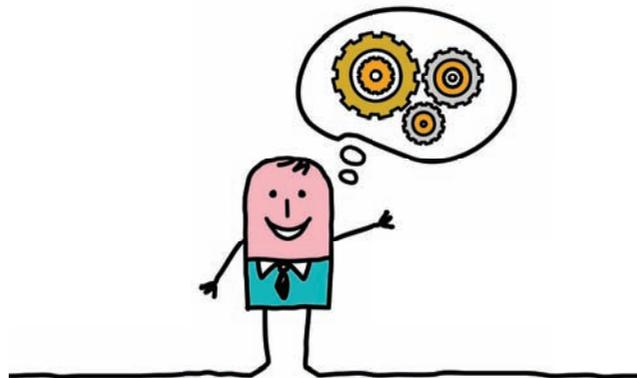
Further debate & reflection

You will find purple boxes at some points in the toolkit on further thoughts for debate and reflection.

Feel free to check http://advocacy.deeep.org for updates on advocacy for DEAR. If you have (critical) thoughts and additions yourself – please let us know: advocacy@deeep.org

DEEEP (www.deeep.org) is a programme initiated by the Development Awareness Raising and Education Forum of CONCORD that aims at strengthening capacities of NGDOs to raise awareness, educate and mobilise the European public for world-wide poverty eradication and social inclusion. DEEEP is co-funded by the European Union.

Objectives

1. On-going pan-European and National coordination, networking, exchange, learning and systematisation mechanisms are actively supported and coordinated
2. Political support to Development Education at European and National level is increased and translated into concrete strategies and policies
3. A pan-European multi-actor reference framework on quality Development/Global Education is developed
4. Skills and knowledge of Development/Global Education practitioners are improved and increased all over the EU-27

A. EXPLAINING DEAR

1. Definitions

Development Education and Awareness Raising (DEAR) is a term which has been given several definitions interlinked and/or ovelapping with other terms such as Global Education, Global Learning, Education for Sustainable Development, Global Citizenship Education, Environmental Education, Human Rights Education, Peace Education and Intercultural Education.

The **European Development Education Consensus** (http://ec.europa.eu/development/icenter/repository/PUBLICATION_CONSENSUS_EN-067-00-00.pdf) defines Development Education and Awareness Raising as follows:

The term "development" is still often associated with a paternalistic, charity based approach to progress: assistance to "underdeveloped countries" should help them reach the level of the "developed North".

CONCORD Development Awareness Raising and Education (DARE) Forum rejects this vertical conception of development and proposes a horizontal model, based on a shared human responsibility.
Development understood as shared responsibility for planet and humanity requires changes and efforts from all actors involved – actually from all human beings.

The context of DEAR

Development Education and Awareness Raising contribute to the eradication of poverty and to the promotion of sustainable development through public awareness raising and education approaches and activities that are based on values of human rights, social responsibility, gender equality, and a sense of belonging to one world; on ideas and understandings of the disparities in human living conditions and of efforts to overcome such disparities; and on participation in democratic actions that influence social, economic, political or environmental situations that affect poverty and sustainable development.

The aim of DEAR

The aim of Development Education and Awareness Raising is to enable every person in Europe to have life-long access to opportunities to be aware of and to understand global development concerns and the local and personal relevance of those concerns, and to enact their rights and responsibilities as inhabitants of an interdependent and changing world by affecting change for a just and sustainable world.

Development education is an active learning process, founded on values of solidarity, equality, inclusion and co-operation.

It enables people to move from basic awareness of international development priorities and sustainable human development, through understanding of the causes and effects of global issues, to personal involvement and informed action.

Development education fosters the full participation of all citizens in world-wide poverty eradication, and the fight against exclusion. It seeks to influence more just and sustainable economic, social, environmental, and human rights based national and international policies.

Definition approved by CONCORD General Assembly and Development Education Forum in 2004

In the practice of many actors, Development Education and Global Education are used as interchangeable terms. Although Global Education is often understood as thematically broader than Development Education including also Human Rights Education, Intercultural Education, Education for Peace and Conflict Resolution, Education for Sustainable Development and others, for the purposes of this toolkit we will refer to both terms as if they were equivalent.

2. Conceptual approaches

It is important to note that the term Development Education is at present used for communication, information and education activities of very different type with very different aims and respective levels of depth. The different conceptual approaches used by diverse actors often create unclarity and make a common understanding more complex.

In many cases the distinction of DE from other areas is not based on conceptual considerations but on institutional realities. For example, Ministries and agencies responsible for aid delivery often distinguish DE through its historical and traditional rooting in the ODA system, while today many actors take on an understanding of DE which goes far beyond the limits of classic "development co-operation" and further North-South issues.

> "Conceptual clarity is crucial for a meaningful discourse about DE and for developing powerful DE strategies.
>
> It is recommended to all stakeholders to clearly and explicitly define their concept of Development Education."
>
> (DE Watch report)

The DE Watch report 2010
In order to analyse what is happening in DE in the different European countries, the DE Watch report (2010), provides a typology of four distinct types of conceptual approaches to DE. Although these types are not meant to be understood as a normative framework for conceptual orientation, they give a descriptive account of the different understandings of DE which occur in the reality of different actors' policies and practices. (http://www.deeep.org/images/stories/MSH/de_watch.pdf)

These include one understanding of Development Education which is considered as inappropriate by most actors (DE as Public Relations for development aid) as well as three legitimate although different types of DE approaches: (a) DE as Awareness Raising, i.e. disseminating information about development issues, (b) DE as Global Education, i.e. aiming at changed behaviour and at enhancing action of the target group for global justice and sustainability or (c) DE as the development of Life Skills, i.e. focusing on the learning process and the enhancement of competences needed for life in the complex and dynamic world society.

The following table, which is included in the report, summarises the characteristics of each approach. As clearly stated in the report, the categories and proposed types of DE concepts are neither clearcut nor complete nor exhaustive. They are ideal types – in reality, mostly mixed forms occur.

	Public Relations	Awareness Raising	Global Education	Life Skills
	Not recognised as DE	Recognised as Development Education		
Thematique scope	development cooperation	wider development issues	global interdependency; North-South issues (environmental, economic, political, social)	local and global issues of social ethics in worls society (beyond a north-south perspectives)
Goal	public support	awareness	responsible action	fulfilling life, social change
Educative approach	"indoctrination"	information	participation; process awareness/experience => understanding/ capacity building => action	support/offer; empowerment
Pedagogic thought	commercial	top-down	actors-centred, normative	constructivist, systemic
Target Group	object of PR	recipient of information	subject of a learing process in which normative objectives are given; activist	(dynamic) subject of a self-organised learning process in which results are open; agent of social change
Context	foreign aid	development policy	(recent) globalisation	local community & worls society

As life skills can be considered as a result of the educational process, in practice for the majority of civil society stakeholders in Europe, DEAR is divided between "Development Education" and "Awareness Raising". One of the challenges faced by the sector is to integrate these two components both conceptually and strategically.

An integrated approach to DEAR needs an expanded definition of the "Awareness Raising" element, which is not limited to the dissemination of information around development issues and a top-down approach. In the integrated approach of DEAR, "awareness raising" is addressing the global issues of injustice and inequality by using **strategic participatory advocacy actions as its integral composent.**

We should make clear that besides its educational character, the final objective of DEAR is however **strongly political**: Change of attitudes and behaviours of citizens (including decision makers) and so finally change politics and societies, through a broad range of activities and action fields.

3. Mapping the actors of DEAR in Europe

A wide range of actors is involved in DEAR across Europe. The following diagram draws a map of these actors and their interlinks. The DEAR space in Europe is framed within two perspectives: the geographical (from local to national and international) and the sectorial (Civil Society vs. Government and intergovernmental institutions):
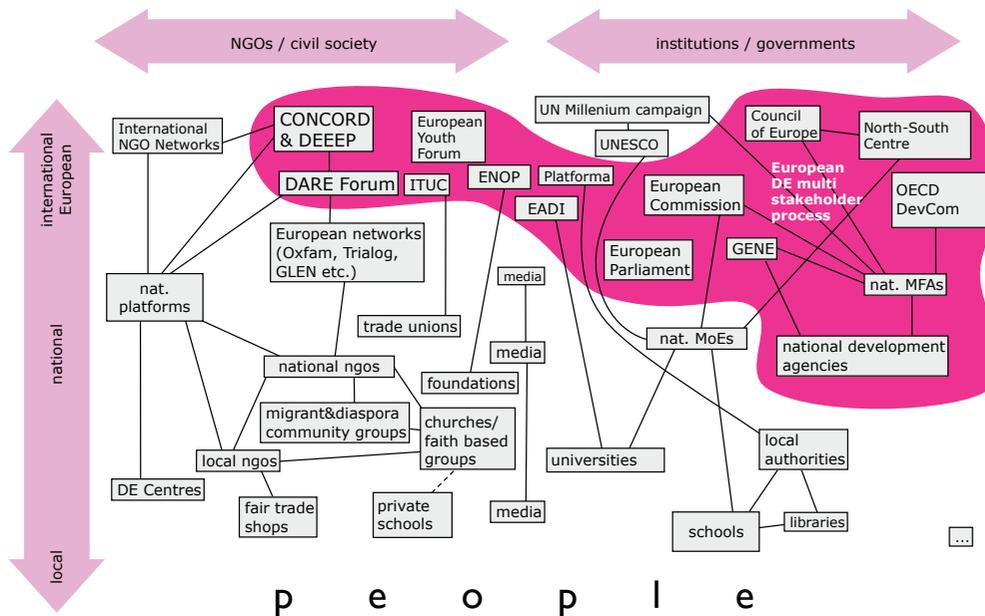
Multi-stakeholder co-ordination processes on DEAR have happened and are happening in a number of EU countries. They mostly involve the Ministries of Foreign Affairs (or Development Cooperation) and of Education and their subordinate agencies, as well as civil society organisations (CSO), academics, and further civil society actors. MSH co-ordination/strategy development processes have given a push to the DEAR sector at national levels in various Member States. They have often resulted in a national strategy for DEAR the focus of which is either on (informal) DEAR activities by MFA & development NGOs or on the formal education sector or both. These national processes of MSH co-ordination and strategy development have often built on experiences from other European countries (e.g. through the Global Education Network Europe GENE, or the DARE Forum). However, in many cases they were not and are not co-ordinated with parallel processes in DEAR allied educations such as „ "Education for Sustainable Development". (2010 "DEAR in Europe" study report, https://webgate.ec.europa. eu/fpfis/mwikis/aidco/index.php/DEAR_Final_report)

B. Making the Case

1. The global challenges

The world is facing significant global challenges such as responding effectively to the climate change, meeting the Millennium Development Goals and framing the post MDGs agenda, ensuring universal human rights and building a culture of peace.

Although the percentage of people living below the poverty line is falling, inequality is increasing rapidly both within and between different countries, sustainability indices are falling, and social indicators are getting worse. As Michael Edwards notes in his paper "Thick problems and thin solutions: how NGOs can bridge the gap" (http://www.thebrokeronline. eu/var/broker/storage/original/application/960b295f2838b63a6609cea4fdf0a51f.pdf) (Hivos, 2011), three conclusions are suggested by the current trends: "The first is that richer countries no longer provide an adequate 'end-point' to aim for in the process of development, if they ever did. The second is that what ties economic growth to human flourishing is less clear and predictable than it ever was. And the third is that these linkages can't be strengthened by doing more of the same, since we've tried that already and largely failed. Instead, existing systems of knowledge, politics and economics must be transformed, not simply expanded or made more accessible to the poor. So the tasks of social change are becoming more, not less complicated and contested - in other words, they are getting "thicker."

Drawing on grounded accounts of what it means for people living in poverty to be part of a global economy at this time, Naomi Hossain in his paper "*Complex Global Shocks and the new Challenges for Civil Society*" (http://www.fimcivilsociety.org/f/library/FIM%20paper%20 Naomi%20Hossain.pdf) (IDS, 2011), sets out four challenges for civil society: the need to a) breach its own boundaries, to address cross-cutting issues at their source; b) amplify the voice of those directly affected; c) influence a fairer policy response at local, national and global levels; and d) fertilise debate, to grow new understandings of how the global economy should work, and for whom.

The current situation demonstrates that the ability of CSO to mobilize financial resources weakens during a crisis just when the need for their social services rises. Eva Maria Hanfstaegl in her paper "*Impact of the Global Economic Crises on Civil Society Organizations*" (http:// www.un.org/esa/desa/papers/2010/wp97_2010.pdf) (UN DESA, 2010) recommends that governments and international institutions need to step in to act "counter-cyclically" and seek a way to institutionalize financial support for the necessary programmes of CSOs during global crises.

At this particular historical context, that DEAR risks to be the easy victim of the cuts on public and organisational spending, it is on the contrary imperative to increase its support!

2. Why DEAR is important?

The ultimate aim of DEAR is to affect change for a just and sustainable world. However, change is a process not an event. DEAR's contribution to this change process is significant particularly in the current historical global context, because it adopts a holistic approach which we here attempt to divide and organise in 4 distinct interlinked aspects: changing oneself, changing together, changing paradigms and changing the rules.

2.1. Changing oneself

The ultimate purpose of DEAR is to develop values, based on knowledge of global issues and relevant skills in order to build attitudes for responsible global citizenship at individual and collective level. Only through this path, sustainable global change can be achieved.

Global education may not introduce new contents to formal education, but it enriches the concepts and contents of all subjects and fields of education related to global development by widening their dimensions.

Contents in global education bridge the problems in a micro context with global issues (which are also problems in macro context) and move from close reality (the family, the neighbourhood, the school, the city) to intermediate reality (the region, the state) and distant reality (the global world). Global education contents do not come from abstract categories but from people's needs, captured in their own expressions. Therefore, the traditional concept of content is replaced by

✔ an analysis of events and developments happening at micro level in the nearest reality
✔ selection of specific themes related to those events
✔ recognition of connections with the macro world and the emerging dialogue between them

This values-based multi-dimensional knowledge along with the associated skills and competencies build global citizenship and add qualifications which also contribute to employability and professional development.

"Take every penny you have set aside in aid for Tanzania and spend it in the UK explaining to people facts and causes of poverty"

Julius Nyerere, former president of Tanzania.

Core values and attitudes of a responsible global citizen

Self-esteem ◆ self-confidence ◆ self-respect and respect to others ◆ social responsibility ◆ environmental responsibility ◆ visionary attitudes ◊ open-mindedness ◆ proactive and participatory community membership ◆ solidarity

North-South Centre, Council of Europe, Global Education Guidelines (2010)

According to a 2011 survey (http://clients.squareeye.net/uploads/dea/documents/BusinessPoll_online_TG.pdf) of senior business leaders published by Think Global and British Council, knowledge and awareness of the wider world is more important than degree classification or A-levels for job seekers in recruiting new employees. Three out of four UK businesses think they are in danger of being left behind by merging countries unless young people learn to think more globally, and are worried that many young people's horizons are not broad enough to operate in a globalised and multicultural economy. The vast majority of businesses think it is important for schools to be helping young people to think more globally and lead more sustainable lives, and four fifths think schools should be doing more.

Of course, for development education "global thinking" is desirable if rooted in values of equity and justice and not primarily as a qualification for employability in the globalised market.

input	• DEAR
output	• Skills and values based on knowledge of global issues
outcome	• Attitudes & behaviours of responsible global citizenship
impact	• Sustainable global change
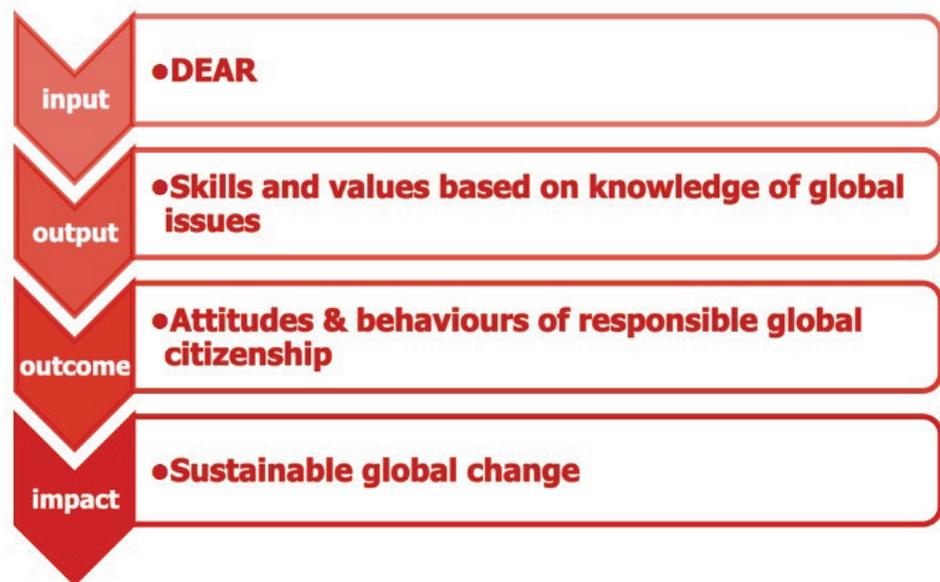
CASE STUDY

Wootton Bassett School in Wiltshire - recently rated as 'Outstanding' by Ofsted (British Office for Standards in Education, http://www.woottonbassett.wilts.sch.uk/Documents/OfSTED2010.pdf) in all categories - aims to be 'a global school in a local community' and achieved the British Council International School Award in 2010 for its extensive international work with partner schools in China, South Africa, Sweden, Canada and the USA, among others.
The 2010 Ofsted report highlights the school's 'burgeoning international programme' and praises its success in preparing students 'exceptionally well' for their future lives and 'particular strengths in developing well-rounded, high-achieving individuals with a strong awareness of global issues'.

2.2. Changing together

Collective action is a precondition for change at any level (local, national or international). Civil Society is the arena outside the family, the state and the market where people associate and act together to achieve social change. In the process of globalisation, the emergence of a Global Civil Society is crucial to shape a positive direction:

✔ As an enabling space for dialogue, mutual learning, participation and purposeful interaction of citizens
✔ As a value based, non-profit economic alternative to that business sector aiming exclusively at maximising profit
✔ As a global watchdog, counter power and pioneer in political and economic processes.

The creation of such a Global Civil Society is not only the task of global NGO elite. The development, formation and fabric of a Global Civil Society will only be effective if people around the world work together as responsible global citizens in equal partnership.

In particular, advocating for development effectiveness needs strong and informed public engagement. It is worth mentioning, that aware and active civil society is of particular importance in "emerging donor" countries (BRIC, EU12), which are now defining their international cooperation policies.

Development communication and top down campaigning are not sufficient to provide deep and values based options for citizens to engage. To create lasting support and engagement for global justice, NGOs should aim to strengthen intrinsic and positive values: The true level of ethical development of a society is revealed by the extent to which citizens are able to choose values transcending their own immediate self interest. The "Finding Frames" (http://www.findingframes.org/) research study shows that people who have stronger 'self-transcendent values' engage more and longer in pro-social behaviour. DEAR proposes an approach to reinforce these values and to facilitate long lasting supporter journeys.

Successful DEAR forms multipliers that reach out in society and can enable the large and deep public support, which is crucial for any global justice movement to succeed.
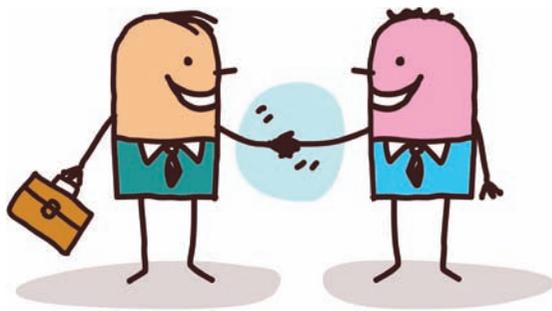
Skills built by DE

Critical thinking and analysis
◆ changing perspectives
◆ recognize negative stereotypes and prejudices
◆ intercultural communication
◆ active listening ◆ teamwork and cooperation ◆ empathy
◆ assertiveness ◆ dealing with complexity and uncertainty
◆ conflict transformation
◆ decision making
◆ creativity ◆ research
◆ dealing with media
◆ dealing with science and technology

North-South Centre, Council of Europe, Global Education Guidelines (2010)

Collective or individual change?

From a psychological perspective sometimes harmony through contact and prejudice reduction are necessary and sometimes the collective challenge of status quo is beneficial for a more just society (Wright & Lubensky, 2009; Wright, 2009). Even a personal change might be necessary as advocated from post-colonial theorists (Andreotti 2006). When is what necessary? And how to combine the different approaches meaningfully?

2.3. Changing paradigms

The role of DEAR in the development discourse is crucial by fostering new development paradigms (today, widely accepted):

✔ The **Human Rights Based Approach** (HRBA) to development puts the individual and collective human right to enact one's own development at the centre of any development intervention: Not the satisfaction of externally identified needs, but the right of people to choose their own development is at the centre. Capacity building and popular education empower communities to chose and implement their own way to development. Advocacy gains importance to achieve systemic changes. (more on HRBA in education here (http://unesdoc.unesco.org/images/0015/001548/154861e.pdf))

✔ **Policy Coherence for Development** (PCD) is considered as key in the fight against poverty: The rich states should stop doing harm through their e.g. trade, fishery, fiscal or agricultural policies. When illicit financial flows from the South to North are at 10 times higher than the whole of aid from North to South, any aid policy appears to be wasted: PCD is central to any attempt in reaching more global justice. (read more here (http://www.eucoherence.org/))

✔ **Development Effectiveness** incorporates development cooperation into the agenda of PCD and HRBA: Development cooperation can only be effective when relevant policies are coherent and coordinated and non-aid issues are systematically addressed. (read here (http://www.oecd.org/dataoecd/25/30/48742718.pdf) the *2011 Survey on Monitoring the Paris Declaration*) **Enabling environment for CSOs** is central in development effectiveness and the role of DEAR in this can be critical. The Busan Partnership for Effective Development Cooperation (http://www.aideffectiveness.org/busanhlf4/en/topics/busan-partnership.html) for the first time established an agreed framework for development cooperation that embraces traditional donors, South-South cooperators, the BRICs, CSOs and private funders. However, the deal reached is not binding for all the donor countries, and definitely more works needs to be done on advancing favorable conditions for civil society.

The principles and approaches of these paradigms are essential part of DEAR policy and practice, and DEAR can be a major tool to further promote and operationalise them by empowering and mobilising people to campaign and by providing a structure in which the public can critically assess aid and development and exercise ownership of the global development agenda.
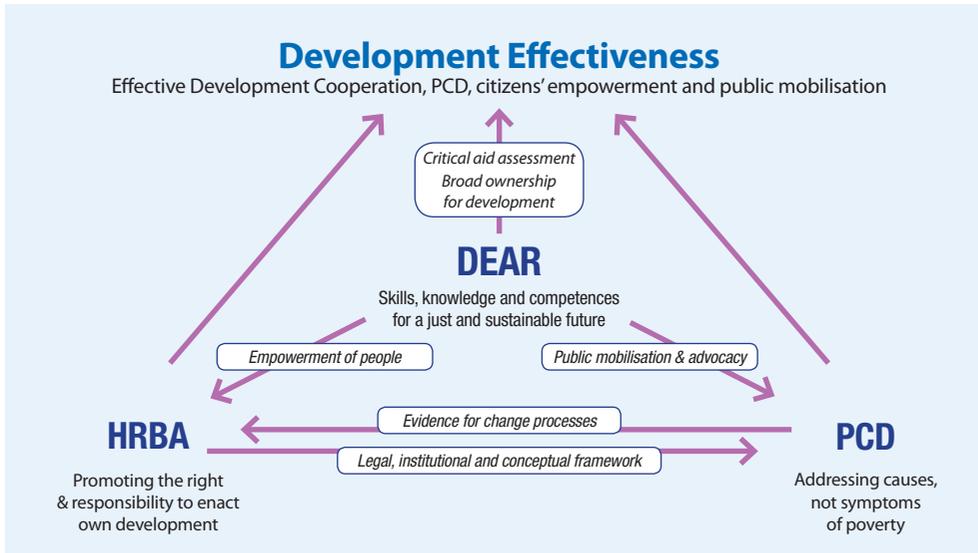
(source "Development Needs Citizens", DARE forum position paper, http://www.deeep.org/index.php?option=com_content&view=article&id=112&catid=34)

2.4. Changing the rules

DEAR promotes the challenging and changing of the unfair and unequal world which we live in. Beyond the aim of "more and better aid" and a more sustainable and fair development, as already stated, DEAR proves to contribute overall to a better and just society by influencing political decisions and changing policies
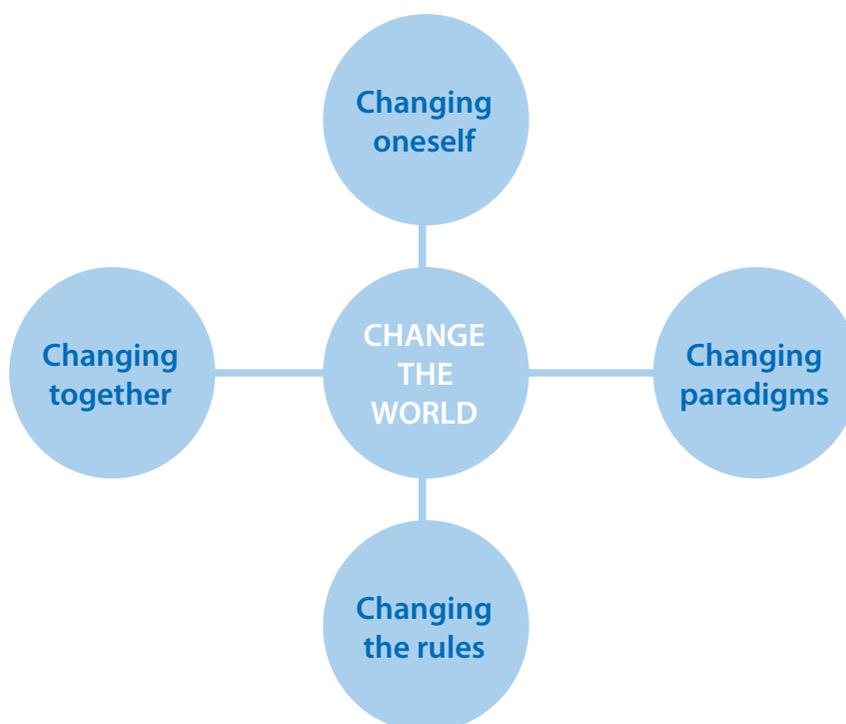
CASE STUDY

Oxfam's Make Trade Fair campaign

Oxfam started in 2002 a huge campaign to change the rules governing trade. Oxfam recognized that the problem of poverty requires a systemic approach that ensures that rights of the poor are protected by the rule of law at the national and international levels. Through the MAKE TRADE FAIR campaign, Oxfam had not only made the issues understandable; it had succeeded at embarrassing developed countries for their hypocritical approach to policies: instead of robbing half the world of a proper living, trade could help millions of poor farmers and workers in developing countries beat poverty, and change their lives for good. But this would not happen unless countries changed the way they trade.

Changing oneself
Oxfam's campaign tickled personal involvement and responsibility. By questioning people with "*Do you know that every time you buy something made or grown in a developing country, you take part in a billion pound scam?*" Oxfam recognized personal choice as a vehicle of change: right to choose → chance to choose → responsibility to choose. By empowering personal commitment and personal changes Oxfam created the base for a shared approach to the campaign.

Changing together
Oxfam involved a wide range of actors and rock stars to add "star power" to its outreach campaign. Scholars and editorials endorsed its ideas. "We're in it together" was a slogan of this campaign. Until 2006, MTF campaign had been a catalyst in an array of alliances, had generated amazing publicity, and mobilized public opinion on rigged trade rules around the world. More than 20 million people signed the Big Noise petition.

Changing paradigms
Oxfam has adopted the "rights-based approach" to development and is committed to "put economic and social justice at the top of the world's agenda." While other civil society groups, academics, unions and activists have long argued that trade agreements could undermine specific human rights such as labor rights, Oxfam examined this issue from a broader world view: It pointed out that trade rules can undermine the "rights and interests of poor people" including their rights to food, water, health care and a sustainable livelihood. Noting that poverty, development, human rights and trade are linked and thus must be addressed cohesively, Oxfam argued that these rights must be placed at the center of the agendas of international bodies and governments.

Changing rules
The campaign has achieved concrete results in influencing policies and practices at international level. For example, it successfully lobbied the World Trade Organization (WTO) – the body that sets trade rules – to exempt developing countries from cutting their import tariffs on agricultural products that are essential for food security and rural livelihoods which they have promised to do by 2013. Also, in 2007, Oxfam's successful campaign secured a landmark deal between Starbucks and the Ethiopian government. This enabled farmers to get a fairer price for their coffee beans and gave them more to spend on food, health care and education.
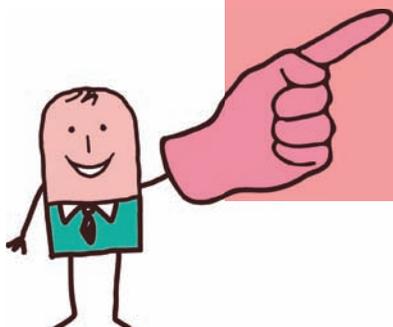
3. Why DEAR should be supported

All the arguments about why DEAR should be supported are not applicable to each actor/target. It is very important to have this in mind when advocating for DEAR, particularly as sometimes some of the arguments that are convincing for one target may be contradictory for another. The following diagram gives examples of arguments linked with the respective actors to which are applicable:

In the process of globalisation, the emergence of a global civil society is shaping a values based alternative to the business sector and acts as a global watchdog in the economic process

Through paradigms such as HRBA and PCD, DEAR provides a structure in which the public can critically assess aid and development and exercise ownership of the global development agenda

Successful DEAR forms multipliers that reach out in society and can enable the large and deep public support

NGDOs and their networks

Other Civil Society actors

DEAR builds longer engagement and pro-social behaviour and facilitates long lasting supporter journeys

Creation of a global civil society provides legitimacy and democratic ownership for political action

EU "global" citizens and civil society can play a key role in framing the post-2015 agenda and objectives

International political commitments

EU

Ministries of Foreign Affairs

More DE means better ODA

Ministries of Education

Global education has a transformational learning power developing values, based on knowledge of global issues and relevant skills in order to build attitudes for responsible global citizenship

Global education enriches the concepts and contents of all subjects and fields of formal education related to global development by widening their dimensions.

"Unlike a growing number of member states, the European Union as one of the most significant funders of DEAR in Europe still doesn't have an explicit strategy on development education. The opportunity to develop such a strategy was never better than today".

Rilli Lappalainen, CONCORD board member

4. Political commitments

The European Parliament,

…Recognises that globalisation has profoundly changed Europe's societies and recommends the inclusion of Global/Development Education within all education to enable citizens to deal with the threats and opportunities of a changing world.

2010 EP resolution on key competences for a changing world

It happens now!

5 MEPs from Poland, UK, Germany, Spain and France propose a written declaration on Development Education and Active Global Citizenship to be adopted by the European Parliament in June 2012. DEEEP and the DARE forum have started a lobbying campaign to all MEPs.

In a growing number of international political commitments and declarations, governments and institutions have recognized the importance of DEAR:

▶ 2001 EU Council of Ministers Resolution on DE
(http://www.deeep.org/index.php/advocacy/289)
▶ 2002 Maastricht Global Education Declaration
(http://www.deeep.org/index.php/advocacy/288)
▶ 2005 Recommendations of the Brussels conference on DE
(http://www.deeep.org/index.php/advocacy/286)
▶ 2005 to 2014 UN decade Education for sustainable development
(http://www.deeep.org/index.php/advocacy/287) of
▶ 2005 European Consensus on development
(http://ec.europa.eu/europeaid/what/development-policies/european-consensus/index_en.htm)
▶ 2006 Recommendations of the Helsinki conference on DE
(http://www.kehys.fi/julkaisut/kehyksen-julkaisut/konferenssiraportti-conference-on-european-development-education-2006/primapaper/2)
▶ 2007 European DE Consensus
(http://ec.europa.eu/development/icenter/repository/PUBLICATION_CONSENSUS_EN-067-00-00.pdf)
▶ 2008 EP report on Development Cooperation Policies for the NMS
(http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P6-TA-2008-0097+0+DOC+XML+V0//EN)
▶ 2008 Recommendations of the Ljubljana conference on DE
(http://www.ecas-citizens.eu/index.php?option=com_docman&task=doc_download&gid=718&It)
▶ 2009 EP resolution stating that DE for the European public has been constant priority for the Committee
(http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P6-TA-2009-0358+0+DOC+XML+V0//EN)
▶ 2010 EP resolution on key competences for a changing world, recommending "the inclusion of Global/Development Education within all education to enable citizens to deal with the threats and opportunities of a changing world"
(http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P7-TA-2010-0164&language=EN)
▶ 2010 Council of Europe Charter on Education for Democratic Citizenship and Human Rights Education
(http://www.coe.int/t/dg4/education/edc/Source/Pdf/Downloads/6898-6-ID10009-Recommendation%20on%20Charter%20EDC-HRE%20-%20assembl%C3%A9.pdf)
▶ 2011 EC Structured Dialogue's statement on the importance of DEAR for Global Sustainable Development. Call to EU member states and Commission for developing strategies for DEAR.
(https://webgate.ec.europa.eu/fpfis/mwikis/aidco/images/e/ea/FINAL_CONCLUDING_PAPER.pdf)

At **national level**, political commitments are expressed mainly through the implementation of DE national strategies or other institutional support of DE activities. Strategy and framework documents from around EU member states can be found here (http://www.deeep.org/index.php/advocacy/158).

DEAR, at national level, is characterized by a high level of heterogenetity due to the unique historical, cultural, political and economic context of each Member State. Even within the same national context, the different levels of commitment, experience, impact and knowledge that NGOs involved in DEAR bring, play a critical role. Therefore an advocacy strategy must take this fact into account and be developed accordingly.

An overview of DEAR in EU member states and Norway is presented in the Development Education Report "DE Watch" (http://www.deeep.org/images/stories/MSH/de_watch.pdf) published in 2010.

5. EC supporting DEAR in pracitce

The 2010 "DEAR in Europe" study report (https://webgate.ec.europa.eu/fpfis/mwikis/aidco/index.php/DEAR_Final_report) analyses the support provided by the EC and other main EU actors to DEAR in Europe and gives a set of recommendations for improving this support. A summary of the SWOT analysis of EC's support of DEAR given below draws the picture

▶ European partnerships involving civil society across the EU;
▶ Promotion of North – South partnerships;
▶ Availability of funds to civil society organisations which adds to or takes the place of national funding opportunities;
▶ Thematic openness of the Calls; and
▶ Three years grant duration

STRENGTHS

▶ Absence of clearly stated strategic objectives and related policy statements for DEAR;
▶ Absence of coordination between the actors;
▶ Absence of learning from assessments of EC supported DEAR projects;
▶ Grant allocation conditions and insufficiently transparent process favourable for big CSOs;
▶ Relationship between EC NSA-LA DEAR programme staff and grant recipients limited on administrative tasks;
▶ Grant finances shown limited growth since 2005

WEAKNESSES

▶ EC's potential role as facilitator and strategic promoter for DEAR;
▶ DEAR is highly relevant to EC engagement;
▶ Existence of a wealth of experience in DEAR at all levels;
▶ Interest of DEAR actors to develop closer relationship with relevant stakeholders in the South and globally

OPPORTUNITIES

▶ Social and economic situations in the EU and its Member States may lead to an inward looking approach to policies;
▶ Populist movements mobilising attitudes of intolerance and exclusion may jeopardise efforts in DEAR;
▶ Existence of policies that are actually or potentially counter-productive to development;
▶ Focus on the promotion of aid policies rather than on enhancing critical citizen engagement with global issues;
▶ Narrow interpretation of DEAR as an added aspect of development cooperation;
▶ EC support of DEAR may be used as excuse by Member States to not deveop own policies and strategies

THREATS

C. Advocacy: the Basics

1. Defining the issue

Advocacy is a process aiming at bringing change in the policies, practices and attitudes of individuals, influential people, institutions and groups.

Through advocacy we put a problem on the political agenda, providing a solution to that problem, and building support for applying the solution in order to change the situation. It is about achieving specific outcomes - a measurable change in policies and practices.

Advocacy happens at all levels – local, national, regional and international

Misconceptions about advocacy

Advocacy can be a challenging concept because there is no one set of instructions about where to begin, how to begin and what constitutes effectiveness. Moreover, the international lexicon for advocacy related concepts and actions complicates matters by using multiple words for the same actions as well as blurring understanding of what an organization is really doing.

The word "advocacy" is often used interchangeably with related words such as "lobbying," and "education." Identifying lobbying with advocacy is wrong, as lobbying is only one kind of advocacy methods. Not all advocacy is lobbying, but all lobbying is advocacy. At the same time, information, education and communication campaign, for example, against smoking may be an effective approach for influencing behaviour at personal level, but it will not – on its own – achieve change in policy and practice on this issue, such as an anti-smoking legislation.

Associated with the above misconception is the myth that advocacy means "doing politics" and that lobbying is not of nonprofits' business! Indeed, not only is lobbying a right of nonprofits, it is a duty. While nonprofit organisations should generally not support or campaign against a political candidate or party, they can and should speak up on matters of concern to the organization and the community it serves.

> Advocacy is not just about getting to the table with a new set of interests; it's about changing the size and configuration of the table to accommodate a whole new set of actors. Effective advocacy challenges imbalances of power and changes thinking.
>
> VeneKlasen, L. with Miller, V. (2002) A New Weave of Power, People & Politics: The Action Guide for Advocacy and Citizen Participation.(http://www.justassociates.org/ActionGuide.htm)

Advocacy means to speak up, to plead the case of another, or to fight for a cause. Derived from the Latin word advocare, which means "coming to the aid of someone," *advocacy* is an important function of most nonprofit organizations.

2. Advocacy Approaches

1. **Involving leaders:** Leaders refer to those who are extremely influential in facilitating changes in national or international issues. Leaders can be reached by
- Formal settings (meetings, seminars, conferences, etc.)
- Informal settings (public gatherings, festivals, sport events, at home, etc.)
- Directly (meetings, letter, media)
- Indirectly (through their colleagues, friends, family, etc)

2. **Building partnerships:** partnerships are formed by groups of individuals that join together aiming to accomplish a common purpose.

Advantages		Disadvantages
Enlarge the support	⬅➡	May require to comprise own position
Increase resources	⬅➡	Larger organizations can influence more
Enhance influence	⬅➡	Needs extra effort on coordination
Assist networking	⬅➡	Can distract from other work

3. **Mobilizing community groups:** the mobilization of the community groups aims at involving community leaders and encouraging key stakeholders to take action, providing feedback for community needs and feelings, collecting data, disseminating information among public and creating public support for a given issue.

4. **Capacity development:** this approach is used to maximize the impact of our advocacy campaign by expanding the network of advocates, develop our leadership and maintaining high level of knowledge and skills.

5. **Working with mass media:** to generate public support, the work with media is an important approach that enhances visibility, informs the decision makers and public about our positions, stimulates discussion on the issue promoted

(Based on N. Assiffi's lecture "Key approaches of advocacy" http://www.pitt.edu/~super1/lecture/lec18371/002.htm)

Taking party?

There might be cases when NGOs want – or even have to – advocate for or against a political party or candidate (e.g. South-Africa during apartheid, or when right wing extremists thread to win elections). When and how can NGOs take party in politics? What can be the consequences and risks, e.g. regarding funding sources or reputation?

"An idea is like a play. It needs a good producer and a good promoter even if it is a masterpiece. Otherwise the play may never open; or it may open but, for a lack of an audience, close after a week. Similarly, an idea will not move from the fringes to the mainstream simply because it is good; it must be skillfully marketed before it will actually shift people's perceptions and behavior."

David Bornstein, How to Change the World: Social Entrepreneurs and the Power of New Ideas

3. Advocacy methods

Reduced to its most basic level, effective nonprofit advocacy is about communication and relationships. All the previously described approaches used by advocates choose practically three key methods or paths to pass the message to their targets: lobbying, public mobilisation and mass media. In fact, mass media normally co-exists with one or both other paths.

4. The roles of an advocate

Depending on the objectives, an advocate takes different roles, some of which are presented in the table below:

ROLE	CHARACTERISTIC	
Represent	Speak for people	
Accompany	Speak with people	
Empower	Enable people to speak for themselves	
Mediate	Facilitable communication between people	
Model	Demonstrate the practice to people or policy makers	
Negotiate	Bargain for something	
Network	Build coalitions	
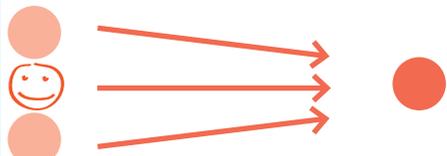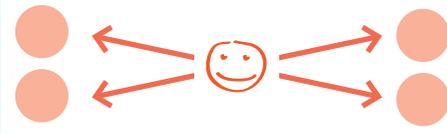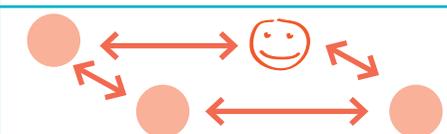
(source: Tearfund 2002, Advocacy Toolkit, http://tilz.tearfund.org/webdocs/Tilz/Roots/English/Advocacy%20toolkit/ATENGA_2_Understanding%20advocacy.pdf)

5. How to plan for successful advocacy

Strategy development is at the core of effective advocacy. Advocacy is a systematic and logical process with distinct steps and activities. An outline of the main steps is presented below while the analysis of each step along with tips and tools is given in the following chapter.

STEP 1: Define the issue, its causes, potential solutions

STEP 2: Analyse the context

Power analysis   **Stakeholders mapping**

STEP 3: Develop your plan

Long term goals   **SMART objectives**   **Success indicators**

STEP 4: Analyse the risks

STEP 5: Build alliances

STEP 6: Make the case and develop key messages

STEP 7: Convey your messages

Lobbying   **Public campaigning**   **Working with Media**

STEP 8: Consolidate your plan

Budget & resources   **Activity plan**   **Monitoring & Evaluation**

The advocacy process is not linear; therefore the steps may not always occur in exactly the same order. Moreover, there is no "one size fit all" strategic template that can be applied to any case, actors and situations. The actual approach depends very much on the specific context or situation.

> **"One of the most common mistakes campaigners make is to fall into the activity trap. One goes straight from good intentions into full activity mode – with or without activity plans. The result is often misused resources, frustration and ultimately failure. By posing a little and doing some homework on strategy, campaigners can have a much better chance of channeling their resources towards the outcomes they are after"**
>
> From International Freedom of Expression Exchange
> Campaigning for Freedom of Expression, A Handbook for Advocates

D. Developing a Successful DEAR Advocacy Strategy

1. Defining the issue

The starting point of a strategy process is necessarily the identification of a need or a challenge to address. A useful tool for analyzing the problem, identifying root causes and finding solutions is the problem tree. (http://www.smallstock.info/info/comm/prob-tree.htm)   An application of this tool is given below using as example an advocacy strategic plan with the ultimate objective "to develop and adopt a national DEAR strategy":

"I think that the most important aspect of the strategy lies in our mutual agreement on one term, the description of a unified definition and the creation of a list of goals and topics."

Kristýna Fialová,
Global Development Education coordinator,
Czech NGO Adra

Elaboration
and application
of a national DE strategy

Global dimension in
formal education

Increase of public
awarness on global issues

media interest for the topic

good DE practises
are known

increased awareness on DE
among decision makers

Increase in
funding for DE

Development issues are
high on the political
public agenda

significant political support for DE

Increasing
quality in ODA

SPECIFIC OBJECTIVES

strong collaboration
of different DE stakeholders

Strong CS
engagement for
int. solidarity

clear CS position on the topic

strong collaboration
of different DE stakeholders

International
development
commitments met

EFFECTS

International development commitments
unlikely to be met
Weak CS engagement for int. solidarity
No global dimension in formal education

Weak and incoherent OOA
Development is low on the political/public agenda
Lack of public awarness on global issues
Lack of funding for DE

CORE PROBLEM → NO NATIONAL DE STRATEGY

CAUSES

insuffient political support for DE

no media interest for the topic

no collaboration of different DE stakeholders

no clear CS posiiton on the topic

good DE practices are unknown

insuffient an awarness on DE among decision makers

2. Analysing the context

Analysing the context is one of the most critical steps of the process - often overseen - and consists of a power analysis and a mapping of the stakeholders.

2.1. Power analysis
Changes in globalisation have tremendous implications for how we understand power, where and by whom it is held. Power is not static and can be used, shared or created by social actors and their networks in multiple ways. In advocacy, it is essential to appreciate the interrelationship between change and power. However, advocacy is often undertaken without a clear understanding, or proper analysis, of how change occurs.

Power is often thought to be exercised in a negative and coercive manner ('Power over' being seen as domination or control of one over another). However, there are alternative expressions of power that pave the way for more positive thinking and action.

Expressions of power

Expression	What does it mean in practice?
'power to': individual ability to act	Citizen education and leadership development is rooted in the belief that every individual has the power to make a difference.
'power with': collective action, the ability to act together	Power with helps build bridges across different interests, multiplies talents and knowledge.
'power within': individual or collective sense of self-worth, value, dignity	Enhancing the power within individuals builds their capacities to imagine, raise aspirations about change.

(Framework developed through the work of Just Associates, http://www.justassociates.org/chapthreepower.pdf)

Dimensions of power
The Powercube (http://www.powercube.net/) approach, developed by John Gaventa of the Power, Participation and Social Change team at IDS, is a useful tool for identifying levels, spaces and forms of power and analysing how they interact with each other. It allows you to conduct a comprehensive power analysis of any context or issue helping you fully explore relationships and forces to find potential entry points for advocacy and ways of challenging power dynamics.

Analysis of the dimensions of Powercube means looking inside the spaces, unpacking hidden power and understanding forms of power and their actual effects.

THE POWERCUBE FRAMEWORK: dimensions of power
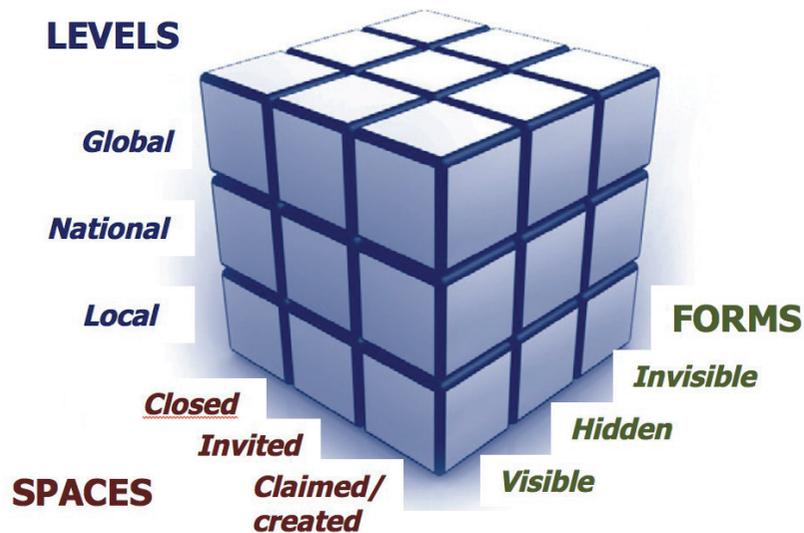
Visit www.powercube.net for a thorough analysis and case studies

The following matrix is a potential application of the *Powercube* at **national level** in the example of an advocacy strategic objective "to develop and adopt a national DE strategy". One indicative example is given for each combination of the other two dimensions of power:

NATIONAL LEVEL	Closed	Invited	Claimed
Visible	Minister of Education	Public consultation process	Coalition of NGOs
Hidden	MoE's educational advisors & experts	Drafting team or person	Highly influential member or individual within the coalition
Invisible	Philosophy and values of the national educational system	Level of commitment/ trust to participatory decision-making	Level of conceptual clarity and consensus

Linking strategies for change across the three dimensions of the Powercube is a huge challenge. For any given issue or action, there is no single strategy or entry point. For instance, along the spaces dimension, while many groups seeking action work either on opening closed spaces through demanding more transparency or supporting internal reform, or on building social movements and mobilization in claimed space, much research suggests that it is effective when horizontal alliances are built across these spaces that real change occurs. The multi-stakeholder process presented in the case study at the end of this chapter is an example. Similarly, advocacy and change strategies must often build vertical alliances across local, national and global levels to make sure that changes are meaningful at each level. And, those seeking not only to influence policies in the public arena, but also to change power relations more fundamentally, must simultaneously think about winning the issue, mobilizing to broaden the political space, and building awareness of those who are excluded. Rather than any single strategy, an ensemble of strategies, which work together and not against each other, are required to fully challenge these sets of power relationships.

Combining dimensions of the Powercube with tools for actor and network analysis presented below is an ideal way to assess the changing political and/or economic and social context.

2.2. Stakeholders mapping

Stakeholders are those who have rights or interests in a system. If you are concerned with the future of a system – the stakeholders are those you should worry about. In some cases, a broad definition is adopted which includes interested parties as well as affected parties. In other cases, a more narrow approach is preferred restricting the term to those who have a 'stake', claim or vested interest – those who provide something of importance to the organisation, and expect something in return. Stakeholders can be individuals, communities, social groups, or organisations.

Types of stakeholders could break into the following categories:

TARGETS	Decision-makers, those who have power to make change or to influence decisions
CONSTITUENTS	Directly affected by the situation and could benefit from our advocacy
ALLIES	Those sharing the same aims and can help to achieve the advocacy objectives
OPPONENTS	Opposed to what we want to achieve, blockers of change
COMPETITORS	Compete with you for the same space or opportunity, may have the same goal with different approach or vice versa

Stakeholder influence mapping

(http://www.policy-powertools.org/Tools/Understanding/docs/stakeholder_influence_mapping_tool_english.pdf) is a tool to examine and visually display the relative influence that different individuals and groups have over decision-making. It is especially useful as an aid for discussion among several people and very easy to use. Participants arrange different policy stakeholders within a triangle or 'pyramid'. Influence is shown by the relative closeness of circles to the policy apex, while relationships are indicated by the relative proximity and overlap of the circles. The map reflects one time (usually the present). To explore policy change, more than one time period can be chosen (for example past/present/future) each represented by a separate map.
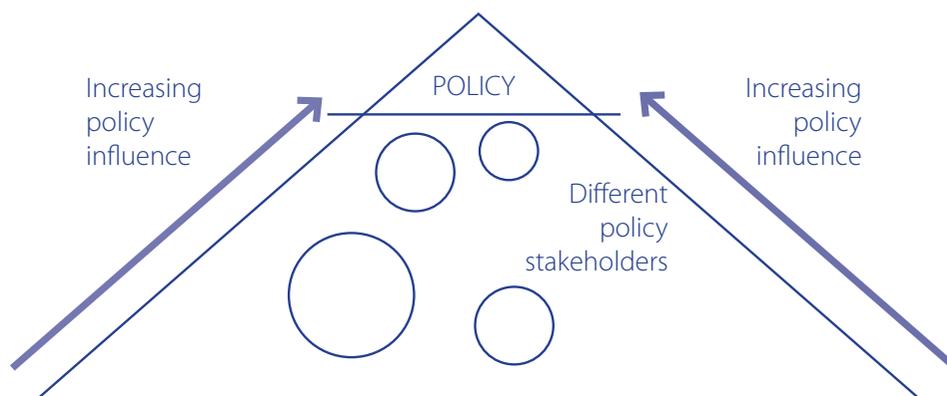
Tips!

- Changes at the level of visible power are not sustainable without work on invisible power
- Move from power 'within' to power 'to' and 'with'
- Give support for claimed spaces
- Hidden power is not only a bad thing

Maro Pantazidou (2012) "What next for power analysis?: a review of recent experiences with the power cube", to be published in www.powercube.net

Blind spots?

Even the best analysis and models will not be perfect -this is fine and there is no reason to panic, but it is worth to be open to alternatives and changes. Which blind spots and unknown areas are in your analysis? How do you approach this?

The Johari window (http://en.wikipedia.org/wiki/Johari_Window) might be one tool to approach this. With this technique it is possible to explore areas which are known to others, but not to yourself (blind spot) and areas which are neither known to yourself nor to others (unkown).

A socio-epidemic approach

Malcolm Gladwell in his book The Tipping Point suggests that ideas spread first through exposure and contagion, secondly due to small causes, and thirdly through a dramatic rise or fall in one moment "when everything can change all at once". As such, a small feature can 'tip' a small trend into a huge trend, and the influence of a few individuals can make a big difference if they have the necessary qualities. The key players in this process are:

Connectors: networkers who know how to pass information to, and are respected for their access to key players
Mavens: information specialists who acquire information, and are able to educate others
Salespersons: powerful, charismatic and persuasive individuals, who are trusted, believed and listened to

If you can identify the above players in your own issue, they may well become some of your
targets.

(by WaterAid Advocacy toolkit, http://www.ideaonline.ie/ sites/default/files/advocacy_ sourcebook_2.pdf)

Stakeholders not only have very different degrees of power to control decisions that have effects on policies, but they also have different degrees of 'potential' to contribute, or 'importance' to achieving a particular objective. Power and potential can be combined in a table or diagram. Stakeholders can be positioned in relative terms according to these two broad criteria on vertical and horizontal axes. Alternatively, or in addition, stakeholders can be categorised in terms of four general strategies for engagement.

Stakeholder power/ potential	High potential	Low potential
High power	Collaborate with	Mitigate impacts, defend against
Low power	Involve, build capacity and secure interests	Monitor or ignore

The power matrix
(http://www.justassociates.org/publications_files/MCH3.pdf), developed by VeneKlasen, Miller, Reilly and Clark, is a tool which makes the connections between concrete examples of forms of 'power over' (visible, hidden and invisible) with the strategies needed to resist or transform these, and the 'expressions of power' (power 'to', 'with' and 'within') needed to carry out these strategies. A simplified version adopted by Maro Pantazidou is given below:

Forms of power	Empowerment strategies
Visible Power: making and setting the rules	Lobbying, campaigns, negotiation, representation, engaging in formal politics
Hidden Power: setting the agenda	Organising communities, strengthening organisations, alternative research, media
Invisible Power: shaping meaning and values	Popular education, discourse analysis, awareness-raising, building self-esteem, media and cultural action

CASE STUDY

THE MULTI-STAKEHOLDERS PROCESS IN POLAND

**"Polish DE Consensus process:
towards a strategy, ending up with an agreement"**

Two years ago, the Polish national NGDO platform Grupa Zagranica initiated a national multi-stakeholder process to institutionalise previous cooperation between NGOs and the Ministry of Foreign Affairs (MFA) in the field of DE.

The situation
Global education is quite a new concept in Poland. It was introduced in the country only few years ago and there was so far no consensus on definition.

The process
It is crucial to note that the process was not started nor conducted by the government but initiated by NGOs. Starting from a North-South Centre conference on Multi-stakeholder co-operation of Global Education in December 2009, passing to the fundamental constitution of a working group in January 2010, 5 multi-stakeholder meetings run by NGOs and several internal preparatory and drafting meetings, a national Global Education Consensus was officially endorsed in May 2001.

The outcome
The agreement was signed by the NGDO platform, MFA and the Ministry of Education. While this "GE Consensus" is not binding and has no legal implications it is still an important document, to which NGOs can refer. Moreover the process itself played important role in either initiating or reinforcing cooperation between most of the institutions engaged in DE.

The challenges
The DE working group within the platform, consisting of NGOs representatives, faced many obstacles, as the lack of clear objectives of the process, the lack of consensus among NGOs (overcome by organising an internal meeting for NGOs preceding each multi-stakeholder meeting to work out a common position on each of the issues to be addressed), the several changes of stakeholder representatives, the scarcity of resources (human and financial ones) for an efficient co-ordination.

The learnings
The key learning is that despite the result, the process itself has a value on its own. Many months of joint efforts, meetings and collective drafting of the document all led to increasing the intensity of contacts and cooperation between the parties involved and helped to identify and introduce new actors. The second learning is that the multi-stakeholder process can be initialized and coordinated by NGOs – however it takes a lot of commitment on the side of NGOs and willingness of public administration.

**The "seven deadly sins"
of advocacy**

1. Unclear aims and objectives
2. Activity planning happening before (or without) developing an influencing strategy
3. Action plans that run to an internal timetable
4. Lack of innovation
5. Messages that do not get noticed and move people
6. Poor monitoring and evaluation
7. Failing to focus

Ian Chandler, Advocacy and Campaigning How To Guide, 2010, http://www.dochas.ie/Shared/Files/4/BOND_Advocacy_Guide.pdf
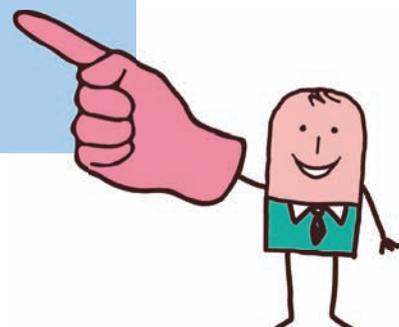
3. Developing your plan

Once you have identified your issue (problem and change solutions) and analysed the context through a thorough power and stakeholder analysis, you can develop your strategy plan by defining goals, objectives and success indicators.

A **goal** is the overall purpose of the advocacy initiative, the long-term vision of change.

An **objective** is a specific thing to be achieved in the short and medium term on the way to achieving the overall goal.

A **success indicator** is the evidence that shows progress of our efforts towards an objective.

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Tripple Loop learning

Next to questioning if we are doing things right (action level, e.g. procedures and rules) and are we doing the right things (assumption level, e.g. insights and patterns), it might also be worth to question the context-level: How do we decide what is right? This can be done through reflecting on principles, e.g. with e.g. multi-stakeholder approaches.

cf. Chris Argyris www.infed. org/thinkers/argyris.htm

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PROBLEM	lack of a EU explicit strategy on Development Education
PROBLEM STATEMENT	although the importance of DE is recognized at EU level and the need for EU strategy is underlined in growing number of commitments, there is still no long-term strategy for DEAR in Europe.
GOAL	EU adopts a long term cross-sectoral European strategy for development education.
OBJECTIVE	the majority of MEPs are informed about the importance of Development Education, sign and adopt the written declaration on development education in May EU parliament plenary session.
SUCCESS INDICATOR	50% + 1 of the MEPs sign the declaration

Based on their nature, we can have three different types of objectives: process (being accountable by setting numbers/types of activities), impact (how you change/influence attitudes and behaviours in the short term) and outcome (longer-term result of our work).

Here are examples of the different types:

Process objective	By April 2012 I will inform 750 MEPs on the Written Declaration on Development Education
Impact objective	At the end of May 400 MEPs will have signed the written declaration on Development Education
Outcome objective	In 2012 a written declaration on Development Education will be signed and adopted by the MEPs

THE SMART APPROACH

A well-defined objective should have the following characteristics:

SPECIFIC
What exactly do you want to happen? Why you are doing this and for whom and what? The more concrete you are the clearer is the objective (avoid verbs with vague meaning as sensitise, enable etc. and words like accountability or transformation etc.
Adoption of the written declaration on Development Education.

MEASURABLE
Can we measure this objective's result? How will we know when we have achieved it? It is quite difficult to measure objectives that refer to a state of mind or a process like "enable": what you should do is to analyze deeper with a question like "what does an enabled person do?" and try to get measurable result from it.
51% of MEPs sign the written declaration on Development education.

ACTION ORIENTED
Say what you are going to do. A good objective statement should describe a result which requires your action to be achieved.
51% MEPs sign the written declaration on Development Education as a result of our lobbying efforts.

REALISTIC
Goals should be challenging, but not impossible to reach. Practically, this must be checked when the objective is finalized. This check may lead to reviewing the objective. For example, in the above described objective would seem unrealistic to say "ALL MEPS sign…"

TIME BASED
A good objective should include a time limit. By when do you want it to happen?
51% MEPs sign the written declaration on Development Education, as a result of our lobbying efforts, in May 2012.

Examples of SMART vs. "NON-SMART" objectives	
SMART	NON-SMART
To convince the Ministry of Education to increase by 20% the funding for DEAR at national level within 18 months, in order to cover the co financing part of the EU funded proposals	To increase funding for DEAR
To convince the Ministry of Education to agree to adopt a DEAR national promotion programme, as part of the curriculum for all primary and secondary school age children, within 12 months	To promote DEAR in schools

4. Analysing the risks

Advocacy is about challenging power, therefore is often risky. While acknowledging that all effective campaigns require some risk-taking, carrying out a comprehensive risk assessment is a crucial step before selecting advocacy strategies and engaging in any advocacy activities, which helps you to think through how to minimise or mitigate the risks. Consideration of risks requires you to think about what could be the adverse consequences as a result of your advocacy initiative, or what could be the factors that could limit the success of your campaign.

For example, advocating in partnership means by itself that there are some specific areas of potential risk for your organisation, such as:

▶ *impact on the reputation of the organization* – the partnership alone, any possible repercussions in the future if the relationship fails, or changes in public image of any of your partners can have impact to the reputation of your organization
▶ *loss of independence and autonomy* – working in partnership may require to give up some of your independence and autonomy, sometimes even to make uncomfortable compromises at both the strategic and operational levels.
▶ *Resource drain* – Advocating in partnership usually requires heavy investments in attention, time and other resources in advance of any future benefit.

Furthermore, every advocacy approach you may choose is associated with different types of risks, and certain advocacy tactics entail more risk than others.

For example, if your strategic objective is that development education is included in the new national educational curriculum and in order to achieve this objective you have chosen as exclusive approach and tactic the direct influence of the Minister of Education, then a government reshuffle or a sudden call for elections could be a major risk for your advocacy strategy.

Risk assessment

Risk assessment is an area to be considered during various stages of your advocacy planning and implementation. Ideally in practice, at least two levels of risk assessment should be considered, one at the initial stage during the development of the strategic plan after the context analysis have been completed, and one at the latest stage before consolidating your activity plan.

The best way to assess the strategic risks is to start with a brainstorming of all potential threats and major things that might go wrong in carrying out your advocacy initiative, which may be of different type and nature, internal or external and different for diverse stakeholders. Once you have identified the risks, you need to consider two dimensions of those risks, which are the potential impact (in terms of reputation, funding, operations of the organization or failure in achieving key objectives) and probability (the level of likelihood that the risk could actually happen).

For each of the risks, each dimension need to be scored as suggested in the risk matrix below. The risk value is the result of multiplying the two scores:

Risk value = Impact X Probability

"It is better by noble boldness to run the risk of being subject to half the evils we anticipate than to remain in cowardly listlessness for fear of what might happen."

Herodotus
(485-415 B.C)

PROBABILITY					
Almost certain	5	10	15	20	25
Highly probable	4	8	12	16	20
Likely	3	6	9	12	15
Low	2	4	6	8	10
Improbable	1	2	3	4	5
	Minimal	Minor	Major	Serious	Catastrophic
	IMPACT				

For risks that show a high or a medium risk value in your risk matrix, it is imperative that you develop clear strategies to mitigate their impact or avoid them altogether if possible. If your risk matrix contains more than two (or maximum three) risks with high risk value you should reconsider your advocacy initiative as the overall risk of failure is very high.

In the example presented before, although the replacement of the Minister of Education could have very high impact, its probability would depend on the stability of the government, time away from the scheduled elections etc. Examples of potential strategies to mitigate the risk could be gaining the support of teachers' unions and associations or building strong relationship and influencing key public officials in the Ministry.

When developing a risk management plan, always keep in mind that the analysis of risk should be revisited periodically as your advocacy develops and unexpected outcomes are considered.

5. Building alliances

Although it is possible to do advocacy work on your own, often it is more effective to work in collaboration with others. Partnerships can start small and they can either keep on being small or be enlarged during the advocacy process. Partnerships should include only partners committed to your cause, but this does not mean that you should just include NGOs, academic and institutional bodies. Try to engage also those groups or individuals whose life is affected by Development Education and that can bring their perspective and their engagement into your actions. Working in partnerships has both advantages and disadvantages (see chapter C.2)

As the reference model of joint working for advocacy in DEAR we will use the term coalition. Coalition members contribute with expertise, resources, efforts and contacts aiming at a wider political and popular support. A coalition uses advocacy to engage in high-level dialogue with influential leaders and policy makers with greater impact than organisations operating alone.

Coalitions need to be well organized in order to be efficient: their founding members must have the time and energy to initiate the group, to find funding resources, to develop skills. Most important is that shared advocacy goals should be integrated with the rest of each organisation's activities.

Models of partnership and joint working:

- **Networks:** mainly active in information sharing
- **Coalitions:** usually formed to work on a single issue or campaign
- **Alliances:** longer-term strategic partnerships

Before forming a coalition

After clarifying your advocacy issue, you need to find out if there are other members of your community who are already working on this issue. If there is already an appropriate coalition, then you should take into consideration to join this and explore ways in which your organization can add value to the work of current members. Otherwise, contact other organization working on similar issues to investigate their activities and will or not to be part of a joint body. Invite also "non-traditional partners," with whom you can define shared problems, identify solutions that are acceptable to the larger community, and accomplish mutually defined goals. The stakeholder and power analysis will be your baseline to do this.

Shapes and size of coalitions:

Formal: Members formally join the coalition, pay dues, and are identified as coalition members on letterhead, coalition statements etc.
Informal: There is no official membership, so members can constantly change.
Geographic: The coalition is based on a geographical area. It can act at local, national, regional or international level.

A success story from Nepal

'Valuing Teachers' research carried out in Nepal identified a lack of meaningful participation of teachers' representatives as a core problem affecting teachers' terms and conditions. They developed a partnership with the teachers' union and arranged various volunteer placements, covering areas such as strategic planning, advocacy and lobbying. They then forged alliances with other NGOs and international NGOs, such as Save the Children, and linked up with the local chapter of the 'Global Campaign for Education'. The result was that the union now participates in round table donors meetings, the Nepalese government has agreed to provide life insurance to permanent teachers, and a code of conduct has been prepared to improve minimum standards. http://www.vsointernational.org/what-we-do/advocacy/campaigns/valuing-teachers.asp
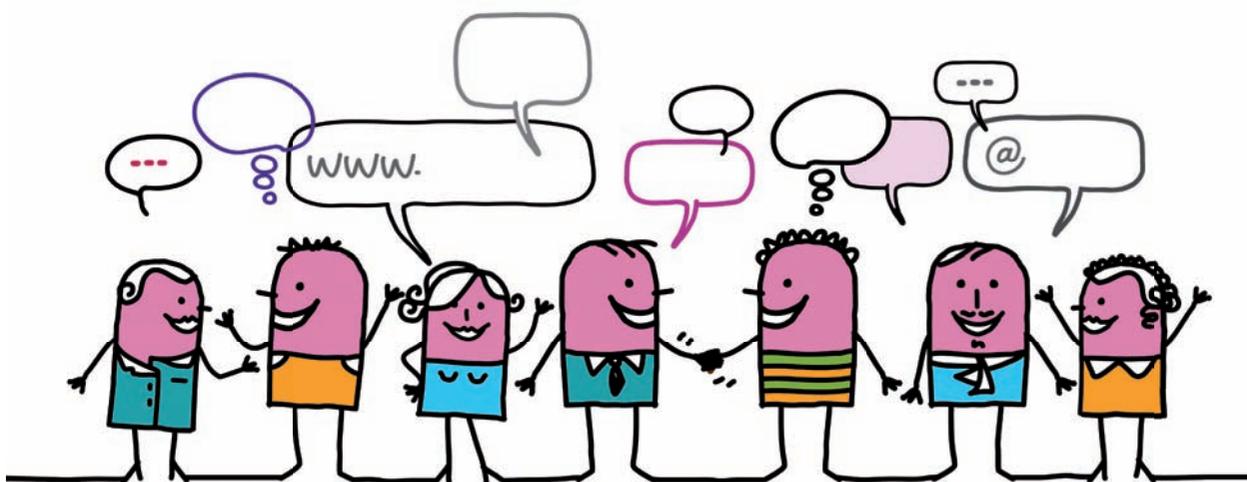
TIPS

TIPS for setting up and managing coalitions successfully

After spending the appropriate time to secure that all members share the same mission and purpose

1. Establish a steering group to guide and monitor implementation of the work, and make adjustments regularly. Try to be democratic, or at least participatory, in this.
2. Establish a clear decision-making process that enables each coalition member to be involved. Members should not be left out of key decisions.
3. The coalition should formulate a clear plan for how to achieve the advocacy objectives.
4. Establish a clear operating structure. Vertical, hierarchical structures are rarely appropriate for developing coalitions – consider a more fluid horizontal structure, based on team-work and rotating responsibilities.
5. Define the following things up front: management responsibility, how finances are raised, how resources are distributed, how members are expected to participate, the consequences for members who fail to uphold their commitments to the coalition.
6. Set up a fair division of roles and responsibilities to manage the workload.
7. For specific tasks and activities, it might be beneficial to form subgroups. Subgroups should report back and be accountable to the larger coalition.
8. When conflicts or disagreements arise, it is important to deal directly and openly with these. It is helpful to establish dispute procedures in advance (possibly use a mediator).
9. Establish a clear communication system. Member organisations should be kept aware of developments and changes in the coalition on a regular basis.
10. Fill expertise gaps by recruiting new members or upskilling current ones.
11. Network to broaden the coalition's base of support (co-operate with other coalitions and alliances, or broaden the coalition to gain a wider base of support).
12. Plan events incorporating credible spokespersons from different partner organisations.
13. Create a member database (name, organisation, type and focus of organisation, contact details, etc.).
14. Plan well ahead - coalition action can be cumbersome.
15. When the coalition has successes, celebrate and spread the glory. Motivation keeps coalitions going.
16. If the coalition is going well, consider the pros and cons of creating a 'secretariat' (an office, with a paid coordinator or other staff).

Source: VSO Participatory Advocacy Toolkit, 2009
http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf

Coexistence

Communication

Cooperation

Coordination

Collaboration
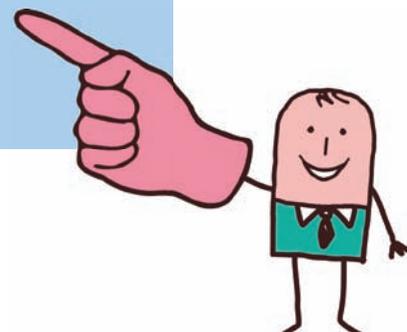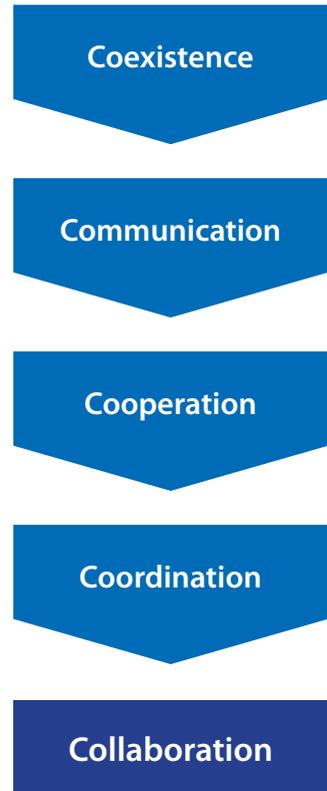
6. Making the case and developing key messages

Solid reliable evidence is what you need to build your case. Good participatory research is a prerequisite for a successful advocacy campaign, giving legitimacy both vis-à-vis the people you work with and the decision makers you are targeting. It goes without saying that basic research must have been done at step one of the planning process. At this stage you just elaborate and focus your research appropriately. Research tools may include in-depth interviews, consultations or focus groups, opinion polls, surveys and questionnaires, computer based 'web-conferences' or web-discussions, field visits and investigations, case studies and pilot projects.

Evidence can be factual, anecdotal, quantitative or qualitative based on experience or proper research, but which part of it and how you will communicate it depends on your advocacy approach and targets. For example, the evidence that three out of four UK businesses think they are in danger of being left behind by emerging countries unless young people learn to think more globally is very useful when targeting a UK corporate donor for a DE strategy but it is not useful when building your respective NGO coalition. At the same time, the evidence which shows that people who have stronger 'self-transcendent values' engage more and longer in pro-social behaviour, can be a good argument in promoting DEAR internally in fundraisers/ marketers of an NGO, as DEAR proposes an approach to reinforce these values and to facilitate long lasting supporter journeys, that is, higher supporters retention rates.

You should develop one clear core message, a summary of you position and the change you want to bring. Then, you need to proceed in customising your message to tailored messages directed to the different audiences that your stakeholder power analysis has indicated.

For example, a core message "Keep your promises!" can target a government but could not be used to target general public, while the message "stand up for your rights" exactly the opposite. A tailored message should not only fit to the target (receiver); it should also reflect the creator (sender) of the message. For example, the message "Send my friend to school" targets the governments, but it is designed to fit to the Global Action Week (http://www.globalactionweek. org/) (part of the Global Campaign for Education, http://www.campaignforeducation.org/) which mobilised pupils.

Ideally, the core message of an advocacy campaign should apply for all audiences and targets and should be used as the umbrella for any tailor made sub-messaging. A good example is the "1Goal: Education for All (http://www.join1goal.org/home.php)" message.

Reliable evidence is

- objective, not biased
- representative of all parts involved, not a single viewpoint
- accurate
- methodical and systematic

A clear message!

Content
- Summarises the change you want to bring about
- includes a deadline for when you want to achieve it includes the reasons why the change is important
- includes any action you want the audience to take in response

Nature
- short and catchy
- understandable by anyone (jargon free)
- memorable

7. Conveying your key messages

Advocacy actions can be grouped under three broad headings:
Lobbying: process of trying to directly influence decision-makers
Public campaigning: activities to engage and mobilise the public
Media work: raising public awareness, with a view to changing public attitudes and behaviour, and encouraging support for the other two advocacy actions.

7.1. Lobbying

The term 'lobbying' comes from the word 'lobby' which refers to an entrance area or meeting place. In the case of advocacy, it refers to direct one-to-one conversations and/or meetings where people get access to and seek to persuade those in power.

Lobbying can be formal (meeting with a politician at her/his office) or informal (talk during a lunch or coffee). Engaging directly with decision makers can be a critical part of a successful advocacy strategy but it is not appropriate or possible in all contexts, so judgment is needed before deciding this method of conveying your message.

Lobbying needs to be carried out by people who know their subject well and they have built the desired skills and capacities. Many people involved in lobbying activities do not identify themselves as lobbyists. A lobbyist can come from a variety of professional and academic backgrounds but needs to have certain personal skills as shown in the box at the right.

Ideally lobbying should lead up to face to face meetings with decision makers but can be done also by using reports or position papers, detailed follow-up letters and follow-up telephone calls.

How you present your data to policymakers is crucial in determining whether or not your message is received the way you intended. Everyone is busy and policymakers are no exception. Often, they do not have time to read through lengthy reports, no matter how well-written. A single sheet (can be double-sided), commonly referred to as a **"fact sheet"** or "one-pager", that highlights your position and top arguments presented in a clear format is the most effective way to summarise your issue. Ideally, you should bring the fact sheet with you when you meet with the policymakers. Any lengthy document or report is better to be sent as a follow-up after the meeting. An effective sheet summarises the problem in two sentences, uses current data and statistics, is written simply but professionally avoiding jargon and includes name, address, phone and email of a contact person.

Results versus Process?

There is the old debate for process versus results. Does a campaign have to educate the MEPs in the process of of reaching its aim of that 51 % of members sign? Or is it only the result that counts? What is the right balance and compromise?
On the question of values and process oriented campaigning, see the Finding Frames report: http://findingframes.org/

Advocating for DEAR

Regarding the topic of development education – rather an abstract policy field than a "hot issue" of broader public interest, the most common tool for conveying your message would be lobbying. However, it might be worth to explore mobilisation of a specific public group (e.g. teachers) or targeted media (e.g. development or education press) to support your advocacy efforts

Lobbying is the art of persuasion

The ideal lobbyist is/has

- Expert in the issue
- Committed to the issue
- Deep knowledge of the political context
- Good interpersonal and communication skills
- Strong negotiation skills
- Strong personality
- Integrity
- Optimism
- Patience
- Persuasive, not argumentative

TIPS

Face-to-face meeting with a targeted decision-maker

1. Choose the right time for meeting decision-makers, when your issue is already on their agenda or most likely to be taken up – for example, before an important vote – or when they are able to take action in support of your advocacy – for example, during the budget-setting process, or at the time of an annual meeting.

2. Try to imagine how the issue or problem looks from the decision-maker's point of view. Why should they support your advocacy objective? How can they benefit from taking the action you are requesting? This can be answered more easily if you have fully researched the 'target person' you are meeting.

3. Before arranging a meeting with the highest in hierarchy decision-maker, make all possible preparatory work with key people who influence her/him.

4. Have persuasive case studies, statistics, facts and figures to hand.

5. Anticipate the counter-arguments

6. Make realistic requests/ policy asks, ideally one at a time! If you work with allies encourage them to also lobby the same decision-maker, giving the same message

7. Have minimum and maximum positions and be ready to negotiate

8. Present first the most important points

9. Be clear, concrete and careful of everything you say and always polite.

10. Keep consistent body language: calm voice, relaxing body, conscious of what your demeanour and tone are indicating

11. At the end of the meeting, re-state what you have understood as the other's commitments.

12. Don't forget thank the decision-maker for their time

13. Follow up the meeting with a thank you letter to your lobby target including a summary of the points that were raised and referring to any agreements or disagreements made and the what the next steps are.

14. Follow up on any action points that were agreed at the meeting, and share the information and details of what was discussed during the lobbying meeting with colleagues/allies.

Negotiations

Negotiation is a careful exploration of your position and the other person's position, with the aim of finding a mutually acceptable compromise that gives you both as much of what you want as possible. Strong negotiation skills are needed for those undertaking lobbying activities. Negotiation does not only take place between you and your advocacy target but also among the members of an advocacy alliance. Consensus building is the ultimate result of a negotiation process and can be built only if all parts adopt a win-win approach. Before engaging in negotiations is important to set your minimum and maximum objectives and estimate your realistic agreement zone (RAZ). A negotiation result could look like this:

A Potentially Successful Negotiation

Exit/Worst case

Entry/Best case

Overlap RAZ

The process of trading closes the gap between opposing objectives

Exit/Worst case

Entry/Best case
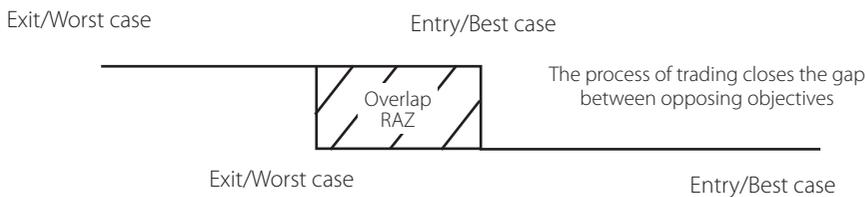
A Potentially Unsuccessful Negotiation

Exit/Worst case

Entry/Best case

No overlap No RAZ

Exit/Worst case   Entry/Best case

GOOD NEGOTIATOR	BAD NEGOTIATOR
1. **Plans thoroughly**	1. Lack of preparation, no targets
2. **Asks questions**	2. Talks too much
3. **Listens**	3. Interrupts & does not listen
4. **Good observation skills**	4. Argues
5. **Tests understanding & summarises**	5. Lack of logical argument
6. **Builds on common ground**	6. Does not read the signs
7. **Builds on their ideas**	7. Gives too much away, caves into pressure
8. **Presents a sound logical argument**	8. Lacks patience
9. **Sends signals/Flexibility**	9. Inflexible
10. **Demonstrates mental dexterity**	10. Naivety, makes assumptions

Source, First Creation Consulting (http://www.davidhowardtraining.com/pdfs/Be_a_Good_Negotiator.pdf)

Drawbacks of lobbying

Tokenism : politicians often meet with advocates without taking into consideration their opinion and using them as a pretext of democracy.
Conflict of interests : fear of losing the insider position could prevent an advocate from being powerful
Co-option : there is a danger for the advocate to become co-opted ("one of them")

VSO Participatory Advocacy Toolkit (2012)

http://www.ideaonline.ie/sites/default/files/advocacy-toolkit_VSO.pdf

7.2. Public campaigning

Public campaigning is the process of mobilizing the public, influencing their behavior and engaging them in taking some action in order to achieve a social or political change that you propose with your advocacy project. Campaigning's aim is to show to decision –makers that you are not the only one caring for your issue but that a significant part of the public (voters, consumers and customers, or, regarding the topic of DEAR, teachers, students or parents) is with you!

A public campaign can focus at national or international level: you should remember that EU countries have different legal context and cultural environment on which will depend the way you can carry out your campaigning work.

There are several ways of getting public support, through letter writing, signing a petition to a decision-maker, participating in a protest or public demonstration. New media has already started to play and will continue to play a critical role in raising awareness and mobilising people.

Micah White, on his article "Clicktivism is ruining leftist activism" (http://www.guardian.co.uk/commentisfree/2010/aug/12/clicktivism-ruining-leftist-activism) (Guardian, 12/10/2010) argues that real activism can be ruined by digital activists who hide behind gloried stories of viral campaigns and inflated figures of how many millions signed their petition in 24 hours... The so-called clicktivists are to blame for alienating a generation of would-be activists with their ineffectual campaigns that resemble marketing. Although, there is a truth in this argument, our opinion is that the opportunities given by the social media like facebook, twitter, blogs are huge in disseminating information, networking, recruiting and mobilising activists, and building brand, therefore it is up to the NGOs to make the best of them.

6 Twitter Tips!

• Use a twitter desktop app
• Follow the real time web
• Find your evangelists
• Measure your impact
• Get mobile
• Get strategic

(source, www.socialbrite.org)

CASE STUDY

When a tweet can change the world

Fifty years ago, Amnesty International activists fought to free prisoners of conscience by putting pen to paper. In February 2011, 14-year-old Faizan Rafiq Hakeem was arrested in Jammu and Kashmir for throwing stones. The police detained him under the controversial Jammu and Kashmir Public Safety Act. Under this act, he was held for over a month without trial—and could have been held for up to two years. Despite the fact that he was a minor, authorities claimed that medical tests proved he was old enough to be treated as an adult. Amnesty call for Faizan's release and initiated on April 1 an online campaign using the twitter using the @aiindia account. The campaign was joined by Govin Acharya in the U.S. As a **result**, #freefaizan became a hashtag for twitter users from all over the world tweeting directly to the Jammu and Kashmir Chief Minister Omar Abdullah @abdullah_omar, asking him to "free Faizan." On April 5, Fraizan was free.

Campaign guidelines

When developing a public campaign, follow the list of the 13 guidelines suggested below (adopted by www.campaignstrategy.org)

1. **Reality check!** Do you really need a campaign? Can you get what you want with other means without involving the public?
2. **Motivation not education:** Campaigning maximises the motivation of the audience, not just their knowledge. However, from a DEAR point of view, the educational and "empowering" elements of the campaign should be explicit.
3. **Analyse the forces:** Why what you need hasn't happened already? Try to map the forces for and against. This is an overlapping exercise with the power and stakeholders analysis.
4. **K.I.S.S.** Keep it simple, stupid! Effective motivation needs simplicity in message and purpose. Communicate only one thing at a time. Use a simple unambiguous 'call to action' which requires no explanation. Nevertheless, provide possibilities to engage further and learn more and don't leave the contributor with a feeling that "It's fine, I have done my part!"
5. **Right components…right order:** follow the sequence awareness > alignment > engagement > action
6. **Start from where your audience is:** Do market research before, getting know current attitude and knowledge of the public.
7. **Construct critical path:** All issues are complex but your campaign must not be. Plan a campaign as a series of steps where one leads to the next - like dominoes. Identify the milestones in between and some short term achievements besides your ultimate goal.
8. **Campaign against the unacceptable:** Choose your battlefront. Find the pieces of an issue which are unacceptable to a big enough group of people to get the effect you need
9. **Make real things happen:** Too often campaigns become absorbed in circulating information to people who already agree with the cause. Set the pace and change real things!
10. **Say what you mean:** Every day we are exposed to many thousands of messages. Almost all are ignored or immediately discarded. So, be direct and straightforward.
11. **Find the conflict in events:** This is often misunderstood. Conflict is inherent to campaigns. Without a conflict of interest, a campaign would not be needed. A campaign is about forcing a change to the status quo.
12. **Communicate in pictures:** Create a chronological story board - your critical path - and work out how you will make that happen. Follow the film-makers' rule 'show - don't tell'.
13. **Don't send messages:** Campaigning is a conversation with society - a two way process like a phone call. What are the activities going to be that you do with your target group? How will you campaign together? What are the ways the public can actually shape the campaign?

7.3. Working with media

Media is a powerful force shaping public opinion and influencing the way that decision-makers act. It can play a role in social change. We could say that without involving media, any social change movement would mainly be limited to reduce to 'preaching to the converted' without brining any significant growth of the movement.

So, to raise awareness of your issue and gain a wider public support putting additional pressure on key decision-makers, you may consider working with the media. Politicians are aware of the mass media's influence over people and for this mainstream media can also have a strong influence on decision makers.

Media are daily seeking for news to fill pages and tv programmes: our chance is to present our advocacy activities, objectives and goals in an attractive way so that media engage themselves to offer coverage facilitating the way to reach not only decision makers but also the public, potential supporters. Building relationships with journalist is critical for successful media coverage. But have in mind that getting into the media demands more than just good relations.

You need a newsworthy story. The key for a good story is when you meet both good timing and a link with the actual reality and breaking news. Unfortunately, media formula is fairly limited. The type of stories that make it to the media are those including incredible facts and figures, shocking statements or sad emotional human stories and in the nest of the cases, a human story showing the success of the powerless over the powerful.

The most common method to get your message to media is a press release. A well written press release makes life easy for the journalists, giving them enough information to persuade them to run your story in combination with your website offering back up info, quotes, stories, statistical data, photos, videos etc.

Build media relationships, not just responses!

1. File the media you are targeting
2. Try to meet the journalists face to face
3. Remember the areas and issues that they cover
4. Keep a profile of their articles and opinions over a period
5. Learn the editorial process
6. Find out their deadline and when they usually have the editorial meeting
7. Become their credible source of information

CASE STUDY

Timing and Targeting Media Work for Change

VSO collaborated with Oxfam and the Global Campaign for Education to investigate a wage cap on public sector salaries imposed by the IMF in Zambia, which had resulted in severe teacher shortages. The research was published in a report 'undervaluing Teachers', which formed the basis of lobbying and media work. The report was given to media who attended the annual meeting between the IMF and the World Bank. The economics correspondent from The Guardian then used the briefing as a basis for the questions he asked at their press conference. The **New York Times** and the **Guardian** both ran articles about the story, as did the national press in Zambia. The IMF then asked VSO for a follow-up meeting. Subsequently, negotiations between the Zambian government and the IMF led to a relaxation of the wage freeze to allow an increase in the education budget.

(source, VSO Participatory Advocacy Toolkit)

Celebrities

It often happens in the NGO sector and particularly in advocacy organizations to limit their communication means to press releases. However, there are many other ways to attract media attention; one of the most successful is engaging well-known people or celebrities in your advocacy campaign. A great example of a campaign engaging world-wide known celebrities is the 1Goal: Education for All Campaign (http://www.1goal.org) which so far has mobilized over 18 million people to sign up as supporters.

New media

The Internet has revolutionized the way advocacy can be done. It is inexpensive, easy and efficient in reaching targets. For the country with easy Internet coverage is a way also to involve geographically isolated people around an advocacy issue. Social media, as facebook, twitter, blogs are becoming the new means of communication for a major part of the society particularly the younger generations. (see also chapter D 7.2)

The dark side of star power

Engaging celebrities can have a backside. It reinforces the current culture of consumerism, star cult, obsession with public image, wealth and power. When you chose to work with celebrities, make sure that they represent the values you are fighting for, and that they engage in a credible and meaningful way with the topic (role models rather than advert faces).

The EPIC talk!

When you have the chance to speak to a journalist or an MP, typically you will only have a couple of minutes to get your message across and attract the attention of the other. 'EPIC' is a methodology developed by RESULTS an acronym to help remember the basics of creating a powerful message.

> **E** is for ENGAGE your audience
> **P** is for state the PROBLEM
> **I** is for INFORM the audience about the solutions
> **C** is for the CALL TO ACTION

Tips for delivering an Epic talk:
- ▶ Practice your talk several times before practicing in front of another person.
- ▶ Memorise as many of the details as possible.
- ▶ Choose a member of your group that your feel comfortable practicing with.
- ▶ Identify your audience – for example an MP, journalist or a new advocacy partner.
- ▶ Deliver your talk without stopping, even if you have a few stumbles along the way. The more you practice the better you will get.
- ▶ Once finished, critique yourself. Pick two things that you liked about the talk and one thing you would like to improve upon.
- ▶ Listen with an open mind and ear. Learn how to make your talk better when your partner gives you feedback on your delivery.
- ▶ Learn a good repertoire of EPIC talks that you can pull out at any time.

The EPIC talk tool (http://results.org.uk/sites/default/files/Create and deliver and EPIC talk.pdf) is developed by RESULTS (http://www.results.org.uk)

Traditional Media:
newspapers, magazines, television and radio

Modern Media:
Internet, websites, social networking sites, blogs, mobile telephones

8. Consolidating your plan

8.1. Budget and resources

Before you can finalise which activities you will carry out, it is vital to consider what resources you have at your disposal. Indeed, part of your advocacy work may be to raise finances or lever additional resources in order to carry out other advocacy work, but fundraising strategies and activities are not presented here.

The available resources for advocacy are divided in the following categories, financial, human capacity and common or shared knowledge.

Money: Availability, sources, potential cash flow problems, spending restrictions. Make provisional budget of the advocacy strategy at this stage and then revise it after the activities will be selected.

People: Staff availability, skills, experiences, training needs, volunteers, potential delegation of tasks to partners.

Knowledge: Depth and quality of research analysis on the issue, on your objectives and solutions, need for further research, information collected by partners or relationships.

Over all the above, you need to consider also the time:
- Do you have enough time to implement your project effectively?
- Are there particular deadlines that you have to meet?
- Are there external events that you wish to use as milestones to your strategy?

The advocacy budget depends on the types of activities included in your plan. Some general categories found in advocacy budgets are

▶ Research costs (from research fees to travel/meeting costs)
▶ Printing and reproduction costs (from promotional leaflets to research report publications)
▶ Public activities costs (from a press conference launching a report to a public mobilisation event)
▶ PR costs (costs related to meetings with politicians, journalists and other key targets)
▶ Advertising costs (from graphic designing and creation of a TV spot to buying advertising space)
▶ Staff costs (dependent and/or contract-based)
▶ Administration costs (phone-calls, photocopies, consumables,...)
▶ Operation costs (part of office rent, database maintenance,...)
▶ Web costs (website design, development and maintenance)

8.2. Activity plan

An activity plan is the operationalisation of the strategy. In order to achieve a strategic objective, we need to plan our milestone actions and the list of respective activities. Each milestone action must have a target, timeline, owner, and performance indicator(s). The term "Key performance indicator" (KPI) is often used to identify a measurable expected result which helps us to assess performance against objectives.

In the example of chapter D 3, our SMART strategic objective was the following:

51% MEPs sign the written declaration on Development Education, as a result of our lobbying efforts, in May 2012.

Two examples of indicative milestone actions for this objective could be the following

WHAT	TO WHOM	BY WHEN	BY WHOM	KPI
E-mail lobbying letters	All MEPs	12/3/2012	National Platforms	80% of MEPs reached
EU Parliament on-site campaign action	Philosophy and values of the national educational system	Level of commitment/ trust to participatory decision-making	Level of conceptual clarity and consensus	
	All MEPs	Last week of March 2012	DARE Forum advocacy officer	90 MEPs sign the declaration

The owner of the action normally has the overall coordination of the activities no matter if is responsible for implementing each of them by him/herself. Examples of activities for the on-site campaign action are

Stand on-site campaign in the last week of March

WHAT	BY WHEN	BY WHOM
Write the content of the leaflet	3/3/2012	Comms officer
Design the leaflet and poster	9/3/2012	Graphic designer
Produce 1000 leaflets & 50 posters	16/3/2012	Printing firm
Get permission from the EP administration	3/3/2012	CONCORD Secretariat
Brief the volunteers	21/3/2012	Advocacy officer

Writing a press release

One of the most common activities in advocacy is writing press releases. Here are some tips for writing successful press releases:

Structure
▶ Start with a simple, descriptive and catchy headline to grab attention, and include the date of the release
▶ The opening paragraph tells the story in a nutshell, and tells the reader: who, what, when and where. The 'why' can be covered in subsequent paragraphs
▶ Imagine it is a pyramid. The most important information first, and the background information lower down
▶ A quote is a useful means of changing the tense, tempo and interest, and will usually appear as paragraph three
▶ A 'Further information' section should contain your contact name and telephone number on which you must be available
▶ Finish with 'Notes to editors', in addition to any specific notes relating to the news release

Style
▶ Tell it as a story but providing a clear illustration of the message.
▶ Quote must sound like someone actually said it.
▶ Avoid jargon, emotional language and charity-speak.
▶ Always explain acronyms the first time you use one.
▶ Only use capital letters at the start of sentences and for proper nouns

Format
▶ One page only, with ample spacing between lines.
▶ Use organisation's letterhead paper
▶ At the finish of the body of the release write 'Ends' in bold at left hand margin
▶ Check your spelling!
(source, Wateraid Advocacy Toolkit)

Writing lobbying letters

Lobbying letters are necessary part of almost any advocacy campaign targeting politicians. Here are some tips for writing good lobbying letters:
▶ Be brief, no more than one or two pages (relevant documents or other materials can be attached)
▶ State clearly the purpose of the communication from the very beginning
▶ Keep your introduction very short
▶ Use formal language avoiding NGO jargon and unexplained abbreviations
▶ Be firm but courteous
▶ Try to mention something you are in agreement with the recipient of the letter
▶ Check for spelling, typos, and punctuation mistakes
▶ Make sure all signers receive a copy, send copies to other influential actors, remembering to keep a copy – as well as copies of any responses – for yourself

8.3. Monitoring and evaluation

Monitoring and evaluation (M&E) is probably the most misunderstood and overlooked element of a strategy. The fact that it is always described at the end of the whole process, it doesn't mean that M&E is just the final step and conclusion of a strategic plan. In fact, monitoring and evaluation is a critical reflection and learning process that follows strategic planning and implementation from the very beginning till the very end.

There are several methodologies available for M&E. A common methodology to measure effectiveness is the logic model which has 5 key elements:
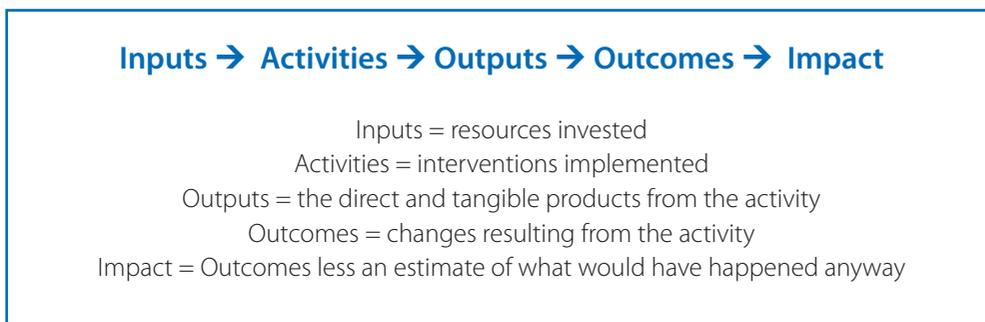
Inputs ➜ Activities ➜ Outputs ➜ Outcomes ➜ Impact

Inputs = resources invested
Activities = interventions implemented
Outputs = the direct and tangible products from the activity
Outcomes = changes resulting from the activity
Impact = Outcomes less an estimate of what would have happened anyway

THE FISH SOUP Real life is less linear that is often suggested in the M&E literature. The advocacy context, in particular, is substantially complex; therefore it needs more sophisticated M&E frameworks. An excellent tool to understand the complexity of the evaluation process can be found in The Fish Soup Development Story (http://vimeo.com/38146768) by Ricardo Wilson - Grau presented in the webinar from the Outcome Mapping Learning Community.

THE POWERCUBE As public advocacy is about change in terms of 'shifts in power', then keep in mind that the Powercube (http://www.powercube.net) tool described in chapter B 2.1 can be easily transformed to a great evaluation framework for looking beyond the outputs and outcomes.

Powercube can also bring out the realities of power behind obvious successes at the policy or legislative levels and providing insights on why such changes are not by default enough for changing people's lives. Lucy Ben, in her case study on Kenyan Constitutional Reform (http://www.powercube.net/wp-content/uploads/2009/11/case_study_kenya.pdf) analyses how "building a movement for change without the participation of those negatively affected can consolidate inequality – a central premise of participatory approaches but one often sacrificed by movements in favour of 'pragmatism'.

SYSTEMATISATION The reconstruction of and analytical reflection about an experience is a methodology called systematization. ActionAid has used this methodology in practice to critically examine advocacy experiences, together with all the relevant actors, in three countries. The full report is documented in the publication "ADVOCACY for Change (http://www.cepalforja.org/sistem/documentos/advocacy_for_change_introduccion.pdf): Lessons from Guatemala. Brasil and USA", an idea of which is given below.

THE LOGIC MODEL

Study how to bring together planning, evaluation and action in the Logic Model Development Guide
W.K. Kellog Foundation (2004)

http://www.wkkf.org/knowledge-center/resources/2006/02/WK-Kellogg-Foundation-Logic-Model-Development-Guide.aspx

CASE STUDY

Systematizing and Learning from Experience

ActionAid used systematisation methodology in three countries where different actors involved in advocacy or campaigns critically recalled what the experience was about, analyzed the rationale for the choices made, how and why different factors intervened to shape or change the intervention over time, and what processes of change emerged from the experience. One example of lessons learnt in each country (Guatemala. Brasil and USA) is given below:

ActionAid Guatemala, reflecting on the lessons that came out on lobbying and the challenges of managing resources.	"In some moments during the lobbying not all the youth organizations walked together on the same road. This made us think that we need to design and put into practice better mechanisms of communication, consultation and motivation to promote better synchronicity in the participation" "The resources to improve the levels of participation, organization, expression of demands and mobilization by youth organizations are really scarce. For this reason, it is necessary that all the organizations participating in an experience such as the one that we went through consider putting in place a clear mechanism where the main actors are represented, for the good administration of resources, particularly financial resources".
ActionAid Brazil and Ação Educativa recalling how mobilization was done in the framework of the Education Campaign.	"The mobilization had a name 'Rolling out the Ball' And the intention was to demonstrate the public and collective strength of the network of actors that came together around the movement Fund for Basic Education (Fundeb pra Valer). We also wanted to attract new actors and particularly attract attention from the press. The actions happened during the legislative process and were conceived from a perspective that mixed intentionally political communication, humour and popular brazilian art which resulted in public action and innovative tools for mobilization. We had 'cirandas'; the showing of baby diapers in strong colours, miniparades where people walked with baby trolleys and during the Soccer World Cup, we gave a soccer ball to members of parliament that had a text saying 'Fundeb Now – Score a goal for the Education!'"
ActionAid USA concluding on the lessons that came out from the "Building Sustainable Futures for Farmers Globally Campaign"	"While the Building Sustainable Futures for Farmers Globally campaign was not able to achieve substantial changes in US agricultural policy, it did contribute to a more nuanced public debate on the issues, and did so in a way that rejected the characterization of US family farmers as greedy or obsolete. In many ways, it builds on the deeper understanding of international solidarity based on common interests that emerged during the tri-national debate on the NorthAmerican Free Trade Agreement. In that case, ties among labor unions in Canada, the United States and Mexico managed to transcend the stereotypes that had previously existed among those organizations, leading to joint advocacy efforts that nearly resulted in the agreement's defeat".

Acronyms

CONCORD	European NGO Confederation for Relief and Development
CSO	Civil Society Organisation
DE	Development Education
DEAR	Development Education and Awareness Raising
DEEEP	Developing Europeans' Engagement for the Eradication of global Poverty
EC	European Commission
EP	European Parliament
EU	European Union
GCE	Global Campaign for Education
GE	Global Education
HRBA	Human Rights Based Approach
IDS	Institute of Development Studies
IMF	International Monetary Fund
M&E	Monitoring and Evaluation
MDGs	Millennium Development Goals
MEP	Member of European Parliament
MFA	Ministry of Foreign Affairs
MoE	Ministry of Education
MP	Member of Parliament
MSH	Multi-Stakeholder
NGDO	Non-Governmental Development Organisation
NGO	Non-Governmental Organisation
NSAs	Non-State Actors
ODA	Official Development Aid
OECD	Organisation for Economic Co-operation and Development
PCD	Policy Coherence for Development
UN DESA	United Nations Department of Economic and Social Affairs

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Other toolkits

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http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf

Tax Justice Advocacy: a toolkit for Civil Society, Christian Aid and SOMO (2011)
http://www.christianaid.org.uk/images/completetaxadvocacytoolkit.pdf

TB /MDR -TB Advocacy toolkit, Advocacy Partnership (2011)
http://www.advocacypartnership.org/resources.php

Advocacy Toolkit: Guidance on how to advocate for a more enabling environment for civil society in your context, Constanza de Toma, Open Forum for CSO Development Effectiveness, CIVICUS (2010)
http://www.cso-effectiveness.org/IMG/pdf/120110-of-advocacy_toolkit-en-web-2.pdf

Advocacy and Campaigning, how to guide, Ian Chandler, BOND for International Development (2010)
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"Advocacy Toolkit: Understanding Advocacy", TEARFUND (2002)
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http://www.justassociates.org/ActionGuide.htm (http://www.justassociates.org/ActionGuide.htm)

The Advocacy Toolkit, WaterAid Sourcebook
http://www.ideaonline.ie/sites/default/files/advocacy_sourcebook_2.pdf

Campaigning for freedom of expression: a handbook for advocates, IFEX (2005)
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First 5 Advocacy Toolkit, Center for Health Improvement and the California Children and Families Foundation (2004)
http://www.f5ac.org/files/advocacytoolkitnew.pdf

Advocacy in Action: A toolkit to support CBOs and NGOs responding to HIV/AIDS, International HIV/AIDS Alliance & ICASO (2002)
http://gametlibrary.worldbank.org/FILES/2_Advocacy_Toolkit.pdf

List of advocacy tools

Tools for all steps and activities of an advocacy strategy can be found in all the toolkits listed above.
Links to resources for the tools included in this toolkit are listed:

The Problem Tree - http://www.smallstock.info/info/comm/prob-tree.htm

The PowerCube - http://www.powercube.net/

Power tools for policy influencing including stakeholder power analysis - http://www.policy-powertools.org

Power matrix - http://www.justassociates.org/publications_files/MCH3.pdf

Be a Good Negotiator: Pocket Guide to Success, First Creation Consulting
http://www.davidhowardtraining.com/pdfs/Be_a_Good_Negotiator.pdf

Campaign guidelines - http://www.campaignstrategy.org/ (http://www.campaignstrategy.org/)

The EPIC talk! - http://results.org.uk/sites/default/files/Create%20and%20deliver%20and%20EPIC%20talk.pdf

The Logic Model Development Guide, W.K. Kellog Foundation (2004)
http://www.wkkf.org/knowledge-center/resources/2006/02/WK-Kellogg-Foundation-Logic-Model-Development-Guide.aspxc

The Fish Soup Development Story - http://vimeo.com/38146768

How to make the case for development education and awareness raising in a context when public spending is under constant pressure and established paradigms of development policies are increasingly questioned? How to transform the challenges into opportunities for the sector – opportunities, which actually might never have been bigger, in a world where active global citizenship is more needed then ever before?

This toolkit provides solid arguments, background information and hands-on advocacy tools to make the case for development education, towards institutional stakeholders as within civil society, at local as well at national or international level.

Development needs citizens–
this toolkit will help you to bring this message across