

Advocacy Strategy Workbook

Building your advocacy plan

STEP ONE: Assessing the problem

Break down the problem

What do you want to change? Who is affected by the problem? Is there more than one problem? Separate and prioritize them.

Set goals

What would solve the problem? What is the best outcome? What is the worst? What compromises would you make to reach a resolution? What would you refuse to give up?

Recognize your Biases

What perceptions do you have about the other side that might impede your efforts? Assess your emotions carefully. Focus on ways to channel anger, resentment, or anxiety, rather than letting emotions sabotage your efforts.

Be objective

What does the other side want? Step into their shoes. What obstacles do they face?

Troubleshoot early

What are the potential obstacles to getting the resolution you want? How will you acquire resources needed to reach your goals?

Determine allies

Where can you go for help or advice? Who is on your side? Who is not on your side? How do you convince neutral parties to take your side?

Balance information against advocacy style and talents

Based on the information you already have, what are the talents you have to best reach a resolution? Are you a good writer? Are you an articulate speaker? Do you work well with media? Are you more aggressive or do you prefer a less direct approach? How have you solved problems in the past?

STEP ONE WORKSHEET

Personal Advocacy Plan

Date Started:

Dates Revised:

Goals:

Objectives

Supporters:

Name:

Why in support?

What can you do to get more supporters?

Barrier

How do you overcome it?

Opponents:

Name

Why in opposition?

What, if anything, can be done to change opponent's mind?

Decision-makers

Name

Position

Resources

Name of Supporter

Talent/Skill/Resources

What do you need but not have?

How can you get it?

STEP TWO

Forming an advocacy team

Find the common cause

What is the goal of the group? How do the immediate problems fit into the big picture? Out of all the conflicting interests and wishes, what is the most important issue that everyone wants to be addressed? A unified mission fosters commitment and helps everyone stay focused.

Troubleshoot conflicting interests within the group

Are group members willing to sacrifice self-interests or personal agendas for the good of the group, or the group's mission? Are there conflicts of interest that need to be resolved or addressed to ensure everyone will be able to work together?

Establish structure

What is the regularity of meetings, type of facilitation, etc. What is the communication process between meetings? Think through resources needed, i.e.; a place to meet, teleconferencing, printing costs, etc. Build into your structure a method to evaluate progress regularly.

Establish decision-making process

As a group, decide what the formal structure for planning and decision making will be. Is there a steering committee? Do members vote on issues? Is the communication process formal or informal? Is there a figure head for your group? Who speaks for the group to media or other groups?

Match group talents with your plan

What are the talents in your group? Do you have motivating speakers? Strong writing skills? Mediation and negotiation abilities? Do you know someone who has dealt with this or similar circumstances before? What have they done? Internally assess group skills, talents, interests, resources and allies.

Make sure everyone is at the table

Who has inside information or expertise about the problem? Be careful not to avoid those within a seemingly-opposed organization. Some of your best allies may come from those who work within a system and understand how to get around its shortcomings, or who also wish to challenge the same issues you face in your coalition.

STEP TWO WORKSHEET

Decision-making

How will decisions be made?

___ majority vote of all group members?

___ consensus of all group members?

___ leadership will make decisions under following circumstances:

How will decisions be made when there is no time to consult with others in group?

Leadership

Name of group member

Leadership role/title

Speaking for the group

Who can speak for the group with media?

Who can speak for the group with decision-makers? Other?

Group communication

How will group members be kept up to date?

newsletter or mailing

email

phone

other

Describe how communication will work?

Meetings

Who will call meetings?

When and where will meetings occur?

Who will lead the discussion, and how will the meeting be conducted?

STEP THREE: Gather information and form solutions

Research!

Gather all the information you need. Look for existing laws, policies and contracts that apply to what you are trying to change. Think through the best places to find this information. You may need to interview professionals, research libraries or the internet. Look for radio or TV documentaries, written media and educational materials. There may be budgets or other public information that is relevant. What information do you have a right to access? Even when something is public information, accessing it can at times be tricky and require some strategizing.

Examine what has been done before

Have others in your community worked on this issue before? Has there been successful resolution in your community or somewhere else? Analyze information for what has worked, and what hasn't.

Research the opposition

Understanding the opposition's interest and approach to the issue will improve your strategy. This will generate win-win solutions, uncover obstacles you may face, and help you avoid strategic mistakes.

Create a paper trail

Closely document all of your research. You may need proof of your findings down the road, and others will benefit from what you have discovered and what you have done.

STEP THREE WORKSHEET

Information you need

Laws, Regulations, Policies and Contracts that apply to your problem

Who enforces these laws, regulations, policies and contracts?

How will you keep track of information you gather?

How will other members of the group learn what you find?

Opponents position

What support is there for your opponent's position?

What has been done before

Have others in your community worked on this problem before? What happened?

In other locations, have advocates found solutions to this problem?

Plan for gathering information

Information Needed	Where to get it	Who will find it	Due date
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STEP FOUR Choosing your strategies

Litigation and media scandals can be expensive and embarrassing, and may permanently damage successful working relationships. Look to resolve problems at the lowest possible level. Seek compromises that benefit both sides and maintain working relationships while producing the results you want. If low-level strategies don't work, you may need to try a higher-level approach.

Determining which strategy is best will depend on your group goals, talents and the barriers you face. Pros and cons of each approach should be carefully evaluated, especially where media or courts are

involved. Strategies to consider are:

Policy reform

Filing a formal complaint or following procedural grievance processes can sometimes yield the result that you want. It may also be beneficial utilizing ombudsman programs, quality assurance systems, etc. You may want to attend public meetings or join a board or commission. Look for public officials who are interested in your issue.

Organized community response

Mobilize email lists, community groups or other interested parties to “flood with complaints” by responding to an issue with letters, email responses, telephone complaints, etc.

Dispute resolution

This includes mediation, negotiation and other conflict resolution.

Media

Media can be a very effective advocacy tool, but it requires skill and careful consideration to ensure the news coverage is objective and accurate, and that it doesn't come back to haunt you. What is your accessibility to media? Would this be a story of interest? What stories, if any, already exist about this problem? What media organizations are sympathetic to your cause?

5) **Legal**

Find out what your rights are and what legal strategies would work. An attorney can help by drafting letters, giving advice, appearing at meetings or by filing a lawsuit.

STEP FOUR WORKSHEET

Policy Reform

Discuss pros and cons of trying to change policies as a way to solve your problem.

Can committees, boards, commissions, or other bodies help solve your problem?

Can public officials, heads of businesses, or other policy-makers make changes which will help your problem?

Organized Community Response

If many complaints were made by others, would it help your problem? If yes, what is the most efficient way to organize this?

Dispute Resolution Process

What is the resource for mediation or other dispute resolution in your community? What are the pros and cons of using mediation?

Media

Who in the media would be helpful to you?

What about your problem would be interesting to the media? (Angle)

Carefully consider possible risks and benefits of media coverage.

Legal

What are the possible legal strategies for solving your problem?

Other Strategies?

STEP FIVE: Writing your plan

Start with your solution

Your plan will change as you go and require continual critique. Keep your goal foremost in your mind. That will help you stay on task.

Break down the steps to reach your solution

Be specific. Who does what? When do things happen?

What is your timeline?

Organize & Prioritize your activities

What takes priority and needs to happen immediately? Which tasks are easier than others and can be handled more quickly? What is the logical sequence of events?

Continually evaluate progress as a group

At regular intervals ask the group if everyone feels the approach is on target. Are your strategies working? Look for new opportunities for other approaches. This will generate more solutions. What would make things easier? What lessons have been learned in the process?

Be on the lookout for new allies

Look for others interested in your cause. Have others offered assistance? How can you utilize their help?

Prepare for when the going gets tough

Listen to criticism carefully. Sometimes others have good input or advice. Remind yourself of what you are trying to accomplish. It may

require discipline not to rise to others' bait. Be careful not to allow your reaction to criticism to become your focus. This will rapidly pull you away from your goal.

STEP FIVE WORKSHEET

Your Step by Step Plan

Goal:

Activity

Who will do it?

Due Date

STEP SIX: Evaluate & Follow up

Make sure you have an agreement

You've done it! You've reached a resolution and attained your advocacy goals. Not so fast, though—before you celebrate, you want to make sure your agreement does what you want it to do! Your agreement should:

- 1) Be written
- 2) Be enforceable
- 3) Spell out what happens if people don't live up to the agreement
- 4) Have methods for follow-up

Look at what remains to be done

Is there more work to be done? Do you have the basis for another advocacy plan?

Evaluate your overall plan

What worked?

What didn't work?

Did you reach your solution?

Did you meet your personal and group goals?

What could be improved for next time?

What have you learned?

STEP SIX WORKSHEET

Did you meet your advocacy goals and objectives?

What did you accomplish?

What was not completed?

What worked well?

What did not work well?

How could it be better next time?

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**Promoting Dignity, Equality
& Self-Determination**