
A Practical Guide for Rallying Stakeholders Through Advocacy

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Editor's note: This is the [second piece in a series](#) about advocacy work in our sector. How charities and non-profits engage in policy and political advocacy has been an important topic of conversation for some time, and one The Philanthropist has engaged in through past writing, including a short series in 2016. The recent legislative change removing limits on the amount of public policy advocacy permitted at Canadian charities presents a good opportunity to revisit this issue and see how organizations are adapting to this new regulatory reality. Additionally, the current [COVID-19 crisis](#) underscores the sector's vital role in this space and illustrates the importance of continuing to build capacity so we can do this meaningful work. Our ability to be advocates, both as individual organizations and as a collective, is more important than ever.

Very few organizations can achieve their mission and social change objectives on their own. It is also hard to imagine significant and sustainable change without policy change. And policy change is rarely achieved without some advocacy activity aimed at rallying the public, stakeholders, and decision-makers around an issue and a solution. Hence, advocacy skills are now seen as a core competency for leaders who are serious about addressing the root causes of a given issue.

It is therefore no surprise that foundations are increasingly considering policy and advocacy work as an essential means of achieving their mission (Pearson, 2019). There are many ways a foundation may initiate such work. At a minimum, we suggest that foundations have a significant role in building the capacity for non-partisan advocacy of policy options within the charitable sector and civil society organizations.

Leaders are eager to develop their skills

In 2017, the PRÉCA organization (*Partenaires pour la réussite éducative en Chaudière-Appalaches*), with the support of the Lucie and André Chagnon Foundation, commissioned a survey among 1,458 local leaders in early childhood and public education in the province of Québec. It asked about their needs and interests in developing advocacy-related skills (Léger, 2017). The survey showed that: 87% were involved in communication activities; 58% were involved in advocacy activities on behalf of their organization; and only 13% used tools or had had advocacy training.

Respondents said the main challenges in increasing and improving their advocacy initiatives included lack of time, difficulty identifying and articulating advocacy objectives, inadequate organizational capacity and engagement, and difficulty in achieving coherent and sustained action in advocacy. Between 55% and 65% expressed an interest in improving their advocacy skills in the coming year, preferably through webinars, readings, case studies, training activities, and expert advice.

Questions that show the way to success factors

In response to these results, the *pourrallier.com* resource was developed with, and for, leaders who need to mobilize citizens and decision-makers to their cause and who want to learn and develop advocacy skills to do so more convincingly. It is based on a review of the literature (e.g. Advocacy Learning Lab, 2015; Brownson *et al.*, 2011; Bryant *et al.*, 2014; Lagarde, 2013; and O'Hare, 2014) as well as extensive input from practitioners themselves. It uses the Socratic questioning method, which “focuses on asking a person a series of open-ended questions to help promote reflection; this, in turn, is likely to produce knowledge which is currently outside of her/his awareness and thereby enable her/him to develop more helpful perspectives and actions in tackling her/his difficulties. Through this method, people are able to reach their own conclusions rather than being told what these should be by the questioner” (Neenan, 2009).

This article presents an abridged list of questions from the *Pour rallier* tool. Twenty-five questions encourage practitioners to consider a range of factors to help them build a successful advocacy strategy. The questions are divided into four categories: 1) Groundwork; 2) Strategy; 3) Relationship-building; and 4) Learning. In the following sections, each category is introduced, and the related questions outlined. The table below presents a 2019 case study from the Early Childhood Observatory, which worked with multiple stakeholders to advocate policy changes that would give children in migrant families access to free health care, regardless of their immigration status or that of their parents. This example shows how we applied the questions in the Groundwork and Strategy categories to this particular case.

Groundwork[1]

Why is groundwork important? Devotion to the cause is just not enough. Rallying a decision-maker to a specific cause or solution isn't something that can be left to chance. In addition, what convinced one person to commit to a given cause is not likely to work the same way with other stakeholders. One's views may differ from the views of the person or group one wants to convince in many ways: vocabulary, issues, challenges, allies, beliefs, etc. An advocacy strategy must be based on an explicit clarification of your objective as well as an analysis of the issue, the person you want to convince and the context.

What are your advocacy objectives? What is your case in relation to the issue and the solution?

- 1: Which person in a decision-making position do you want to rally to the issue that concerns you and the solution you're proposing?
- 2: What do you want the person you are trying to rally to your cause to agree to? What do you want them to do?
- 3: Are the issue and your solution considered urgent or high priority? Is this a concern shared by several actors in your community?
- 4: Is your issue well documented and clearly defined?
- 5: Is your solution clearly defined? Effective? Realistic? Adapted? Tested? Documented?

What do you know about the person you are trying to convince?

- 6: Why would this person say "yes?"
- 7: Why would this person say "no?"
- 8: Who has influence over the person you are trying to rally to your cause?
- 9: Has your solution been adopted by another leader in the same sector?
- 10: If you are trying to gain the support of several different people, which of them would be most likely to say "yes?"
- 11: Through what channels, activities, or events can you reach the person you are trying to persuade?

What is the context?

- 12: What is working in your favour in the current social context? Is this the right time?
- 13: What could work against you?
- 14: Who is downplaying your issue and opposing your solution?

Strategy

Think of your strategy as the result of all the preceding aspects of your analysis. Starting from an analysis of the issue and the solution, the person you're trying to win over and the context, it is possible to structure and plan your advocacy communication, including all the allies who can provide concrete support.

- 15: What are you going to use to describe and present the issue? (Data, stories, testimonials, etc.)

16: How do you plan to describe and present your solution? Will you speak to the soul, head, heart, and/or pocketbook of the person you are trying to persuade?

17: What will be your key and specific messages, expressed in simple language, aimed at the person you want to convince?

18: Who (influential individuals and stakeholders) could accompany you to help promote your solution?

19: What media, events and interpersonal channels will give you access to the person you want to convince?

Relationship-building

Rallying a partner to your cause or issue is much more than a financial transaction. To establish a real sense of mutual interest, you need to build a relationship with that partner — and their partners — as well as all the people who could influence them. In addition, media contacts can be powerful allies in enhancing the credibility of your issue and your solution. More than just having a “media strategy,” you need to work on building and maintaining a real connection with your media contacts. An effective advocacy communication strategy demands that you not only develop worthwhile partnerships, but that you nurture those relationships. There’s no point in making the effort to win over a key decision-maker unless you’re in it for the long term.

Building a relationship with the person you want to convince

20: What could you do to establish a more permanent relationship with the person you are trying to persuade, especially if you will be asking for their support more than once over the next few years?

21: Do you know any influential people in the circle of the person you are trying to persuade who could give you access to them, show support for the solution you’re proposing, or otherwise assist you in advancing your strategy?

Building a relationship with the media

22: In your region or community, which media personalities (journalists, columnists, talk show hosts, bloggers, and influencers) are talking about your cause or your issue?

23: Are you familiar with the communication styles of the various media and their preferred content (focused on data, controversy, stories, heroes)?

Learning

Learning means adjusting. It is essential that you take a critical look at your process so that you can adjust as needed. “Non-success” can provide a valuable opportunity to apply lessons learned to future actions. It is also important to assess whether your solutions achieved the desired effect or if, on the contrary, you need to make mid-term adjustments. Decision-makers are usually reassured to see that collaborators are capable of learning and fine-tuning their actions. It’s one more way to maintain positive partner relationships.

24: What evaluation framework do you plan to use to determine whether you have achieved your advocacy objectives? Are you doing the right things? Are you doing things right?

25: How and when do you plan to follow up the outcome of your solution?

Conclusion

The capacity to rally stakeholders is a critical element of any social change initiative. Each of the questions raised in this article represents a potential success factor to consider in developing an advocacy strategy. Although practitioners may initially see this list as daunting, the idea is not to apply the entire set of questions to every project or initiative. The tool is intended to be an effective starting point to integrate certain practices that will increase their odds of successfully rallying a range of essential stakeholders to their cause to achieve significant and lasting change.

Case Study: Early Childhood Observatory’s Advocacy Initiative for “Children in Migrant Families” Policies

Notice of the Observatory (Observatoire des enfants, jeunes et de la famille) (Observatoire de l'enfance, de la jeunesse et de la famille) is a non-profit organization that provides support and services to young children and their families. The Observatory provides the most reliable and relevant data on early childhood development in the province of Quebec, which is the foundation for evidence-based public policy and program development in the area of early childhood development. The Observatory is a member of the network of Observatoires de l'enfance, de la jeunesse et de la famille in Quebec.