

The Art of Advocacy

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- *What's Advocacy*
- *Developing an Advocacy Strategy*
- *Grassroots Advocacy*
- *The Role of Partnership in Advocacy*
- *Advocacy Competencies*

Lobbying or Advocacy – Differences

↳ **Lobbying:** Lobbyists are defined as “individuals who are paid to

communicate with government public office holders in an attempt to influence government decisions” (federal, provincial or municipal). There are 3 categories of lobbyist each with its own filing / registration requirements:

- a) consultants lobbyist;
- b) in-house lobbyist (corporate); and
- c) In-house lobbyist (organizations).

↳ **Advocacy:** an advocate is someone who speaks up for others. The advocate may be an individual or an organization. Advocacy involves identifying, embracing and promoting a cause. Advocacy is an effort to shape public perception or to affect change that may or may not require legislation.

Can charitable groups advocate? **YES.** While charities are not allowed to engage in “political activity” (like endorsing a candidate or political party) they are allowed to advocate for their cause. A charity may make the public aware of its position on an issue provided:

- a) it does not explicitly connect its views to any political party or candidate for public office;
- b) the issue is connected to its purpose;
- c) its views are based on a well-reasoned position;
- d) Public awareness campaign does not become the charity's primary activity.

Note: see Customs & Revenue Act (CRA) for guidelines for Registered Charity Advocacy.

Developing an Advocacy Strategy / CHECKLIST

⑥ Identify Issue – what's your concern, problem or focus?

Set Goals – what's your objective? What outcomes are acceptable and what alternatives are acceptable to the membership / community?

⑥ Research & Get Facts – facts is what makes your argument credible. Avoid anecdotes or hearsay.

⑥ Determine your target audiences – with whom are you trying to communicate? Elected officials? Civil servants, media people, public at large, members?

⑥ Develop a formal position – develop statements, key messages, brief or scientific paper. Develop tactical action plan – timelines, activities and assignments of responsibilities.

⑥ Communicate clearly with your target audience – inform your target audience of your concerns / views. Establish communications and begin developing relationships. Consult your membership – continue to seek input from your membership and involve your membership in the process.

⑥ Keep your membership informed – inform members of your progress along the way.

⑥ **Build coalitions** – look to develop relationships with organizations of common interest. Share information (or) join in more formal coalitions / strategic alliances.

⑥ Review Campaign – make adjustments where necessary.

Feedback – seek feedback from members, media, public, officials. *They can be good indicators of progress, challenges and future successes.*

Grassroots Advocacy – Where do we Fit IN?

Grassroots members can play a key role in advancing an organization's goals by interacting with elected officials directly. More importantly, organizations can facilitate such meetings by establishing grassroots advocacy programs.

Key to Success

- Effective advocacy relies on membership involvement
- Grassroots communication of concerns has the greatest impact on local politicians
- Broad-based communications will be more effective if it supports a central message.
- Using originality serves to break through the clutter.
- A sustained & coordinated approach managed centrally but applied locally is effective.
- Personalized approach to political leaders works best. Real people explaining real concerns.
- Feedback to your organization following member letters & visits is critical.

What doesn't Work?

- Contacts that look purely bought and paid for, i.e. professionals paid for, rather than grassroots / volunteer;
- A confrontational style that harasses or insult politicians / public office holders;
- Members who are under/ill informed or are speaking to issues without conviction;
- Providing members with tools that make them look like wound-up robots.

Advocacy Tools – Box

- Well-written letters to MP, governing party, Chair-Person of Committees, key management staff;
- Plan briefers / effective meetings with key stakeholders / decision-makers;
- Ensure proper & timely follow up.
- Newsletter style reports to membership
- Guide to set up meetings / focus groups
- Guide to set up meetings with MP's, etc.
- Reaction-sheet /feedback form

Building Coalitions / PARTNERSHIPS

- Do the potential partners have a shared vision/shared goals?
- Define success & get all players to buy-in before embarking formally on a coalition process

- Can the partners agree upon a workable advocacy plan?
- Who's in charge?
- Accountability mechanism to members?
- Are costs-sharing agreements clear/explicit?
- Can coalition partners take small workable steps in the early stage?
- Do partners have an exit strategy?

Note #1: many coalitions waste precious time & energy arguing or fighting over cost allocations that should be agreed upon as early as possible.

Note #2: by focusing on an immediate action, coalitions can more easily demonstrate success to all the partners and ultimately help sustain the coalition in the long run...

Note #3: Each organization should know under what terms and conditions it would abandon the coalition. An organization should also have plans in place to exit the coalition when it has achieved all or most of its goals.

Advocacy Competencies

- Develop an advocacy strategy
- Select an effective spokesperson. Such a person should:
 - be confident and has strong public speaking skills;
 - is knowledgeable of the issues, both internally/externally;
 - appears trustworthy;
 - has the authority to speak on behalf of the organization and its members;
 - Depending context, bilingual if possible.
 - Develop position using: membership questionnaires, issue specific committees and contingency plans.
 - Prepare a brief addressed to reach multiple audiences; using facts, figures, case studies, do an executive summary, avoid being negative and ensure accuracy throughout
 - Makes the most of technology to research particular position; monitors government views, organize-mobilizes and communicate with members; promote viewpoint, attract / recruit supporters, organizes campaign.

RESOURCES

- The Art of Advocacy handbook – for Non Profit Organizations
On-line: <http://www.ccednet.rcdec.ca>

. A Guide to Government Relations for Directors of Non-Profit
Organizations / Canadian Society of Association Executives
On-line: **<http://www.csae.com>**

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Immigrant Men Advocacy Network
Edmonton, Alberta (Canada)