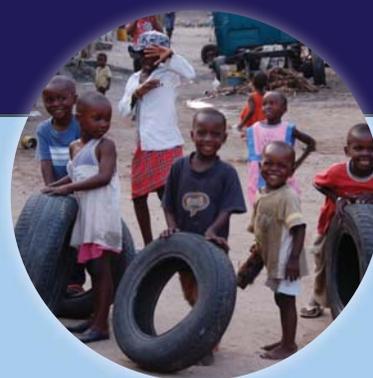


Leadership in Public Health

A guide to **advocacy** for public health associations



CPHA  ACSP

CANADA'S PUBLIC HEALTH LEADER
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acknowledgements

This manual was developed by the Canadian Public Health Association (CPHA) as a resource for organizations working in public health, particularly other Public Health Associations (PHAs). It is intended to act as a guide to developing and implementing advocacy campaigns and strategies around public health issues. It integrates real-life examples from several PHAs working in different socio-economic and political contexts.

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1

what is advocacy?

Advocacy is an active process that uses strategic actions to influence others to shift opinion, initiate positive change, and address the underlying factors that contribute to a healthier community. It is different than an information, education and communication (IEC) campaign as it focuses on policy change to address the social and environmental causes of an issue, rather than on individual behaviour change.

Advocacy is a core function of all public health associations. Advocacy is the process of influencing outcomes, including public policy and resource allocation decisions within political, economic, and social systems and institutions that directly affect people's lives. Advocacy consists of organized efforts and actions that seek to highlight critical issues that have been ignored and submerged, to influence public attitudes, and to enact and implement laws and public policies so that visions of "what should be" in a just, decent society become a reality. Advocacy organizations draw their strength from and are accountable to their members, constituents, and/or members of affected groups. Advocacy has purposeful results: to enable people and communities to gain access and voice in the decision making process of relevant institutions and organizations; to change the power relationships between these institutions and the people affected by their decisions, thereby changing the institutions themselves; and to bring a clear improvement in people's lives (Chauvin et al., 2005: 168).

Advocacy can be achieved through a variety of approaches. Sometimes advocacy is done through a process of constructive engagement. At other times, advocacy can be done in a very critical and confrontational fashion. At times, a subtle approach might be used; at other times, a very pro-active and visible approach might be more appropriate. The approach taken depends upon a variety of factors and it is up to the advocate to determine what approach will be the most effective and the wisest political approach.

Advocacy is a catch-all word for the set of skills used to create a shift in public opinion and mobilize the necessary resources and forces to support an issue, policy, or constituency ... advocacy seeks to increase the power of people and groups and to make institutions more responsive to human needs. It attempts to enlarge the range of choices that people can have by increasing their power to define problems and solutions and participate in the broader social and policy arena.

Wallack et al, 1993: 27-28

1.1

advocacy and public health associations

“Public Health is the science and art of preventing disease, prolonging life and promoting health through organized efforts of society.”

John Last,

A Dictionary of Epidemiology

A strong public health system protects and enhances the health of a population. Although critical for public health, the public health system is often not that visible, because its intention is to prevent health problems before they occur.

Public health functions include:

- health promotion
- disease and injury prevention
- health protection
- health surveillance
- population health assessment
- emergency preparedness and response

Public health associations play a critical role in the public health system and in successful community and social development by acting as a strong civil society voice on public health through advocacy activities. In their role as advocates, public health associations can participate in the formation of policy and strategies by providing evidence-based research and recommendations, representing the views of a wide-range of members, and providing an independent, politically non-partisan voice on public health issues. In fact, the advocacy work carried out by PHAs and other civil society organizations is an essential element of the policy formation process. Public health advocacy can also help to increase the visibility of public health issues, both among health professionals and in the wider community.

2

creating, implementing and evaluating an advocacy strategy

The elements of developing a strategy are outlined here in a logical, step-by-step process. However, you may also find that information from later steps causes you to change what you have already outlined in earlier steps. For example, once you have identified your stakeholders, you may revise your goals based on where you know you have influence and support. Also, the environment for advocacy will be different in each country. The steps and techniques outlined in this guide are meant to be flexible and adaptable – use them in the way that best suits the context in your country.

Outlined below are the basic steps in developing an advocacy strategy:

- step 1** Problem recognition
- step 2** Develop a position/policy statement
- step 3** Define goals & objectives
- step 4** Identify opportunities & risks
- step 5** Map stakeholders & their opinions
- step 6** Choose your advocacy approach
- step 7** Develop key messages
- step 8** Create an action plan
- step 9** Implement and evaluate

case study 1: waste management in the republic of the congo



In the Republic of the Congo, the **Congolese Association for Public and Community Health** (*Association Congolaise pour la Santé Publique et Communautaire*, ACSPC) conducted a survey on waste issues in five neighbourhoods of the Tié Tié district of Pointe-Noire. Based on the results of this survey, the ACSPC identified waste as an important public health area where they wanted to develop an advocacy campaign. The focus of the advocacy campaign was the management of household waste in these neighbourhoods. They worked with 8 neighbourhoods to implement a household waste collection process to deal with a lack of services from the municipality in this area. While this represented a good way of mobilizing the communities and of addressing the problem in the short-term, the ACSPC advocated for a more permanent, long-term solution.

The main goal for this advocacy campaign was to see visible changes in the management of household waste. ACSPC targeted the relevant areas of government with the aim of getting them to provide receptacles for waste in these neighbourhoods and empty the receptacles once they were full. The main targets of the campaign were the mayor of Pointe-Noire and the Presidents of the 8 neighbourhoods that were part of the waste collection project. ACSPC also formed connections with other NGOs working on waste management in these areas.

Since the ACSPC decided to target individual politicians (mayors and community leaders) in their campaign, they chose to use face-to-face meetings with these key people as their primary approach. They also used letter-writing, posters and flyers and photos as key resources in their campaign.

Although the campaign was supported by funds from the European Union and the Canadian International Development Agency (CIDA), the ACSPC also organized a campaign to get households to pay a small fee to help cover the costs of the waste collection that took place.

Challenges that were faced during this campaign included the slowness of municipal services in emptying the waste receptacles once they were filled, the absence of garbage cans in many households in the neighbourhoods, and the lack of carts to ensure regular collection of waste from households.

Results:

- The creation of a temporary location in each community for the collection of household waste;
- The receipt of 3 waste collection receptacles; and
- The emptying of these receptacles once full over an extended period.



Official launch of the new waste collection system by the Administrative Mayor of District III Tie-Tie, Pointe-Noire, Congo

2.1 developing a position/policy statement

Developing your PHA's position on a public health issue is a critical first step in creating your advocacy campaign. It is important to have internal agreement on the PHA's position before sharing your campaign with others. This section reviews the process for developing a position or policy statement.

a) problem recognition and analysis

An advocacy campaign is carried out not for its own sake, but because there is a public health problem that needs to be addressed. Public health issues can come to the attention of a Public Health Association (PHA) in a variety of ways:

- Members of the association or other interested parties may identify an issue.
- Another organization may ask the PHA to become involved in an issue or endorse its position.
- The PHA may recognize a situation that is creating difficulty for a particular group of people.
- The media or the general public may raise an issue.
- A new opportunity raises an old issue due to a change in government, a policy consultation process, or in response to an urgent situation related to the issue.
- There is a need to counter misinformation.

When selecting an issue to work on, ask yourself the following questions:

- *Is the issue consistent with your organization's values and mission?*
- *Is it within the domain of public health?*
- *Does your organization have credibility or a track record on this issue?*
- *What is the magnitude of the problem? Is an urgent response required?*
- *Can your organization make a unique and important contribution on this issue?*
- *Will your work on this issue be widely supported?*
- *Is it easily understood by the public and policy makers?*
- *Are there existing good data on this issue?*
- *Is success/change on the issue achievable? Will you be able to influence thinking and actions?*
- *Would action on this issue respond to an identified need in the community?*
- *Would it result in a real improvement in people's lives?*
- *Would it help build alliances with other groups?*
- *Would it help to build grassroots leadership?*

Public health issues may be longer-term, allowing more time for strategic planning, or they might be short-term, situational issues, requiring a more immediate response.

It is also important to consider the question of resources and capacity. Although there are likely many public health issues on which your PHA might want to do advocacy work, it is realistically not possible to work on every issue. Because resources are limited, it is critical that PHAs prioritize the issues they choose to work on. Sometimes it may be more appropriate for another organization to take the lead on a particular campaign. When trying to prioritize issues for action, consider the answers to the questions listed above in making your decision.

Case Study 1: Waste management in the Republic of the Congo (page 8) provides an example of how a public health issue was identified. Case Study 5: CPHA's advocacy for a "determinants of health" approach in Canada (page 20) also provides another example of problem identification.

a policy or position statement should include the following components:

- an explanation of the issue or concern;
- an explanation of the relevance of the issue to the PHA;
- an outline of the policy or position; and
- an outline of the types of actions that may be taken (for a policy statement).

Be sure to involve all of the key people within your organization as you develop your position, including staff and board members. In some cases it may be appropriate to get input from your members as well.

For an example of a position statement, please see CPHA's resolution on idling control, 2007 CPHA Resolution No. 3, Idling Control Bylaw, www.cpha.ca/uploads/resolutions/2007_e.pdf.

b) develop your position

Once you have clearly defined the issue you want to address, the next step is to create a statement that describes what you want to accomplish. The statement will also help you with the next step of identifying key stakeholders.

A **position statement** explains, justifies or recommends a particular opinion or stance on an issue. A position statement often stands alone, and might lead to a policy declaration. Taking a position does not always imply a commitment of action with attendant resources.

A **policy statement** is a plan, with stated objectives, that influences organizational responses in terms of its activities, procedures and decisions, and which directs future work or action by the organization, resources permitting. Endorsement or approval of a policy does commit organizational resources to carry it out.

If your PHA has decided to actively address a particular issue, you will want to develop a statement that fully explains your position and approach. A position statement might be more appropriate in a situation in which the PHA wants to lend support or express an opinion on an issue, but is not going to take any other active actions. A policy statement may be more appropriate when the advocating organization is able and willing to invest resources in support of a directed action on the issue.

fact-finding and analysis

Once you have identified the problem you want to focus on, you need to do a brief analysis of the issue.

Some questions to consider are:

- What information already exists on the issue?
- What does the evidence say? Are there examples of from other contexts that would be useful for you?
- Where are the information gaps? Where could you get more information?
- What is the current policy environment (e.g. what is the government's position on the issue)?
- What policies and regulations already exist that address this issue?

Whichever issue is the focus of your advocacy work, it is important to clearly define the problem you want to address. This will make it easier to set goals and objectives and to communicate your message to members, decision-makers and the public. Part of defining the problem is also identifying the factors that contribute to, or the causes of, the public health issue.

2.2

defining an advocacy strategy

SMART:

Specific: Make sure that your goal is specific about what you want to achieve. If a goal is too vague it will be hard to implement and evaluate.

Measurable: Establishing measurable goals will make it easier to evaluate progress and celebrate success. Ask yourself *“How will I know when my goal is accomplished?”*

Attainable: It is good to set ambitious goals, but they must still be attainable. If you set a goal that is impossible to achieve, you can easily be discouraged or deterred from working towards it. Is your goal “do-able”? Can you find the resources and support needed to make it happen?

Relevant: Is your goal relevant to the mission of your organization? Is each objective in the campaign relevant to the others and to the overall goal?

Time-bound: Your goal should be grounded in a time frame – what do you want to achieve, and by when? Without this time frame, there is no sense of urgency in getting the work done.

a) goals and expected achievements

An advocacy goal is similar to a vision – it describes what you would like to achieve on the issue in the longer-term. The goal of your advocacy campaign should be based on the position statement you have developed.

In order to determine how you will achieve your goal, you then need to break the goal down into shorter-term objectives – smaller and more specific changes that you hope to achieve along the way to your goal.

Other questions to think about in developing objectives:

- What resources or knowledge will you need to achieve your goals?
- Is there a logical process that you should follow?
- Is timing important? Do certain things need to happen by certain dates?
- What are the shorter-term objectives that will help you move towards a long-term goal?
- Do you need to gain public support?
- Do you need to get parliamentarians on your side?
- Do you need to demonstrate the benefits of your proposed solution?

All of these may be objectives that will help you move towards your goal.

case study 2: use of the global youth tobacco survey in bosnia & herzegovina



Tobacco use has been identified as a major health issue in the Balkan region. Thirty-seven percent of the population are daily smokers and over 50% of health professionals smoke. Public health literacy about the dangers of tobacco use is inadequate.

Partnership for Public Health, one of the Canadian International Development Agency (CIDA) funded, CPHA-supported public health associations in the Balkan region, is targeting its efforts toward tobacco control. Partnership for Public Health recently conducted the WHO's Global Youth Tobacco Survey (GYTS) to get better data on smoking behaviour among young people.

The survey results, released in March 2009, showed that between 2003 and 2008, smoking prevalence in students under the age of 10 increased from 11.9% to 14.3%. Young people were also exposed to high levels of tobacco advertising and to second-hand smoke.

The data from the GYTS demonstrated that tobacco use among young people is a serious issue in Bosnia and Herzegovina.



The Ministry of Health of the Federation of Bosnia and Herzegovina is now strongly considering supporting a Partnership for Public Health school-based intervention program to address some of the recommendations of the GYTS. Public support for tobacco control efforts seems high.

Partnership for Public Health will continue to use the GYTS data, along with other advocacy tools, to push for the implementation of the GYTS recommendations, including enforcement of existing public smoking bans; coordinated federal anti-smoking campaigns; and a ban on the sale of tobacco to minors under 18 years of age.

b) opportunities and risks

As you develop your goals and objectives, and refine your position or policy statement, it is important to consider the opportunities, risks and challenges present in addressing the public health issue that you have identified.

identifying opportunities

In choosing your approach, it is important to consider what opportunities exist that can help you get your message heard and understood. For example, you may know that in the past, government has not agreed with your position on the issue. A change in government would create a good opportunity to make your case to new politicians. A health crisis, although of course undesirable, can sometimes be a catalyst for action on an issue, and provide a new opportunity to make your case. Think also about your PHA's strengths or

Questions you may want to ask include:

- *How contentious or controversial is this issue? Is it politically sensitive?*
- *Is your organization aware of all relevant political and policy developments?*
- *Is it clear how much time and effort you are willing to invest in this issue?*
- *Will your position be seen as biased?*
- *Will there be any implications for your organization's reputation or credibility?*
- *Have you assessed the possible unintended consequences?*

special assets on a particular issue. Do you have members with special expertise in the area? Are there people who have expressed support on the issue in the past? Is there especially persuasive evidence to support your position? Do not forget to also make use of all opportunities to express your position, including public consultations, media requests, or participation in public events.

identifying and dealing with risks

In addition to considering your strengths and opportunities, it is also important to consider weaknesses or threats that may pose a risk to a successful campaign, and how you might lessen these risks. Think about potential roadblocks to success, both internally and externally. For example, risks or challenges may include resources (human and financial), expectations, roles and needs of stakeholders, or the political climate.

If you consider the potential risks in advance, you will be much better able to respond to them if they do occur. Developing a risk management strategy may also be appropriate. Depending on the activities you are planning to include in your campaign, risk management may consist of developing policies to guide staff and volunteers, purchasing insurance, providing training, and ensuring financial and other commitments are provided in writing, among other things.

c) mapping stakeholders and their opinions

A critical step in developing a campaign is identifying your audience, your allies, the decision-makers who need to be persuaded, and those who might oppose your campaign.

Some questions to ask yourself are:

- Who will benefit from addressing this problem? How can you mobilize their support?
- Who might be negatively affected? What implication might this have for your advocacy work?
- Who else is working on this issue that might have influence? Can you work with other organizations or individuals?
- Who is responsible for taking the action needed to make the change you have identified in your goals?
- Who are your allies on this issue in government? In the community? Nationally? Internationally?
- Who might be opposed to your position on this issue and why? How will you respond to this opposition?
- Within your organization, who do you need to get involved (e.g. board, staff, members, volunteers, funders)?

Regardless of who you are working with, taking the time to develop respectful relationships with all of your stakeholders (both those who support your position and those who may have different positions) will go a long way towards helping you achieve your goals. Good relationships with bureaucrats, politicians, the media, and communities are critical to success.

Case Study 3 (below), CPHA's advocacy on HIV/AIDS, provides an example of working with a range of stakeholders.

case study 3: cpha's advocacy on hiv/aids



In the early 1980s, **Canadian Public Health Association**, participated in the formulation of the country's first national HIV/AIDS strategy. Because of the disease's epidemiology (the largest infected and affected population in Canada at that time was gay men), the issue was politically sensitive. CPHA initiated a consultative process engaging a wide range of non-governmental organizations and government departments to solicit their views and opinions about the direction and content of a national strategy. This took place at a time when information about HIV transmission and prevention and AIDS care and support was emerging, and a treatment for AIDS was far in the future.

Over the next year, CPHA convened several roundtables and consulted with organizations serving the needs of people infected and affected by HIV and AIDS. This multi-stakeholder approach advocated for a strategy that included a strong HIV prevention component and AIDS care and support. The result was a comprehensive, evidence-based HIV and AIDS strategy that addressed the needs of those affected by the disease, created through a multi-stakeholder approach.

CPHA remained proactive over the next two decades in its advocacy for a public health approach to HIV and AIDS. In 1983, CPHA was the first professional association in Canada to call upon the provincial and federal governments to make AIDS officially notifiable and to increase epidemiological surveillance as a means to improve the country's capacity to monitor the spread of the disease and to enhance infectious disease surveillance and control. In 1988, CPHA passed 10 resolutions and one motion related to HIV and AIDS, which advocated among other topics, confidentiality on HIV testing and reporting, the need for high quality, reliable and effective testing and counselling services, HIV prevention and public awareness, and recommendations for addressing the issue of AIDS in the workplace based on human rights. The following year, CPHA advocated successfully for the federal and provincial governments to develop a multifaceted, comprehensive national policy and strategy and to provide funding for HIV prevention and AIDS care and support programs throughout Canada. CPHA's proactive advocacy on HIV and AIDS issues, both domestically and internationally, continued over the subsequent 12 years.



2.3 advocacy approaches

In this step, you will determine which activities will help you meet the goals you have set. For example, if your goal is to see a policy change at the national level, you may want to meet with key policy-makers and leaders to press individually for change; you may need to conduct additional research to provide evidence to support the change; you may want to focus on a public information campaign to create public pressure for change; or it could be some combination of all three options.

Examples of activities you might want to consider include:

- Meeting with leaders at all levels (including government, community and business leaders).
- Building a network or coalition of groups to work together on an issue.
- Conducting a media campaign – letters to the editor, media events, interviews, Op-Eds, etc.
- Conducting a public action campaign through public presentations, partnering with other organizations, public awareness events, etc.
- Conducting research, surveys or opinion polls that will support your position.
- Developing communications materials that share your message (e.g. policy briefs, websites, print materials, public presentations, etc.)
- Holding an event that will raise awareness about the issue.

The information you have gathered in the earlier steps, especially identifying your stakeholders, will help you determine the best approach. Evaluating your existing resources and the potential costs and requirements of each approach will also play a role in helping you decide which approaches to use.

Each of the case studies included in this guide contains examples of different approaches.

case study 4: tobacco control in uganda



Following the **Uganda National Association of Community and Occupational Health's (UNACOH)** participation in the series of discussions beginning in 1996 that led to the WHO Framework Convention on Tobacco Control (FCTC) in 2005, it was decided that UNACOH would have a Tobacco Control Advocacy programme. UNACOH is the single geographically most widespread non governmental organisation dealing with tobacco control in Uganda. UNACOH has used advocacy to advance tobacco control generally and the FCTC in particular.

The UNACOH Tobacco Control Advocacy programme evolved over time, rather than as one specific activity. Since tobacco was a big contributor to government revenues, it was critical that non-governmental partners like UNACOH supported national tobacco control efforts.

UNACOH has undertaken a range of strategies to help achieve their goal of improved tobacco control:

- UNACOH works with Government in the Tobacco or Health Forum (ToHF), a networking forum that includes the Ministry of Health as well as other NGOs and individuals interested in tobacco control. UNACOH has been a member of the ToHF for over 10 years, and is one of the key members on advocacy from the health perspective.
- UNACOH has been involved in research on tobacco use and control in order to generate information to support its advocacy work and information campaigns.
- In 2005 UNACOH undertook the role of preparing the national TV presentation for the World No Tobacco Day on behalf of government.
- UNACOH organised, with the support of the CPHA, a Framework Convention on Tobacco Control (FCTC) Awareness Workshop for Parliamentarians.
- In 2007 research findings from an IDRC funded study on health, socio-economic and environmental effects of tobacco growing were disseminated to district leaders of two study districts, to national leaders including Parliamentarians and to the UNACOH 2007 Annual Scientific Conference.
- In 2008 to 2009 as part of CPHA funded FCTC Awareness Project, UNACOH had one hour radio talk show per week for 10 weeks. Members of the public phoned in to ask questions and make comments about tobacco control.
- In 1999/2000 (funded by American Cancer Society) and 2008/2009 (funded by CPHA) UNACOH carried out Tobacco Control Awareness Projects involving schools in 16 and 12 Districts with UNACOH Branches respectively. District and school leaders were also targeted in both projects.



a) develop key messages

Once you have set your goals and objectives and determined your approach, think about the key messages you want to get out as part of your campaign. It is best to focus on a small number of messages (3-5) as this will be easier to communicate. Your key messages will vary somewhat depending on the audience (e.g. policy-maker vs. general public).

b) create an action plan

Now that you know your goals and objectives, and the approach or approaches you want to take, the next step is to develop a plan of action that puts everything together and clearly outlines what steps you will take, by when, and who will be responsible. If you are working in a coalition with other organizations, develop the action plan together.

For each objective, identify the tasks that need to take place. Tasks may include fundraising, hiring staff, setting up meetings, preparing written materials, conducting or participating in training, conducting analysis, etc. Then for each task you need to identify the person responsible (even if more than one person is working on that task, there should be a lead person to ensure that things are on track) and the timeline (when does the task need to be completed?).

Developing a budget is also an important piece of your action plan. What resources are required to carry out your campaign, and where will the resources come from? Consider what is needed for each task, and think about the different ways in which you can get support for your work. Don't forget to consider the time required from any current staff when determining needs, and be sure to consider in-kind support that might be available when looking for resources.

Key Messages are:

Concise: avoid jargon and acronyms.

Active: make every sentence active.

Positive: talk about what you can do, not what you can't.

Short: one memorable sentence, 10-15 seconds to say.

Specific: address a particular challenge and audience.

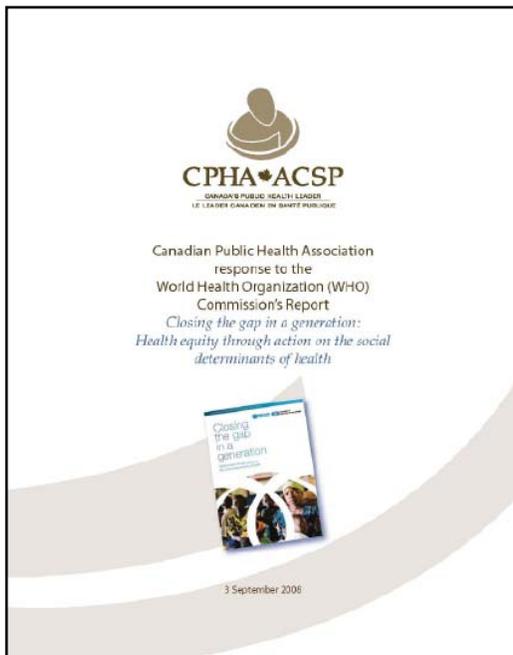
Credible: provide examples or evidence to back it up.

case study 5: cpha's advocacy for a 'determinants of health' approach in canada

Within 24 hours of the release in late August 2008 of the report of the WHO Commission on the Social Determinants of Health, the Canadian Public Health Association (CPHA) released its initial response to this milestone document. The purpose of CPHA's response was to draw public awareness to and interest in the concept of social determinants of health, to promote the launching of a social movement in Canada to address health inequalities through a social determinants of health approach, and to contribute to moving forward the agenda for a multi-stakeholder "made-in-Canada" strategy to address health inequalities.

CPHA's advocacy on the medical and non-medical social determinants of health dates back to the late 1970s, even before the concept was conceived and became popular. Over the past thirty years, CPHA has promoted a "determinants of health" approach through the release of over 25 resolutions and motions on a wide range of factors that affect population health (health inequalities, income and income security, food security, housing, employment, transportation, education & literacy, intersectoral action, among others) and several position papers on these same topics. Many of CPHA's members are actively involved in community-based programs and strategies that address health inequalities at a local level through a social determinants of health (SDH) approach.

Eleven of CPHA's annual conferences over the past 20 years have dealt with health inequalities, the determinants of health, and equity of access for all to the conditions that affect human health. At its 2008 Annual Conference, CPHA committed itself through a public "Call to Action" to contribute to promoting and supporting a national effort to reduce health inequalities in Canada through the production of evidence about the impact of the social determinants of health and action on community-based strategies to address health inequalities.



2.4 advocacy activities

There are many different types of activities that you can carry out as part of your advocacy campaign. This section provides an overview and examples of some common activities that you can use as part of your advocacy strategy. These activities are not mutually exclusive, and are often used in some combination, or all at the same time. Don't feel limited by what is described here, be creative and find new approaches!

a) engaging government

Advocacy is about influencing decisions. Often the decisions we want to influence the most are those made by governments at all levels, so working with government is frequently part of an advocacy strategy. If your goals and objectives relate to changing a government policy, changing legislation, ensuring government funding for specific projects or programs, or the implementation of existing policies and legislation, this section is relevant for you.

Case Study 6: The Canadian Coalition for Public Health in the 21st Century (page 24), as well as case studies 1, 3, 4, and 7, all provide good examples of the different ways in which PHAs can work with government.

Advocacy work is often a critical part of the policy cycle. The policy cycle usually includes 5 main steps: agenda setting, where issues come on to the government's policy agenda; policy formulation, where the policy options to address an issue are considered; decision-making, where a specific policy is chosen; implementation of the policy; and evaluation of the policy. Just like in the work of planning an advocacy campaign,

Tips for writing letters to politicians:

- Keep the letter to 1½ – 2 pages.
- Be sure to use the correct name and title and the correct contact information.
- Keep attachments short and in summary form (unless a longer document had been requested).
- State the purpose of your letter in the first line.
- The second paragraph explains your request and provides some context (e.g. explaining your organization's mission and credentials).
- The third paragraph can provide some rationale and supporting information for your request.

the policy cycle does not necessarily proceed in linear order. However, civil society organizations have the opportunity to influence policy during all phases of the policy cycle, and particularly in the earlier phases. Policy makers sometimes even seek out the advice and input of civil society in the policy formulation process.

One important thing to keep in mind when dealing with a government at any level is the difference between working with governments and working against them. Working with a government is a more collaborative approach – you try to understand their position and work with them to negotiate improvements, and you may offer support to help the government meet its own goals, as well as yours. Working in opposition to a government usually means taking a more confrontational or oppositional approach such as strong public criticism of policies or action, or organizing public protests. While both approaches can have a role to play depending on the issue and the actors involved, it is difficult to successfully do both at once.

Governments and advocacy groups can and do work together to move legislation and policy forward, so this section focuses on working with governments. Keeping relations with government (both politicians and bureaucrats) positive and respectful will help you meet your goals.

the political context

Every country's government may operate in a different way.

It is important to consider various factors when planning your approach:

- Is your government open to ideas and constructive criticism from civil society groups?
- How easy is it easy to gain access to politicians? What about bureaucrats?
- What are the positions of the key players in government on your issue? Do they see it as important, or not?
- What other issues are relevant and how will they affect your issue (e.g. economic or fiscal policies)?
- What legislation and policies already exist on your issue? What is the problem with these (e.g. no existing policy, policy exists but not being implemented, policy has a different outcome than desired, etc.)?
- How does the legislative process work? Is there a specific committee working on your issue that you could approach?

- What international or national agreements have been signed by your government that might affect your issue?
- Do other groups that might oppose what you are trying to accomplish have a lot of power with government?

The political context in your country will help you determine the best approach. Try to be realistic about what is politically possible on your issue. If it's difficult to get access to policy-makers, you may need to start with getting support from opposition political parties, or rallying community support on your issue.

timing

If you are seeking government action or intervention on an issue that will require funding, you should consider timing your activities to coincide with the government's budget cycle. For example, in Canada, budget priorities are reviewed for the following year's budget over the summer, from June to September. This is the best time to bring your ideas forward and try to get funding, as budget priorities have not yet been fully decided. Once final decisions have been made, it will be more difficult to make the case for new funding.

It's important to remember that things sometimes move very slowly, and policy change takes time. It requires patience and perseverance. Don't forget to appreciate and celebrate successes along the way. When a government takes a step in the right direction, although it may not go as far as you would like, be positive about the progress made even if you also offer some constructive criticism for how to improve.

Community mobilization can also be an important part of advocating to governments. When politicians see that there is broad support from the public on your issue, they are more inclined to listen to what you have to say.

Non-profit organizations can be more effective in influencing government in a number of ways:

- Serving as a source of credible, analytical and timely information.
- Reaching out to all political parties.
- Working in coalitions, especially with non-traditional partners (e.g. from outside the voluntary sector or with those that government might not expect to be supportive).
- Focusing resources on one or two top policy priorities.
- Convincing high profile organizations to take on your issue.
- Involving policy makers with others in a study commission that makes policy recommendations.
- Using face to face contact as the main method of communication.

case study 6: the canadian coalition for public health in the 21st century

Advocacy through coalitions has been a mechanism favoured by the Canadian Public Health Association. Its successful advocacy and programming in the areas of HIV/AIDS, tobacco control, chronic disease prevention and infectious disease control has been in large part due to the use of a coalition approach. A good example of this is the Canadian Coalition for Public Health in the 21st Century (CCPH21).

The CCPH21 is a national network of not-for-profit organizations, professional associations, health charities and academic researchers who share the common goal to improve and sustain the health of Canadians. This coalition was formed in May 2003 at a meeting held during the CPHA Annual Conference, following the release of a report on the state of Canada's public health system and capacity to respond to public health emergencies. Its purpose is to present a strong and unified civil society voice to advocate for increased investment to ensure that adequate public health functions are in place and information is made available to protect and promote health and prevent disease and injury.

Through its advocacy, CCPH21 contributed to the government's decision to establish the Public Health Agency of Canada (the first federal government body dedicated solely to public health), the creation of the position of the Chief Public Health Officer of Canada, and the creation of the Canadian Institutes of Health Research (CIHR), which includes the country's first Institute of Population & Public Health. This was a major achievement, and demonstrates the value-added of a strong, unified, multi-stakeholder voice for public health that bases its advocacy on evidence in support of the basic principles of public health.

types of activities

In order to reach out to government you could:

- Set up meetings with politicians at various levels. Ask others in your network or in the community to do the same so politicians know there is a wide base of support.
- Organize a letter-writing campaign to key people in government.
- Ask to make a presentation about your issue to a politician or group of politicians.
- Share ideas for new draft legislation or regulations.
- Participate in government-run public consultations that are related to your issue.
- Invite politicians or government officials to your events so they can hear your point of view.

meeting with government officials or elected politicians

Meeting with politicians and bureaucrats will likely be an important part of your advocacy strategy.

Here are some tips when meeting with politicians:

- Formally request a meeting in writing then follow up with a phone call.
- You may have better luck meeting with a local politician in your area or a politician who you know is supportive of your issue as a first step. That person can then sometimes help you get a meeting with other key people if you are having difficulty with that.
- Respect the time constraints of politicians and recognize the many advocacy issues they are presented with daily. At the beginning of the meeting, check to see how much time you have so you can effectively deliver your pitch and leave time for questions and discussion.
- Go in to the meeting with an idea of what you want to accomplish: do you want to be able to set up another meeting, to have a commitment to a certain policy or activity, or to get more information about something?
- If you are presenting anything that is technical or complex, it's helpful to prepare an overview document or proposal that can be circulated in advance. Keep documents short (1-2 pages ideally) and focused.
- Make sure you are well-prepared for the meeting. If you have prepared a presentation or background document, provide copies in advance. Know your facts and figures inside and out.
- When it comes to your message, follow the KISS principle and Keep It Short and Simple. Focus on being consistent, concise and positive. Rather than spending a lot of time critiquing government, give praise for positive moves and focus on the ways that your solution can help the government achieve its own goals as well.
- If you are making a request, keep it specific and direct (for example, don't ask for "support", ask for the very specific kind of support you need).
- Be sure to mention the political benefits of your solution (e.g. increased support from the community).
- Be a good listener. How the official responds in the meeting can give you insight into the best follow-up strategy.
- After the meeting, follow up by thanking the politician you met with. If you asked for follow up on any items, find out who to contact and when to expect the follow up. If you were asked to provide any additional information, be sure you do that.
- It is always helpful to take a non-partisan approach – meet and share information with all political parties. The government in power may not be interested in taking action, but someone in the opposition may be willing to champion your policy change.

Please see the Resources section (page 39) for more information on working with government.

Some tips to keep in mind:

- *Be sure to communicate with each other clearly and often.*
- *Keep the number of issues you want to address in a given time period focused and limited. This will help ensure you are successful.*
- *Identify a key organization or person that will act as the Convenor for the coalition. This person will ensure that information is shared among all participants.*
- *Coalitions will also use the other strategies listed in this section to achieve their goals – they are not an end in and of themselves.*

b) building coalitions

Working with other partners is critical, especially if your organization is small or relatively new. Because there is strength in numbers, working in a coalition can be the key to your success, especially if you are facing a large and powerful opponent (for example, the tobacco industry). Coalitions can provide increased support and credibility, better access to media, politicians, and other policy-makers, and the sharing of information, costs and resources.

Coalitions represent a range of interests, disciplines (i.e. not just health-related), and sectors (government, businesses and civil society) and can include both organizations and individuals. Coalitions can be temporary or permanent. Sometimes they address a single issue, and sometimes they are broader. A strong coalition can help build broad support for a policy change, increase public awareness of an issue, and develop new solutions to complex problems.

Coalitions do require more time and effort as you must work with the needs and goals of all members of the group and spend time building consensus. However, if managed properly, the benefits can outweigh the disadvantages.

Here are some key steps to take in building a coalition:

step 1: identify potential coalition members

You have already done the necessary work for this first step when you identified stakeholders in your advocacy strategy (section 2.2 C). Any organizations or individuals who share your goals are excellent candidates for participating in the coalition. Make sure to include someone from the group affected by the issue you want to address (e.g. if you're focusing on youth smoking, make sure youth are represented). Also think about non-traditional partners. Are there groups you haven't worked with before that might be interested in collaborating on this issue? Be as inclusive and participatory as possible in identifying potential coalition members, and continue to use your networks to find new members on an ongoing basis.

step 2: hold a planning meeting with interested groups

Identify a time and place where all interested parties can get together to discuss shared goals. At this meeting you should try to get consensus on the goals the coalition will focus on and come up with an initial plan of action.

Discuss how the group will be structured and administered. You will need to identify which person (or people) will be responsible for the administration of the coalition. Someone needs to take minutes, inform members about meetings, follow up on action items, etc. Define clear roles and responsibilities for those taking a leadership position in the group and make sure you have a key contact for each participant or group.

Once you've identified some shared goals, start to think about how you will achieve those goals together. Use the processes identified in step 2.b, 2.d and 2.f above to help with this step. Sometimes it's helpful to assign a lead group to each issue or goal.

For examples of how PHAs have worked in coalitions, please see Case Study 7 (page 28), as well as case studies 3 and 6.

types of activities

Coalitions can undertake the same activities described in the rest of this manual.

For example, coalitions might:

- Share information and communication materials among partners.
- Prepare a joint policy brief or position paper.
- Organize a joint event on the issue, such as a workshop or a media event.
- Meet together with key decision-makers to demonstrate strength in numbers.

case study 7: tobacco control in costa rica



The **Costa Rican Public Health Association** (*Asociación Costarricense de Salud Pública, ACOSAP*) identified tobacco use in Costa Rica as an area in which they wanted to focus their work. ACOSAP felt that civil society input on this issue was critical, and that they could play an important role in helping to move the tobacco control agenda forward in Costa Rica. They carried out a variety of campaigns related to tobacco, including information and education campaigns and an advocacy campaign on the issue of tobacco control.

One of the major achievements of ACOSAP's advocacy work on tobacco control has been working with a newly created national network against tobacco consumption (RENATA, Red Nacional Antitabaco) to support the implementation of the Framework Convention on Tobacco Control (FCTC) in Costa Rica. ACOSAP was the first NGO in Costa Rica to work on the tobacco issue. In their early efforts to improve tobacco control, they realised that the work would be best supported by a coalition of groups. Therefore, in 2007, ACOSAP became a founding member of RENATA, and worked to engage other organizations on the tobacco control issue. The groups involved worked very successfully in the coalition, and RENATA won an important battle when the National Congress unanimously approved the FCTC on June 1, 2008 after almost five years of working towards this goal. Now ACOSAP and RENATA continue to work with the Ministry of Health and with local health authorities in implementing all of the details of the FCTC in Costa Rica.

Other organizations that became members of RENATA include the Institute for Alcoholism and Drug Addiction (IAFA), the Ministry of Health, the University of Costa Rica, the Costa Rican Open University (UNED), the Municipality of San José (MSJ), the Institute for Electricity and Telecommunications (ICE), the Costa Rican Chapter of IFMSA (International Federation of Medicine Students Association), the Institute against Cancer (ICCC), and the Foundation for Non-Smokers Right's (FUPRODENOF).

Please see the Resources section (page 39) for more information on coalition building.



c) community mobilization

Community mobilization is the process of engaging all sectors of a given population in the effort to address an issue of concern. Mobilizing the community is a central part of almost any campaign because of the importance of getting community support on your issue. Usually we are trying to mobilize the community to take some form of action such as writing a letter to a local politician or taking collective action to address a communal problem.

There are many benefits to community mobilization:

- Give new energy to an issue or campaign.
- Expand support for a particular position on an issue.
- Encourage collaboration.
- Promote local decision-making.
- Create public pressure to change laws, policies or practices.

Community mobilization can be a particularly effective approach when you have a local issue that is not receiving sufficient attention from government. The community can then be mobilized to either develop its own solution to the problem or to apply public pressure to government to get a response.

In many cases, coalition building and community mobilization go together – you are building a coalition of community members in order to mobilize the community – so the steps and information in the previous section can apply here as well. Working with community members to develop goals, approaches and actions is critical.

Start the process of community mobilization by engaging with the community. This will help you get a sense of what issues are important in the community and where the community stands on your issue. You can learn more about the community by meeting with and interviewing key community leaders, or holding open public forums or information sessions where people are invited to share their opinions and ideas.

During this process of working with the community, it is important to remain flexible and open-minded. Find out what the community feels they need in relation to your issue. Respect local knowledge and values, and follow local community protocol in terms of who you need to speak with first.

Working with community members is a two-way street. You likely have information and support you can provide to community members in helping them to meet their needs. Community members can provide you with public support, volunteers, and the local context and response on your issue.

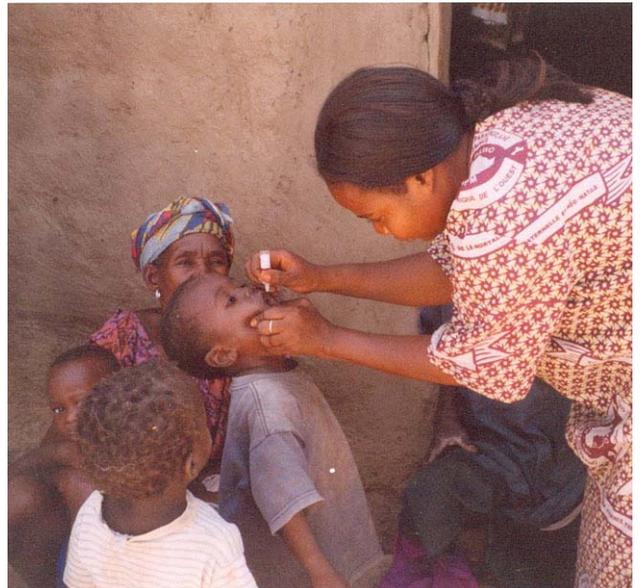
If you are asking the community to take action, it is important to get their input on the problem first. How do they see the problem being resolved? What actions do they see as being effective? Information is persuasive – if you are suggesting an action, make sure community members see how that action will have an impact.

Please see the Resources section (page 39) for more information on community mobilization.

case study 8: cpha's canadian international immunization program

The **Canadian International Immunization Initiative (CIII)** works with Canadians and organizations around the world to strengthen immunization programs in low and middle income countries and to support global efforts in controlling the spread of polio, measles and other vaccine preventable diseases.

During National Immunization Awareness Week in 2008, CIII conducted a community mobilization campaign to encourage people to express their support for its international immunization efforts. Informational brochures that explained the importance of immunizing children around the world were developed and circulated to CPHA members, health centres, federal, provincial and territorial public health offices, physicians and public health clinics. Postcards were filled out and mailed to every Member of Parliament encouraging ongoing support for the CIII's international immunization work.



d) media advocacy

Media advocacy is the process of working with the media to get your issue and position into the public realm. It is focused on addressing the root causes of health problems rather than on changing individual behaviour (for example, advocating for a ban on smoking in public places vs. directly encouraging individuals to quit smoking). There are many different sources of media, including newspapers, television, radio, and web media.

working with the media

Developing good contacts and relationships with members of the media can go a long way towards helping you get media coverage on your issue. A good first step is developing a media list. Think about all of the local and national media that cover health-related issues. Watching, listening to and reading different sources of news will help you get a feel for the types of stories and angles that different media sources are likely to use, and which might be more likely to cover your story and/or reach your intended audience. Once you have an idea of which media outlets you want to target, create a list of contacts. It's fine to start small and develop your list over time. These contacts should include editors, producers and reporters, as well as the general newsroom information for each outlet. For each contact, include all relevant contact information (full name, address, phone, fax, email) as well as area of expertise (e.g. reporters on the health beat).

You can look up media information yourself (in the phonebook, online, or sometimes at your local library). You can also ask other organizations with similar mandates to share media lists. Be sure to include local media outlets as well as national ones.

Make sure you maintain and update your list over time. Media sign-in sheets at press events can help update old contacts and add new contacts to the list.

Once you've identified the media you want to target, you need to choose the best approach(es) (see next page). You will also need to identify a spokesperson on your issue that the media can contact. A spokesperson is important to ensure that the media get a consistent message. Make sure that person is comfortable handling media and responding to media requests.

It takes time to develop good media relationships. You can do this by making sure your press materials are clear and well-written, that you have a spokesperson available who returns media requests promptly, and that the information you provide is timely and relevant. Sending in Op-Eds or Letters to the Editor (see below) are great ways to familiarize media outlets with your organization. Also, be sure to follow up with individual journalists after interviews, editorial board meetings and other media events. This will help create the relationship with media that you need to get your story in the news.

types of media advocacy activities

press or news release

A news release is something that you would circulate to media outlets and reporters to give them information about your issue.

The release should be written in the style of a newspaper article, using short paragraphs and interesting quotes and statistics.

The whole release should be kept to a maximum of 2 pages.

Make your headline attention-grabbing to help get your story covered. Then lead with the key message you want to get across.

Making a connection to a local issue or recent news story will help get your release noticed.

Don't forget to include contact information for someone in your organization who can answer questions or provide more information to a reporter.

letter to the editor

Letters to the Editor are a great way of getting your point of view into a newspaper, as the chances of your letter being printed are relatively high.

The key to writing letters to the Editor is to make them concise (usually 250-300 words) and link them to a story that recently appeared in the paper.

Make sure to refer to your organization or campaign in your letter.

TV shows and radio programs also often accept feedback from their viewers/listeners, so even though it won't appear in print, you may want to consider submitting something to these other formats as well.

op-ed

An op-ed is an opinion piece that runs on a newspaper's opinion-editorial page. An op-ed is similar to a letter to the Editor, but it provides a bit more space than a letter to make your point as they usually have higher length limits.

Make sure you are familiar with your paper's guidelines about length and format before submitting your op-ed piece.

Making it relevant to a particular current issue will increase the chances of getting it published.

It's a good idea to follow up with the editor after submission to see if they have any questions.

editorial board meeting

Meeting with the editorial board of your newspaper will help you gain editorial support and will raise awareness about your issue. A meeting gives you the opportunity to persuade the editors that your issue is important to their readers and it increases the likelihood that the story will be covered in the paper.

To request a meeting, contact the editorial page editor of your newspaper. It's helpful if you can tie your issue to a recent event or local concern.

Make sure you are well prepared for the meeting with all of your facts and key messages, and familiarize yourself with the paper's editorial page. Think about how your issue fits in with other recent editorials.

At the meeting you will have the opportunity to give a short presentation, and then you will be asked questions.

After the meeting, be sure to follow up with the editor to thank them. If you don't see an editorial on your issue within a few days, it's a good idea to follow up as well.

media event

Sometimes, the best way to get your message out is to hold a media event, such as a press briefing or a news conference. A press briefing provides journalists with background information on an issue and is more informal. It's a good way to make contacts with the media and to give an update on key developments in your organization's work. A news conference is held to announce a major story – for example, the release of a report or the kick off of a major new campaign. A news conference takes more preparation, but it can be very valuable in attracting attention when you have something major to say on an important issue.

Pick a location for your event that is easy to get to and that has enough space for journalists and TV cameras (usually placed in the back of the room). To attract TV media, it is helpful to pick a location with a meaningful visual (for example, if you're talking about the health impacts of air pollution, maybe the windows in your location could look out over a factory with a big smoke stack).

Determine the best day and time to hold your event. Check with others in your area to find out what days and times media events are usually held (for example, in North America, the best time for an event is around 10 or 11 am on Tuesday, Wednesday or Thursday). Be sure to plan around other potential competing activities (e.g. special events, holidays, etc.).

Send a media advisory out letting journalists know about the news conference in advance (aim to get the advisory out at least a week ahead). Be sure to include all of the relevant details (date, time, location, speakers, contact info, etc.), and a short summary of what will be presented. You need to give enough information to attract attention to your event, but not so much that you give away all the details of what will be presented. Follow up with a phone call to the newsroom a day or two before the event to remind them about your news conference and inquire if they are planning to send anyone.

Prepare a press package to give out to journalists who come to the event. This usually contains news releases,

fact sheets or background information, biographies on the speakers, as well as copies of the material being released at the event (such as a report, copies of the presentation, etc.). It's a good practice to get journalists to sign in when they pick up press materials so you know who attended.

Make sure everyone involved knows their roles – who is going to speak when, who will greet journalists coming in, who will be responsible for setting up and testing technology, etc.

Formal statements should be kept to a maximum of 15-20 minutes to allow plenty of time for questions. There should be no more than 5 speakers (3-5 minutes each).

Allow time following the formal conclusion of the event to do one-on-one interviews or have a photo taken.

After the event, follow up by sending materials to journalists who did not attend, and checking with those who did attend if any further information is needed.

Case Study 9: Smoking is not fashionable, tobacco control in Serbia (page 34) provides a good example of the use of media, as well as using an event to draw attention to an issue. Case Study 4 also includes examples of working with the media.

interview

The various forms of media (radio, TV, print, online) are always looking for stories and for guests to have on their shows. Giving an interview is another great way to get your message out to a wider audience.

To arrange an interview, contact the host or producer of the show you are interested in. Make sure you are familiar with the program and explain why your issue is of importance to that show.

case study 9: smoking is not fashionable: tobacco control in serbia



In 2004, the Tobacco Control Commission of the Republic of Serbia, composed of representatives from government, health sector institutes, and non-governmental and private sectors, drafted a tobacco control strategy, which included the objective of reducing smoking prevalence among youth by 50% over 5 years.

In order to help meet this goal, the Tobacco Control Commission launched a new smoking prevention and cessation campaign aimed at adolescents and young adults. The centerpiece of the campaign is a poster originally developed and used in British Columbia. The “Tobacco Industry Poster Child” is a graphic representation of the effects of smoking and tobacco smoke on the physical health of a young person (e.g. gum disease, wrinkles and skin problems, lung disease, heart disease, cataracts, etc.).

The Tobacco Control Commission organized a fashion show to launch the poster’s release. The event was used to promote the idea of tobacco-free fashion, media and film among professionals and the general public and to lobby the fashion and media industry to support and promote smoking as socially unacceptable behaviour among Serbian youth. Over 120 people attended, many from the republic’s media. The master of



ceremonies, a well-known actor and media person, explained the significance of smoking on the health of young people. Several media representatives, actors and singers then made brief presentations about the effect of smoking on their lives, both as active and passive smokers.

Excerpts from the fashion show were aired on TV stations and articles were published in several papers. The poster was distributed to primary and secondary schools and to health clinics and institutes throughout the republic. Reaction by teachers and students was positive, with the poster being used to generate discussions around smoking and health in the schools.

Once the interview is set, make sure you prepare well: get all the information about the interview (how long it will be, if it will be live or taped, the length, etc.), and prepare the key points you'd like to make during the interview. Sometimes doing a role play interview with a partner can be really helpful and ease any nervousness you might feel.

During the interview, remember to remain calm (don't say anything you wouldn't want to see on the evening news!) and speak clearly. Be concise in your answers, and use simple language, avoiding acronyms and jargon.

Use the questions as a lead-in to your main messages, and then follow up with supporting points. Don't be afraid to correct others in a calm manner if you feel someone has misstated facts or made an error.

For a TV interview, be sure to dress professionally. Solid designs are best. Look at the interviewer (not the camera) unless you are told otherwise. Sit up straight, but try not to be too stiff. Try to avoid nervous gestures. And of course, don't forget to smile!

After the interview, follow up by thanking the reporter, host or producer. It's good to request a taped copy of the interview. Review this so you can learn for your next interview.

e) using research & data

Making effective use of research and data is an important part of drawing attention to your issue and making the case for action. If you can back up your key messages with facts based on solid research and data, people are more likely to listen to what you have to say. In addition to demonstrating the links between causes and health outcomes, research can also focus on best practices for intervention, potential cost-savings of promotion activities, or sharing information from people affected by the issue.

The first step in making use of research is to find out what's already out there on your issue. If good research and data is already available, all you need to do is synthesize it into a research report or policy brief. If data is not available or outdated, or if there has been no analysis of existing data, more detailed research or data gathering may be needed. If your organization does not have the capacity for this kind of work, you may be able to partner with another organization that does.

Case studies 1, 2, 5 and 7 all provide examples of using data and research as part of an advocacy strategy.

Please see the Resources section (page 41) for more information about and examples of research and reports

types of activities

There are many other ways of presenting research for public consumption once it is completed. Other methods you may want to use include media (e.g. press release or Op-Ed), public presentations, fact sheets, report cards, websites and more

policy brief

A policy brief is a short, focused document aimed at presenting key facts and recommendations to busy policy makers. It should be a maximum of 6-8 pages and should include an overview of the current situation, a review/critique of existing policies, and a set of policy recommendations. Make your policy brief easy to skim quickly by using subject headings and bullet points and adding graphics when relevant. Policy briefs are based on fact but are also intended to persuade policy makers to follow the recommendations you are making.

research report

A research report is a longer document that looks in detail at one issue. For example, on the issue of youth smoking used in the Sample in section 2, a research report might look at the data on youth smoking and identify trends over time, review best practices to reduce youth smoking from the literature, and make a set of recommendations based on the evidence presented in the report.

data collection and analysis

When looking for data, the first step is to check with national and provincial/local governments. Is there a statistical agency that collects data? What data is available? What are the gaps (e.g. data is out of date, no local data available, data is suppressed, no data available at all on your issue)? If you identify gaps, you may want to consider doing your own data gathering and analysis. You may want to conduct a community survey, talk with key informants, hire a company to do an opinion survey, or look at data that is available for other areas. This type of research can be technically complex and is outside the scope of this manual, so you should consult someone familiar with data gathering techniques before proceeding.

2.5 evaluating advocacy

Evaluation is a critical component of any advocacy strategy. While it is important to evaluate the campaign once it is over, evaluation should also be a continuous process that takes place throughout the campaign, so that you can make changes when necessary. Going through the planning process and developing a solid campaign strategy is important. It is just as important that your strategy be flexible so that you can adapt if a particular approach isn't working or a new opportunity presents itself. Make sure to celebrate successes along the way as well as at the end of the campaign.

Having a clear goal and objectives as described above is the first step in the evaluation process. The next step is to define the way in which you will measure progress towards your goal.

Think about the following questions:

- How will you know when you've achieved your goal?
- What are the most important achievements that need to be reached?

Measures of progress can be relatively simple or more complex, depending on the complexity of the campaign.

There are three key types of evaluations to consider: a process evaluation, an outcome evaluation, and an impact evaluation.

Evaluation is an important part of any project. Finding the time and resources to do at least a basic evaluation of the key elements of your strategy is essential for learning how to do better next time. Positive evaluation results can also be helpful in gaining support and funding going forward, because they provide evidence that the PHA can do effective advocacy work.

In addition to consider the progress you are making towards the goal and objectives you have identified, evaluation will also assist you to identify strengths and weaknesses of your advocacy campaign. You can learn a lot from evaluation, especially in the case of things that didn't go well. This is important to do both during and at the end of a campaign.

Add the following questions to your evaluation process:

- What was the most successful aspect of the strategy? Why?
- What was the least successful aspect, and why?
- What strategies/activities/approaches would be good to use again? Which ones didn't work?
- Were there any major challenges that were not foreseen in the initial planning and risk assessment activities?
- Did any unexpected windows of opportunity open up that made success more likely?
- In addition to your stated goals and objectives, what were other positive outcomes of your work (e.g. the formation of a new coalition, the development of new media relationships, improved internal capacity, etc.)?

process evaluation

A process evaluation is the simplest type of evaluation. It is focused on determining whether the planned activities are taking place as planned, whether they are reaching the people they are intended to reach, and whether the work is adequately resourced (funding or other resources). Evaluation measures might focus on the number of activities conducted (e.g. number of meetings with policy-makers) or the degree of satisfaction the intended audience expresses with the information provided. This type of evaluation can tell you whether your activities are proceeding as planned, but don't tell you anything about the outcomes of your activities.

outcome evaluation

An outcome evaluation evaluates progress towards short- and medium-term objectives. You have already developed objectives for your campaign. You must now measure your progress against those objectives. For example, if an objective was to have the municipal government implement a waste management and collection service, you can easily determine whether or not you have met this objective. It is also important to consider progress that is being made. For example, perhaps a full waste management service is not yet in place, but the government has provided funding for waste receptacles to collect litter. This is movement in the right direction, towards your objective.

impact evaluation

An impact evaluation assesses the progress you are making towards your long-term goal. Because the focus is on the long-term impacts of your strategy, an impact evaluation usually takes place 3-5 years after the activities. Impact evaluations may focus on trends in health indicators. For example, has there been a change in the rate of tobacco use as a result of a tobacco-related advocacy campaign?

3

resources

general advocacy resources

Institute for Sustainable Communities, "Advocacy Tools & Resources," <http://tools.iscvt.org/>.

Vancouver Coastal Health, "Vancouver Coastal Health Population Health: Advocacy Guideline and Resources," www.vch.ca/public/docs/advocacy/VCH_Advocacy_Public.pdf.

Global Call to Action Against Poverty, "Campaigning and Advocacy - Online Resources," www.whiteband.org/resources/campaign-tools/campaigning-and-advocacy-online-resources.

Global Call to Action Against Poverty, "Millennium Development Goals Campaigning Toolkit," www.whiteband.org/resources/campaign-tools/mdg-campaigning-toolkit/mdg_campaigning_toolkit_eng.pdf.

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