# Advocacy planning and evaluation template:

# [Title of project/campaign/advocacy area]

*This template is structured around the detail of an individual advocacy campaign, project or issue. Repeat the template for each campaign or advocacy project you are working on. It will be most useful if your CLC wants to take a systematic and thorough approach to planning, monitoring and evaluating your advocacy work.* *For more detailed guidance on using the template, refer to the document: How to use the Advocacy Register templates.*

**Last updated:**

## 1. Issue

What issue is this advocacy focused on? Briefly describe the issue, who or what it affects, and its impacts.

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## 2. Advocacy partners and roles

Who is leading the advocacy? This might be a single individual or organisation, or an alliance or working group with multiple partners.

| **Advocacy partner** | **Role** |
| --- | --- |
| List your organisation and any other organisations, individuals or coalitions who are playing key roles in leading the advocacy on this issue. | Briefly note the role of each partner – what is their key contribution / value add to the advocacy effort? |
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## 3. Aims and solutions

What are the intended outcomes of the advocacy? Focus here on changes to the issue and its impacts, not on intermediate (tactical) achievements such as an increase in public awareness of the issue.

### Overall aim

* Describe in broad terms the overall aim of the advocacy, e.g. ‘To improve housing security for residential tenants in Victoria’

### Specific solutions to the issue – changes, demands or recommendations

| **Item** | **Status** | **Date** | **Comment** |
| --- | --- | --- | --- |
| List specific changes or demands that the advocacy is pursuing e.g. ‘To amend section X of the RTA so that …’, ‘To provide increased resourcing for family violence services for Y group’, etc. | To what extent have these items been achieved? Not achieved / partially achieved / Fully achieved | For items that have been partially or fully achieved, record the date | Brief comment on status of item – e.g. evidence of its achievement |
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## 4. Stakeholder analysis

Who are the main individuals and groups associated with the issue? What are their stances in relation to the issue and to your advocacy positions? This might include a range of individuals and groups in positions of influence in relation to the issue, including those currently contributing to the problem or providing the ability for others to contribute to the problem; those working to overcome the problem; and groups currently not involved but who could potentially play a role.

| **Individual / group** | **Initial position** | **Current position** | **Advocacy approach** | **Comments / reflection** |
| --- | --- | --- | --- | --- |
| Name the person or group | What is their stance in relation to the issue, at the commencement of your advocacy activities? Opposed / neutral / supportive / mixed / unaware; can briefly comment as to why | What is their current stance in relation to the issue and your advocacy positions? Opposed / neutral / supportive / mixed / unaware; can briefly comment as to why | How will the advocacy strategy attempt to engage with this person or group – if at all? E.g. ignore; inform through social media; build bridges through meetings; partner; confront through direct action; debate; etc. | Reflection on any changes in this stakeholder’s position over time, the reasons/drivers for their current position, what if anything might shift their views, instances in which the advocacy has been successful in reaching this group |
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## 5. Overview of strategy

In broad terms, what is your advocacy strategy? Grassroots? Focused on key decision makers? Primarily informational? Direct action? There are many ways of approaching campaign strategy; *Pathways to Change* (<http://orsimpact.com/wp-content/uploads/2013/11/Center_Pathways_FINAL.pdf>) provides some examples. See also *The Change Toolkit* (<http://www.thechangetoolkit.org.au/>).

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## 6. Key frames and messages

What are the key frames and messages to be used in your advocacy? For example, in your media comments, social media posts, in conversations with stakeholders and communications to your supporters. How will your framing of the issue affect the way your advocacy is perceived by your target audiences? Remember that messages can be conveyed non-verbally, through your approach and actions as well as your words.

### Frames to promote

### Frames to be wary of

### Key messages

| **Message** | **Targeted to** | **Comments / reflection** |
| --- | --- | --- |
| What is the message? | Is this message aimed at all stakeholders, or specific groups? | Why is this message important? How effective has it been? Is there a need to modify it? |
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## 7. Advocacy activities

What advocacy and engagement activities have been undertaken, or are planned in relation to the issue? Keep a running log of these to aid later reflection on what has been most and least effective. Note that these can include informal, collaborative and/or ‘behind the scenes’ influencing activities as well as public campaign activities.

| **When?** | **What?** | **Where?** | **Who?** | **Reach** | **Comments / reflection** |
| --- | --- | --- | --- | --- | --- |
| When did it or will it occur? | What was or will be done? (e.g. meeting or informal discussion with relevant stakeholders, submission, strategic litigation, social media posts, online petition, doorknocking, rally, community meeting, …) | Where did it or will it occur? | Who led or will lead the activity? This could be your organisation, a partner organisation, an individual or a community group | Who was or will be reached by the advocacy? What is the intended and actual audience? Note numbers if available and applicable, e.g. web click-through rates, online petition signings, attendance at events | Further describe the activity if needed. How useful was it? If the advocacy was led by others, what was the role of your organisation in supporting it? List any specific outcomes, e.g. CLC key messages noted in reports, responses by decision makers or others, etc. |
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## 8. Changes to law, policy or process

What changes to laws, policies or processes relevant to the issue have occurred?

| **When?** | **What was the change?** |
| --- | --- |
| When did the change occur? | Briefly describe the change that has occurred – it may be a change in a current law, policy or administrative process, or the prevention of a threatened negative change to law, policy or process. |
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## 9. Overall evaluation

*This section can be used for periodic reflection on advocacy work completed. Duplicate the table on each occasion to build up a record of reflections over time.*

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| **Date of reflection** |  |
| **Period covered** |  |
| **People involved in the reflection** |  |
| **What positive changes have occurred in relation to the issue? When did they occur? What has driven these? How (if at all) did we contribute?** |  |
| **What negative changes have occurred in relation to the issue? When did they occur? What has driven these?** |  |
| **What has worked best about our advocacy?** |  |
| **What has been least useful in our advocacy?** |  |
| **What are the current trends in relation to the issue and context?** |  |
| **What changes (if any) should we make to our strategy and advocacy activities going forward?** |  |