

A Practical Guide for Rallying Stakeholders through Advocacy

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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, we developed the *pourrallier.com* resource 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.

Groundwork¹

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?

¹ The following material is taken from *Pourrallier.com*.

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 after the fact 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

<p>Mission of the Observatory: (<i>Observatoire des tout-petits</i>, a project of the Lucie and André Chagnon Foundation): To ensure that the development and well-being of Québec’s very young children has a place at the heart of the province’s list of social priorities. To achieve this, the Observatory compiles the most reliable and relevant data on early childhood (from pregnancy to five years of age), which it then disseminates to encourage public dialogue on possible collective actions in this area.</p>	
<p>Groundwork</p>	
<p><i>What are your advocacy objectives? What is your case in relation to the issue and the solution?</i></p>	
<p>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?</p>	<p>The Québec health minister.</p>
<p>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?</p>	<p>Give all children in migrant families access to free health care, regardless of their immigration status or that of their parents.</p>
<p>3: Are the issue and your solution considered urgent or high priority? Is this a concern shared by several actors in your community?</p>	<p>The issue:</p> <ul style="list-style-type: none"> • There are children living in Québec who do not have access to insured health care because of their immigration status or that of their parents. • These children are at greater risk of developing various problems that will follow them all their lives. • The issue is a concern shared by several stakeholders in the health care, children’s rights, and community sectors. • The issue is not considered to be a priority in Québec, however: most citizens are unaware of it.
<p>4: Is your issue well documented and clearly defined?</p>	<p>Data is unavailable on the exact number of young children in this situation in Québec.</p>
<p>5: Is your solution clearly defined? Effective? Realistic? Adapted? Tested? Documented?</p>	<p>The solutions:</p> <ul style="list-style-type: none"> • For children born here: revise the interpretation of the law. • For children born outside Québec: change the law. <p>Legal experts have validated these solutions.</p>
<p><i>What do you know about the person you are trying to convince?</i></p>	
<p>6: Why would this person say “yes?”</p>	<ul style="list-style-type: none"> • Career in health services management. Has already taken a public stand on the importance of improving overall access to health services. • Social worker by training: sensitive to the needs of population groups living in vulnerability. • Opportunity for her political party to act in line with its electoral commitment to take better care of immigrants. • Her government is focused on the importance of early childhood development, education, and the provincial labour shortage — all of which are potentially affected by the issue.

7: Why would this person say “no?”	<ul style="list-style-type: none"> • Hard to assess the potential cost of this change as we don’t have any data on the exact number of young children in this situation (would be low, however, according to groups working with these populations). • Since getting access to healthcare is already a problem for the entire population (waiting lists, etc.), the health minister might want to tackle that problem first as it affects more citizens.
8: Who has influence over the person you are trying to rally to your cause?	<ul style="list-style-type: none"> • Other members of the Québec National Assembly (MNAs) in her party; • MNAs in opposing parties; • Federal ministers or MPs; • Electorate: majority in favour of change; • Influential, credible organizations and actors in the eyes of the electorate; • Business sector; and • Media.
9: Has your solution been adopted by another leader in the same sector?	<ul style="list-style-type: none"> • Precedent in education in Québec; • Alberta already covers healthcare fees for children born in Canada; and • Certain European countries provide publicly funded healthcare for all children (France and Spain, for example).
10: If you are trying to gain the support of several different people, which of them would be most likely to say “yes?”	<ul style="list-style-type: none"> • Ministers and MNAs/MPs responsible for health, immigration, and families. • Organizations and actors in the healthcare, children’s rights, and community sectors.
11: Through what channels, activities, or events can you reach the person you are trying to persuade?	Meeting at her office and through the media and actors of influence
<i>What is the context?</i>	
12: What is working in your favour in the current social context? Is this the right time?	<ul style="list-style-type: none"> • Precedent in education sector; • Québec ombudsperson’s report; • Many charters and conventions stress the importance of non-discriminatory access to health care; • New government was looking for ways to stand out, to show how it’s different; • Labour shortage cannot be remedied without immigrants; and • According to a survey, most Québec citizens are in favour of the change (68% according to Léger in 2019).
13: What could work against you?	<ul style="list-style-type: none"> • Current public debate on secularism is bringing out anti-immigration sentiment among certain actors. • General public is worried about birth tourism and illegal immigration. • According to a survey, most Québec citizens are unaware of the situation (70%) – it isn’t a social priority.
14: Who is downplaying your issue and opposing your solution?	<ul style="list-style-type: none"> • Finance minister could oppose the solution because of the difficulty in evaluating costs.

	<ul style="list-style-type: none"> • Taxpayers are already unhappy about their own lack of access to health care (waiting lists, etc.). • People who have a negative attitude towards immigrants.
Strategy	
<p>15: What are you going to use to describe and present the issue? (Data, stories, testimonials, etc.)</p>	<ul style="list-style-type: none"> • Challenge: There is no data on the number of families affected by this situation in Québec. We do, however, have statistics on the clientele of the Montreal clinic run by Doctors of the World as well as an estimate of the number of families affected in Québec produced by workers on the ground. • Review of scientific literature on the human, social, and economic impacts of the situation. • Small-scale studies have documented the vulnerability of these families: difficult living conditions and consequences of not having access to publicly insured health care. • Testimonials of families and the healthcare workers who help them (Doctors of the World, for example).
<p>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?</p>	<p>Soul:</p> <ul style="list-style-type: none"> • For a prosperous Québec that is rich in healthy citizens. • Opportunity to be the minister and the government that solved the problem. <p>Head:</p> <ul style="list-style-type: none"> • Change desired by most of the population and many key influencers. • Examples: Alberta and European countries that have already made this change. <p>Heart:</p> <ul style="list-style-type: none"> • Early childhood is a critical period of development: the current situation could jeopardize children’s development and overall health for their entire lives. • Examples of cases encountered at the Doctors of the World clinics that exemplify negative impacts. • Québec study on living conditions in these families: unhealthy housing, low incomes, difficult working conditions. <p>Pocketbook:</p> <ul style="list-style-type: none"> • The current situation could result in medical complications and health problems that will be costly for the healthcare system to treat. • Providing universal access is an investment, not an expense (refer to California study). • Connection with labour shortage.
<p>17: What will be your key and specific messages, expressed in simple language, aimed at the person you want to convince?</p>	<ul style="list-style-type: none"> • Facilitating access to healthcare for these children is an investment in the future of our society, as it would help to prevent medical complications that could be complex to treat and thus costly for the healthcare system. We would also be assured of healthy citizens and a productive labour force in the future. • It is possible to take legal action. Alberta, France, and Spain have all done so.

	<ul style="list-style-type: none"> • The health minister could be known as the person (and political party) who rectified this injustice. This is a change that most voters and many key influencers in our society want to see happen.
18: Who (influencers and stakeholders) could accompany you to help promote your solution?	<ul style="list-style-type: none"> • President or representative of Doctors of the World Canada; • Researchers specialized in this area; • Lawyer working with these families at Justice Pro Bono Québec; and • Representatives of influential organizations that support the change (e.g. children’s hospitals, pediatric associations).
19: What media, events and interpersonal channels will give you access to the person you want to convince?	<ul style="list-style-type: none"> • Offices of the health minister and other ministers we want to meet with (immigration, family); • Offices of other political parties; • PR operation targeting news and public affairs media; • Section on the Observatory website; • Content marketing aimed at media focusing on baby boomers and Gen Y; and • Advertising video and social media campaign (including storytelling videos) aimed at citizens.
<p>Short-term outcomes:</p> <ul style="list-style-type: none"> • During the week following the press release, several organizations and actors in the healthcare, children’s rights, and community sectors published a total of 10 open letters or news releases that were picked up by 12 media outlets. • The public relations campaign generated 77 media items, 45 of which prominently featured our partners. • The advertising video was watched more than 973,471 times (from May to October 2019). • The operation generated 72,753 visits to the Observatory’s website (from May to October 2019). • Storytelling videos were viewed more than 63,000 times on Facebook. • Many partners and citizens took part in the dialogue on social networks. • The proportion of the population that is unaware of the issue went from 70% pre-campaign to 62% post-campaign. • The proportion of the population that thinks the health minister should settle this question in the case of young children went from 68% pre-campaign to 76% post-campaign (Léger, 2019). • Politicians reacted quickly at Québec’s National Assembly: <ul style="list-style-type: none"> ○ An opposition party member raised a question to the health minister. ○ The minister subsequently announced the creation of an interdepartmental committee to look into the situation, which is a significant first step. 	
<p>Continued effort: A coalition of partners is ensuring that the interdepartmental committee issues its recommendations diligently and that permanent solutions are implemented.</p>	

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