

*The Strategic Advocacy Framework
in Outline Form*

The Big 4:

- I. What's the **Situation**?
- II. What's our current **Strategy**?
- III. What are likely future **Scenarios**?
- IV. How can we **Modify and improve our Strategy**?

I. The Situation

1. WHAT HAS BEEN HAPPENING

- A. What draws our attention? Why do we care?
- B. Create timeline of recent events
- D. Trend lines of substantive problem or issues
- E. Relevant political trends, movements, events

2. WHO ARE THE KEY DECISION-MAKERS

- A. Sub-groups within mass public
 1. Opinion/Attitude leaders/shapers
- B. Public Agency
 1. Venue, rules, procedures
 2. Individuals with power to set agenda, make decisions, review decisions
- C. Private Entities
 1. Structure of decision making
 2. Influential players

3. WHO IS "WE"

- A. Level of organization: informal – formal – coalition - movement
- B. Level of the issue that captures our attention
 1. Single action or decision
 2. Major policy action
 3. Single/narrow attitude
 4. Broad attitude/belief
- C. What we want
 1. Vision/Goals
 2. Short term objective
 3. Immediate path forward
- D. Why we want it
 1. Our story/narrative about what is happening and why
 2. Our lenses/world view

- 3. Our value priorities
- E. What problems, opportunities or ideas in the environment should we emphasize to maximize support and minimize or divide resistance?
- F. Our theory of change and style (default strategies, norms)

4. ADVOCACY COALITIONS¹ PRESENT IN THE DOMAIN

For each important one

- A. Popular name; prominent organizations and people associated with it
- B. Perspective
 - 1. Shared beliefs, narrative about causal relationships, what is happening and why.
 - 2. Lenses, worldview
 - 3. Value priorities—what’s most important to them
- C. Shared beliefs about right path(s) forward
 - 1. Policy instruments
 - 2. Other processes
- D. Is this particular issue core, near-core or peripheral?
- E. Resources of influence (sources of power)
- F. Dominant theory of change and style (default strategies, norms)

5. OTHER IMPORTANT ENTITIES ACTIVELY ENGAGED

For each

- A. Name
- B. Advocacy coalition membership
- C. Resources of influence
- D. Priority they assign to the particular issue
- E. What is their particular story/narrative that explains what is happening and why (through their eyes; may differ from other Advocacy Coalition members)

6. POTENTIAL PARTICIPANTS

- A. Likely to become involved if issue matures
- B. Potential allies
- C. Sleeping dogs

7. POWER RELATIONSHIPS

- A. Between Advocacy Coalitions
- B. Relative status of “we,” resources of influence

¹ The term “Advocacy Coalition” is from the work of Paul Sabatier to describe large networks of loosely connected network of people, groups and organizations held together by shared beliefs about causal relationships, policy instruments, value priorities and world view. “Pro-life,” “pro-choice,” “Religious Right,” “Environmentalists,” “Pro-Business” are examples of what we mean by “Advocacy Coalitions.”

C. Relative Status of other engaged entities, resources of influence

8. FACTORS THAT COULD IMPEDE OR PROPEL MOVEMENT FROM OUR DESIRED PATH

II. Our Strategy

1. THEORY OF CHANGE

A. What would it take to alter the flow of events toward our goals (long term) and our desired path (short term)?

B. Why do we think that will work?

2. DESIRED PATH

3. Action Plan

A. Tactics

B. Target Audiences

C. Stories/Messages

III. Create Scenarios

1. **PROBLEM OR ISSUE:** What is the current direction and rate of change as it relates to the problem or substantive goal?
2. **POLICY CHANGE:** Are there policy changes that are recent or in prospect that will change the situation (e.g., court decisions, rule-making, statutory change, government reports)?
3. **POLITICS:** What current or impending elections, appointments, political movements or major events will impact the possibilities?
4. **IDENTITY:** How will the choices we make affect who we are, our reputation and our resources of influence?

IV. Modify and Improve our Assessment and Strategy

1. How solid is the basis for our assessment of other engaged entities and Advocacy Coalitions other than ours? Does it take into account how others view themselves?
2. What is the likely course of events in policy-making if all actors behave more or less as they have been recently?
3. What are alternatives that are within our resources and consistent with who we are? Is there a way to act that is outside the range of the expectations of key individuals and groups?
4. Are there recent events that change the situation or create new opportunities?
5. ***Create new scenarios by modifying our situation assessment and Strategy until Strategy stands out as the best; commit to that Strategy and move forward.***

Supplementary Material:

Critical Skills: *Three practices will improve the quality of strategic thinking:*

1. *See as clearly as possible from the perspective of others*, including those of differing opinions, to understand their motivations and likely decisions. When disagreements are sharp there is a natural tendency to demonize others—especially when they are demonizing *you*. Seeing them as they see themselves will help you understand and anticipate how they are likely to react and sometimes reveal opportunities for defusing opposition or even collaborating.
2. *Anchor your work in vision*. Every advocate is tempted to act in ways that conflict with the values they and their organizations claim to live by. Stay aware of your long-term goals and vision, especially in the heat of the moment when it is easy to go off track or mirror the opposing side rather than be true to your organization's values.
3. *Be aware of your own emotions*, especially anger and fear, which can cloud realistic assessment of options. Find ways to observe wrongdoing, mendacity and deceit without being controlled by your personal response to provocation.
4. *Seize the time*: Unplanned, external events can generate a sudden spike in interest from outsiders; the spotlight will soon shift, so be willing to adjust tactics and messages quickly.

Some Characteristics of Generic Strategies

Spectrums from – to . . .

1. Push -- Bargain -- Blend
2. Inside -- outside
3. Mass action -- one-on-one interaction
4. Follow -- tweak -- break conventional norms and rules
5. Coalition of “usual suspects” -- “Strange Bedfellows”

Examples of Tactics

1. Demonstrations
2. Nonviolent resistance
3. Lawsuits
4. “Leaks”
5. Quick “studies” or “reports.”
6. Large-scale studies and reports
7. Gather story material and supply to media
8. Seek appearances in media
9. Phalanx of editorials
10. Formal policy consensus process
11. Change the Forum