

# CAMPAIGN & MOBILISATION *TOOLKIT*

A STEP BY STEP GUIDE ON HOW TO SET UP YOUR CAMPAIGN



Transform  
Health



MY DATA  
OUR HEALTH

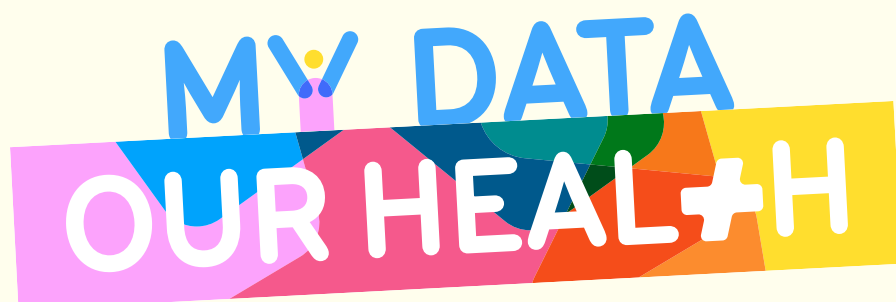
# MY DATA OUR HEALTH

## CAMPAIGN AND MOBILISATION TOOLKIT

This campaign toolkit will take you through the different stages of **planning**, **implementing** and **evaluating** your campaign. It is aimed at community based organisations and civil society organisations wanting to improve and systematise their campaigning.

With this toolkit you will:

-  prepare for your campaign, to ensure you are able to maximise the use of your organisational assets to increase your influence.
-  identify common misconceptions and pitfalls organisations fall in at different stages of their planning and implementation process.



# KEY ASPECTS OF CAMPAIGNING

## PLANNING

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## STRATEGY

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## TACTICS

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## IMPLEMENTATION

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This toolkit does not make any suggestions on how to organise campaign activities. An activity in and of itself only becomes a campaign activity when it is directed at engaging a certain audience to influence a set of targets that are then able to make the changes you want to see happen.

The learnings from this toolkit can be applied to any issue. However, we will be focusing on its application to the issue of health data governance, the focus of the **MyDataOurHealth** campaign.

# BACKGROUND ON THE #MYDATAOURHEALTH CAMPAIGN



DIGITAL  
TRANSFORMATION



COMPUTATIONAL  
CAPACITIES

(to collect, store, and analyse vast  
amounts of personal data)

Health data **can be used to mount more effective responses to the health needs of a population**. It can also be used to marginalise and exclude certain groups from health benefits (such as health insurance) or services (sexual and reproductive health and rights), or to deepen social surveillance and control. Therefore the need for clear rules on the way data is collected, stoped, managed and disposed.

Current public debates around data governance focus on issues of individual privacy and data security. However, **when it comes to health we need to balance individual privacy and security with the health needs of the population**.

The health data of each  
one of us **holds the key** to  
the well-being of others

Join the movement [bit.ly/mydataourhealth](https://bit.ly/mydataourhealth)








MY DATA  
OUR HEALTH





# THE CAMPAIGN

Transform Health launched a **mobilisation campaign** to raise awareness and galvanise action on the issue of health data governance, and to encourage a public and political conversation on the following set of questions:

-  Who determines how this data is collected, managed, used, stored and disposed of?
-  What are the limits of this authority?
-  How can we ensure this data is going to be used for public benefit purposes?
-  How much access and control do, and should individuals have over their health data?
-  How can we ensure this ownership and control is respected and protected?

At the heart of this campaign is the question of **trust in those collecting and using our health data**, to keep us healthy – now and in the future.

**A lot of health data and data for health is collected** by apps and institutions not in our own country, for example Google Apps, NGOs and research institutions, private sector companies. A lot of research is also carried out in different countries that could be of benefit to us, if those researchers had access to that data. A set of **global standards or guidelines that countries could draw on to inform their national laws would ensure we all benefit from the same level of security and protection**, while benefiting from the use of data by researchers, innovators and health planners anywhere in the world.

# THE CAMPAIGN CYCLE

All projects require a set of steps that can be broadly categorised as:

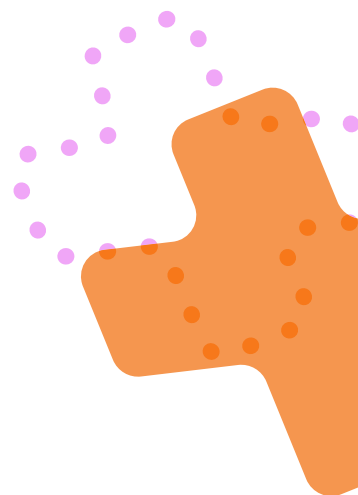
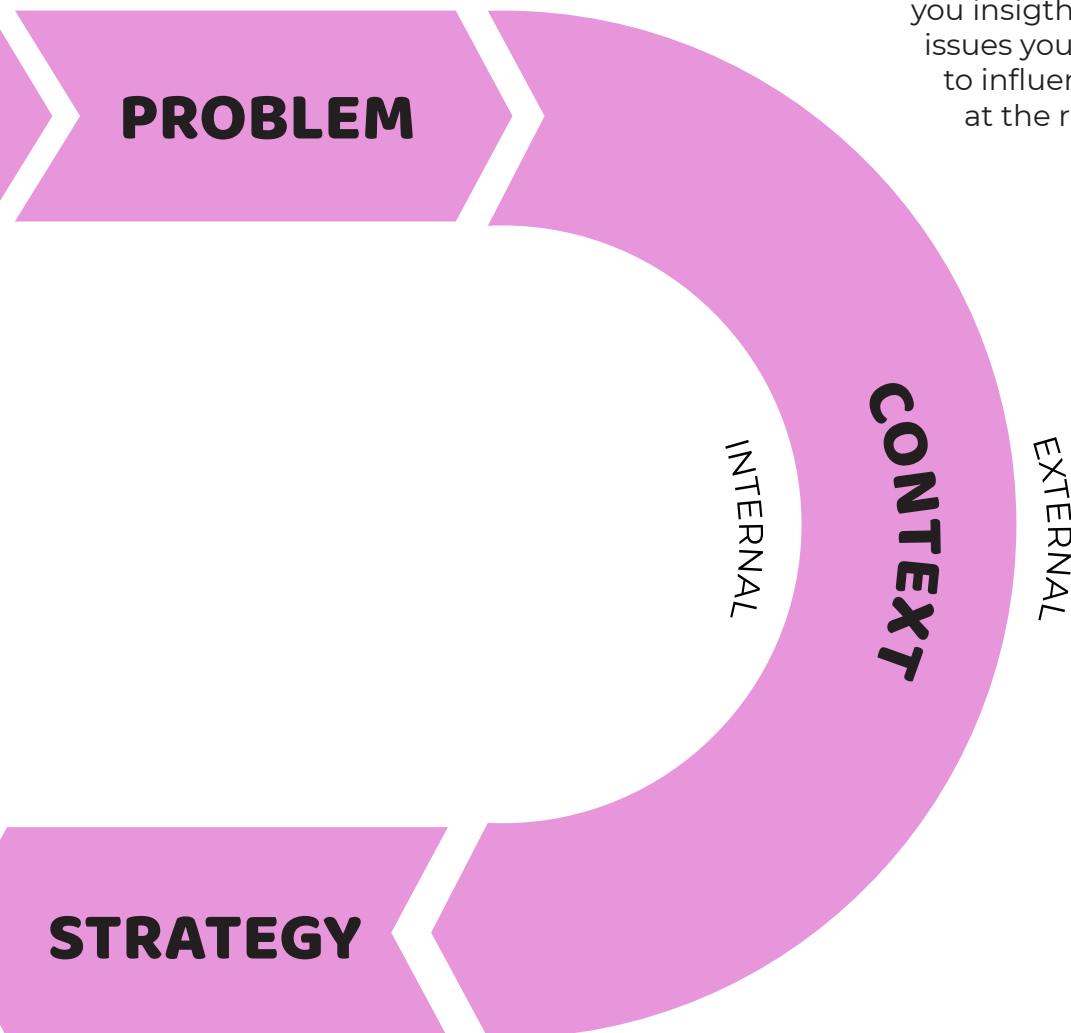
- + Analysis and planning
- + Implementation
- + Evaluation
- + Reflection



During the campaign cycle, a lot of **time** and **attention** is dedicated to **analysis and planning**,

to ensure you are able to maximise the use of your institutional assets to influence decision makers and achieve your outcomes.

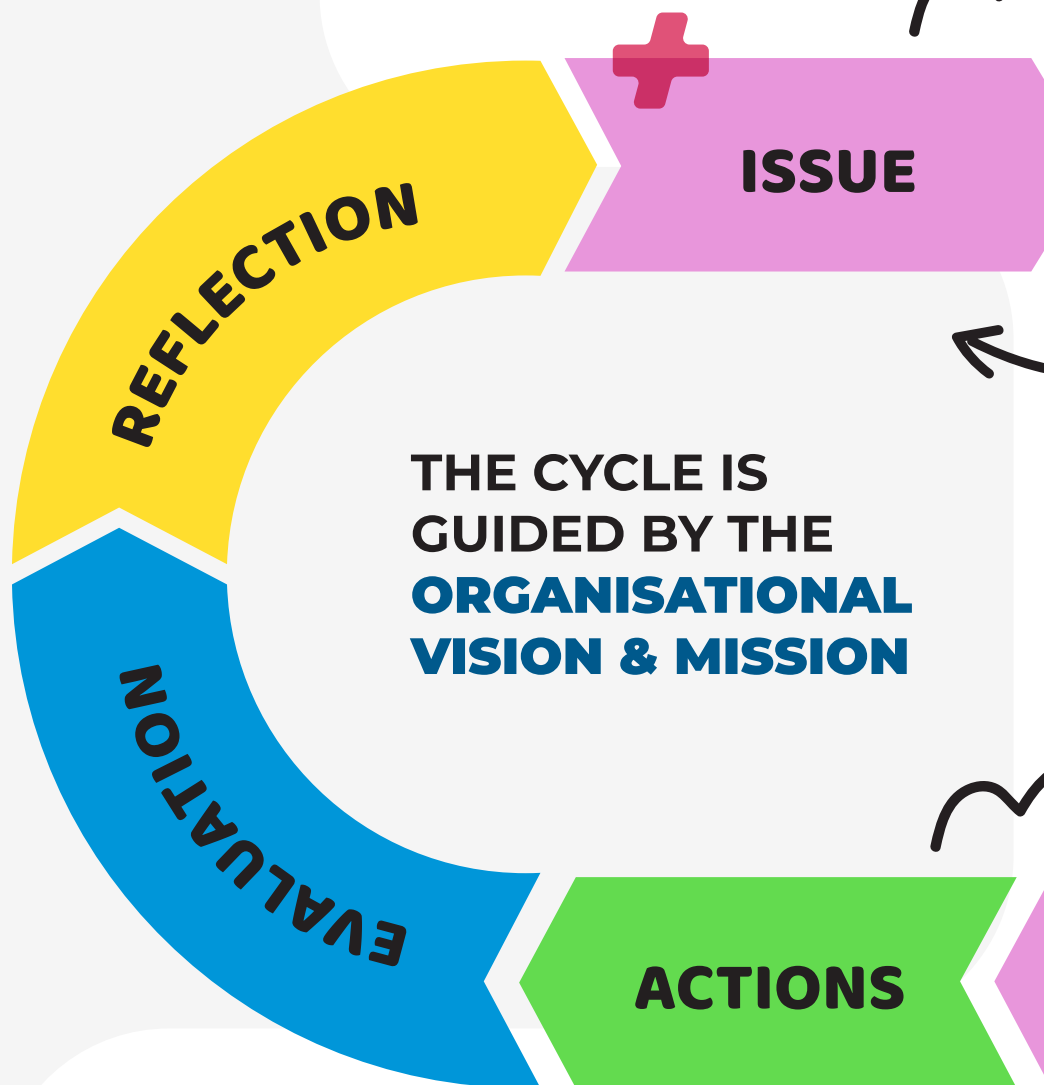
Analysis and planning will give you insights to understand the issues you are facing and how to influence the right people at the right time to achieve your outcomes



# THE CAMPAIGN CYCLE

THE CAMPAIGN CYCLE IS AN **INTERACTIVE** PLANNING PROCESS

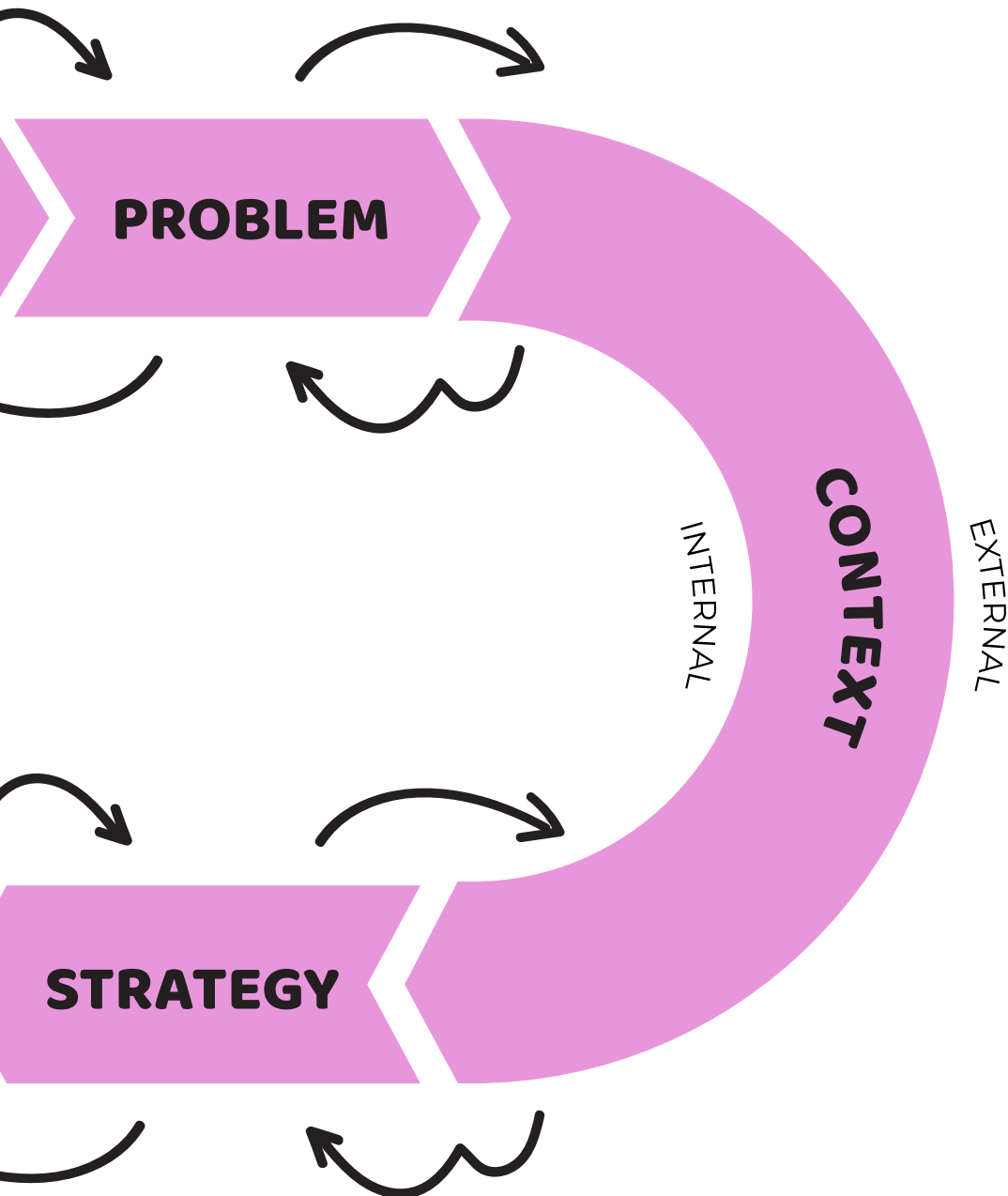
*where you may need to go back a step and rethink earlier steps based on what you discover as you progressed*





## LEADS FOR ITERATION

- + Reflection on the previous phase. Do we need to change anything? Rethink the previous phase?
- + Refinement of the previous phase.





# PLANNING your campaign

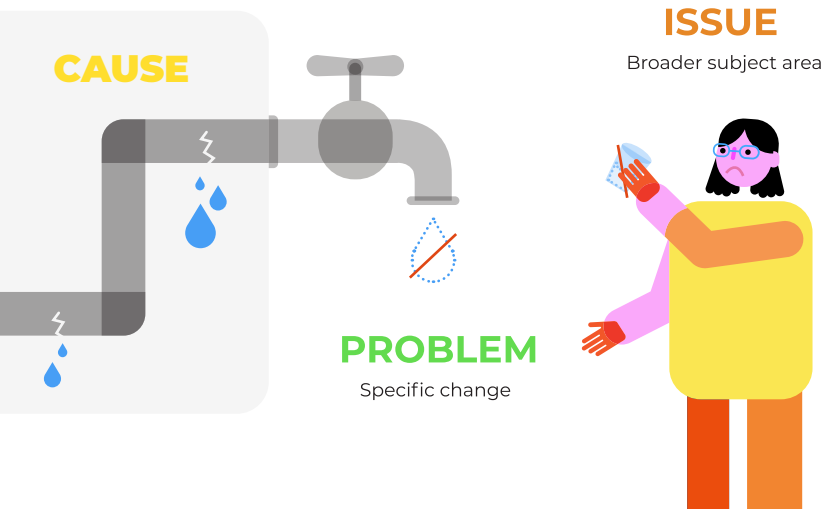


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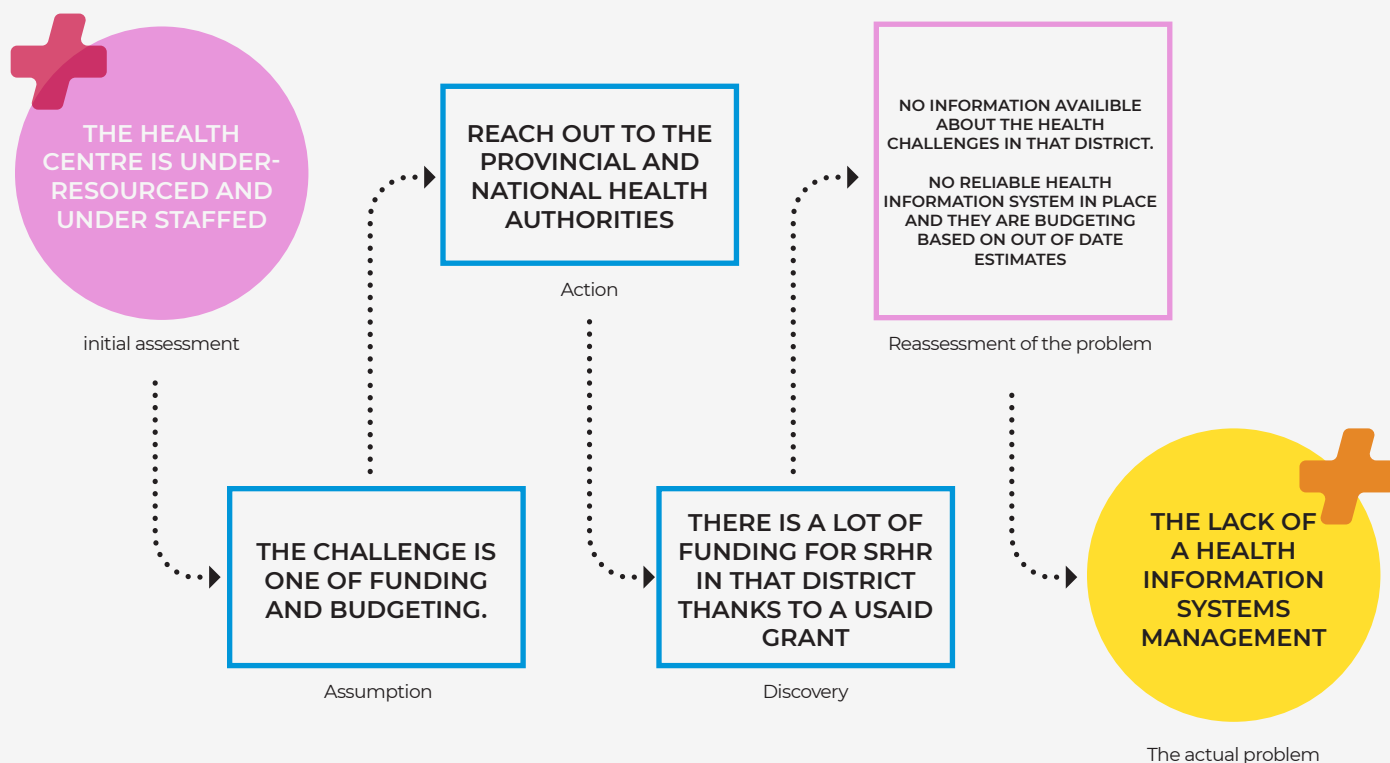
# FROM ISSUE TO PROBLEM

*to be successful, be specific.*



Once you identify the issue you need to understand the problem, its causes and its effects. **Your strategy will focus on addressing the causes of the problem.**

## Example: ADDRESS THE LACK OF ACCESS TO SEXUAL AND REPRODUCTIVE HEALTH SERVICES IN A PARTICULAR DISTRICT



# PHASES OF CAMPAIGN DEVELOPMENT

## A. IDENTIFYING THE FOCUS OF THE YOUR CAMPAIGN - *Defining the problem*

Once to have agreed on the issue you want to address, is important to be very clear what problem you are trying to address and what you are trying to change. **You will need to distinguish the problem from its causes and effects to distinguish between the problem, its causes and its effects.** It is important to understand how the causes maintain the problem.



### PROBLEM TREE

The **problem tree** helps to understand the problem and the relationship between its causes and its effects. This is very important - **your campaigning and advocacy work will focus on the causes of the problem** so that the problem goes away.

SEE TOOLS SECTION FOR DETAILS

## LEARNING POINT

The more specific you are in defining the causes of your problem, the more strategic and targeted your campaign will be and the more likely you are to succeed.

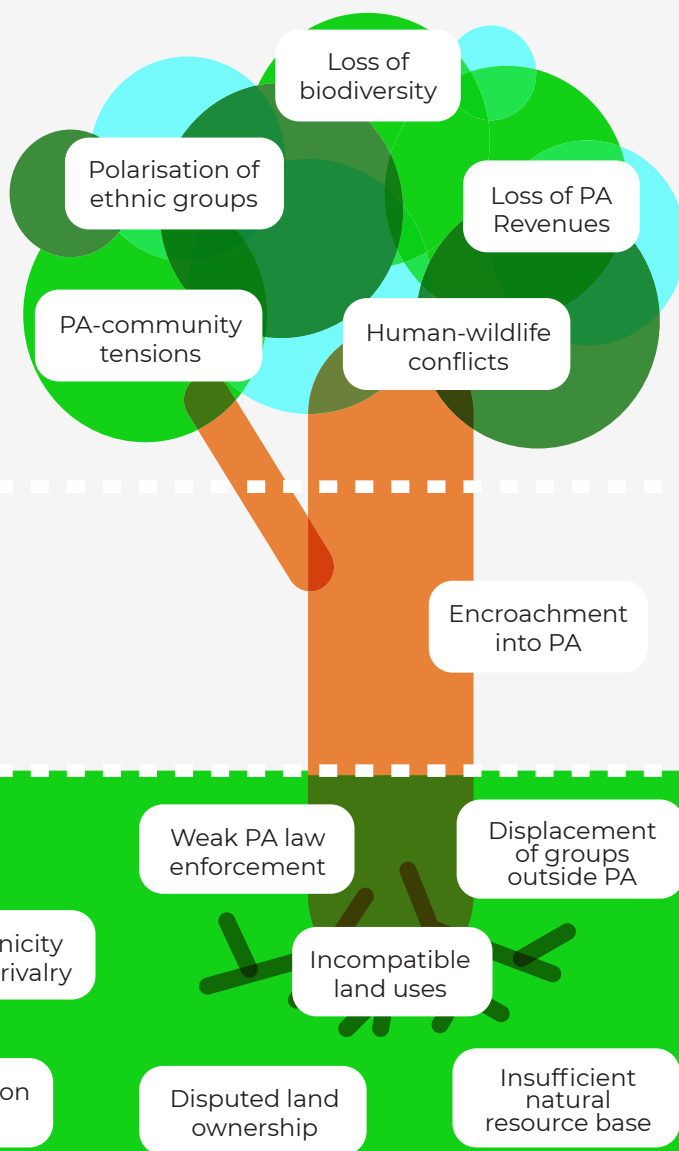
### PROBLEM TREE RELATED TO THE ENCROACHMENT OF VILLAGERS INTO A PROTECTED NATURAL AREA

PA = protected area

## Effects

## CORE PROBLEM (PRIORITIZED CONFLICT)

## CAUSES



After analysing the problem and its causes and effect, you will need to **analyse and understand the context in which this problem emerges and subsists** in order to know who and how to influence different stakeholders to bring about change.

## B. UNDERSTANDING THE CONTEXT

### POLITICAL CONTEXT

The political context, including the relations of **power that impact on the problem** are important considerations when planning your campaign. To understand the context you might want to ask yourself the following questions:

- + What is the political context in the country, region, or district?
- + How are decisions made in my context and how are political priorities taken forward?
- + Are there elections coming up? How far away are the next elections (are you in a political campaigning cycle or has the government or elected authorities just started their terms)?
- + Which groups are contesting power at the local, provincial or national level and where do they stand on your issue?
- + Where does this issue sit on the public and political agenda?

### ORGANISATON CONTEXT

It is important to understand this context in relation to your own internal capabilities, assets (*financial, technical, intellectual and social and political*). This will allow you to **develop a campaign and influencing approach that is most suited to your organisation and context.**





**You can use different tools to understand the wider context in relation to your ability influence it using different tactics and approaches.** These include:



### **SWOT analysis**

To examine internal strengths and weaknesses, and external opportunities and threats.



### **Forced Field Analysis**

To examine the external environment, and assess which forces would support your campaign, oppose it, or who might be regarded as uncommitted.

### **Issue Lifecycle** *See page 51 for more details.*

To help you map where the issue of health data governance (or any other issue) stands on the public and political agenda, an important consideration when assessing the level of political support for it, and planning a campaign response.

## **RISKS AND ASSUMPTIONS**

List the potential risks you face and also your assumptions, why you thinks this approach, at this moment in time and in this context will help you achieve your objectives



# STRATEGY for your campaign



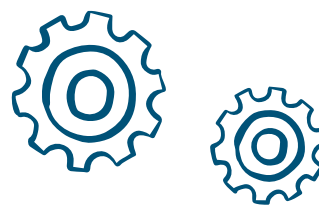
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# SOLIDIFY PLANS

*relating activities to objectives*



A strategy is a

**document developed following a strategic planning process.**

The planning process, more than the strategy document itself, is key to the success of your campaign.

## Your strategy aims to:

- + Be your road map for the campaign
- + Gain approval and release of resources from potential donors, members and supporters
- + Communicate plans to other allies and potential supporters and win their participation
- + Be a reference point for campaign evaluation

## Usually a strategy includes:

### + Aim

WHY are you doing this campaign

### + Objectives

WHAT specific changes do you want to see happen

### + Approaches

This needs to be based on both the resources within the organisation and the access members of the organisations have to different key audiences.

### + Risks and assumptions

### + Targets

These need to be individuals not institutions

### + Action plans

### + Resources and budgets



A strategy may also include background information, such as research, the political context, a summary of previous related work, a description of the consultation process used to develop the strategy, and an explanation of the analysis.

A strategy **is a working document that needs to be updated on a regular basis in order to reflect changes in the real world.**

## DEVELOPING YOUR STRATEGY

### A. THE AIM OR GOAL

Is a general declaration of intent that guides the advocacy campaign and answers the question

#### WHY ARE WE DOING THIS CAMPAIGN?

The aim of the **#MyDataOurHealth** campaign is to start a public conversation on the issue of health data governance and generate political support for a set of common global standards that can be domesticated into national legislation.



## B. OBJECTIVES

The objectives set out specifically what you want to change. They respond to the question **WHAT DO WE WANT TO MAKE HAPPEN?** to achieve our aim.

- ✚ A well formulated objective **gives you a destination and a reference point** for your campaign.
- ✚ These objectives are **underpinned by a set of assumptions** that you need to make very clear. The assumptions are set out on your theory of change.

### CAMPAIGN OBJECTIVES TEND TO FALL INTO 5 DIFFERENT TYPES:



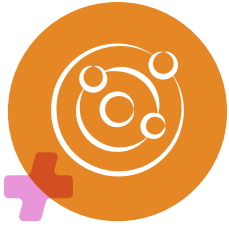
#### **Policies, legislation and regulation**

these objectives look at changes to existing policies, legislation and regulation or the development of new policies, legislation and regulation if current ones do not adequately address the issues you are concerned about.



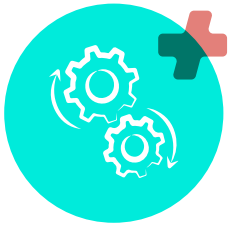
#### **Regulatory and funding**

these objectives focus on enabling the policies and legislation to be implemented, either by detailing how the legislation should be interpreted and implemented (regulation), or by providing the resources for a policy or piece of legislation to be implemented.



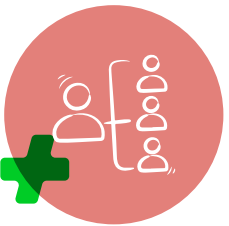
### **Structural, systemic or management**

these objectives focus the effectiveness of the systems and the structures in place to deliver on a certain set of commitments, policies or legislation. They also focus on the management systems and process, and the incentive structures across the system that encourage a certain set of behaviours (for example health workers getting a bonus for effective use of digital tools to enter patient data).



### **Practice**

these objectives focus on changes in the way staff or members of an organisation operate and implement their programmes, for example to greater transparency and accountability in the way programmes are taken forward. The MyDataOur Health campaign's objective is to change the way people treat their health data, so that they ask for it from their health providers and own it.



### **Levels of participation**

these objectives focus on the level of knowledge and understanding of an issue and the levels of participation and engagement by a certain audience. The MyDataOurHealth campaign aims to increase levels of knowledge and understanding of the issue health data governance among young people, women and marginalised communities and increase their levels of participation on this issue.

For MyDataOurHealth **our objectives** fall into the category of **CHANGING LEVELS OF PARTICIPATION.**

# LACK OF CLARITY IN THE OBJECTIVES WILL LEAD TO

*lack of clarity of the campaign*

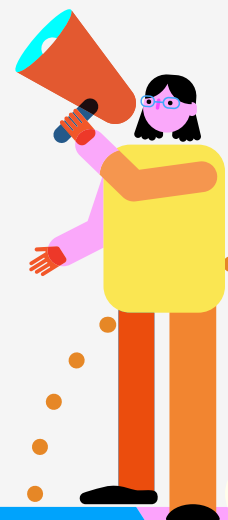


Lack of focus and lack of cohesion among partners (who may all have a slightly different understanding of what you are trying to achieve and why). It will also **lead to confusion over messaging and targeting** and may limit the impact of your campaign effort.

If your objectives are **too broad and not focusing on the causes of a problem**, you will find your **activities and engagement tends to be output focused rather than outcome oriented**. It will be unclear exactly how your activities will influence specific audiences to make specific changes happen that will address the causes of the problem you are focusing on.

To overcome this, you need to **develop objectives that are**

**S M A R T**



## B1. SETTING SMART OBJECTIVES

WHEN YOU SET OBJECTIVES YOU NEED TO MAKE SURE THEY ARE:



**S**PECIFIC

**M**EASURABLE

**A**CHIVABLE

**R**ELEVANT

**T**IME-BOUND

Unless objectives fit these criteria it is very difficult to monitor and evaluate the progress or impact of your campaign. This is because there are no criteria for measuring whether any event or engagement was a successful event or activity for advancing the campaign objective (as opposed to just a successful event).

Your objectives need to **focus on the changes you want to see happen, rather than the activities you will implement** to bring them about.

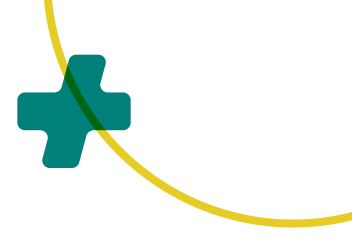
## ADVOCACY AND CAMPAIGN OBJECTIVES

- ✚ **These differ from programming objectives** where you have a more direct relationship to the impact you want to see and where your objectives can integrate your actions. An example of the programme objective that includes what you will do to resolve the problem identified:

*We will address the lack of clean drinking water in the community by building a well, by December 2025.*

- ✚ In campaigning and advocacy, given **we are managing knowledge for the purpose of influencing others**, we need to clearly set out what we want these others to do and why, rather than focus on our activities. An advocacy objective for the above example would look like this:

*The County government allocates budgets and mandates the water and sanitation department to build wells in all communities in the district by May 2024 to address the lack of clean drinking water.*



# SMART OBJECTIVES

To ensure your objectives are **SMART**, ask yourself the following questions for each one:

## S

- Is the objective clear, concrete and practical?
- Have we clearly identified the institutions responsible for the implementation of this objective?
- Is the objective described with strong action verbs such as conduct, develop, build, plan, or execute?
- At what level of the system or in which structure is this objective located?
- Is the outcome specified?
- Will this objective lead to the desired results?

## M

- How will we know that change has occurred?
- Are we able to gather the data on the indicators we are tracking?



## A

- Can it be done in the proposed time frame?
- Is this within the remit and capabilities of the government structure or stakeholder we are planning to engage and influence?
- Are the limitations and constraints understood?
- Are we taking into consideration the decision making process and cycle of our target audience?
- Can we achieve this objective with the resources available?
- Is it possible to achieve this objective within the timeframe?



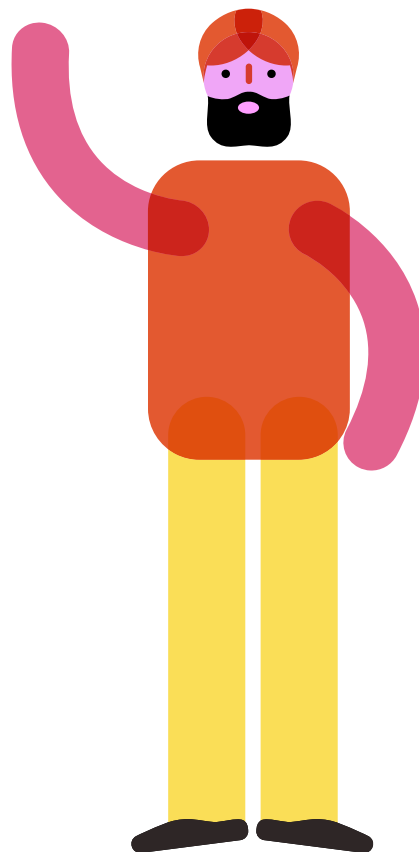


R

- Is this objective worthwhile? Will it have the desired impact on my target beneficiary group?
- Is this the right time?
- Does this match our other efforts/needs?
- Are we the right organisation to press for this?
- Is this the right objective given the current socio-economic and political environment?

T

- When will this objective be accomplished?
- What is the stated deadline?
- What needs to happen in three months from now for this to be accomplished?
- What needs to happen in six months from now?
- What needs to happen in 9 months from now?



**Given we are working to influence state authorities** that are accountable for service delivery to the population, **our level of ambition can be higher than a programming objective**, but we must take into account the government's internal decision making processes such as the planning and budget cycle. Therefore the time-frame for achieving our objective may be longer, but the impact will be greater.



## LEARNING POINT

Sometimes in setting **SMART** objectives people use language that may be **abstract and open** to interpretation and **therefore not be specific or tangible enough**.

Add at the beginning of the sentence: Unless you have a baseline or you can define exactly the change you want to see and how you will measure results, avoid language such as:

- + Advocate for a change in policy
- + Sustainable attitudinal and behaviour changes
- + Strengthen capacity
- + Sensitise key audiences
- + Reduce poverty
- + Empower people
- + Sustainable development

These words and concepts by themselves can't be measured.

Below are examples of objectives that use **abstract language**. **These objectives cause** ambiguity and risks confusing people involved in the campaign rather than define exactly what the campaign seeks to achieve:

- + Influence Government policy and action on community actions for desired, sustainable attitudinal and behaviour changes built around well defined local and national development needs and priorities.
- + Effect positive change in communities' negative attitudes, behaviours and practices through sensitization, motivation and mobilisation as they themselves identify their own constraints and solutions to social development issues.

- ✚ Conceptualise and implement campaign programmes aimed at lobbying for policies which advance the interests of marginalised members of our society (e.g. poor women and rural residents).

The vagueness of these objectives makes it very difficult to know who you are trying to influence or how you will know you are on track to achieving them.

A **SMART** objective would look like this:

The government of Cameroon endorses the Health Data Governance Principles and calls on the WHO Secretary General to table a resolution on health data governance at the World Health Assembly in May 2024.

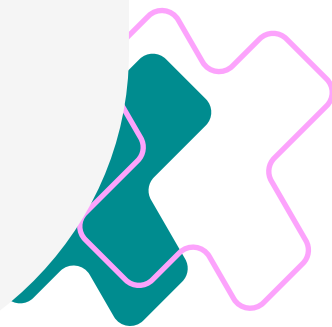
This objective is more practical and identifies precisely what we want to see happen. **A well formulated objective gives you a destination and a reference point for your campaign.**

✚ For MyDataOurHealth we want people to be more engaged on the issue of health data governance, and in particular in relation to what happens to their health data. To achieve this, the first step is to increase people and politician's knowledge and understand of the issue.

We developed two general objective that became **SMART** when you read how we intend to achieve them:

## 1. GENERATE A PUBLIC DEBATE ON HEALTH DATA GOVERNANCE

We will know this has been achieved when:



A

We have generated at least 10 media stories on health data governance in the country by April 2024

B

At least five traditional and social media influencers and thought leaders are regularly (at least once a month) speaking on the issue of health data governance by April 2024

C

At least two questions are raised by Parliamentarians on the issue of health data governance in the legislative assembly

D

Constituents across at least five districts visit their local MPs in their constituencies to ask them to call on the Minister of Health to sponsor a resolution on health data governance at the World Health Assembly in May 2024.

AS YOU SEE **THESE OBJECTIVES ARE VERY CONCRETE**, THE GOVERNMENT EITHER ENDORSES THE HEALTH DATA GOVERNANCE PRINCIPLES OR THEY DO NOT, 10 STORIES HAVE BEEN PUBLISHED IN THE NATIONAL MEDIA OR THEY HAVE NOT.

## 2. INCREASE AWARENESS AND UNDERSTANDING AMONG PARLIAMENTARIANS OF THE ISSUE OF HEALTH DATA GOVERNANCE

We will know this has been achieved when:

-  The Government sponsors or supports a health data governance resolution at the World Health Assembly in May 2024, instructing the WHO to develop a set of global standards on health data governance that can then be integrated into national laws.
-  The Government endorses the Health Data Governance Principles
-  The Government publicly recognises the importance of engaging civil society in any global, regional or national process relating to health data governance and commits to ensuring this happens.



THESE OBJECTIVES ARE **UNDERPINNED BY A SET OF ASSUMPTIONS** THAT YOU NEED TO MAKE VERY CLEAR. THE ASSUMPTIONS ARE SET OUT IN YOUR THEORY OF CHANGE.

## C. THEORY OF CHANGE AND MILESTONES



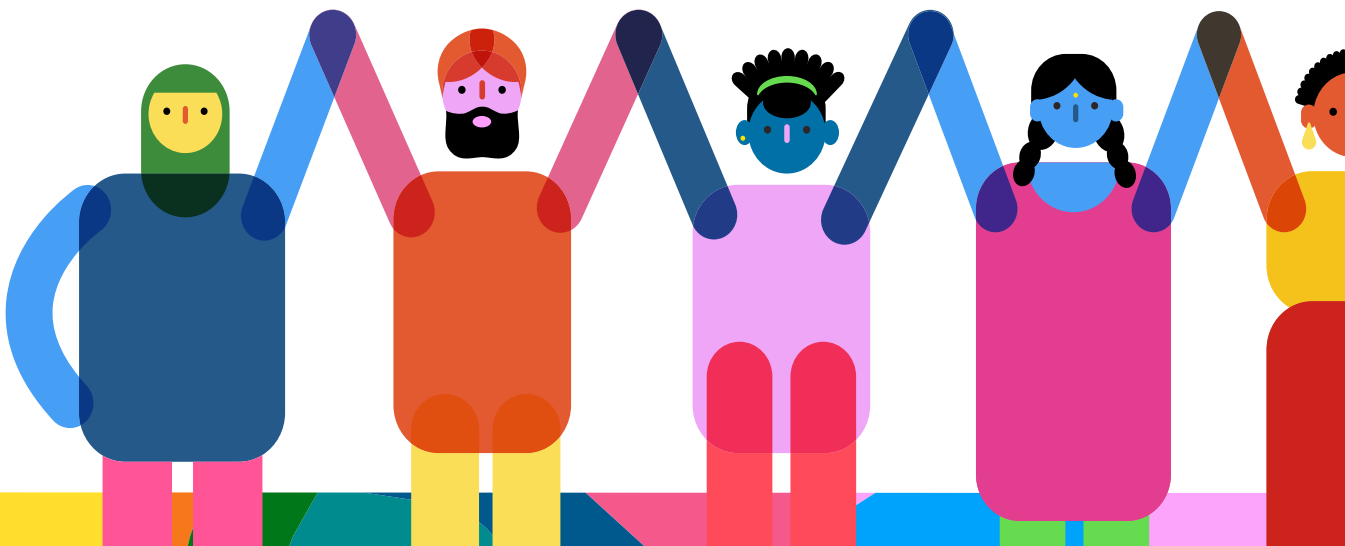
Your theory of change or change pathway sets out how you understand the change process happening.

**START YOUR THEORY OF CHANGE BY  
LAYING OUT YOUR ASSUMPTIONS AND  
ALLOW OTHERS TO TEST THESE BEFORE  
STARTING TO ORGANISE ACTIVITIES**



It includes the different steps that need to see decision makers take as they progress through the change process (your milestones) and the actions you and others will take to influence them to go from one step to the other (your activities and outputs).

The process of developing your theory of change and having it questioned and tested by others is as important, if not more so, than the final document.



SEE TOOLS SECTION  
FOR MORE DETAILS



## OUTCOME TRACKER

A tool to help map this out, before going into your workplan (which focuses more on what you will do rather than how change happens and how your actions are contributing to this).

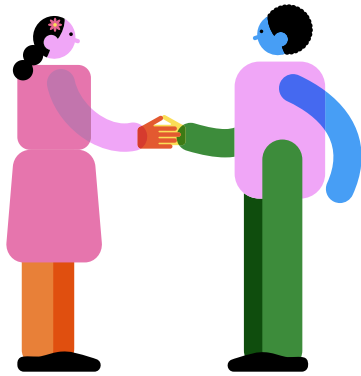
Once you have set out your underlying assumptions **you need to map your campaign journey and set out the milestones** you need to reach on your way to success.

Your **MILESTONES**, sometimes called SUB-OBJECTIVES, are the stages along the change pathway that **need to happen for you to know you are on the right track** and influencing change towards your objective.





## THEORY OF CHANGE AND MILESTONES



**Our  
action**

### **Consequence**

The audience/ target  
will change the  
way they approach,  
understand, or feel  
about the issue and  
prioritise it

### **Consequence**

The decision makers  
will be compelled  
to act, either by  
commissioning or  
requesting further  
research, developing  
draft legislation or  
budgets, bring  
a Bill forward to  
Parliament, etc.

If...

Then...

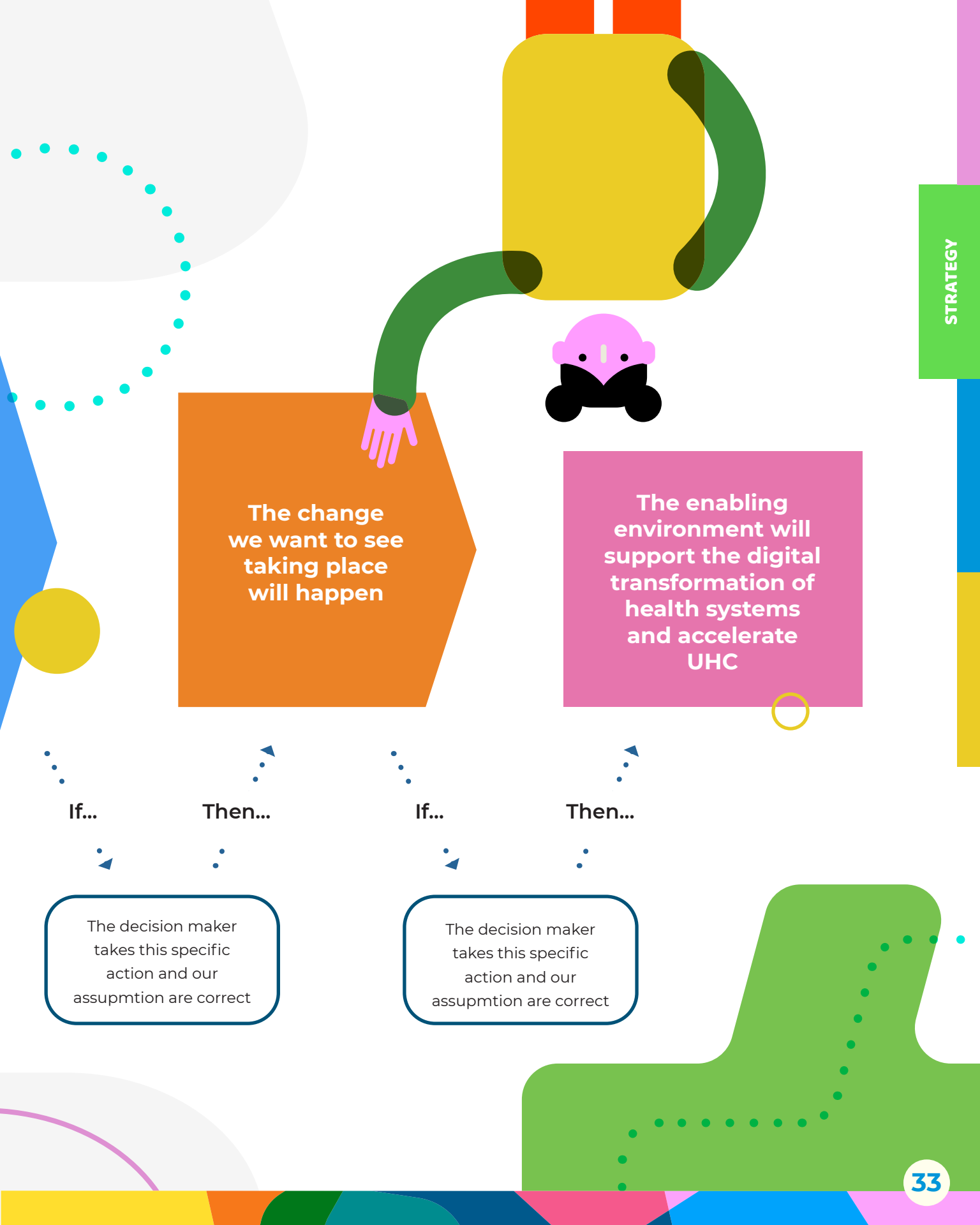
If...

Then...

We do this, and  
our assumptions  
are correct

The target prioritises  
the issue, and our  
assumptions are  
correct





The change  
we want to see  
taking place  
will happen

The enabling  
environment will  
support the digital  
transformation of  
health systems  
and accelerate  
UHC

If...

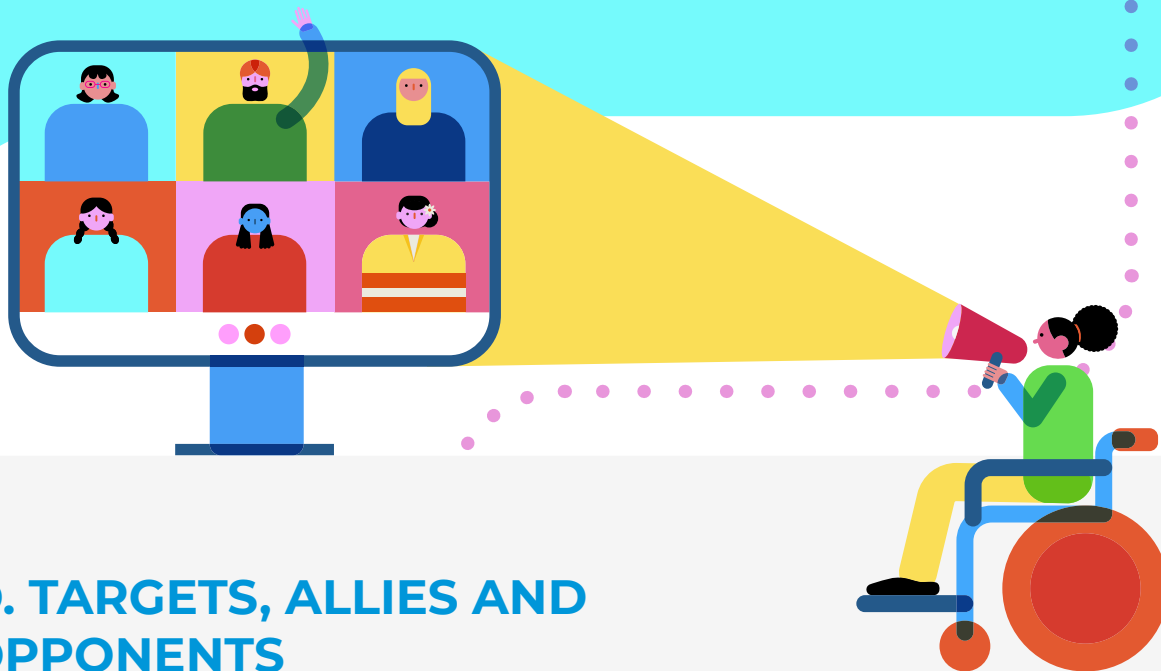
Then...

If...

Then...

The decision maker  
takes this specific  
action and our  
assupmtion are correct

The decision maker  
takes this specific  
action and our  
assupmtion are correct



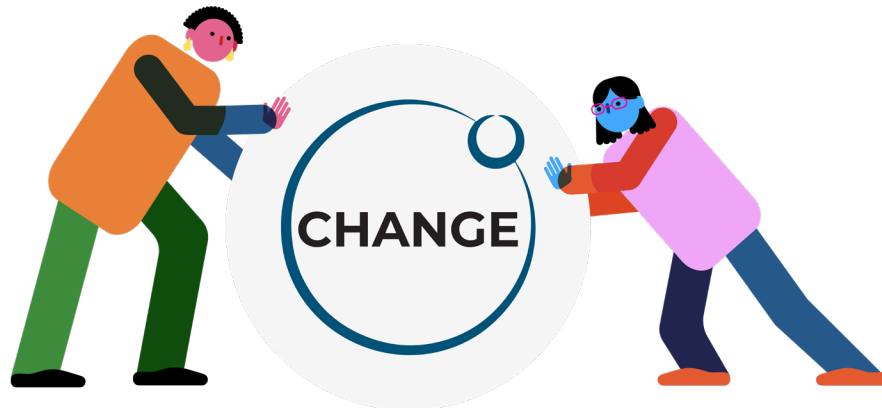
## D. TARGETS, ALLIES AND OPPONENTS

For each campaign objective there will be one or a number of **decision makers that you will need to influence**. You can do this directly or indirectly, by working through intermediary audiences.

You must remember that however just your cause, it does not mean that politicians will act on it.

On most issues, you will find that some people have a vested interest in things not changing and they are pushing equally hard for the situation to remain the same. Other people would like to see the politician or decision maker focus on other issues and will be competing for that person's attention to ensure their issue is prioritised above yours.

## CHANGE CAN BE DIFFERENT...

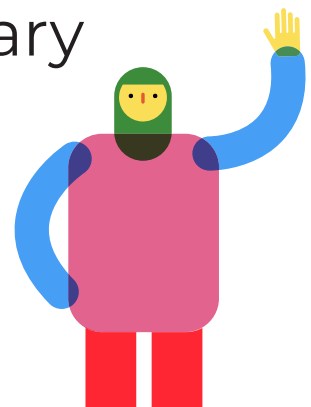


...TO DIFFERENT PEOPLE

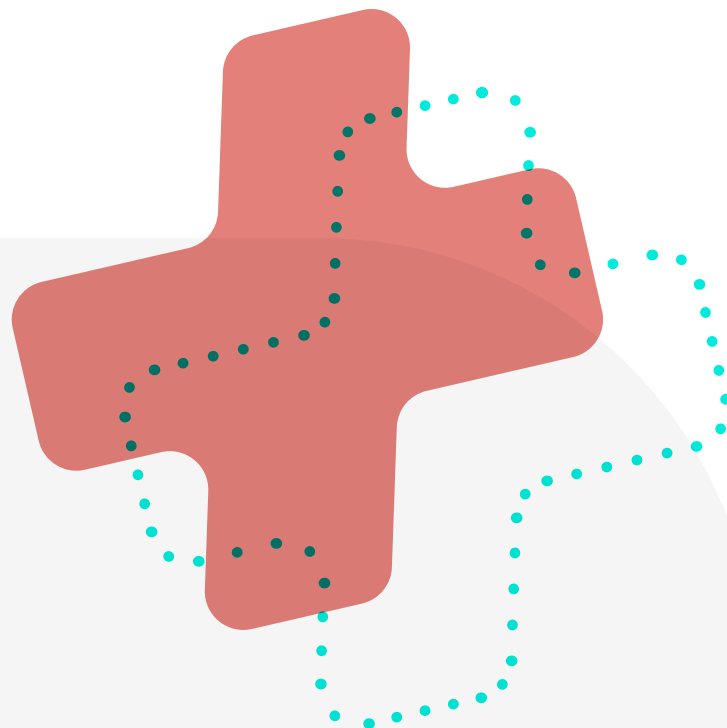
**TO GET THE POLITICIAN OR DECISION MAKER TO PRIORITISE YOUR ISSUE, YOU NEED TO KNOW YOUR TARGET:**

You need to know who they are, **who they take advice from**, what other audiences they listen to, and ensure your communication is targeted at both your decision maker, and the people she or he listens to. This will be critical to ensure you are more persuasive and influential than others.

A **stakeholder analysis** will **help** you identify your primary and secondary audiences, and your most powerful allies and opponents.



# TOOLS



**Stakeholder Analysis**



**The audience prioritisation matrix**



**Targets and chains of influence - Chains of influence**



**Targets and chains of influence - Simple influence map**

**SEE TOOLS SECTION FOR  
WORKING BOARDS**



# STAKEHOLDER ANALYSIS



A stakeholder is **anyone who is affected by or who has some influence (good or bad) over the issue you are working on.**

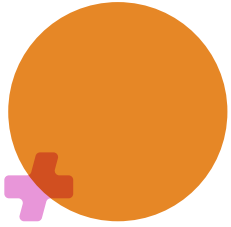
## A STAKEHOLDER ANALYSIS CAN HELP YOU IDENTIFY:

**The most important audiences for your campaign**  
(those with the most influence over the main decision maker)

**Your allies and opponents,**  
important in developing your strategy and messages

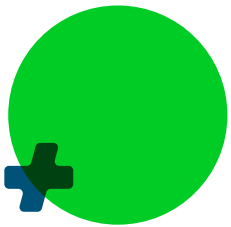
A successful campaign requires an understanding of the decision making processes and who is involved in it, so as to direct messages to the right people at the right time and in the right format and through the right channels.








## STEP 1

Brainstorm all the people (stakeholders need to be people not institutions) who have an interest or a potential influence over the issue. **Be creative, work with others so that your own assumptions are not the only ones that dominate.**



## STEP 2

Next, you need to classify these stakeholders based in the following questions:

-  What is the stakeholder's attitude to this issue, do they agree or disagree with your position?
-  How importantly does the stakeholder view the issue, compared to other issues?
-  How influential is the stakeholder over the decision?

There may be instances where members of the group disagree on a particular stakeholder's influence or interest in the issue. In this case you can do some further research (ask others, or contact the stakeholder directly). You may identify subgroups of stakeholders emerging and will then need to identify the primary stakeholders and the secondary ones.

**You can now use this information to identify both your primary and secondary audiences, and your main allies and opponents.**



SEE TOOLS SECTION FOR  
WORKING BOARDS



Stakeholder	Attitude of the stakeholder to your position	Importance of the issue to the stakeholder	Influence of the stakeholder over the issue
NAME	VO/O/N/S/VS	L / M / H	L / M / H
NAME	VO/O/N/S/VS	L / M / H	L / M / H
NAME	VO/O/N/S/VS	L / M / H	L / M / H
NAME	VO/O/N/S/VS	L / M / H	L / M / H

VO = Very opposed  
 O = Opposed  
 N = Neutral  
 S = Supportive  
 VS = Very Supportive

L = Low  
 M = Medium  
 H = High

## THE AUDIENCE PRIORITISATION MATRIX

This tool allows you to **map your primary stakeholders, those that cannot be ignored because they have influence over the decision makers.**

It may throw up some unsettling results, for example an advocacy campaign on the right to education for orphans and vulnerable children (OVC) may identify the issue as very important for the OVCs, but that their influence is low. Therefore there will be no point in developing messages and material for them, they are already persuaded, but do not have much influence over decision makers.



It is very important to **engage beneficiaries in your campaign**, however you should do this with the clear aim to **empower them to engage and influence your main decision maker**. The key audience may be the local MP, or private sector leaders.





Attitude of the stakeholder towards the issue

VO



MAIN ALLIES

O



N

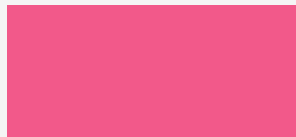


KEY  
BATTLEGROUND

S



VS



MAIN  
OPPONENTS

Low

Medium

High

Influence of the stakeholder on the issue

STRATEGY

Use colour coding to map the importance of the issues to each audience in the table.



SEE TOOLS SECTION  
FOR DETAILS

Once you have plotted your stakeholders, you can **develop a more effective strategy to influence you target** that will includes the following:

- + Building alliances
- + Increasing the influence of people who are in favour of your position
- + Persuading people who have a lot of influence over the target but who are either neutral on the issue or slightly against your position that you are right
- + Reducing the influence or lower the importance of the issue for people strongly opposed to your position through force of argument and strategic delivery of messages

## LEARNING POINT

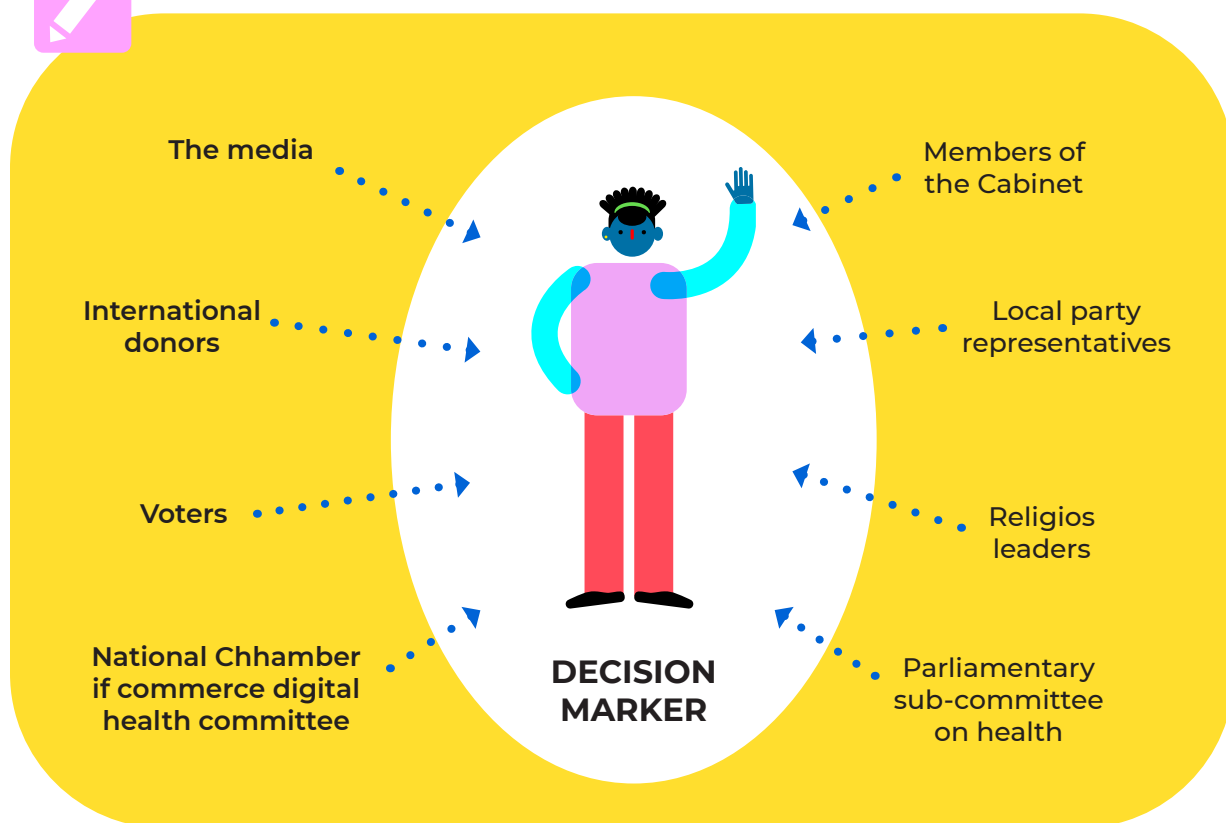
Many people put down “the Government” or “the Ministry of Health” as targets and call on these institutions to make the changes. Institutions are abstract entities. **People make decisions, not institutions.** You need to identify the person with the power to make the decision and bring about the change,, not the institution.

## SIMPLE INFLUENCE MAP

A simple influence map allows you to **visualise who the decision maker** is and who surrounds that person and influences them.



SEE TOOLS SECTION FOR DETAILS



This simple influencing map shows the **different perspectives and messages competing to influence a particular decision maker**. It is **important for your message to stand out and for it to arrive at the decision maker** from different channels (for example through the media, the Parliamentary sub-committee on health and from local party representatives). **This will ensure the decision maker prioritises it.**



## TARGETS AND CHAINS OF INFLUENCE

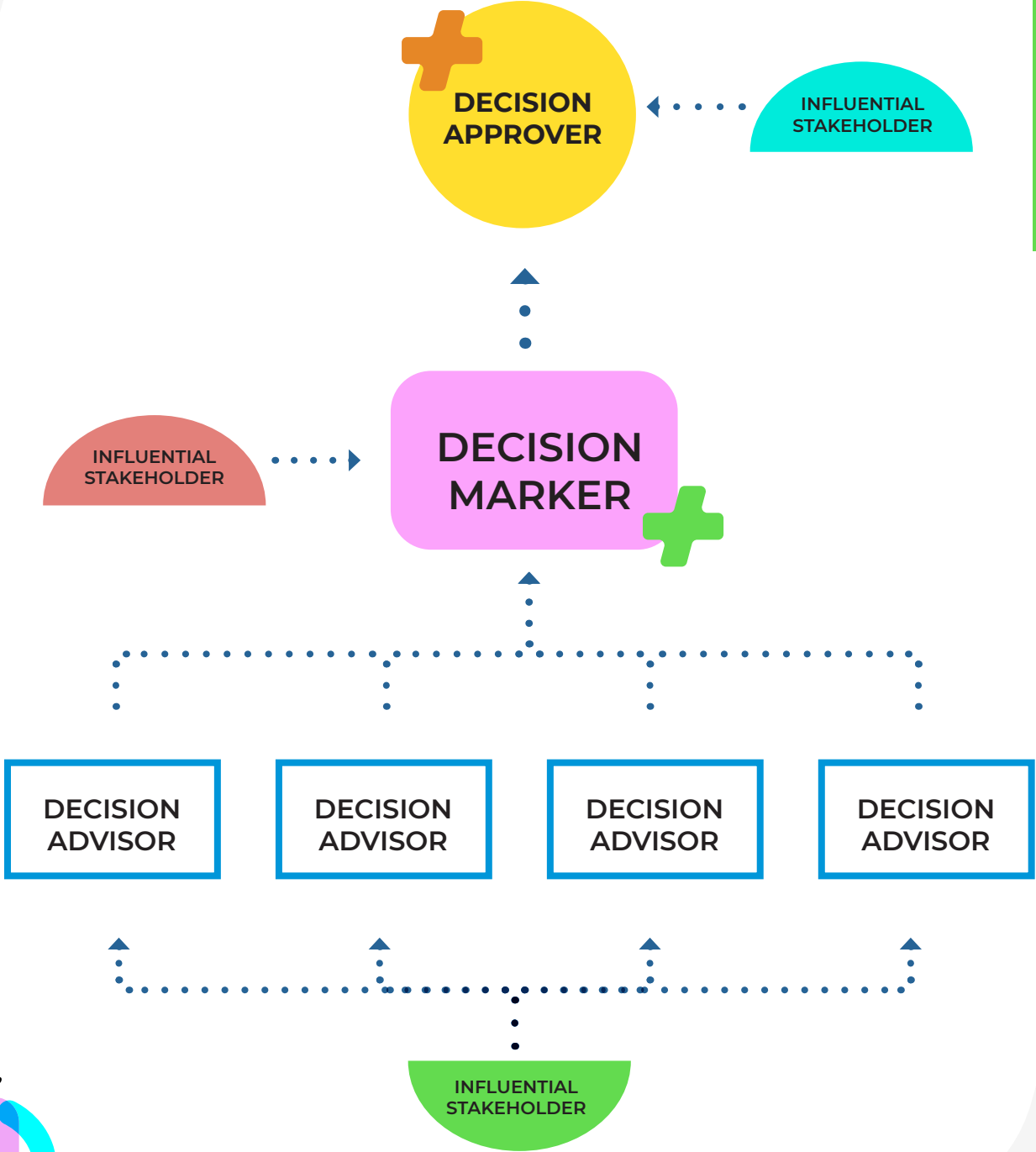
In order to achieve an impact **you need to identify who to target in your campaign, why, when, and with what messages.**

The target can be a person or a small group of people (not an institution) that has the power to change the situation you are working on. Remember, the decision maker is not always the figurehead of a particular government department, often it is the technical advisor!

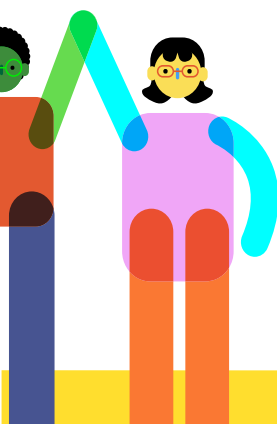
**Once the target is identified chains of influence should be worked out to understand how best to influence that person.**



SEE TOOLS SECTION FOR WORKING BOARDS

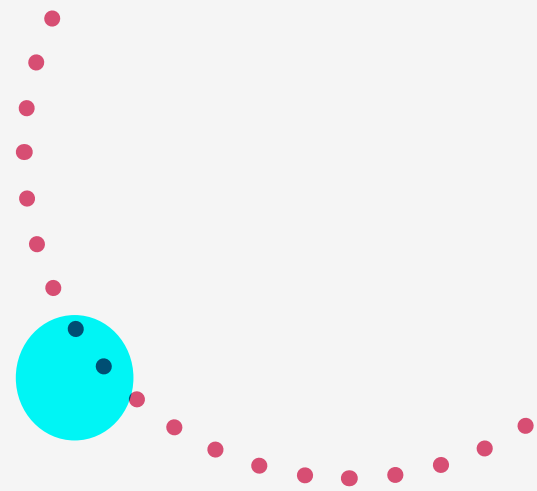


STRATEGY



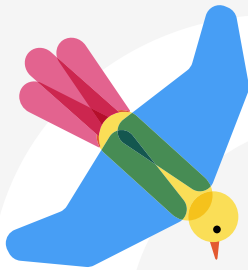
# CHAINS OF INFLUENCE

Here the chains of influence plot **how messages move from you to your target via specific intermediaries.**



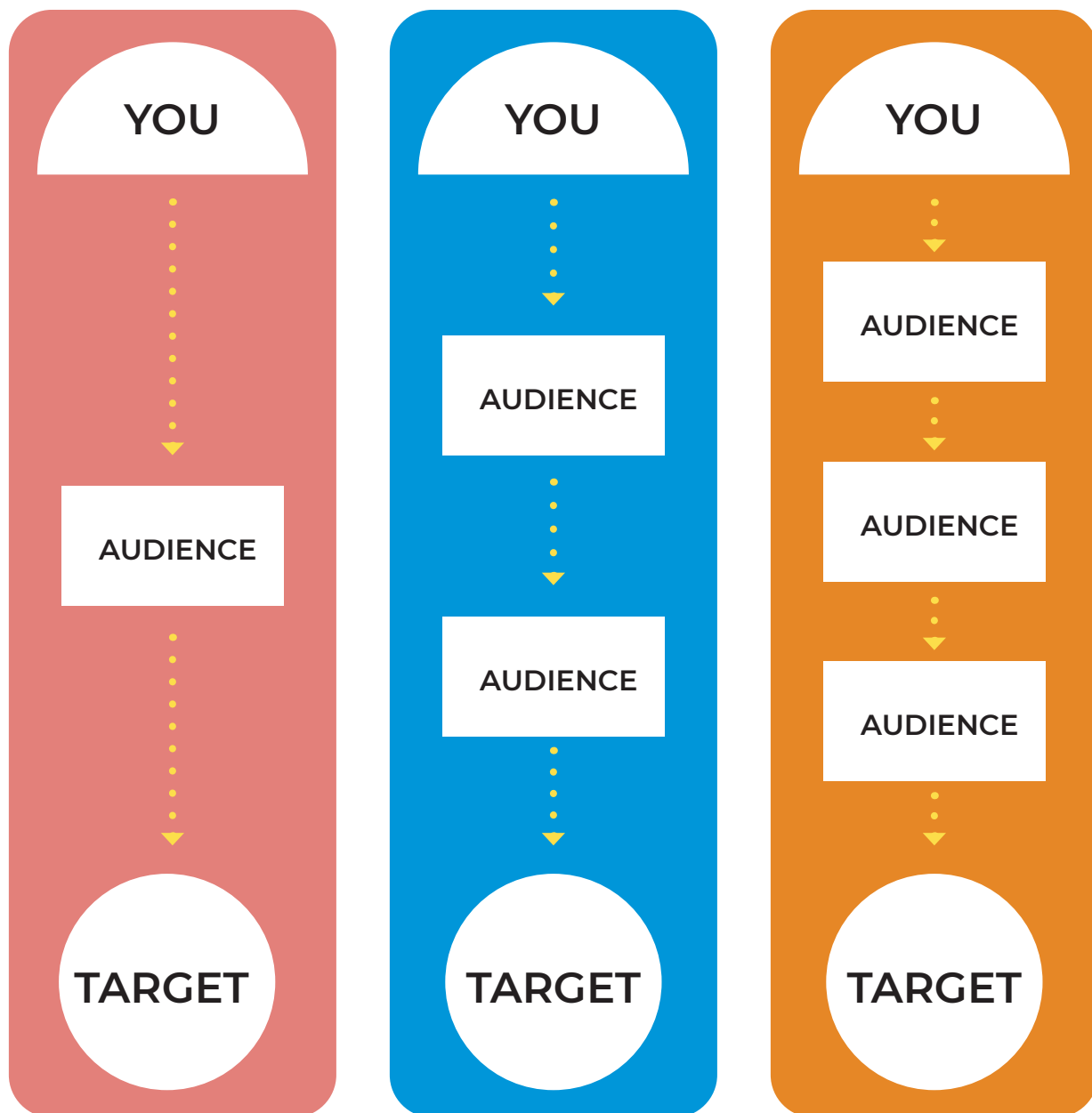
The more intermediaries between you and your target, the less control you will have over the final message, therefore **the simpler that message needs to be to ensure it is received by the decision maker with minimum distortions.**

By specifically identifying the decision maker as the target of your campaign, you will be able to understand better how that person is influenced and develop campaign messages and actions, and work through chains of influence that are more tailored at influencing that person.



## LEARNING POINT

Remember, influence is not about you asking someone to do something and they do it. **It is about shaping the way others understand and talk about an issue** and ensuring they have the same expectations in terms of government responses to it as you do. Once you see others take this issue on and own it a you will know you have achieved influence over the sector. **Do not worry about not getting the credit for having achieved that change,** your strategy sets out your intentions and allows you to claim and report back to donors and supporters.



SEE TOOLS SECTION FOR  
WORKING BOARDS



# TACTICS for your campaign



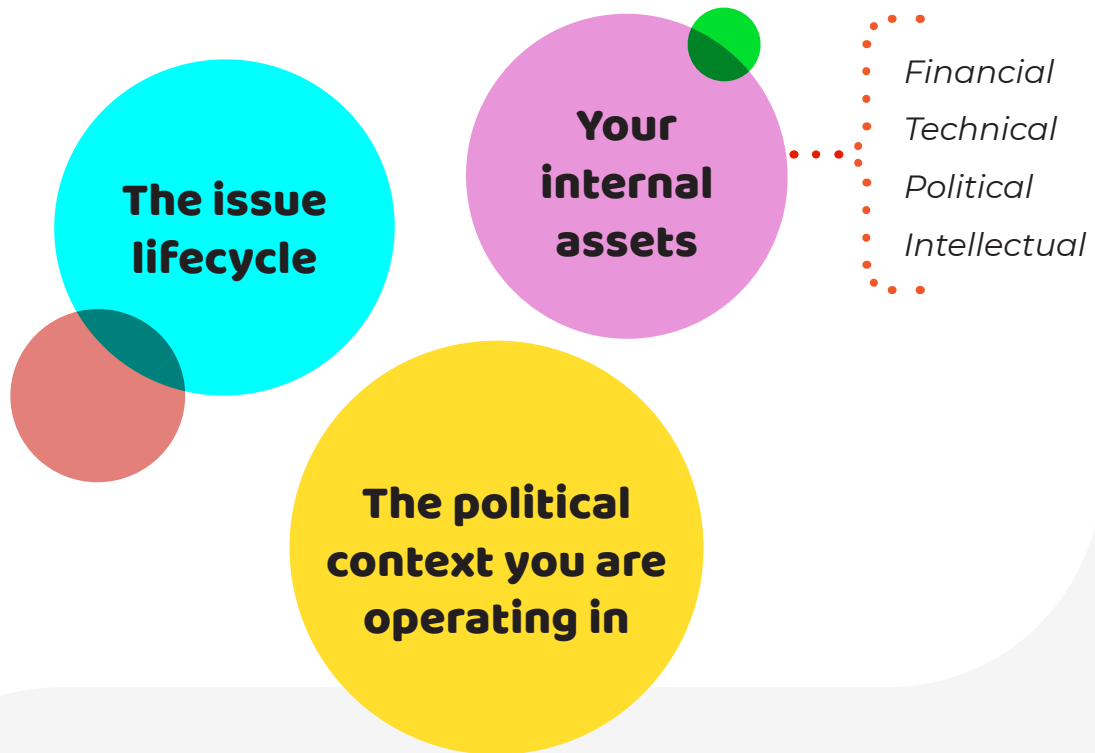
Transform  
Health

MY DATA  
OUR HEALTH



# TACTICS SET OUT **WHAT YOU WILL DO AND HOW YOU WILL DO THIS** TO INFLUENCE A SPECIFIC SET OF PEOPLE AND ACHIEVE YOUR MILESTONE.

Your tactics will be determined by three main factors:

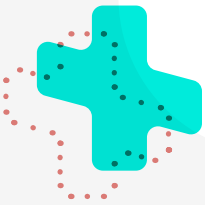


For the **My Data Our Health** campaign we have limited resources, a large network of members, the issue we are working on is clearly a new demand (number 1 in the issue cycle), and the political climate in the countries we are implementing the campaign in is stable, with most countries at the beginning or mid election cycle.

**Our challenge therefore is how to bring this issue to the attention of the public and politicians and make them realise it is important to them and wider society, and requires their attention.**

## A. ISSUES TO CONSIDER WHEN DEVELOPING YOUR TACTICS

Campaigning is about getting the **right information** to the **right people** in the **right format** and at the **right time** to influence decision makers so that they can change policies, legislation, regulation, funding priorities and institutional practices.



There are **different types of information and different ways to use information** to influence your target. What information you use and the way you use depends on the following:

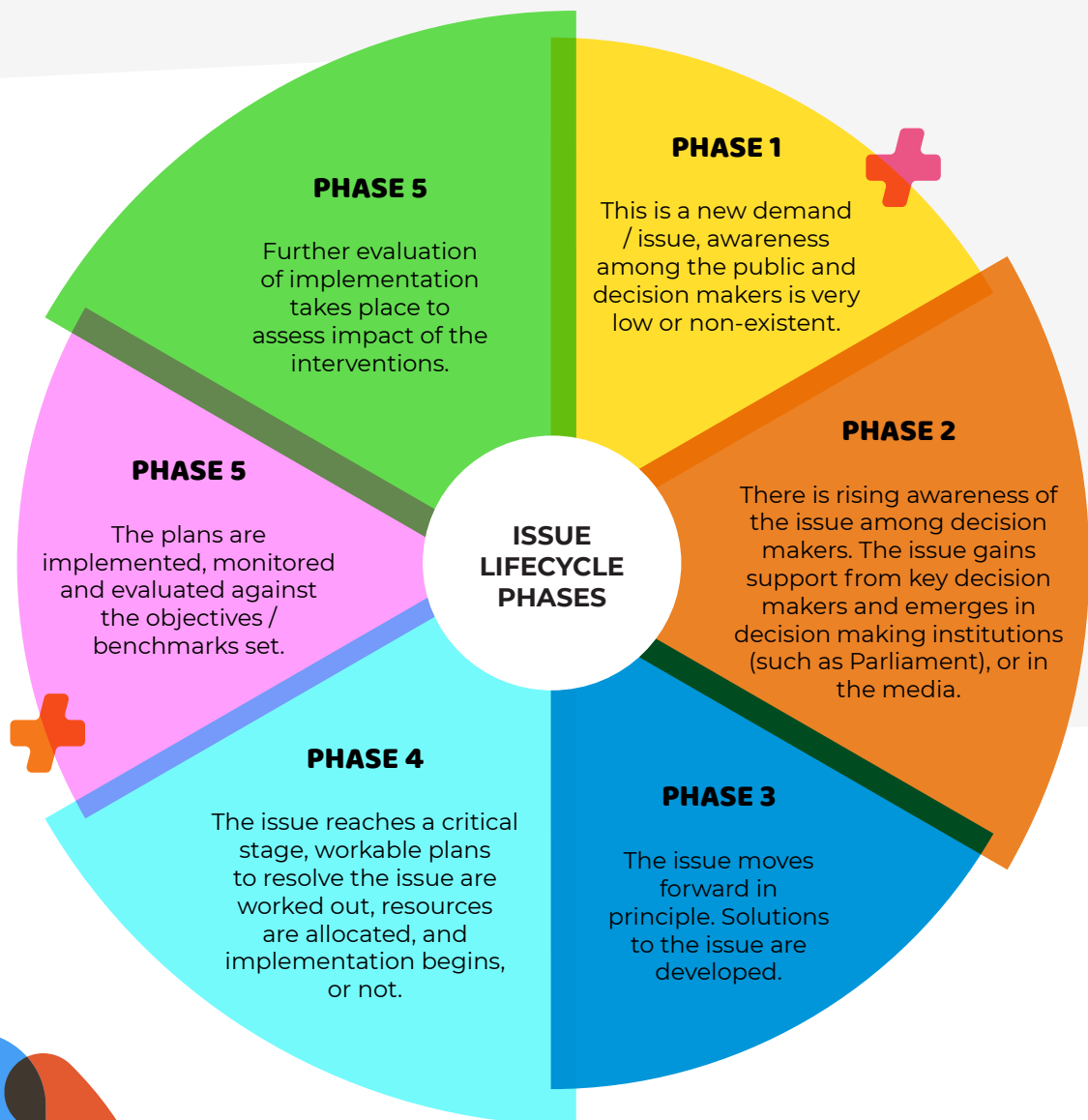
- + The type of organisation you are
- + The type of knowledge you have access to  
*(is it based on experience or expert knowledge gathered from research?)*
- + Your supporter / membership base
- + The networks and connections you have
- + How well known you are nationally
- + How well funded you are

**These are called you influencing assets.**

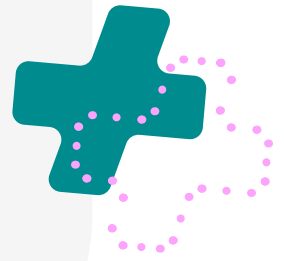
**Try to avoid speaking on issues you are not known for, or have no expertise or credibility on.**

## B. YOUR TACTICS IN RELATION TO THE ISSUE LIFECYCLE

You will need to develop your tactics in relation to the Issue Lifecycle **to ensure your outreach and communications are relevant**. The issue life cycle breaks down an issue into different phases:



## EACH OF THESE PHASES IN A CAMPAIGN WILL REQUIRE A DIFFERENT STRATEGIC AND TACTICAL RESPONSE:



### PHASE 1

The terms of the debate need changing, campaigning at **this stage involves engaging the public, donors and other influential audiences on the issue** (awareness raising) to change the way people talk and think about it (think of the environmental movement a 20 years ago). Decision makers may not be interested at this stage.

### PHASE 2

Policy proposals are consolidated and alternatives presented that inform public debates. **Alliances within civil society begin to consolidate.**

### PHASE 3

Campaigning begins, **groups start to approach decision makers directly and negotiate support (technical or otherwise)** that will allow the decision to move forward in principle.





#### PHASE 4

Campaigning **begins to address the structural constraints to implementation** (including the resource allocation) and **press decision makers on the resources and mechanisms** for effective implementation of solutions.



#### PHASE 5

Campaigning goes **back to the grassroots to monitor the impact** of the implemented solutions.

#### PHASE 6

**Progress is reviewed** and the organisation reviews its strategic direction.

A clear understanding of where in the cycle this issue sits will help you understand **what tactics or approach you will need to take in your campaign and outreach work, and what type of messaging and communications strategies and tactics to adopt.**

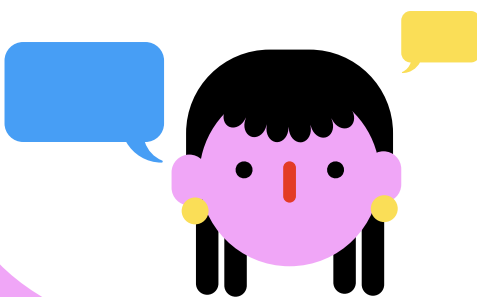
## C. UNDERSTANDING HOW DIFFERENT AUDIENCES ARE INFLUENCED

Understanding **how different audiences and stakeholders are influenced** is important in helping you develop your tactics.

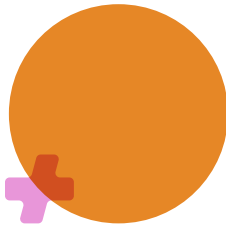


This will then define the **types of information and the communication approaches you will adopt to** influence those audiences.

People are generally not influenced by a message they hear once from one source. They are normally influenced by **information that comes to their attention in different ways and from different sources**. Sometimes they are influenced by the information itself, sometimes they are influenced by the person carrying the information, the messenger.

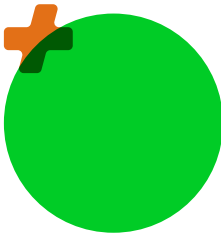


BELOW IS A LIST OF DIFFERENT SOURCES  
AND TYPES OF INFORMATION THAT ARE  
USED TO INFLUENCE PEOPLE:



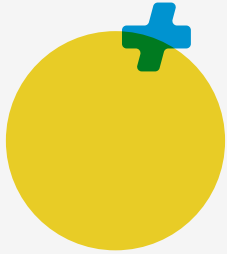
### **EXPERT KNOWLEDGE**

Comes from rigorous research on an issue and is seen as objective. Expert knowledge provides organisations with intellectual authority to speak on issues and make recommendations without seeming partisan. This type of knowledge has suffered over the last few years with the expansion of the internet and rise of the notion of “alternative facts”.



### **LEGITIMATE MESSENGER**

People can be influenced by messengers they consider legitimate representatives of the issue, either because they are impacted directly by the issue or work on behalf of people that are directly impacted. Legitimate messengers are only legitimate in relation to the specific issue, and would not be considered legitimate on issues wider than the specific one they have direct experience of.



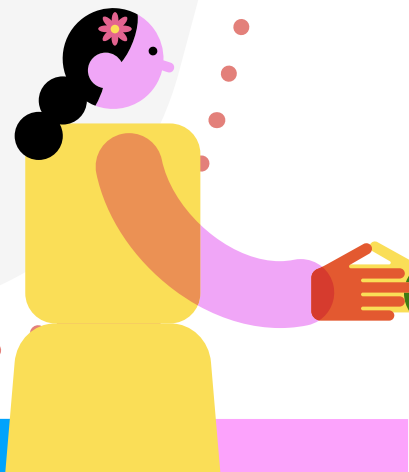
## REPRESENTATIVE

An audience tends to believe people whose views they feel are representative of a section of society. This is particularly important for organisations who represent the views of many members. There is a risk that the organisation may become discredited if the audience believes that it is not really representing the views of their members (that there has not been a true consultation on the issue).

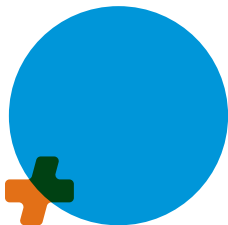


## PRAISE

People are more likely to be influenced by organisations who acknowledge their efforts and praise them when they have made progress on the issue. This appeals to both the vain side of human nature but also engages the decision maker on the issue and with the organisation. On the other hand people generally dislike criticism. Criticism by people who always criticise has little impact, but well founded criticism by an organisation that is also known to praise decision makers for addressing issues is a persuasive tactic.

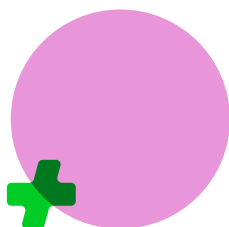






## SELF INTERESTED MOTIVES

People are more likely to listen to people from whom they want something. An organisation with a large supporter base may be a valuable ally for a politician or decision maker approaching an election for example. Equally a decision maker may want access to information on an issue to gain political advantage over opponents.



## LIKE MINDED

People are more likely to believe people they consider to be like minded. People feel like minded people share their values and are less likely to misinform or manipulate them for ulterior political ends. In taking the moral high-ground and avoiding politicising the issue a organisation can gain people's trust and present itself as representing the values of an audience.



When developing your tactics to influence a certain audience you will need to **spell out what influencing approach you are adopting for each audience and why**. This will ensure your messaging and approaches to different audiences and stakeholders **is far more impactful**.



# Putting it all into **PRACTICE**



**Transform  
Health**

**MY DATA  
OUR HEALTH**






Once you have analysed the context and the problem, developed your strategy and agreed your tactics, you can start the outreach and engagement.

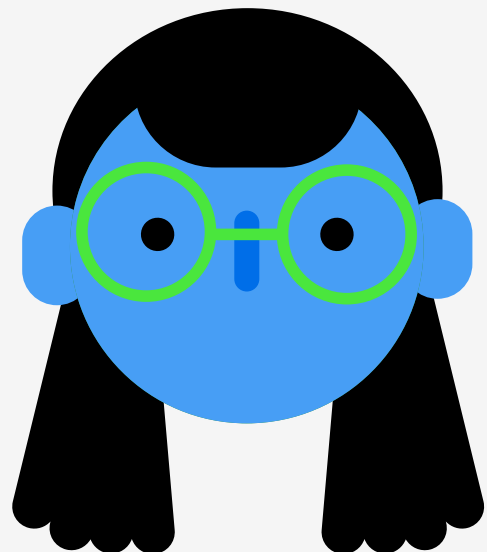


## A. PLANNING YOUR CAMPAIGN ACTIONS

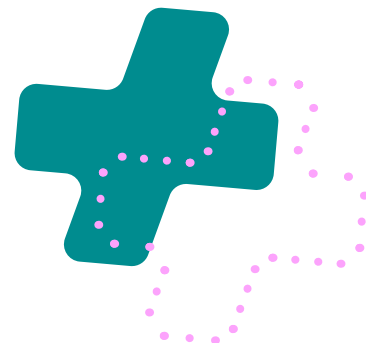
When planning your campaign actions it is very important to be clear about the ends you are pursuing. You should always be asking yourself the following questions:



-  Why are we doing this?
-  What do we want to make happen through this action?
-  Is this the best way to make this happen?
-  What is the follow up to this specific activity to ensure what we want to see happen, actually happens??
-  Do we have the resources to do the activity and the follow up?



A guiding question is “so that”, always ask this question of everything you are doing. For example:



We are sensitising 100 people so that ....

We are printing posters so that .....

And ensure that you have the time and resources for the follow up.

## YOUR CAMPAIGN ACTIVITY

We are sensitising 100 people

They can go and find their health data at their local health facility

They can go and find their health data at their local health facility

SO THAT...

SO THAT...

SO

As you see from the diagram below, **your campaign activity does not stop with the sensitisation workshop.** You need to ensure you have the time and resources, as well as the commitment from the participants at the workshop to follow through.

STARTS AND ENDS HERE

IMPLEMENTATION

We can coordinate a meeting with the local MP so that people can discuss their experiences and concerns.

The MP can raise a question in parliament

The Minister of Health feels more pressure to support a health data governance resolution at the World Health Assembly

THAT...

SO THAT...

SO THAT...

## B. CAMPAIGN ACTIONS

In many respects **implementing your campaign activities is the easiest part.**

Most campaign activities require communications or logistical skills to coordinate the production of material and / or the gathering of people. **What makes these activities campaign activities** (rather than marketing, promotion, awareness raising, behaviour change, or educational activities) **is the strategic intention behind them, the purpose of the activity.** The activity as such does not constitute campaigning. Rather it is the intent behind the activity and the action plan it is part of, **which should be aimed at influencing specific decision makers to achieve specific outcomes which is the campaign.**

For each action and activity a list of key questions need to be answered, many organisations do this through the creative brief that sets out the purpose of the product or activity you are planning:

1 **Audience** – Who is this for?

2 **Purpose** – What is it for, what do we hope to achieve with this?

3 **Format** – What is it?



4

**Delivery** – How will this be distributed or promoted and used?

5

**Key messages** – What is the core message, here we need to consider tone as well as content?

6

**Action** – What do you want the audience to do? Why should they?

7

**Response** – How can the audience get more information or get more involved?

8

**Accompanying materials** – What goes with this, what other resources accompany this?

9

**Evaluation** – How will you evaluate the impact of this material or activity?

10

**Budget/Technical Specifications/  
Numbers/Deadline**



## ASSET DEVELOPMENT TEMPLATE

SEE TOOLS SECTION FOR DETAILS

A simple table to fill in before you prepare any campaign asset. Assets could include anything from a press release, a policy brief, a blog, posters, or flyers. You can also use this template when planning events or workshops.

## C. CAMPAIGN ACTIVITIES

**People usually associate a certain set of activities with campaigning**, for example workshops, community engagement, lobbying MPs, or social media campaigns.

Below is a list of activities that are often associated with campaigning:

- |               |                                |   |
|---------------|--------------------------------|---|
| + Lobbying    | + Presentations                | + Artists, entertainers and celebrities                               |
| + Meetings    | + Email/internet               | + Press conferences, media briefings                                  |
| + Negotiation | + Project and other visits     | + Social media including blogs, tweets, Facebook posts, Instagram     |
| + Events      | + Emails / letter writing      | + Leaflets, information packs and press kits, newsletters and posters |
| + Reports     | + Drama/theatre                |   |
| + Petitions   | + Speeches/presentations       |   |
| + Videos      | + Mass media: TV, radio, press |   |

### LEARNING POINT

**These activities, in and of themselves, do not constitute campaigning.** A workshop is a workshop, a community engagement activity is a community engagement activity, a lobbying meeting is a lobbying meeting. **They can be performed by many different organisations and for many different reasons.** For example to promote a new product, to plan for the building of a new road, to convince a politician to amend a law to incentivise a particular sector of the market, to encourage behaviour change or the uptake of services, to encourage a change of habits (mask wearing or hand washing), to promote the opening of a new gym or other facility.

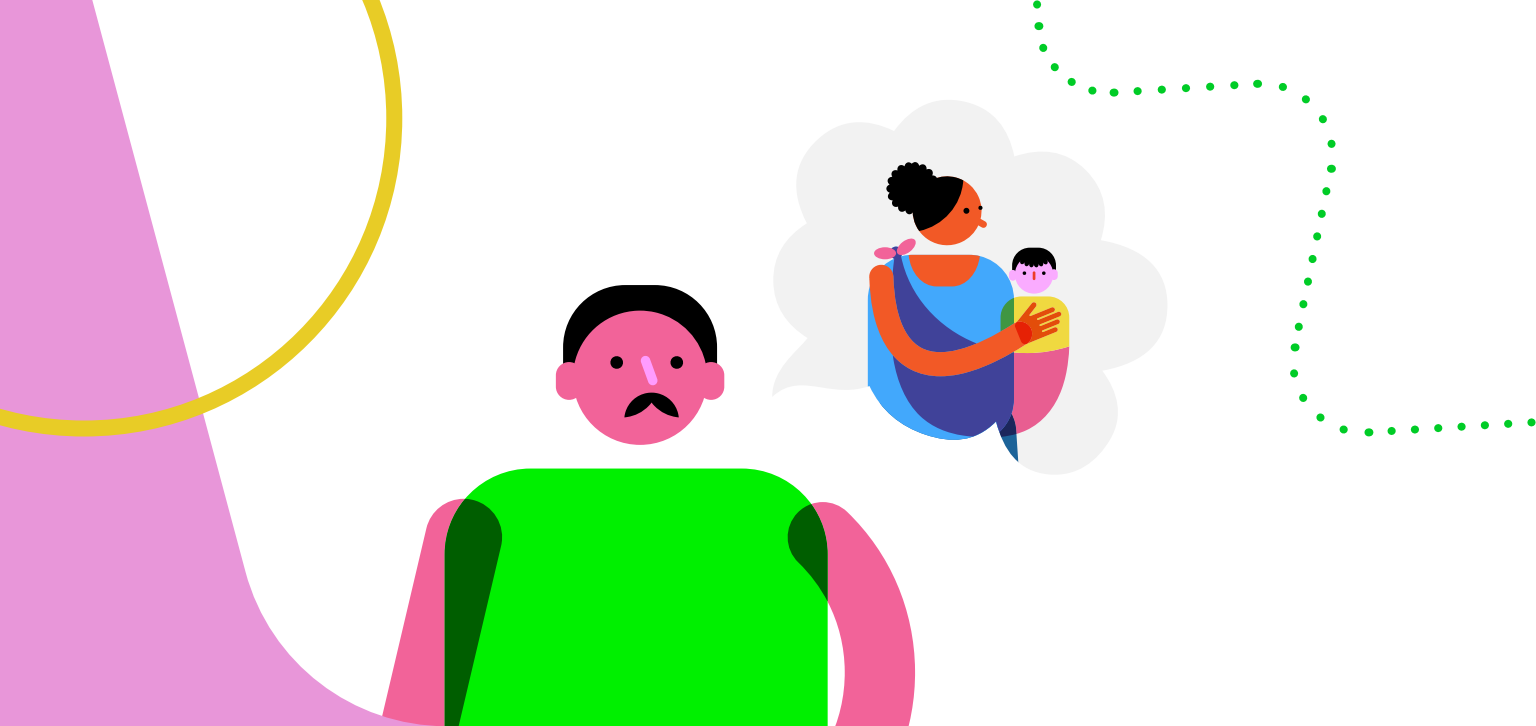


**These activities become meaningful in the context of a strategy, and when there is clear intentionality behind them.** These intentions may be commercial, programmatic, social or political. **They become campaign activities when they take place in the context of a strategy aimed at influencing** a certain set of decision makers to take actions that will lead to changes in policies and practices.

For example, we will do a workshop to raise awareness of the issue of health data governance and to encourage and participants them to meet their local MP and persuade her to call for laws on health data governance. **To stop at just the workshop will not help you achieve what you aim to achieve through the activity.** In the workshop you can raise people's awareness, you can even provide them with details of where to go to meet their local MP. However this will not guarantee success. **To achieve impact you**

**need to organise the visit to the MP, provide people with key messages.** Go with a group to the MP's office. Give the MP a leaflet and some talking points, and finally follow up with the MP as a group. The workshop will only be one in a series of the activities that will lead to the local MP being persuaded to raise the issue in parliament for example. **Only then does the workshop becomes a campaign activity.** Before that it was merely an awareness raising activity.

**Remember, an activity becomes a campaign activity when it is part of a broader influencing process aimed at changing specific policies, legislation, regulation, or funding priorities.**



## D. DEVELOPING YOUR KEY MESSAGES

When developing your key messages **you need to put yourself in the position of your target audience** and try and answer the following questions:

**What** does this audience **currently say** about this issue?

**What** does this audience **currently think** about this issue?

**Where** does this audience **access its information** on this issue?

**What** does this audience **currently hear** about this issue?

**What** does this audience **currently feel** about this issue?

**Why** should the audience **care** about the issue?

## Elements of your key messages should include:

### The problem

Make a brief statement of the problem and what the campaign wants to change. This should be empowering and inspiring to the audience. This will enable you to frame the problem and its consequences.

### The consequences of the problem

What will happen if the problem persists, if you can relate this directly to people's lives and lived experiences that is even more powerful!

### Propose a solution

Or example a common set of global standards on health data governance that governments can integrate into their national legislation

### Resonate with the target audience(s)

and leave a lasting impression, to do this think of the language you use, the words and metaphors you use.

### Identify an action your audience can take, what

What you want the target audiences to do in order to effect or support the proposed change, for example take the Where'sMyData? action.

## LEARNING POINT

Remember, for **each issue you work on, there is someone else, who is benefiting from the status quo** and pushing decision makers equally hard for things to remain the same. Good intentions and the moral high-ground alone will not necessarily lead to changes. **You need to understand who has a vested interest in the current situation and unpick their positions and arguments when you build your narrative** (never criticise the messenger, always engage with the argument and the message).

## E. WHERE'S MY DATA?

Among the key questions to address when developing a campaign is:



How to get people actively involved?

How can you make this relevant to them and their lives?

What practical action can they take to be involved in this campaign?

To get people involved in our campaign we had to **develop simple, manageable, accessible actions that people could do and that would make** the issue relevant to their lives and interests.

The MyDataOurHealth team faced the challenge of trying to find a way for people to engage on **an issue that is very technical and very removed from people's everyday reality,** health data governance. We came up with an innovative approach to engage people. We simply asked them to go to their health facility and request their electronic health data and report back on their experience.

**This simple action fulfilled multiple functions:**

1

Just asking them to take the action raises the question and gets people thinking about the issue

2

Anyone can take part in this campaign, it costs nothing and it is directly relevant to people's lives, it is their data!

3

When people went to the health centre to request their data they were able to experience the issue first hand

4

This experience sensitised them and helped them develop their own understanding and their own position on the issue

5

This experience and that of many others, gives the campaign team a lot of data that can be used to engage with MPs and the MoH

6

We can use individual stories and experiences in social and the mainstream media

7

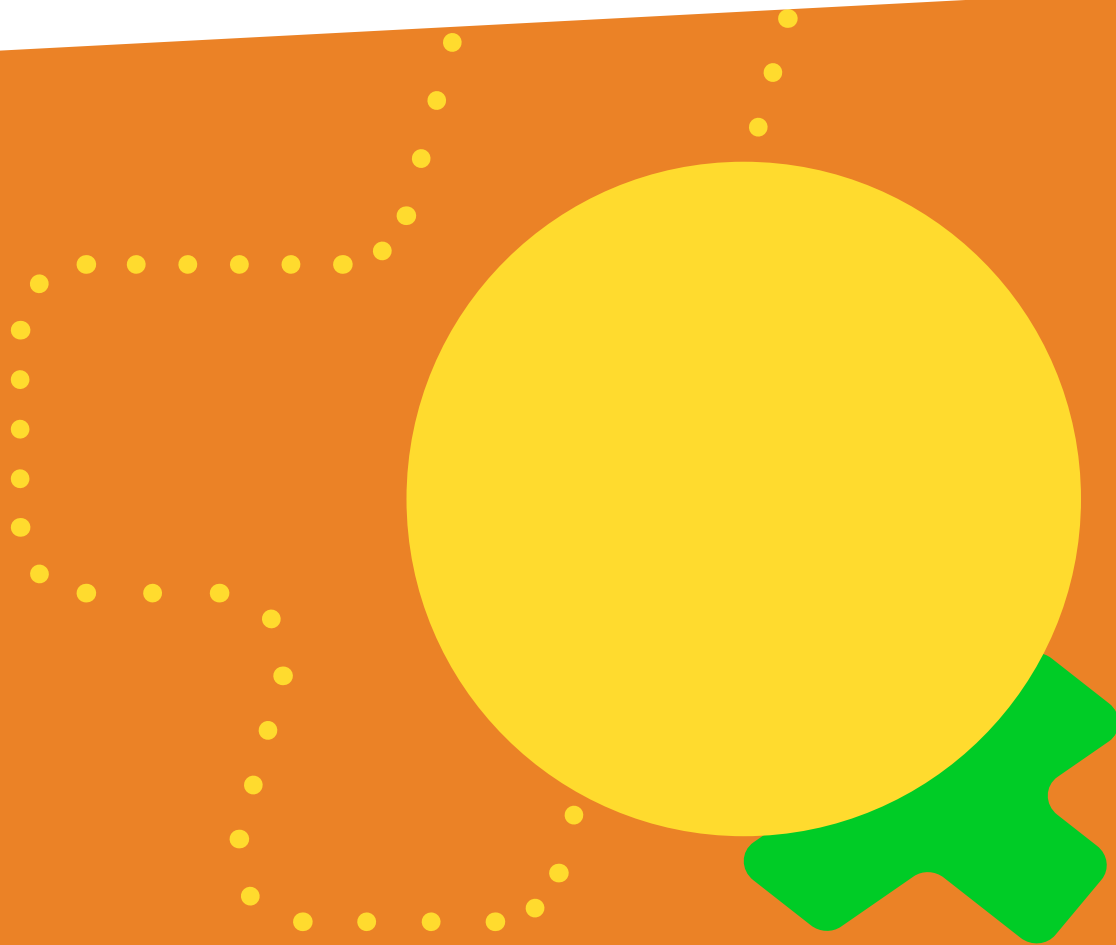
We can invite politicians and journalists to go to their local health centre and try and get their electronic health data

8

This action makes people feel and become part of the campaign



# TIPS AND TECHNIQUES



Transform  
Health

MY DATA  
OUR HEALTH

**Good planning and preparation is key to effective influencing.** When you are preparing to meet a decision maker or an audience you want to influence, **there are certain tips and good practices to follow.**

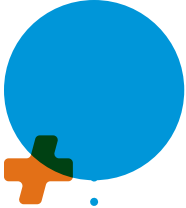
## A. RELATING TO POLITICIANS OR DECISION MAKERS





Review information about the decision maker to understand that person better

- + Is the politician / decision maker sympathetic to the issue?
- + Does the politician / decision maker need to be won over?
- + What is that person's main interests?

Identify the politician / decision maker's accomplishments and be prepared to applaud them





**Recognise and value 'gatekeeper' roles, those people who can help or hinder your access to a decision maker. This can be an assistant, who manages someone's calendar, or colleague for example**

-  Sell the gatekeeper on the importance of the politician/ decision maker meeting with you
-  Introduce yourself and record name(s) of staff





**Position yourself as a resource to staff and the politician / decision maker**

-  For example by providing timely information that will assist the politician / decision maker respond to queries and concerns
-  Position the issue in the context of the public interest



**Do not assume the politician / decision maker is knowledgeable about the issue**

-  It is almost impossible to be fully informed about all issues
-  Briefly provide information needed to understand issue and your concern



## The meeting

**It is important to give a good impression at the meeting. The following general rules should help:**

- No more than three people should attend the meeting
- Organise yourselves before the meeting, make sure you have the following: a clear idea what you want from the meeting, clear talking points, clear examples to illustrate the problem, if a number of you are visiting a decision maker, make sure you are all clear about who is going to lead on what topic, make sure you have any necessary documentation to access the building, that you are clear about the location, and the time it takes to get there, make sure you arrive on time.
- Clarify how much time you have at the start of the meeting
- Take notes

## Materials

- Use prepared briefing notes
- Have copies available for staff who may attend

## Post Meeting

- Debrief immediately afterwards
- Identify and assign tasks arising from meeting to team members
- Prepare a short report or notes of meeting. Make sure you include the action points agreed.
- Send it to the participants and thank them for the meeting



## B. THE ART OF NEGOTIATION

### *internal and external*

Influence and persuasion always involves listening, understanding, with a view to then persuading. Below are four principles of negotiation that will help you in your meeting with decision makers, and also with potential partners:

I

**SEPARATE THE  
PERSON FROM  
THE ISSUE**

II


**UNDERSTAND THE  
INTEREST OF YOUR  
INTERLOCUTOR**

III

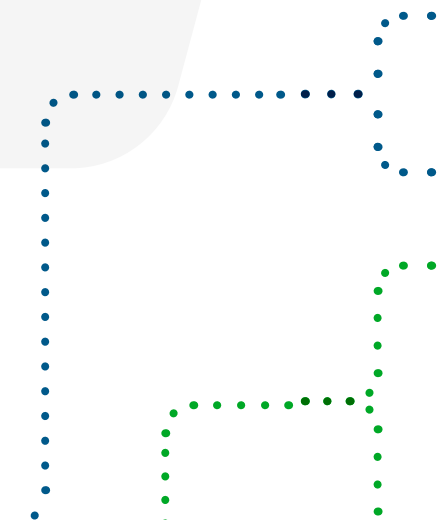
**DON'T JUMP FROM  
PROBLEM TO  
SOLUTION**

IV

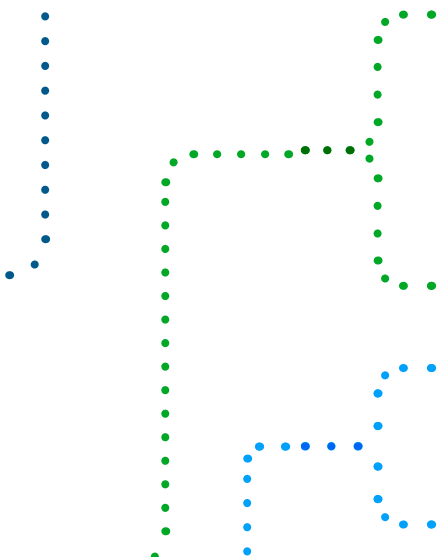
**BEFORE CHOOSING A  
SOLUTION, PRESENT  
DIFFERENT OPTIONS**



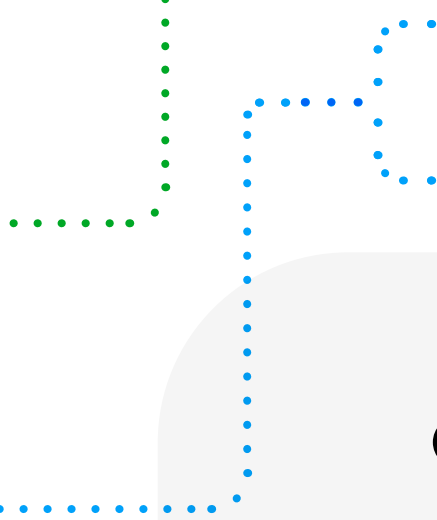
Be firm, negotiate hard, but don't be hard on the person. In a negotiation process the person in front of you is your partner, the person who will help you get the negotiated outcome you want.



Your negotiations should be interest oriented not position oriented. Don't defend a position, focus on the outcome you want.



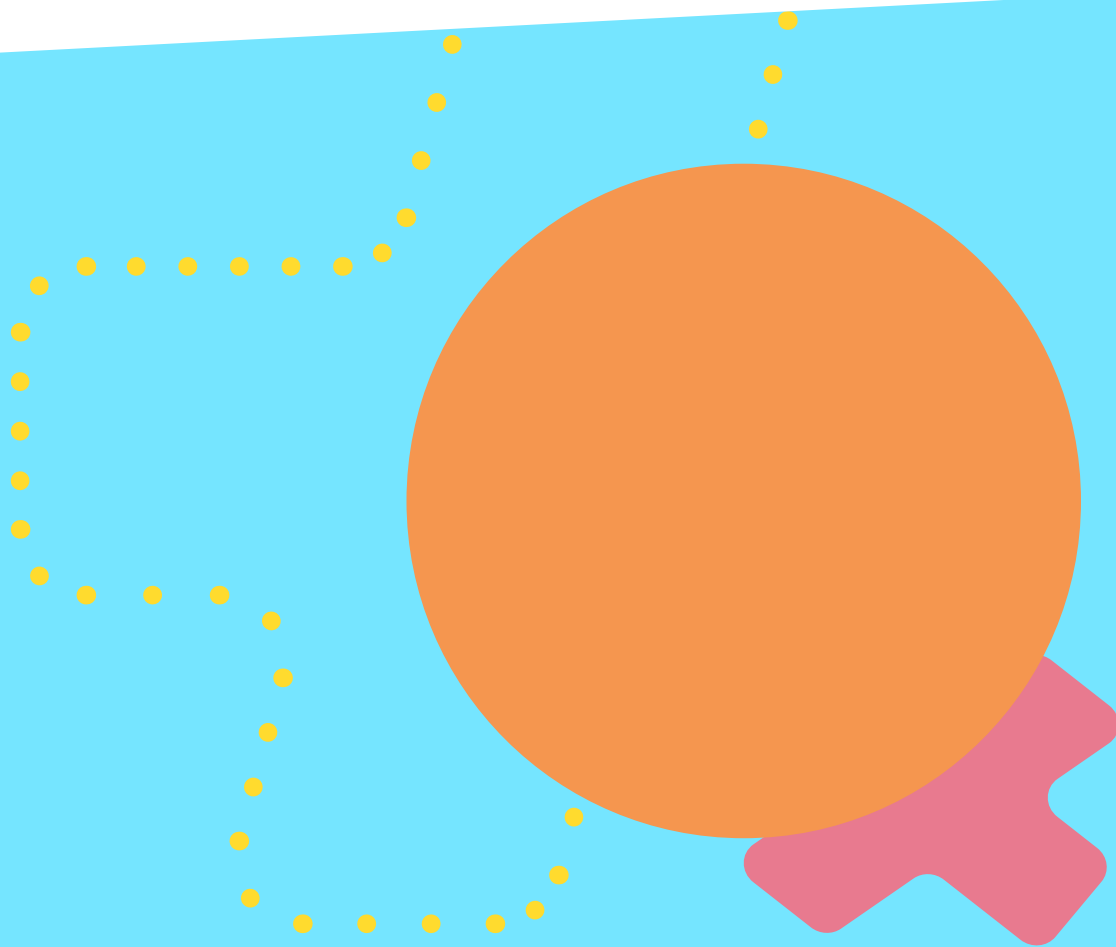
Set out the criteria a solution needs to fulfil to be acceptable. Identify the criteria for a solution for each party then let the criteria narrow down the options and define the solution



Then take the the different solutions proposed and evaluate them in relation to the criteria you agreed on.



# **MONITORING AND EVALUATION**



**Transform  
Health**

**MY DATA  
OUR HEALTH**

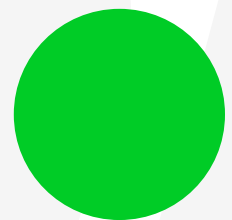
**All aspects of a campaign need to be tracked** to assess whether you are progressing as planned, and evaluated to draw out learnings for future campaigns. **For that we rely on monitoring and evaluation.**



Monitoring is a continuous process of **gathering evidence on specific activities to track the progress you are making towards achieving your outcomes.**


Monitoring involves the regular capture of information about your beneficiary's responses to activities, the follow up they conducted as a result of your activities, the responses from decision makers following your activities or those of your partners.

**Evaluation is a periodic process of reviewing monitoring data and drawing conclusions** from it in order to review the overall campaign at certain periods (every year for example). This can be done at specific points in your campaign, for example half way through, to see if you are on the right track, or at the end to see whether you achieved your objectives, identify unintended consequences, to learn for future campaigns, and often to report back to donors.



## THE MONITORING PROCESS LOOKS LIKE THIS:

Monitoring focuses on activities and outputs, evaluation will look at the whole cycle.



How successful were  
your outputs in achieving  
your outcomes?

**OUTPUTS**

How successful were  
your activities in  
achieving your outputs?



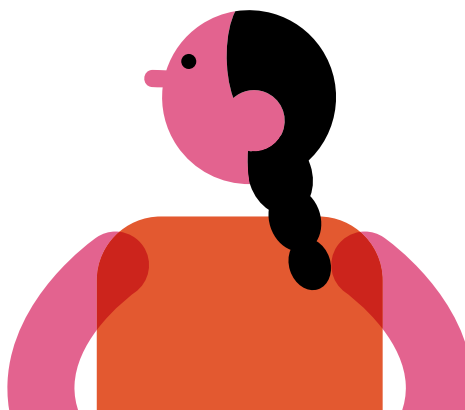
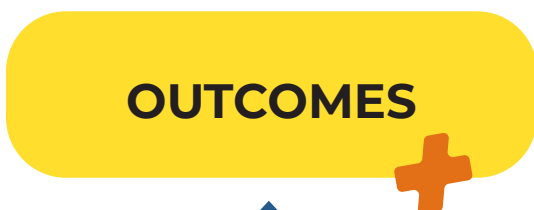
**ACTIVITIES**



How successful was this impact in helping you achieve your goal?



How successful were your outcomes in achieving your impact?



## COMMON MISCONCEPTION

There is a tendency among many civil society organisations to confuse a successful activity (output) with campaign success. A successful campaign depends on changes in policies and practices that will change the lives of beneficiaries, NOT on the successful launch of a report, a successful event with decision makers, or a successful workshop where a Minister attended. These activities in and of themselves may contribute to the success of the campaign, which needs to be measured in terms of the outcomes.

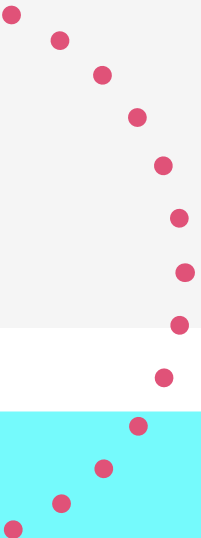
## A. THE CHALLENGE OF MONITORING AND EVALUATION

Evaluating campaigns is difficult because of the question of attribution, **how do we know our actions lead to the changes.**

We can only make educated guesses based on the timing of decisions in relation to our activities, and the nature of the changes (are these in line with what we have been calling for). **There are additional problems associated with monitoring and evaluation.** It is time consuming and costly, and the findings are seldom used. This is because it is sometimes seen as something that is detached from the campaign, and done at the end of a project to satisfy a donor requirement, rather than as **a means of ensuring the campaign is on track and influencing events on the ground.**





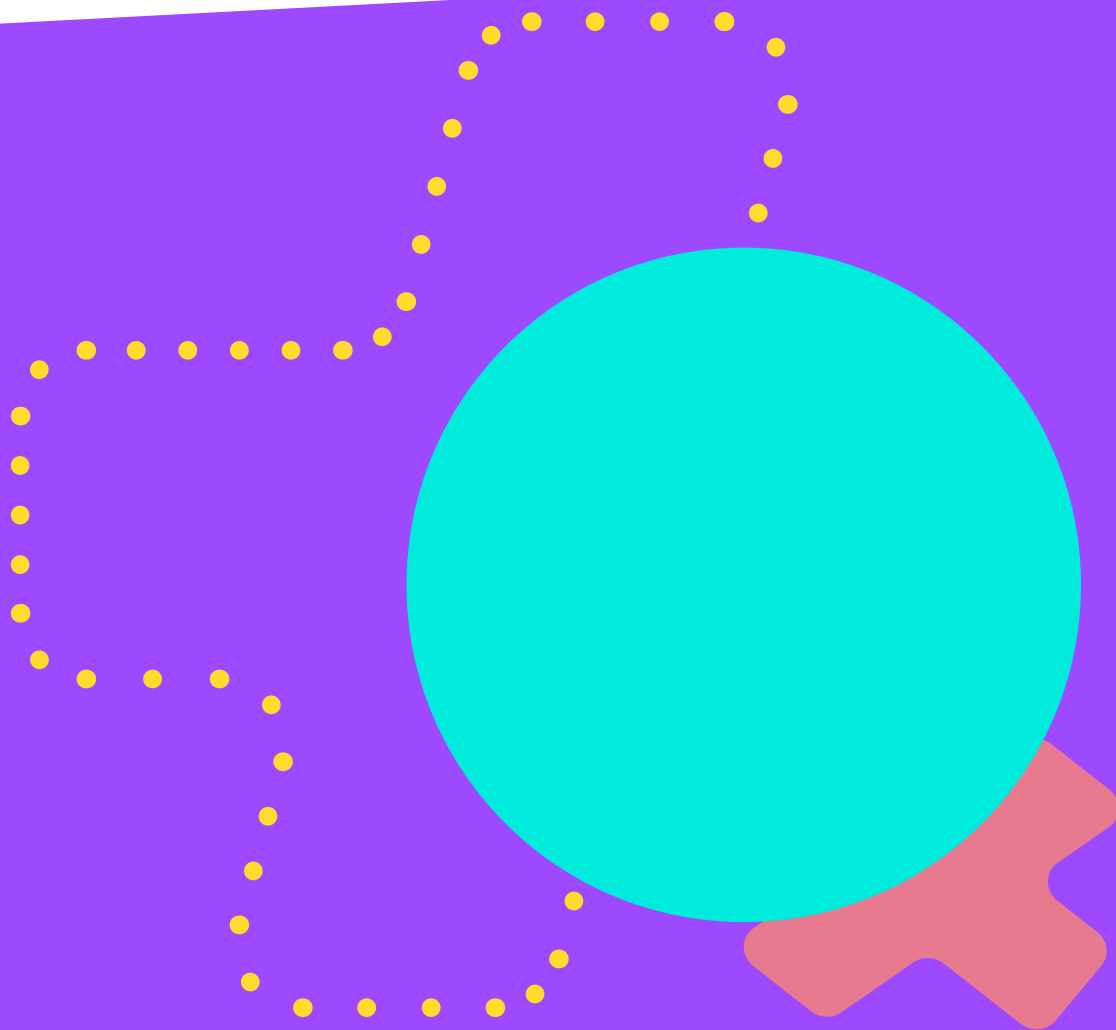


To effectively monitor and evaluate a campaign you need to measure success in relation to **SMART** objectives. These will provide a benchmark against which you will be able to monitor and evaluate the campaign.

**Another rule is to keep records of the responses of key audiences and targets, these include records of conversations.**

These records constitute the raw material for the campaign evaluation and will allow you to track progress and identify changes in positioning by both the audiences you are reaching out to and the target.

# Summary of process and **TOOLS TO SUPPORT**



**Transform  
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