An advocacy toolkit for Caribbean civil society organisations
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An advocacy toolkit for Caribbean civil society organisations

Caribbean Natural Resources Institute

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And the CSOs For Good Governance: Enhancing Civil Society’s contribution to governance and development processes in Trinidad and Tobago (CSOs4GoodGov) project (CSO-LA/2016/382-815):

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The *CSOs For Good Governance: Enhancing Civil Society’s contribution to governance and development processes in Trinidad and Tobago* (CSOs4GoodGov) project (CSO-LA/2016/382-815).

These projects sought to strengthen capacity of civil society organisations to carry out effective advocacy for enhancing participatory environmental decision-making and governance, including climate change adaptation and mitigation, coastal and marine resources management and governance, as well as advocacy on the Sustainable Development Goals.

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<th>Full Form</th>
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<tr>
<td>AG</td>
<td>Attorney General</td>
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<tr>
<td>AP3B</td>
<td>Three Bays Protected Area</td>
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<tr>
<td>CADV</td>
<td>Coalition Against Domestic Violence</td>
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<td>CANARI</td>
<td>Caribbean Natural Resources Institute</td>
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<tr>
<td>C-CAM</td>
<td>Caribbean Coastal Area Management Foundation</td>
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<tr>
<td>CKFTO</td>
<td>Caribbean Kids and Families Therapy Organization</td>
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<tr>
<td>CNFO</td>
<td>Caribbean Network of Fisherfolk Organisations</td>
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<tr>
<td>CQI</td>
<td>Continuous Quality Improvement</td>
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<tr>
<td>CSO</td>
<td>Civil society organisation</td>
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<td>EAG</td>
<td>Environmental Awareness Group</td>
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<td>EU</td>
<td>European Union</td>
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<tr>
<td>FATF</td>
<td>Financial Action Task Force</td>
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<tr>
<td>FFI</td>
<td>Fauna &amp; Flora International</td>
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<tr>
<td>FoProBiM</td>
<td>Fondation pour la Protection de la Biodiversité Marine</td>
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<tr>
<td>GBV</td>
<td>Gender-based violence</td>
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<td>GFCSL</td>
<td>Gouyave Fisherman Cooperative Society Limited</td>
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<tr>
<td>GoMPA</td>
<td>Gouyave Marine Protected Area</td>
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<tr>
<td>M&amp;E</td>
<td>Monitoring and evaluation</td>
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<tr>
<td>MPA</td>
<td>Marine protected area</td>
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<tr>
<td>NCPD</td>
<td>National Centre for Persons with Disabilities</td>
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<tr>
<td>NGO</td>
<td>Non-governmental organisation</td>
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<td>PAM</td>
<td>Patient Advocate Mission</td>
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<tr>
<td>PISCES</td>
<td>Powering Innovations in Civil Society and Enterprises for Sustainability in the Caribbean (project)</td>
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<td>PLHIV</td>
<td>People Living with HIV</td>
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<td>PSI-C</td>
<td>Population Services International-Caribbean</td>
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<tr>
<td>SDG</td>
<td>Sustainable Development Goal</td>
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<tr>
<td>SIDS</td>
<td>Small Island Developing States</td>
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<tr>
<td>SLNT</td>
<td>Saint Lucia National Trust</td>
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<tr>
<td>SMART</td>
<td>Specific Measurable Attainable Relevant Time-bound</td>
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<tr>
<td>SME</td>
<td>Small and micro-enterprise</td>
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<td>SusGren</td>
<td>Sustainable Grenadines Inc.</td>
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<td>VA</td>
<td>Veni Apwann</td>
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<tr>
<td>UNFCCC</td>
<td>United Nations Framework Convention on Climate Change</td>
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<td>UWTT</td>
<td>United Way Trinidad and Tobago</td>
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This toolkit is an output of two projects implemented between 2017 and 2020 by the Caribbean Natural Resources Institute (CANARI) and supported by the European Union:

The *Powering Innovations in Civil Society and Enterprises for Sustainability in the Caribbean (PISCES)* project implemented in partnership with the Caribbean Coastal Area Management Foundation (C-CAM), the Caribbean Network of Fisherfolk Organisations (CNFO), the Environmental Awareness Group (EAG), the Fondation pour la Protection de la Biodiversité Marine (FoProBiM), Sustainable Grenadines Inc. (SusGren) and the Saint Lucia National Trust (SLNT) across 10 countries: Antigua and Barbuda, The Bahamas, Dominica, Grenada, Haiti, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, and Trinidad and Tobago. This project supported civil society and small and micro-enterprises (SMEs) in several ways, including: building resilience of natural resources upon which the fisheries, tourism and other economic sectors depend; strengthening the small-scale fisheries sector; supporting sustainable and community tourism; and strengthening community SMEs and enhancing marine and coastal governance in the Caribbean. To ensure that the importance of the issues addressed by the project continue to progress, gain momentum among its principal beneficiaries and get the support needed to do so by local and state governments, the project placed an emphasis on developing the advocacy skills of project stakeholders.

The *CSOs For Good Governance: Enhancing Civil Society’s contribution to governance and development processes in Trinidad and Tobago (CSOs4GoodGov)* project was implemented in partnership with six other leading Trinidad and Tobago civil society organisations (CSOs). The project’s aim was to drive transformation to a more environmentally sustainable, socially just, inclusive, accountable and resilient model of development and governance through supporting the effective involvement of CSOs in the implementation of the 2030 Sustainable Development Agenda in Trinidad and Tobago and the Sustainable Development Goals (SDGs). Three of the project’s components were dedicated to shoring up effective advocacy where local progress on the Goals is concerned; one component specifically speaks to building civil society capacity to advocate on issues impacting people’s lives and livelihoods, including CSO longevity.

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1 Environment Tobago, Network of NGOs for the Advancement of Women, United Way Trinidad and Tobago, University of the West Indies Institute for Gender and Development Studies, Veni Apwann, Women’s Institute for Alternative Development.
The mid-2010s to 2020 ushered in a wave of effective advocacy efforts, affording Caribbean CSOs opportunities—that did not previously exist—to participate in negotiations and sway and influence public and social policies in their respective countries. This toolkit was created to encourage Caribbean CSOs to continue to engage in advocacy at every level and to do it the right way—strategically!

The purpose of this toolkit is to provide practical, comprehensive guidance to Caribbean CSOs on how to design and conduct effective advocacy especially on key environmental and other sustainable development issues at the local, national, regional or international level.

Mini case studies capturing key examples of advocacy and on-the-ground actions undertaken by national and regional CSOs in the Caribbean form an integral part of the toolkit. These case studies provide inspiration and guidance to CSOs and reflect lessons learnt and results to build awareness and capacity.

How is this toolkit structured?

The toolkit is divided into four sections:

Section 1 explains the meaning of advocacy and commonly used terms in a Caribbean CSO context. This section also outlines key principles of advocacy demonstrated through mini case studies of advocacy initiatives designed and implemented by CSOs in the Caribbean.

Section 2 provides a practical, step-by-step guide, complete with exercises, tools and tips for developing an effective advocacy strategy. This section also includes mini case studies of advocacy initiatives implemented by CSOs in the Caribbean.

Section 3 explains the importance of developing an advocacy action plan and provides a practical guide, also complete with tools and tips for implementing effective advocacy action.

Section 4 is a short recap of the key points put forth throughout the toolkit.

Who should use the toolkit?

This toolkit was designed for use by Caribbean CSOs of all sizes, makeup and with all manner of mandates; supporters and mentors of Caribbean CSOs; and anyone who considers themselves an advocate in the region. Whether one is a novice to advocacy or has been doing advocacy work for “donkey years” (that is many, many years), this resource can help inform their approach.
When should this toolkit be used?

The best time to use this toolkit is at the very beginning of planning an advocacy campaign. However, if an advocacy campaign is already underway and is not yielding the desired results or outcomes, consider using this resource to help rethink existing advocacy efforts and make a pivot toward a more effective campaign.

CANARI regards this toolkit as a living document that will be refined, adapted and expanded based on its own and others’ experiences. We welcome comments, suggestions and feedback to ensure that the toolkit meets the needs of civil society organisations in the Caribbean. Please send these to info@canari.org.
Section 1

Advocacy in and on our terms

1.1. Defining advocacy, Caribbean style
1.2. The parlance of our advocacy
1.3. Principles of effective advocacy
1.1. Defining advocacy, Caribbean style

It should be no surprise, given the nature of the work we do as members of civil society and how differently we all express our passions for our work, that the term ‘advocacy’ can mean different things to different people. For the sake of this toolkit, we are defining the term in a Caribbean CSO context. We take a look at definitions provided by trusted CSOs throughout the region as a basis for establishing a comprehensive, regional meaning for the term.

What are some ways ‘advocacy’ has been defined from CANARI’s experience?

- Advocacy is a means of providing a voice for stakeholders to better communicate their problems and seek support from key partners to address them.
- Advocacy is about promoting behavioural change, which may or may not involve changing mindsets to influence policy and practice at any level.
- Advocacy is making a case for positive change which can involve both talking and doing; it is usually enhanced by collaboration and most often focused in the public sphere.
- Advocacy can have a discrete timeline or be a way of life.

So, which is it, you ask? Honestly, it’s a mash-up of them all.

In the Caribbean, generally and for the purpose of this resource, advocacy means personifying and championing the ideas about an issue we hold dear while encouraging others to adopt our point of view (or at least see the benefit of our viewpoint). Therefore, Caribbean advocacy also encompasses changing mindsets to influence policy and practice at any level. This requires human and financial resources, technical expertise and platforms or media to communicate ideas and messages. Effective advocacy is measured through behaviour change among individual citizens, changes in the laws of the land and/or increased awareness and acceptance of said ideas by society as a whole.

1.2. The parlance of our advocacy

As Caribbean people, we have a knack for language—our colourful and descriptive expressions combined with the sweet lilts of our accents are a big part of our regional charm and appeal to others. Similar to our individual island states with our unique patois and Kreyol, advocacy has a language of its own. In order to effectively communicate our advocacy efforts to funders and stakeholders alike, we need to be fluent in the parlance of advocacy. The following list will help you become fluent in advocacy terms in no time.
1.3. Principles of effective advocacy

Getting the language down is just one part of successful advocacy outreach. The other part is aligning your messaging with the overarching principles of effective advocacy to ensure lasting impact of your efforts.

What are the overarching principles of effective advocacy? Your advocacy efforts should be:

- Fact or evidence-based
- Intersectoral/integrated
- Collaborative/in partnership with others

In this section, we explore each of these principles in more depth and see what applying them looks like in practice.
Principle #1. Fact or evidence-based: As a Caribbean CSO with the power to sway, influence, engage and enrol people to believe what you believe with respect to an issue that you’re passionate about, the ideas you’re championing must be rooted in cold, hard FACTS/EVIDENCE. It is important to engage in advocacy based on actual needs and issues being faced as opposed to a perceived need or issue. Therefore, it is critical to validate your positions and messaging within the beneficiary communities you serve. Whenever possible, your messaging should cite supporting facts and statistics to lend credibility to the points being made and calls-to-action being promoted.

Box 1: Mini Case Study - Together we aspire, together we achieve: ‘Trinbagonian’ CSOs receive a reprieve

Country: Trinidad and Tobago
Organisation: Veni Apwann (VA)
Relevant SDGs: #8 Decent work and economic growth; #16 Peace, justice and strong institutions

About the CSO: VA is a non-profit company registered in 2003. Its mission is to build capacity of Caribbean CSOs by providing training, technical support and guidance to empower them to become visionary leaders in their communities.

The challenge: Certain provisions under a Government-subsidised work experience programme excluded the greater Trinidad and Tobago CSO sector from being able to access additional support staff. The Trinidad and Tobago Government launched an On-the-Job-Training (OJT) Programme which allowed organisations across public, private and civil society sectors access to a pool of qualified trainees with their salary being 50% subsidised by the government. However, unlike the public and private sectors, the CSO sector by and large could not afford to adequately cover the required 50% unsubsidised amount of the salaries. They needed more help.

The solution: VA set out to mobilise civil society and advocate for 100% subsidy by the Government, based on the sector’s invaluable contributions to the larger society. They gathered evidence/data of civil society’s contributions through a March 2015 call to local CSOs. Using the data gathered, VA prepared collectively endorsed documentation that was subsequently submitted to the National Training Agency (NTA). With support of the NTA through an informal partnership formed with the CSO sector, this was successfully presented to Cabinet by the Minister of Science, Technology and Tertiary Education.

Advocacy wins/gains:
• In August 2015, Cabinet approved the recruitment of OJT trainees at 100% subsidy to counter staffing challenges at CSOs.
• CSOs were allowed up to 10 Trainees per organisation for a maximum of two years.
**Top tip**

**Conduct comprehensive desk and on-the-ground research about the issue/cause you’re championing even if you work in or are familiar with the field.** Where necessary make the extra effort to conduct basic interviews and surveys with beneficiary communities to assess needs in line with advocacy objectives.

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**What measures do you take to stay in-the-know about what is happening in your beneficiary communities and with respect to your areas of focus?**

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**Principle #2. Intersectoral/integrated:** It is rare that issues or struggles faced by vulnerable communities exist in a bubble. Oftentimes, they feed into each other and compound issues for those affected. So, it is very important to ensure that your advocacy efforts seek to address the core issue, as well as consider linkages with related problems. This can be done by engaging and enrolling others who have insights into the external factors that heighten the negative impacts of the core problem or issue you seek to remedy.

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**Box 2: Mini Case Study - Against all odds: FoProBiM’s aim to preserve Haiti’s marine protected areas (MPAs)**

Country: Haiti  
Organisation: Fondation pour la Protection de la Biodiversité Marine (FoProBiM)  
Relevant SDGs: #8 Decent work and economic growth; #14 Life below water

**About the CSO/Collective:** FoProBiM is an apolitical, non-governmental, non-profit organisation based in Haiti, officially recognised by the Haitian government in 1995 as a foundation working on environmental issues in the areas of sustainable development, education, research, monitoring, and environmental advocacy. It is the only Haitian operated, and Haiti-based NGO dedicated to the protection and management of Haiti’s coastal and marine ecosystems and adjacent watersheds.

**The challenge:** FoProBiM was the only local NGO in Haiti charged with, and responsible for co-managing and protecting the Three Bays Protected Area (AP3B) - an extensive area (covering over 75,000 hectares) plagued with numerous environmental and socioeconomic issues that threatened to severely tax the organisation’s resources and end their efforts to protect and manage the site before they even got started. There was no government enforcement of environmental laws or protections, and little to no government support with respect to managing the site, other than granting protected area status and government-approved access to the area. Many people in the surrounding communities of AP3B
were solely dependent on the protected area for their livelihoods, mostly via unsustainable practices such as overfishing. With much to do in the way of managing and protecting the AP3B as well as ensuring it was not further degraded, FoProBiM had to get creative.

The solution: Partner and truly collaborate with local, smaller CSOs, build their capacity to manage projects in the protected area and recruit local community members to work in alternative, sustainable ways at the MPA site. FoProBiM honoured the knowledge and lived experience of local CSO leaders and community members and was able to leverage the trust built to develop long and short-term plans to maintain the MPA and to employ local teams to do it. Working with them to develop solutions made the local CSO actors more likely to participate and comply with the agreed upon plans thereafter. Creating open lines of communication between FoProBiM and local CSOs also lent itself to greater opportunity for future community education and awareness campaigns.

Advocacy wins/gains:

- Several projects focused on conservation, restoration, environmental education and alternative sources of income that contribute to the protection of the area while employing local community members such as development of mangrove nurseries, honey production and sustainable cooperatives.
- A growing number of partnerships with local CSOs to manage the MPA; just over 20 to date.
- Creation of jobs for community members from the AP3B area; consistent care and management of the MPA sites from locally sourced labour.
- Plans for sustained advocacy evidenced by FoProBiM joining environmental advocacy and awareness campaigns like “Haiti Takes Root” to help local CSOs educate the public and the government about the needs of Haitian communities in the context of climate change.

![Figure 1: Honey production; via mangrove-based apiculture, is one of the sustainable forms of livelihood which FoProBiM has worked with local communities to develop within the 3Bays Marine Protected Area (MPA) of Haiti. Photo: FoProBiM](image)
Principle #3. Collaborative/in partnership with others: No Caribbean CSO or representative is an island! There is power in numbers. More people committed to taking action on an issue or championing a particular cause means greater reach and access to more networks to get your messages out. It is, therefore, key to look for like-minded individuals and organisations to collaborate or partner with to create and launch a successful advocacy campaign.

Box 3: Mini Case Study - Opening minds and hearts through partnering to advocate for disabled people

Country: Trinidad and Tobago
Organisations: Caribbean Kids and Families Therapy Organisation (CKFTO) and National Centre for Persons with Disabilities (NCPD)
SDGs: #3 Good health and well-being; #4 Quality education; #8 Decent work and economic growth; #10 Reduced inequalities; #11 Sustainable cities and communities; #17 Partnerships for the goals

About the CSOs: CKFTO is a registered non-profit formed in 2008 in Trinidad and Tobago with a mission to provide therapy and support services to all children in need. The NCPD is a private non-profit organisation that provides disabled individuals with the best opportunities for vocational growth and success.

The challenge: There was a pervasive attitude that children and adults with disabilities and/or special needs are not contributing members of society in Trinidad and Tobago. This challenge manifested itself in both blatant and subtle exclusion from activities meant for the general public. People were not educated on the potential of disabled citizens and simple adjustments that could be made to allow them to contribute meaningfully.
The solution: In 2013, CKFTO and NCPD joined forces with support from REPSOL Trinidad and Tobago to launch “Open Your Mind, Discover the Ability in Disability”, a national disability awareness and education campaign with the aim of:

- changing misconceptions on the issue of disability;
- promoting persons with disabilities as productive contributors to national development;
- encouraging public and private sectors to provide employment opportunities for qualified persons with disabilities; and
- educating, sensitising and informing the public about persons with disabilities.

Advocacy wins/gains:

The campaign:

- contributed to the ratification of the United Nations Convention on the Rights of Persons with Disabilities by the Government of Trinidad and Tobago in 2015
- gained support amongst high level government officials including then president, His Excellency Anthony Carmona, and was later endorsed by the United Nations Development Programme Trinidad & Tobago
- increased awareness levels of public and private sector employees about employment needs and opportunities for persons with disabilities

Top tip

Before launching an advocacy campaign or effort, connect to those already working on the issue, look for opportunities to support their work and to partner! There is strength in numbers; working together provides greater networks of influence as well as greater resources for outreach.
Marrying the three principles we just covered with:

- effective communication that is easy-to-understand and relate to;
- strong negotiation skills;
- a clear understanding of the people we are trying to persuade;
- the ability to be flexible and pivot when need be; and,
- the ability to manage conflict or resistance without being deterred

can provide winning results for any burgeoning advocacy campaign. See Step 3 “Crafting effective advocacy messages” in Section 2 for more on developing effective communication.

Box 4: Mini Case Study - Fighting for a seat at the table: CSO advocacy on the Trinidad & Tobago Non-Profit Organisations (NPO) Bill 2019

Country: Trinidad and Tobago
Collective: Civil Society Alliance: Laws for Us
Relevant SDG: #16; Peace, justice and strong institutions #17 Partnerships for the goals

About the collective: Civil Society Alliance: Laws for Us  is a collective of CSOs in Trinidad and Tobago working to seek the interests of the civil society sector by advocating in support of legislation that benefits and promotes the fair and just treatment and consideration of CSOs.

The challenge: Very limited consultation with CSOs on the NPO Bill 2019 that threatened direct, grave impacts on CSOs’ ability to access funding and operate. Additionally, short public notice of the scheduled debate on the Bill which left the CSO sector with little time to organise a response. In February 2019, Trinidad and Tobago was placed on the European Commission’s blacklist of non-cooperative tax jurisdictions as a result of its failure to comply with the Financial Action Task Force (FATF)’s guidelines on Anti-Money Laundering and the Countering of the Financing of Terrorism. At the time, Trinidad and Tobago was already on FATF’s grey list (meaning it was under review). Assessments indicated that the country was partially compliant on some of the guidelines and noncompliant on others, so the Government was working to address the compliance issues on a number of fronts. One of the 40 FATF international good practice recommendations - Recommendation 8 (R8) calls for countries to put measures in place for the oversight of NPOs. R8 was one area where Trinidad and Tobago was found to be completely noncompliant. The Attorney General’s (AG’s) office drafted the NPO Bill 2019 in an attempt to address this gap and sought to get the Bill passed in Parliament rapidly, in advance of an impending review by FATF. This went ahead despite CSOs’ pleas for greater sector consultation. CSOs specifically took issue with the following:

- Food for thought

What other organisations are interested in and working on solving the problems you are working on? Is there opportunity for collaboration on your advocacy efforts?
the Bill called for the implementation of measures that exceeded those needed for R8 compliance and that were intrusive, blanket and punitive;

the Attorney General’s (AG’s) office sought to pass the bill at exceptional speed;

the CSOs4GoodGov project (in a process led by United Way Trinidad and Tobago [UWTT]) had presented the AG with a CSO Advocacy Paper and thoughtfully developed law reforms to address long standing concerns about sector regulation, yet the measures in the NPO Bill reflected none of these recommendations.

The solution: Alarmed by the lack of response and seeming lack of interest in their advice, CSOs sprang into action with a multi-pronged approach to advocacy including direct lobbying of parliamentarians, media engagement and public education and sensitisation. A loose coalition of CSOs mobilised, drawing on awareness of the FATF compliance issues they had gained, relationships they had developed through the SDGs Catalysts Network and their existing online advocacy efforts (including through the International Center For Not-For-Profit Law). Leaders of CAISO Sex & Gender Justice, CANARI, Coalition Against Domestic Violence (CADV), The Cropper Foundation, Network of NGOs of Trinidad and Tobago for the Advancement of Women, Veni Apwann (VA) and 868Change took leadership roles and spearheaded the process, galvanising other members of the sector to:

• urge the AG (via text, phone calls, social media and a signatory letter campaign) to slow the debate process in order to accommodate meaningful consultation with the CSO sector;

• educate and sensitize the public, and particularly their beneficiary communities, via a media campaign to the serious implications and impacts that could result from the passage of the Bill;

• have a strong and noticeable presence at the parliamentary hearings when the Bill was being debated; and

• engage and educate the other benches in Parliament about the legislation and CSO concerns.

Figure 3: Members of the Trinidad and Tobago collective of civil society organisations, Civil Society Alliance: Laws for Us, met with Trinidad and Tobago Attorney General, Faris Al Rawi (third from right) and Senior Legal Counsel, Ministry of the Attorney General & Legal Affairs (MAGLA), Vyana Sharma (far left), on April 10, 2019 to discuss proposed amendments to the Non-Profit Organisations (NPO) Bill, 2019. Photo: MAGLA

2 The paper specifically examines the legal and fiscal framework within which CSOs in Trinidad and Tobago operate and makes recommendations for improvement.

3 An informal network of 21 leading CSOs convened under the CSOs4GoodGov project, working across sectors in Trinidad and Tobago to address the full range of development priorities encompassed by the 17 SDGs.
Though the Bill was ultimately passed, the local CSO effort resulted in improvements in the language and removal of the most draconian provisions. It also opened the door for CSOs to continue to work with the government to fine-tune the legislation and its implementation after its passage, as well as opportunity to advance the more fundamental and enabling reforms to NPO regulation, including those documented in the CSOs4GoodGov CSO Advocacy Paper.

**Advocacy wins/gains for the Trinidad and Tobago CSOs:**

- More nuanced, specific and clear language that still addresses R8 compliance.
- Lines of communication between CSO representatives and the AG’s Office established and maintained.
- Strengthened local CSO capacity and willingness to collaborate on advocacy.
- The development of the Civil Society Alliance: Laws for Us

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**Top tips**

- **Approach advocacy efforts from multiple vantage points!** Consider all of the audiences you need to reach, who can influence change on your issue, and then launch a simultaneous effort to reach them. In the case of the NPO Bill, ‘Trinbagonian’ CSOs mobilised efforts to reach out to the media, public officials, other CSOs and community stakeholders using different platforms, all at the same time. This multi-pronged approach ensures maximum exposure and engagement; all efforts together contribute to greater gains in a relatively short amount of time.

- **Stay ready so you don’t have to get ready!** Engaging your entire team in advocacy preparation by keeping a pulse on the issues impacting your beneficiaries at all times — reading, watching and sharing news related to your focus and beneficiary communities daily or several times throughout the week (Google Alerts is a great tool to aid in this effort and can be set up so that you are alerted about relevant news to your inbox on a schedule you set). Staying in close contact with your beneficiary communities to find out what they are facing weekly or monthly or every few months would also be helpful here. In the case of the NPO Bill, VA, Network of NGOs of Trinidad and Tobago for the Advancement of Women, and CANARI had long been engaged on sector reform measures so they were up to speed on issues impacting the sector. When rumours of a draft NPO Bill began to circulate, UWTT facilitated the development of an advocacy white paper that involved and sensitised many of the other CSOs about the issues the sector could face, if the Bill passed. So, when the Bill did materialise and there was a sudden need to kick advocacy efforts into high gear, the CSOs who led the charge were ready and able to act and call others to action in short order.

- **Leverage the expertise of your partners and team members — play to everyone’s strengths!** Everyone on your team or every organisation that is a part
of your collective/consortium/partnership should bring their own special set of skills to the table. Be sure to utilise people and organisations for what they do best so that the advocacy campaign/effort benefits from the very best your team has to offer in every area. In the case of the NPO Bill, all parties involved played their positions well: Colin Robinson, Director of CAISO, stepped up as the face of the campaign. CAISO, The Cropper Foundation and CADV worked together to translate the legal jargon in the draft Bill into common, relatable language. Meanwhile, the CANARI team used its digital publication capacity and existing social media platforms, and the other lead CSOs worked on outreach to a wide pool of local CSOs across various interests.

What opportunities are there to work with different stakeholders on your issue at the same time? Who can bring a needed skill to your campaign?
Section 2
Developing an effective advocacy strategy

2.1. Planning is power – 5 reasons we plot and plan before we advocate

2.2. Writing an effective advocacy strategy
Tools we’ll be using in this section:

- **Strategy Tool #1**: Advocacy Strategy Broad Sketch Worksheet
- **Strategy Tool #2**: Simple Advocacy Strategy Template
- **Strategy Tool #3**: Setting SMART Advocacy Goal and Objectives Worksheet
- **Strategy Tool #4**: Defining + Identifying Your Targets Worksheet
- **Strategy Tool #5**: Effective Advocacy Message Checklist

All the Tools listed above and supporting templates and worksheets can be found at the end of this toolkit in Annex 1: Advocacy Strategy and Action Tools.

### 2.1. Planning is power - 5 reasons we plot and plan before we advocate

Making the decision to start an advocacy campaign or sustain an advocacy effort is an amazing first step! There is no greater feeling than when one recognises the power of our Caribbean voices to instigate the change we want to see in our communities, in our region and in the wider world. After that moment passes, however, is when the real work begins. The very next step in the process is to develop a plan and strategy for how you will use your voice to advocate effectively. Putting a plan in place puts you in a position of power to envision your ideal outcomes and put measures in place to achieve them. Specifically, a plan can help you to:

1. **set direction and priorities.** It provides you with an opportunity to look at your available resources and your desired impact and then, decide how to best use what you have at hand to achieve maximum impact (whatever that may be for your cause). For instance, you may decide to act in a way that allows for the greatest number of people to hear/receive your messages or you may decide to focus on converting just one highly influential person into a champion of your work so that he/she can reach others using their influence.

2. **get buy-in from everyone (or most people) involved.** The planning process is a great opportunity to solicit the core players’ insights on how to proceed, thrash out differences of opinion between members of the project or advocacy campaign/effort team and get everyone on the same page with regard to the best way forward. It allows for everyone engaged to have their ideas heard and validated.
3. **ease the burden of decision-making when advocacy is in full swing.** Once an advocacy campaign gets rolling, it can take on a life or momentum all on its own (that is very often what we hope for). If it really takes off and adjustments need to be made for any reason unexpectedly, the plan provides guidance or a line of thought that can be followed to come to decisions quickly and without causing team conflict.

4. **ensure every action, big or small, is aligned with the advocacy goals and objectives.** A well-thought out plan provides a rhyme and reason for every action it promotes. It also encourages you to provide sound reasoning that considers the original intent for all proposed actions as the plan evolves.

### 2.2. Writing an effective advocacy strategy

Now that you know why it’s so important to develop a plan and strategy for your advocacy, let’s dig into how you get started writing one. Writing an effective advocacy strategy requires thinking through every aspect of your approach from why you want to bring attention to this issue at a specific time to who you want to reach, how you’ll reach them and what it all costs. The more detail you include in your advocacy strategy, the more useful your strategy will be when you reach the implementation phase.

Drafting your advocacy plan and strategy comprises three phases:

- **Phase 1:** Assessing your potential and capacity to undertake an advocacy effort right now.

- **Phase 2:** Developing a broad sketch of your advocacy strategy; this is a general overview to get you thinking about all that you have and all that you’ll need to acquire or figure out in order to start working on an advocacy campaign.

- **Phase 3:** Working through developing a more specific and detailed strategy, giving each part of the strategy due time and consideration. This part should be done thoughtfully and step by step.

### Phase 1 Assessing potential and capacity for advocacy

**What are you capable of here and now?**

The first phase of developing your advocacy plan and strategy is assessing your capacity for advocacy. Before getting started, it’s critical to assess whether or not you are in a position to advocate on the decided issue at all. So, you should consider the following:

- What are you advocating for and why?

- How does this issue fall in line with your organisation or group’s vision, mission and mandate?
• Is this a priority for your beneficiaries at the moment, or will it be in the near future?

Pause and reflect on the answers to the questions above. If any of the answers are unclear, require further consideration or clarification and/or indicate that you should not continue, take time out to consider them more carefully, craft clear answers and weigh whether or not it is the right time to pursue advocacy action on this issue.

If all of the responses to the assessment questions above indicate that you are ready to move forward, it’s time to work on a broad sketch or overview of your advocacy strategy.

**Phase 2 Developing a broad sketch**

*Where do you have untapped power and potential?*

The second phase of developing your advocacy strategy is creating a broad sketch. Using the following guiding questions and *Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet*, we can create a sketch that helps you assess what you want to do, your available resources and helps you further determine your internal capacity.

• What do you want to accomplish?
• Who can you partner with on this effort?
• Why would they want to partner with you?
• Do you have teammates who are capable and ready to participate in this effort?
• What strengths do you have on your team to help you achieve your goal?
• When will you launch your campaign or outreach effort?
• Who will you try to reach through your campaign? Why?
• How will you reach them?
• What do you want them to learn or do after you’ve reached them?
• How will you measure the impact of your efforts?

To create the sketch, for each question, you should:

• brainstorm and make draft notes to answer the question as completely as possible - use bullets or list form if the question can be answered completely with more than one response.
• review the responses carefully and transfer the answers to the correlating spaces in the *Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet*. 
Phase 3 Developing a Detailed Advocacy Strategy

The third phase of drafting an effective advocacy strategy is taking the time to drill down into your strategy sketch and devise a more specific, clear and detailed plan that leaves little to no room for misinterpretation. The best way to write such a plan is step-by-step, giving each part of the plan dedicated time and energy to flesh it out as needed.

The **Strategy Tool #2: Simple Advocacy Strategy Template** will be used to document each part of the strategy as you go along. This template includes five key elements and steps (see Table 1) that will contribute to the development of a comprehensive advocacy strategy once completed. Further detail on each step is provided in the sections following.

<table>
<thead>
<tr>
<th>Key elements of an advocacy strategy</th>
<th>Steps in developing an advocacy strategy</th>
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<td>Goal &amp; objectives</td>
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### Step 1. Setting your advocacy goal and objectives

Launching an advocacy campaign or effort without setting an overarching goal and supporting objectives would be like setting sail without a destination in mind. If you don’t know where you’re going — or in this case what you hope to change, there is no way for you to know when you’ve arrived or effected the change you want to see. So, setting a purposeful goal and objectives is critical to your success in creating effective advocacy strategies for your Caribbean CSO. To fine-tune your goal and objectives, you should:

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**Top tip**

*As the saying goes, “look before you leap”!* Take time out before starting your campaign to assess whether or not it is needed, worthwhile and timely, in order to save valuable resources later.
1. Review your responses to the questions “what are you advocating for and why?” as well as “what do you want to accomplish?” in **Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet**, provided in this toolkit.

2. Assess each desired accomplishment using the following questions (and/or **Strategy Tool #3: Setting SMART Advocacy Goal and Objectives Worksheet**) as a guide:
   - Is it specific? (Does it say exactly what end you are seeking, clearly and precisely?)
   - Is it measurable? (Does it provide numbers that you can use to evaluate progress?)
   - Is it attainable? (Is the desired accomplishment reasonably possible to accomplish without extraordinary or superhuman effort?)
   - Is it results-oriented and realistic? (Within the context of your work schedules and organisational priorities, is it likely that this goal or objective will be accomplished?)
   - Is it time-bound? (Does it specify a reasonable timeframe?)
   - In short, is it a SMART goal or objective?

Rewrite each desired accomplishment as a SMART goal or objective.

List the resulting SMART goal and objectives in order of priority and transfer/enter them into their respective sections of **Strategy Tool #2: Simple Advocacy Strategy Template**.

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**Top tip**

**Invest time and human resources into developing a SMART goal and objectives!** Taking this step early in the development of your advocacy strategy will provide clear direction and aid in your ability to evaluate success.

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**Have your advocacy goals and objectives to date been SMART? What can you change about them to ensure they are?**
Step 2. Defining and identifying your target audiences

Who you are trying to sway, influence, inspire to change or persuade to help you instigate change is at the very heart of your advocacy plan and strategy. Getting to the heart of the strategy (read: defining and specifically identifying who you should target), however, can sometimes prove difficult. To get to the crux of who you should be targeting in your plan and strategy, you can:

1. review your responses to the questions “who will you try to reach through your campaign? why?” in Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet provided in this toolkit.

2. assess each listed person or group using the following questions (and/or the Strategy Tool #4: Defining + Identifying Your Targets Worksheet) as a guide:
   - What is the person/group’s name and affiliation?
   - On a scale from 1-10 (1 being “Low” and 10 being “High”), how much does your advocacy issue affect them?
   - On a scale from 1-10 (1 being “Low” and 10 being “High”), how much influence do they have over your ability to instigate/inspire change with respect to this issue? In other words, can they make people for or against your position and to what degree?
   - What, if anything, is most important to this person/group about your advocacy issue?
   - How could this person/group contribute to your advocacy campaign?
   - How could this person/group block or impede your advocacy efforts?
   - If you had to, how would you engage this person/group?

3. highlight or make note of all people or groups who you’ve scored as “5” or “Medium” to “10” or “High” as it pertains to being affected by the issue and/or the amount of influence they wield over your ability to bring about change.

4. also note all people or groups who you’ve noted can block or impede your advocacy efforts in more than one way.

5. list all highlighted or previously noted people or groups in the “Target Audiences” section of Strategy Tool #2: Simple Advocacy Strategy Template. They make up the group of people who require your focus for this advocacy campaign.
Country: Antigua and Barbuda
Organisation: Environmental Awareness Group (EAG)
Relevant SDG: #15 Life on land

**About the CSO:** Formed in 1988, EAG is the oldest environmental group in Antigua and Barbuda. It is widely regarded as a subject matter expert on the environmental issues present in the country.

**The challenge:** A natural phenomenon—an island once populated by plants and animals found nowhere else on Earth—was on the brink of ruin with little hope of rebounding without intervention. The mysterious, uninhabited, third island in the state of Antigua and Barbuda, Redonda, was in ecological despair. The major issue plaguing the island stemmed from historical human interference in the natural ecology. Introduction of non-native species such as goats and their eating habits negatively impacted on the island’s natural, and once world-renowned ecology. The EAG sought to remedy the situation.

**The solution:** The EAG was able to address the problem by quickly identifying key partners, each with different strengths, as well as identifying key stakeholder groups to target for interventions to restore Redonda’s biodiversity. Working collectively to promote the need for restoration, the EAG was able to leverage strong volunteer teams and experience working on similar local projects; the government designated the site as a protected site under the Sustainable Island Resource Management Zoning Plan and contributed human resources and visibility via government media; and Fauna & Flora International (FFI), an international conservation charity and NGO, contributed expansive knowledge and networks as well as project management experience. The government and volunteers from EAG and FFI removed the non-native animals from the island. Shortly thereafter, the Redonda Restoration Programme was formalised. Through sustained public outreach and awareness campaigns, including a phased media engagement plan that resulted in features in local and government-sponsored media, Caribbean Beat Magazine and National Geographic Magazine, the programme has attracted, engaged and enrolled an ever-growing number of volunteers, partners and funders to continue its work. Guided by a project steering committee, the project coordinator, volunteers and visiting environmental scientists conduct regular (monthly and bi-monthly on a scheduled cycle) monitoring and evaluation of the island’s progress with respect to the number of species it is home to, as well as increases in vegetation and any signs of the return of pest populations such as black rats.

**Box 5: Mini Case Study - Restoration through collaboration:**

Redonda lives

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**Figure 4:** Redonda before and after the Redonda Restoration Programme, which helped address severe degradation of the island’s ecosystem. *Photo: Ed Marshall*
Monitoring and evaluation is carried out via site visits, climbing expeditions and overnight stays, and using methods from species counting to setting traps and observing rat response.

Advocacy wins/gains:

- Taking time to identify relevant stakeholders to partner with allowed EAG to build credibility and trust during planning and implementation of the Redonda Restoration Programme, which set the stage for future partnerships and opportunities for continued work on Redonda.
- Engaging various key stakeholders at the national and international level presented opportunities to increase EAG’s expertise and to leverage the resources and expertise from others.
- An increase in vegetation flora with over 88 species, where just 17 once survived.
- Two years after the removal of non-native species, population growth amongst native and formerly migrated species increased significantly.

Plan and think strategically about the partners you enrol and engage in your advocacy efforts and include potential partners in your targeting analysis! It is key to weigh the pros and cons of potential partners and to note how their strengths and weaknesses measure up against yours and that of your organisation. It is wise to consider partners who have strengths that compensate for your areas of weakness and who bring access to different spheres of influence than you do, to ensure that your joint efforts cover more ground in a shorter period of time. In the case of the Redonda Restoration Programme, though the three initial partners had some overlapping skills and traits, each partner also brought a unique quality, skill or strength that the others did not possess.

What strengths do you and your team or organisation bring to your advocacy efforts? Based on those, what qualities should you be seeking in a partner team or organisation?
Step #3. Crafting effective advocacy messages

If the people you are trying to influence are the heart of your advocacy strategy, your perspectives or points of view (to be referred to as your messages or messaging from here on out) are the lifeblood of your planning documents. The power of effective advocacy messages is that they get people onboard with your causes, move people to action and by extension, help you achieve your goals and objectives.

All of your advocacy messaging on your chosen issue should focus on or be derived from one to three key messages that clearly define your position(s) and inform your target audiences about what you want and why. These key messages are foundational and can and should be the basis of the communication you adapt to craft tailored messages for your identified target audiences, using language and through platforms that best resonate with them. To develop your key messages:

1. review your responses to the questions, “what are you advocating for and why?, “what do you hope/seek to accomplish and why?” and “how will you reach them?” in the Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet.

2. use the responses above to craft a cohesive, key message using the following prompts as a guide:
   - **Provide a statement**: your central idea or the analysis/cause of your issue. It outlines why the change is important.
   - **Provide evidence**: support your statement with easily understood facts and figures, using tailored language.
   - **Give an example**: make it personal or at least humanise it - put a face to the issue you’re highlighting.
   - **Reference your goal and objectives**: highlight what you want to achieve through your efforts.
   - **Provide an ask or call-to-action**: your proposed solution (or partial solution) to the problem. This will form the core of your key advocacy message(s) and distinguish it/them from other types of communication.

3. record your key message(s) in the “Key Messages” section of Strategy Tool #2: Simple Advocacy Strategy Template.

**Top tip**

Devise a strong overarching message for your advocacy campaign/efforts! If you really want to sway and influence people at all levels, time spent crafting one or two key messages is more than a worthwhile investment. A relevant, helpful tool to use is the Strategy Tool #5: Effective Advocacy Message Checklist.
Box 6: Mini Case Study - It’s getting hot out here: Boiling it down to 1.5°C for the Caribbean’s well-being

Country: Haiti, Jamaica (Based) (Serves Wider Caribbean)
CSO/Collective: Panos Caribbean
Relevant SDG: #13 Climate Action

About the CSO: Panos Caribbean is a regional NGO that works to amplify the voices of the poor and the marginalised through the media and ensure their inclusion in public and policy debate, in order to enable Caribbean communities and countries to articulate and communicate their own development agenda.

The challenge: Prior to 2015, international climate change talks generally did not adequately take into account, and had limited understanding of, Caribbean Small Island Developing States’ (SIDS) perspectives and experiences related to impacts of climate change. There was a dire need to devise messaging that humanised the issues immediately impacting the Caribbean to appeal to other global citizens as well as to broaden awareness and education of Caribbean people about the issues we face regarding climate change. By extension, there was also a great need to illuminate why the United Nations Framework Convention on Climate Change’s (UNFCCC) Conference of Parties 2015 (COP 21) was a huge opportunity to influence climate negotiations on the region’s behalf.

The solution: As COP 21 neared, Panos Caribbean developed an arts and communications-driven awareness and advocacy campaign to bring attention to regional climate change issues and to shore up the Caribbean’s negotiating positions at the conference. They devised a strong key message coupled with gripping imagery that clearly demonstrated the impacts of certain decisions regarding agreements governing climate change on the Caribbean region and other SIDS. The campaign, “1 Point 5 to Stay Alive,” particularly referenced limiting the increase in global warming to maintain the climate conditions necessary to allow Caribbean life to remain relatively the same or as close to the new “normal” as possible. That effort gave birth to a thriving and longstanding advocacy campaign that not only had great effect on the COP 21 Paris Agreement, but continues to impact global climate change negotiations and sensitisie people locally, regionally and globally about what remains necessary to prevent further damage to vulnerable states and regions like the Caribbean.
Advocacy wins/gains for Caribbean nations:

- Continued education and empowerment of Caribbean people, including policymakers, about the social justice implications of global climate change regulations and agreements through a sustained advocacy campaign using strong visual and verbal messaging.
- Established community of regional visual artists and musicians serving as champions of the issue.
- In 2015 and up until 2019 in advance of the COP 25, the campaign educated the wider media on climate change issues that specifically impacted the Caribbean region and sensitised them on how to report on it in a meaningful way.
- Credited with heavily influencing the language “to pursue efforts to limit the temperature increase to 1.5 degrees Celsius above pre-industrial levels, recognising this would significantly reduce the risks and impacts of climate change” in the Paris Agreement, which still remains a part of the agreement.

Crafting tailored messages

When crafting your tailored messages to appeal to your target audiences, remember that effective, successful advocacy messages:

- are often tailored to your target audience’s current level of knowledge and particular interests;
- communicate clearly to the audience;
- are concise, stating only what absolutely needs to be said to get the point across;
- use easy-to-understand, relatable language;
- are linked to something the audience cares about;
- are credible and can be backed up by facts or evidence.

Your tailored messaging will explain how the objectives you’ve stated in your key message(s) will be met and will be specific to the target audiences that you had in mind when you developed them. These messages will essentially help you communicate how your target audiences can help you achieve your goal. Let’s examine a couple of examples of effective approaches to crafting and delivering tailored messaging in Caribbean advocacy campaigns to get a feel for how you can approach crafting your own tailored messages:

How much time and effort have you invested into crafting strong messages? How will that change going forward?
• Population Services International-Caribbean’s (PSI-C) Trinidad and Tobago-based Make It Stop Campaign Against Gender-Based Violence (GBV), 2014-2017, had several targeted stakeholder groups, ranging from youth ages 13-35, to local CSOs engaged in GBV prevention work, government officials and local media. PSI-Caribbean’s ‘Make it Stop’ team not only tailored their messaging based on targeted stakeholders, but the structure of their events and advocacy actions. To appeal to youth, the tone of their messaging was focused on empowering the audience and calling them to action. The events were play, music and/or spoken-word centred and featured items branded with the empowering messaging (t-shirts, buttons, etc.). When engaging the media and government officials, the organisation’s advocacy team took a very data-driven approach to the messaging, citing GBV fatality and cultural norm statistics that contributed to Trinidad and Tobago’s intimate partner violence epidemic. Outreach events to sensitise media and government officials included breakfast and lunch briefings with keynote speakers and packets of information in the form of talking points, research papers and anecdotal evidence provided by survivors.

• The group Civil Society Alliance: Laws for Us also showcased effective tailored messaging in its NPO Bill 2019 advocacy efforts (see Mini Case Study 4). When targeting legislators, the Alliance used legal jargon to communicate its positions via a signatory letter campaign and memos to the Office of the Attorney General. However, when communicating the looming implications of the proposed NPO Bill to local CSOs, the media and CSO beneficiaries, the Alliance used much simpler talking points and visual aids to share the information its stakeholders needed in order to effectively advocate for themselves. For example, the Alliance published a “Did You Know...?” PowerPoint fact sheet series on its Facebook page.

**Top tips**

- When putting together advocacy-related events, consider your target audience, the tailored messaging you’ve developed with them in mind and make sure every aspect of the event is reflective of your messaging to that intended audience!

- If your key messages are highly technical or jargon-heavy, use visual aids and infographics in your tailored messaging to less technically savvy stakeholders!
Step 4. Identifying appropriate communications products and platforms

The people and products you choose to deliver your advocacy messages can shape the messages and determine their impact almost as much as the words you use to form the messages. So, the products, platforms and placement of your advocacy messages is also mission critical. Ill-thought-out use of communications products and platforms, including information communication technologies (ICTs) could end a promising advocacy campaign before it even gets started. Since you want your advocacy efforts to be sustained and impactful for the short and long-term, you should weigh your options carefully and:

1. review your responses to the questions “how will you reach them?” in Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet and “if you had to, how would you engage this person/group?” in Strategy Tool #4: Defining + Identifying Your Targets Worksheet.

2. draw side by side comparisons between your response in the broad sketch and your response in the target audience worksheet, and note or highlight any overlap.

3. list any highlighted or noted products and platforms (that appear in both worksheets) in the aptly named section of Strategy Tool #2: Simple Advocacy Strategy Template. They will provide a good start to deliver your messages to their intended targets.

4. after the strategy is being implemented, if you note any problems with the products and platforms chosen, you can tweak accordingly.

Box 7: Mini Case Study - Fishing for sustainability in Grenada

Country: Grenada
Collective: Gouyave Fisherman Cooperative Society Limited (GFCSL)
Relevant SDG: #14 Life below water

About the collective: The GFCSL is a fisherfolk cooperative comprising over 80 members based in Gouyave, a fishing town located on the west coast of Grenada.

The challenge: Various environmental factors resulting in decline of key commercial species of fish, threatened the livelihoods of roughly 300 fisherfolk in Gouyave, Grenada, (including members of the GFCSL). Fisherfolk needed a means to increase fish stocks as well as economic opportunity in the area. They also required a strategy to garner community understanding and support of any initiative they launched to meet their and the community’s needs.

The solution: GFCSL became inspired to advocate for the creation of a fish sanctuary and wider marine protected area known as the Gouyave Marine Protected Area (GoMPA). To achieve this, the GFCSL carried out an outreach and awareness campaign in the community of Gouyave, entitled “Our Fish, Our Future,” where members of the cooperative walked around the community, talking to and educating community members on the importance of the GoMPA. The initiative had wider implications than just resolving the immediate impact of declining fish stocks on the local community. It also contributed to the Grenadian Government’s commitment to the Caribbean Challenge Initiative to partner with stakeholders to protect and conserve 20% of the nearshore marine environment by 2020.
Advocacy wins/gains for the Gouyave fisherfolk and Grenada as a whole:

- Advocacy efforts contributed to establishment of the GoMPA, a direct action to support the protection of invaluable ecosystems.
- Broadened community awareness on fisheries issues - successful community education and awareness campaign executed by fishers to explain the importance of the GoMPA and the creation of alternative livelihoods for local fisherfolk as rangers for the protected area and ecotourism opportunities.

Figure 6: Members of the Gouyave Fishermen Cooperative Society in Grenada, speaking to a member of the public as part of their awareness campaign, “Our Fish, Our Future”. Photo: Gouyave Fishermen Cooperative Society

Top tip

Your advocacy strategy is a living document and can and should be adapted for efficacy! Do a thorough stakeholder analysis inclusive of preferred communication products and platforms. However, if time and resources allow it is okay to test delivering messages to specific target audiences on different platforms via different products until you find a way of connecting to that particular target that works. You might think that focus groups, survey instruments and interviews with target audiences prior to developing messaging would allow you to skip the testing phase altogether but past advocacy efforts have taught us that sometimes there is a gap between what people say they will respond to and the products and platforms they actually do respond to. So, it is wise to account for that and to be flexible in both planning and implementation. If something is not working, take the opportunity to learn from that and pivot accordingly to try something else that may work. In the case of the GoMPA and the GFCSL’s outreach efforts so far, they have successfully tested products and platforms that work for educating their target audiences.

What areas of your advocacy efforts or campaigns are not having the desired impact? What do you have to lose by trying a different approach?
Step 5. Putting monitoring and evaluation (M&E) measures in place upfront

If you draft a clear plan to evaluate your advocacy as you go along and measure its impact for the duration of the campaign or sustained effort, you don’t have to wonder about where you stand or how successful your efforts are/were. So, let’s discuss how you can go about doing just that.

There are many ways to monitor and evaluate your advocacy work. Some of them include case studies, stories, opinions and surveys and they measure the quality of your work (they are formally called qualitative measures). Other means of measuring and evaluating your efforts include keeping track of statistics or trends that indicate a change over time; those means/methods deal with amounts and figures and are therefore formally known as quantitative.

You should choose your monitoring methods according to the indicators that you have chosen to evaluate the impact of your work. Some helpful monitoring methods include:

- keeping records of meetings, e-mails or conversations with target audiences and the responses they provide;
- tracking when your key messages or briefing notes are used or mentioned by elected officials, other key influencers or the media;
- conducting surveys and interviews to determine the impact your actions have had and the recognition they have received;
- monitoring the media and social media and keeping track of coverage of your topic in news reports and in online conversations and forums.

Your evaluation should be based on the goals and objectives that you set at the outset of the advocacy planning process (see “Step 1” of this toolkit). Questions you can ask to evaluate the impact of your work include:

- have the objectives been achieved?
- how many meetings were held with key target decision-makers and what were the outcomes of those meetings?
- what, if any, actions have target audiences taken concerning the advocacy issue?
- is the situation better than before? By how much?
- if there is no change, how can advocacy methods be changed?
- what could and should be done differently next time?
- are the team and beneficiaries involved with the advocacy effort happy with the results and the way the work was implemented? Are they still involved?

There are several options to consider when deciding what measures to put in place to monitor and evaluate advocacy efforts. Let’s take some time to consider the options by:
1. reviewing your responses to the questions “what are you advocating for and why?” and “what do you seek to accomplish?” in **Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet**.

2. reading Mini Case Study 5: Restoration through collaboration: Redonda lives and Mini Case Study 8: Continuous quality improvement as patient care solution: A revolution to see what the Redonda Restoration Project and the Patient Advocate Mission (PAM) have done.

3. consulting your colleagues about what has worked for them on their advocacy projects in the past.

4. weighing the information you’ve gathered against your own experience and your listed goal and objectives and deciding on a way forward.

5. documenting your indicators of success in the “Evaluation Method & Indicators” section of your **Strategy Tool #2: Simple Advocacy Strategy Template**.

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**Box 8: Mini Case Study - Continuous quality improvement as patient care solution: A revolution**

**Country:** Trinidad and Tobago  
**Organisation:** Patient Advocate Mission (PAM)  
**Relevant SDG:** #3 Good Health and Well-Being

**About the CSO:** PAM collaborates with other NGOs and corporate sponsors to provide additional interventions to support people living with HIV in Trinidad & Tobago.

**The challenge:** (as told by Conrad Mitchell, Founder/ Director of PAM) People Living with HIV (PLHIV) were “dropping out of care,” putting their and others’ health at risk due to unmet needs within the local healthcare system. “There is [often] a stigma associated with those of us living with HIV that we are uneducated and undereducated and should be talked down to”. PLHIV in Trinidad and Tobago complained constantly about hours-long clinic visits; not being proactively provided with information about their condition; and wanting to be more included in the decision-making process with regard to their care. Their complaints fell on deaf ears due to implicit bias and lack of convenience to accommodate them on the part of clinicians and the existing healthcare system.

**The solution:** A group of PLHIV — who would later come together to form PAM—used a data-driven approach and Continuous Quality Improvement (CQI) as the basis of their appeals to clinician and treatment centre supervisors. CQI is an approach to quality management that builds upon traditional quality assurance methods. It focuses on “process” rather than the individual, recognises both internal and external “clients” and promotes the need for objective data to analyse and improve processes. Working within the system at a range of Caribbean CSOs (including International Training and Education Centre for Health [I-TECH] and the Caribbean Region Quality Improvement Collective [CARIQIC]), they used qualitative data (anecdotal patient accounts of why they were not seeking consistent care) as the basis to implement small, gradual changes to the care model. They then measured the results such as documenting the difference in the length of time patients spent in the treatment centre from arrival to exit, tweaked the model and shared the results. Using this method, they worked together to usher in sweeping changes that improved care for patients and efficiency for clinicians and treatment centre supervisors; stemmed and countered the stigma and related biases; and
introduced economic opportunity for PLHIV. Together, they also founded PAM and have been training and advocating for the admission of Patient Advocates as a part of care teams for PLHIV at treatment centres throughout Trinidad and Tobago as well as the wider Caribbean region.

**Advocacy wins/gains:**

- Patient Advocates installed by the Centers for Disease Control as a part of the care team at the largest and second largest treatment centres on the island of Trinidad.
- An uptick in employment opportunities for PLHIV as Patient Advocates at local treatment sites.
- New tools and systems to guide HIV patients on their treatment journeys, for example, a patient fast-tracking system and HIV-related edutainment and information-sharing programming on waiting room televisions at treatment centres.
- Ministry of Health of Trinidad and Tobago recognised and now emphasises the importance of Quality of Care measures at local treatment sites; and has begun to offer and advocate for psychosocial support for PLHIV at local treatment centres.

---

**Top tip**

Incorporate M&E and data gathering into your advocacy efforts early, often and when possible, make your efforts data driven! The use of data as a part of your advocacy efforts will lend your advocacy credibility and consistent M&E will help your efforts remain nimble and flexible should you have to pivot to meet beneficiary needs.

---

**Final thoughts on developing an advocacy strategy**

For many of us, developing an advocacy strategy can seem big and overwhelming. However, in the steps outlined in this section, we have been able to break it down into smaller, more manageable tasks to help you navigate the process one step at a time. Now that you’ve gotten your plan and strategy written, you just need to work on putting it into action.
3.1. The importance of developing an action plan

3.2. Advocacy action in practice
3.1. The importance of developing an action plan

Up to now, we have covered how to develop an advocacy strategy that incorporates all the key elements such as defining your advocacy objectives, target audiences, key messages, communication products and pathways and how you will monitor and evaluate. It is now critical to be able to move from planning to putting your advocacy strategy into practice. This section covers steps for the development of an action plan, to help you operationalise the advocacy strategy you have developed.

Having an action plan that maps out and determines when, where, how and by whom your advocacy activities are conducted will help you to:

- better understand how your limited resources—people (staff), time and money should be spent;
- minimise risks and maximise opportunities; and,
- track progress as you implement your strategy.

This part of the toolkit is dedicated to helping you create your action plan, step by step.

3.2. Advocacy action in practice

There are practical tools and tips you can use to create your advocacy action (implementation) plans. Cumulatively, these resources will serve as the map that guides your advocacy activities from start to finish. Here’s a quick guide to how each step/part of the plan you develop correlates to your overall plan.
Step #1. Putting your people in place to execute (People Power Play)

It’s important to make sure that you play to your team members’ strengths. The best way to do that is to assess your staff’s or team’s skills and traits and weigh them against what you need for advocacy actions/activities. After that, you can assign them to aspects of the advocacy action that they can do well. If there are gaps, you can work with your partners and their teams to fill/bridge them.

For every advocacy action/activity, there are several key roles that need to be filled. Depending on access to resources, some team members (from your CSO) may have to do double duty or your partners’ team members may have to take on roles on the advocacy action project team.

Refer to Action Tool #1a: Building Our Advocacy Action Team Worksheet: Advocacy Team Roles Defined to get a sense of which teammates are best suited for the roles you’ve outlined, and Action Tool #1b: Building Our Advocacy Action Team Worksheet: Assessing Our Team’s Capacity for Advocacy.

Play #2. Developing timelines (Positioning Play)

The timeline is an instrumental part of every project, and your advocacy project timeline is no different. Action Tool #2: The Advocacy Action/Campaign Project Timeline captures the very essence of when key actions will be taken, how long it will take you to hit milestones and accomplish your objectives. Building comprehensive, accurate timelines will help you get your advocacy efforts off on the right foot.
Play #3. Assessing your “costs” (Resource Play)

The resources needed for your advocacy work will be a mix of monetary, human capital, and common or shared knowledge. Examining each of the elements will help you to identify any gaps that need filling, and work to source the resources needed to be successful.

It is important to reflect on:

- What are you planning to do?
- What human and financial resources will it take?
- Who will do the work (See Step #1: People Power)?
- What funds are needed?
- What, if any, funds are available to you right now?
- What other resources do you have access to?

Your Action Tool #3: Advocacy Resource Map Worksheet will help you work through what is needed to have a successful campaign, what you have and where you might be able to fill any gap in resources.

Play #4. Measuring and documenting your efforts along the way (Impact Play)

Advocacy is an ongoing process. As time goes on, your advocacy asks may change to reflect the changing times and needs of your beneficiary communities. So, it is important that you are constantly monitoring what you are doing and how. It is also critical that you take stock of the impact your actions are having on the issue you’re addressing and on your long and short term goals and objectives. The Action Tool #4: Simple Advocacy Action M&E Framework gives you a starting point from which to assess your impact from day one of your efforts going forward.

Play #5. Consolidating the information from your action plays (All-in-One Play)

Once the implementation of your advocacy efforts is in full swing and you’ve all gotten a handle on your advocacy team roles, it can be easy to lose sight of the bigger picture. In order for you to reach your goal and deliver big change for your beneficiary communities, you have to have a pulse on what is happening with respect to the entire initiative. It’s important for you to maintain a single accessible working document that can provide you with a snapshot of the progress you’ve made to date, who you’ve partnered with and what everyone is working on presently. Your Action Tool #5: Advocacy Action Plan At-a-Glance Template will help you craft the document that provides you with that snapshot.

You’ve gotten a sense of the advocacy climate in our region. You’ve strategised about how you want to advocate. You’ve made plans to implement your strategies. So, what are you waiting for? With these tools and tips in tow, get started on your advocacy efforts!
Section 4
The toolkit in review

4.1 Recapping key points and lessons from this toolkit

As you get started on your advocacy efforts, let’s review key points and lessons learnt from this toolkit.

6 Useful tools to help develop and implement a CSO advocacy campaign/effort:

- **Strategy Tool #2: Simple Advocacy Strategy Template**
- **Action Tools #1a & 1b: Building Our Advocacy Action Team Worksheet**
- **Action Tool #2: “The Advocacy Action/Campaign Project Timeline**
- **Action Tool #3: Advocacy Resource Map Worksheet**
- **Action Tool #4: Simple Advocacy Action M&E Framework**
- **Action Tool #5: Advocacy Action Plan At-a-Glance Template**

5 Steps involved in developing an effective advocacy strategy:

- Step #1 Setting advocacy goals and objectives
- Step #2 Defining and identifying target audiences
- Step #3 Crafting effective advocacy messages
- Step #4 Identifying appropriate communications products and platforms
- Step #5 Putting monitoring and evaluation (M&E) measures in place upfront
4 Benefits of developing an advocacy strategy:

An advocacy strategy and plan will help you to:

1. set direction and priorities;
2. get buy-in from everyone (or most people) involved;
3. ease the burden of decision-making when advocacy is in full swing; and
4. ensure every action, big or small, is aligned with the advocacy goal and objectives.

3 A few top tips to keep in mind:

A few of the unique top tips found in this toolkit that can really aid you in moving the needle on your advocacy issues are to:

1. incorporate M&E and data gathering into your advocacy efforts early and often and when possible, make data central to your efforts!
2. remember that your advocacy plan and strategy is a living document and can, and should, be adapted for efficacy!
3. approach advocacy efforts from multiple vantage points, simultaneously!

2 Lessons learnt from the CSO Mini Case Studies:

Two of the lessons that can be gleaned from each of the case studies presented in this toolkit are to:

- seek collaboration and partnership because there is strength, access to increased resources, greater reach and a greater perception of credibility in numbers!
- be responsive to the needs and desires of the beneficiary communities you serve because advocacy is ultimately about improving lives, communities and the world we live in!

1 Closing thought:

Though advocacy requires forethought, planning and serious consideration, it doesn’t have to be overwhelming and out of reach. Using this toolkit, Caribbean CSOs can get started working on small-scale advocacy initiatives and then scale-up efforts by working through simple steps, using basic tools and applying common sense know-how.
References


Website Resources

CSOs for Good Governance: Enhancing civil society’s contribution to governance and development processes in Trinidad and Tobago. Home page. Available at: https://www.canari.org/csos4goodgov [Accessed March 2020].

FoProBiM. Home page. Available at: https://www.foprobim.org/ [Accessed 1 March 2020].


Additional Resources


The following tools (which are referenced in the preceding sections) are included as part of this toolkit. Relevant worksheets and templates are shared below to help you build effective advocacy strategies and action plans.

Tools for developing an Advocacy Strategy:

- Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet
- Strategy Tool #2: Simple Advocacy Strategy Template
- Strategy Tool #3: Setting SMART Advocacy Goal and Objectives Worksheet
- Strategy Tool #4: Defining + Identifying Your Targets Worksheet
- Strategy Tool #5: Effective Advocacy Message Checklist

Tools for developing an Advocacy Action Plan

- Action Tools #1a: Building Our Advocacy Action Team Worksheet: Advocacy Team Roles Defined
- Action Tools #1b: Building Our Advocacy Action Team Worksheet: Assessing Our Team’s Capacity for Advocacy
- Action Tool #2: The Advocacy Action/Campaign Project Timeline
- Action Tool #3: Advocacy Resource Map Worksheet
- Action Tool #4: Simple Advocacy Action M&E Framework
- Action Tool #5: Advocacy Action Plan At-a-Glance Template
## Strategy Tool #1: Advocacy Strategy Broad Sketch Worksheet

### Generally, What? + Why?
(What are we advocating for? why?)

**SAMPLE (as CANARI, Cropper Foundation, Environment Tobago, EquiGov Institute — Escazú Champions TT):** The ratification of the Escazú Agreement in Trinidad and Tobago to help enhance environmental protections in the country by allowing for greater transparency and accountability where environmental projects are concerned.

### Specifically, What? + Why?
(What do we seek to accomplish? Why?)

**SAMPLE RESPONSE**
To persuade Prime Minister Keith Rowley to sign and ratify the Escazú Agreement in Trinidad and Tobago. Ratification of this agreement will empower environmental management groups like ours to access the information necessary to ensure vulnerable communities most impacted by environmental projects are informed about projects that will impact upon their day to day lives.

### Relevance
(How does this relate to/ support our organisational mission?)

**SAMPLE RESPONSE**
Part of each of our missions and mandates is to engage in natural resource management as a means of improving lives and/or contributing to the well-being of vulnerable populations.

### Importance
(Where would this rank on a scale of 1 [low] to 10 [high] in terms of impact on our beneficiaries, right now?)

**SAMPLE RESPONSE**
9

### Potential Partners
(Who could we collaborate with most effectively to achieve this goal? And why)

**SAMPLE RESPONSE**
We can partner with other leading environmental management organisations as we have with each other, as well as other local CSOs who represent vulnerable communities/citizen populations b/c we all seek to contribute to improving citizens’ lives.

### Proposed Timeline
(When will we launch this campaign? why?)

**SAMPLE RESPONSE**
September 2019 until the agreement is signed locally and ratified.

### Who?
(Who are we attempting to reach through this action?)

**SAMPLE RESPONSE**
Government officials (Cabinet members, Ministers, Senators)
Permanent Secretaries
Public Service Officers
Other CSOs

### How?
(How will we reach them?)

**SAMPLE RESPONSE**
Call to action letters signed by Civil Society Sector members.
News articles and interviews
Tweets, Facebook Shares, etc.

### Importance
(Where would this rank on a scale of 1 [low] to 10 [high] in terms of impact on our beneficiaries, right now?)

**SAMPLE RESPONSE**
9
### Strategy Tool #2: Simple Advocacy Strategy Template

<table>
<thead>
<tr>
<th>Overarching Goal of Strategy and Campaign</th>
<th>SAMPLE Overarching Goal of Strategy and Campaign</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ensure that the Gouyave Marine Protected Area is managed by the Gouyave local fisherfolk for the foreseeable future.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objectives (What do we want to achieve?)</th>
<th>Key Messages (What do we want to say about what we hope to achieve?)</th>
<th>Target Audiences (Who do we want to reach?)</th>
<th>Tailored Messages (How do we want to say it to them?)</th>
<th>Products + Platforms (What is the best way to present the information to them?)</th>
<th>Evaluation Method &amp; Indicators (How will we evaluate whether our objectives have been achieved and what would be indicators of success?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAMPLE RESPONSE Get fisherfolk to join GFSCL in droves.</td>
<td>SAMPLE RESPONSE Joining GFSCL gives local fisherfolk stewardship over their livelihoods.</td>
<td>SAMPLE RESPONSE Fisherfolk who are just starting out; have been fishing commercially for less than two years</td>
<td>SAMPLE RESPONSE Join GFSCL to help manage the Gouyave MPA and hold your future in your hands!</td>
<td>SAMPLE RESPONSE Social media (Facebook, YouTube and Instagram), Government-sponsored TV ads, radio</td>
<td>SAMPLE RESPONSE At least 5 new membership queries a month, and at least 2 new member registrations filed monthly.</td>
</tr>
</tbody>
</table>

This worksheet was adapted from the “Advocacy Strategy Template” included in the Advocacy PowerPoint presentation (created by Sarah McIntosh, Veni Apwann and Kasala Ltd) made at the CSOs4GoodGov “Let’s Advocate Together Workshop” (National Advocacy Workshop) in March 2018.
## Strategy Tool #3: Setting SMART Advocacy Goals and Objectives

<table>
<thead>
<tr>
<th>Kind of Advocacy Achievement</th>
<th>Specific? (Who + What?)</th>
<th>Measurement/Assessment (How?)</th>
<th>Attainable (Realistic?)</th>
<th>Relevant (Results Oriented?)</th>
<th>Time-bound (When?)</th>
</tr>
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<tbody>
<tr>
<td>Overarching Goal</td>
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</tr>
<tr>
<td>Objective #1</td>
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<tr>
<td>Objective #2</td>
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<td>Objective #3</td>
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**Remember...**

A SMART goal or objective is:

- **S**pecific (and strategic): Topic (goal) that you wish to accomplish...Answers the question—Who? and What?
- **M**easurable: The steps that are needed to meet that goal can be measured. Answers the question—How?
- **A**ttainable: Goals/objectives are down-to-earth and can be completed in a precise amount of time and are sensible.
- **R**elevant (results oriented): The goals are aligned with current tasks and projects and focus in one defined area; include the expected result.
- **T**ime-bound or time-framed: Goals have a clearly defined time-frame including a target or deadline date.

### Strategy Tool #4: Defining + Identifying Our Targets Worksheet

<table>
<thead>
<tr>
<th>Person/Group Name &amp; Affiliation</th>
<th>On a scale from 1-10 (1 being “Low” and 10 being “High”), how much does our advocacy issue affect them?</th>
<th>On a scale from 1-10 (1 being “Low” and 10 being “High”), how much influence do they have over our ability to instigate/inspire change with respect to this issue?</th>
<th>What, if anything, is most important to this person/group about our advocacy issue?</th>
<th>How could this person/group contribute to our advocacy campaign?</th>
<th>How could this person or group block or impede our advocacy efforts?</th>
<th>If we had to, how would we engage this person/group?</th>
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</tbody>
</table>
## Effective Advocacy Messages Checklist

Advocacy messages that resonate with and sway target audiences, are oftentimes:

<table>
<thead>
<tr>
<th></th>
<th>Clear: use conversational language and stay away from jargon</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Concise: are able to be expressed in a short paragraph</td>
</tr>
<tr>
<td></td>
<td>Compelling: speak to the values and concerns of the target(s) of the advocacy</td>
</tr>
<tr>
<td></td>
<td>Contrasting: lay out the difference between what you are advocating for and:</td>
</tr>
<tr>
<td></td>
<td>• what others are advocating for</td>
</tr>
<tr>
<td></td>
<td>• what is being offered by the sector(s) you are lobbying</td>
</tr>
<tr>
<td></td>
<td>Credible: fact or evidence-based, verifiable and realistic (able to be accomplished)</td>
</tr>
</tbody>
</table>
### Action Tool #1a. Building Your Advocacy Action Team Worksheet: Advocacy Team Roles Defined

<table>
<thead>
<tr>
<th>Advocacy Team Role</th>
<th>Description</th>
<th>Key Technical Skills</th>
<th>Key Soft Skills + Character Traits</th>
<th>Designated team member/s (Discuss and list the designated team member/s for each role)</th>
</tr>
</thead>
</table>
| The Project/Resource Manager                                           | This member of the team has a bird’s eye view of the advocacy effort/campaign and all of it’s moving parts. They have a pulse on the resources available for the project and how they need to be dispensed in order for the project to have maximum/desired impact. This person is responsible for conveying the larger vision to the rest of the team, managing all of the resources to ensure the goal and objectives are achieved, adjusting/pivoting the project’s focus to align better with the reality of the circumstances on the ground. | • Budgeting and financial management  
• Human capital/resource management  
• Project management  
• Strong verbal and written communication skills  
• Reporting                                                                 | • Effective leader  
• Personable  
• Persuasive                                                                 |                                                                                     |
| The Issue Analyst/Specialist and Researcher                           | Responsible for providing the rest of the team with extensive information on the advocacy issue and its history locally, nationally and regionally, this team member has an in-depth understanding of the issue being advocated for and what gains have been made on it prior to the beginning of the organisation’s advocacy efforts. This person can offer the team wider context for the advocacy issue and inform what may or may not be successful based on what happened in the past and what is happening elsewhere on the issue. | • Research  
• Data analysis  
• Understanding of policy and legislation, nationally and regionally  
• Strong written communication skills  
• Fast learner                                                                 | • Detail-oriented                                                                   |                                                                                     |
| The Beneficiary Community Outreach Specialist                          | This team member is the face of the advocacy movement/campaign/action(s) to the beneficiary community and the team’s liaison to the beneficiaries. They are responsible for communicating the needs of the beneficiary community to the rest of the team and ensuring that the advocacy efforts clearly reflect said needs. This team member is also responsible for communicating any shift in need on the part of the beneficiaries that may impact or change the direction of the advocacy efforts. They have a significant role in crafting the key messages of the advocacy effort/campaign. | • Rapport and relationship-building  
• Data collection  
• Conducting needs assessments  
• Reporting  
• Strong verbal communication skills                                                                 | • Affable  
• Insistent  
• Patient  
• Respectful  
• Even-keeled  
• Kind  
• Emotionally intelligent                                                                 |                                                                                     |
### Action Tool #1a (cont.). Building Your Advocacy Action Team Worksheet: Advocacy Team Roles Defined

<table>
<thead>
<tr>
<th>Advocacy Team Role</th>
<th>Description</th>
<th>Key Technical Skills</th>
<th>Key Soft Skills + Character Traits</th>
<th>Designated team member/s (Discuss and list the designated team member/s for each role)</th>
</tr>
</thead>
</table>
| The Influencer              | This team member is the face of the advocacy efforts to stakeholders in a position to aid the advocacy effort and help instigate the change we’re trying to bring about. They are responsible for networking, researching key stakeholders, developing rapport with and maintaining relationships with these target audience members at all levels. They have a significant role in adapting and tailoring the key messages to better appeal to the target audiences. | • Strong verbal and written communication skills  
• Rapport and relationship-building  
• Research  
• Situational analysis  
• Stakeholder analysis  
• Reporting  
• Strategic planning | • Affable  
• Persuasive  
• Patient  
• Persistent  
• Respectful  
• Even-keeled  
• Emotional Intelligence |                                                                                                                                                    |
| The Impact/ M&E Specialist  | This team member is responsible for monitoring the impact of our advocacy efforts. They are tasked with using agreed upon methods and frameworks to discern the impact of each advocacy action and the overall impact of the campaign/wider effort. This team member is keeping a close eye on what is working and what is not working and what may be contributing to those results so that future actions and advocacy efforts can be tweaked accordingly. | • Understanding of qualitative and quantitative methods  
• Data collection  
• Data analysis  
• Reporting | • Detail oriented  
• Fast-learner |                                                                                                                                                    |
### Action Tool # 1b. Building Our Advocacy Action Team Worksheet: Assessing Our Team’s Capacity for Advocacy

<table>
<thead>
<tr>
<th>Team Member Name</th>
<th>Current Role/Duties (apart from Advocacy)</th>
<th>Technical Skills</th>
<th>Soft Skills + Character Traits</th>
<th>Potential Advocacy Team Role? (based on comparison to Team Roles chart)</th>
</tr>
</thead>
</table>
| **SAMPLE RESPONSE:** Mayasa Dennison | **SAMPLE RESPONSE:** *Performance Analyst*  
- Identify different types of data that need tracking to improve organisational performance.  
- Generate easy-to-interpret reports based on collected data. | **SAMPLE RESPONSE:**  
- Data analysis and interpretation  
- M&E framework development  
- Technical report writing | **SAMPLE RESPONSE:**  
- Persuasive  
- Patient  
- Persistent  
- Respectful  
- Even-keeled  
- Emotional Intelligence  
- Detail oriented  
- Fast-learner | **SAMPLE RESPONSE:**  
*The Impact/M&E Specialist* |
### Action Tool # 2: The Advocacy Action/Campaign Project Timeline

<table>
<thead>
<tr>
<th>Advocacy Action/Campaign Title:</th>
<th>Timeframe: Month(s)/Weeks/Days*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Objective</td>
<td>Advocacy Action/Activity</td>
</tr>
<tr>
<td>SAMPLE RESPONSE:</td>
<td>SAMPLE RESPONSE:</td>
</tr>
<tr>
<td>Enroll 2 new fisherfolk into GFSCL every 6 months</td>
<td>Talk to 20 new fisherfolk monthly for 6 months</td>
</tr>
</tbody>
</table>

*Circle the timeframe that applies and place an X in each applicable numbered column to indicate how long the task (advocacy action/activity) will take to be completed. NOTE: This Timeline Worksheet was adapted from “Agitate Media Project Timeline Template” and “SmartSheets Project Timeline Template”: [https://www.smartsheet.com/free-blank-timeline-templates](https://www.smartsheet.com/free-blank-timeline-templates)
# Action Tool #3: Advocacy Action Resource Map Worksheet

**Planned Advocacy Activity:**

**SAMPLE RESPONSE:**
*Opinion Editorial (Op-Ed) and Letter to the Editor (LTE) series (5 pieces) highlighting hardships faced by the beneficiary community to appear in local news media.*

**Anticipated budget:**
$US 5000

**Source/s:**

<table>
<thead>
<tr>
<th>Main campaign activities</th>
<th>Anticipated needs (See sample responses below)</th>
<th>Related costs: (See sample responses below)</th>
</tr>
</thead>
</table>
| 1. Collect content       | Travel  
Field visits to conduct interviews with beneficiary community members.  
Communications  
Access to key and targeted messaging (from Advocacy Plan + Strategy)  
Interview transcripts from field interviews  
Other | Two visits to Mayaro @ $50 USD (total of $100 USD)  
Wi-Fi, phone and in-office printing (included in organisational operating costs)  
One day (8 hours) of cumulative staff time @ $400 USD/day |
<table>
<thead>
<tr>
<th>Advocacy action (Goal or specific activity)</th>
<th>Baseline (Where are we starting?)</th>
<th>Target (What are we aiming for?)</th>
<th>Indicators (What are specific measures than indicate success?)</th>
<th>Means of verification (what sources of information exist to check progress or confirm the target was achieved?)</th>
<th>Responsible Team Member (Who is monitoring?)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SAMPLE RESPONSE:</strong> (GOAL) The ratification of the Escazú Agreement in Trinidad and Tobago to help enhance environmental protections in the country.</td>
<td><strong>SAMPLE RESPONSE:</strong> Government participation in drafting the agreement and public, international acknowledgment of its importance.</td>
<td><strong>SAMPLE RESPONSE:</strong> Full Government buy-in and support of the agreement by signing and ratifying it and making a public announcement/declaration to that end.</td>
<td><strong>SAMPLE RESPONSE:</strong> Signed, ratified agreement Public notice from The Office of the Prime Minister.</td>
<td><strong>SAMPLE RESPONSE:</strong> News media, articles and press releases Weekly outreach to The Office of the Prime Minister and relevant Environmental agencies and ministries.</td>
<td><strong>SAMPLE RESPONSE:</strong> All team</td>
</tr>
</tbody>
</table>

Goal

Action/Activity

Action/Activity

* "Action/Activity" is meant to signify a singular, more specific task that will aid in the accomplishment of the overall goal; for the listed "sample response," an "action/activity" could be "drafting a call-to-action letter from leaders of civil society urging the Prime Minister to act (sign and ratify) on the Escazú Agreement. NOTE: This tool/worksheet was adapted from Tools4Dev ([www.tools4dev.org](http://www.tools4dev.org)).
<table>
<thead>
<tr>
<th>Advocacy Campaign Name</th>
<th>&quot;Our Fish, Our Future&quot; Conservation in Local Hands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overarching Advocacy Goal (Desired Change in Policy/Behaviour)</td>
<td>Gouyave fisherfolk take stewardship over the Gouyave fish sanctuary and marine protected area (MPA) by joining the Gouyave Fishermen Cooperative Society Ltd (GFCSL) and participating in the management process.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective</th>
<th>Advocacy Activities/Actions (2-3 per Objective)</th>
<th>Success Indicators (How will we know an activity/action has been successful?)</th>
<th>Outputs/ Deliverables (at least 2-3 per activity)</th>
<th>Due date</th>
<th>Current Status</th>
<th>Responsible Team Member</th>
<th>Partner(s)</th>
<th>Associated Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAMPLE RESPONSE: Enroll 2 new fisherfolk into GFSCSL every six months</td>
<td>SAMPLE RESPONSE: 1. Talk to 20 new fisherfolk monthly. 2. Talk to 5 aspiring fisherfolk monthly.</td>
<td>SAMPLE RESPONSE: 1. At least 5 new attendees to GFSCSL monthly meetings every month.</td>
<td>SAMPLE RESPONSE: 1. Notes on conversations with 20 new fisherfolk 2. 1 new registered member every 3 months.</td>
<td>SAMPLE RESPONSE: On-going, due at Monthly meetings</td>
<td>SAMPLE RESPONSE: 1 new member signed up in the first quarter of 2020</td>
<td>SAMPLE RESPONSE: Mayasa Dennison</td>
<td>N/A</td>
<td>SAMPLE RESPONSE: No outgoing costs</td>
</tr>
</tbody>
</table>

This template was adapted, in part, from SHIFT Caribbean's Project Goal Template (c) 2018-2019.
Caribbean Natural Resources Institute

The Caribbean Natural Resources Institute (CANARI) is a regional technical non-profit organisation which has been working across the Caribbean for over 30 years. We are registered in Trinidad and Tobago, Saint Lucia and the United States Virgin Islands, with charitable status in Trinidad and Tobago and 501(c)(3) status in the United States.

Our mission is to promote and facilitate stakeholder participation in the stewardship of natural resources in the Caribbean. Our work currently focuses on four themes: Biodiversity and Ecosystems, Equity, Resilience and Participatory Governance.

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