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Planning Moment #1: Looking Inward

For many organizations, getting involved in advocacy requires a shift from short-term project planning to long-term strategic thinking. It also requires that the organization engage directly with politics and power. These are big changes. Becoming a policy player is a strategic choice that will mean changes in the organization's mission, staffing, priorities, relationships, and strategies. Before you decide to do this, it is important to be clear about who and where you are now.

This process of “looking inward” is equally important for the individuals doing and planning advocacy: staff, organizers, activists, lobbyists, and constituents. The analysis of power that shapes the advocacy plan should start with the people doing the advocacy. Organizations are made up of different people with different identities shaped by class, race, gender, age, country of birth, and other factors. These differences influence our perspectives and shape the power dynamics within our organizations, with our partners and in the larger political environment. Diversity enriches planning, but it also generates conflicts. If we do not explore these differences, they may cause problems rather than serve as a source of richness and creative energy.

This chapter will help you begin the planning process with a clearer sense of who you are and where you stand before you attempt to change the world around you. It can be especially useful to those who are moving from traditional development work to programs that integrate advocacy and citizen participation.

For more guidance on coping with major organizational change, we recommend *From the Roots Up: Strengthening Organizational Capacity through Guided Self-Assessment*, Peter Gubbels and Catheryn Koss, World Neighbors, Oklahoma, USA, 2000.

Four Steps to Looking Inward

This planning moment has four steps:

STEP 1: Who Am I?

Clarify individual perspectives, values, and assumptions that influence planning and action choices. This step can also help people feel less inhibited about speaking up in a group and working as a member of a team.

STEP 2: Who Are We?

Assess the vision, mission, and key strategies of our organizations, and define a new long-term vision for political change that will inform the advocacy work. This can create a sense of solidarity and shared commitment.

STEP 3: Where Are We Going?

Discuss the pros and cons of engaging in or expanding advocacy work for our organizations. This helps get buy-in for new directions and allows groups to analyze the implications of their choices.

STEP 4: How Do We Look To Others?

Evaluate the organization's image, reputation, relationships, and credibility with key stakeholders—especially with constituencies and policymakers. This diagnosis will later feed into a more in-depth analysis of opportunities and threats when you focus on a specific advocacy issue.

Step One: Who Am I? Identifying Ourselves and Our Interests

We get involved in advocacy because we want to improve society and influence the course of history. But we are also part of society and history. Who we are and how we think affects what we care about and how we relate to others. Self-analysis helps to identify our strengths and weaknesses and clarify the power dynamics in a group. What we learn

from self-analysis can then be used in improving our participation and in changing the wider power relations affecting our advocacy. There are many creative ways of approaching self-understanding. (The exercises in the Annex on p. ### complement the following ones for this purpose.)



Looking Inward

Purpose

- To clarify characteristics that shape who we are such as class, race, gender, religion, and age.
- To identify how we think our organization can contribute to positive change.
- To strengthen our ability to communicate as a team.

Process

(Time: 1 hour)

The facilitator can use the categories in the box or others to divide the group into sub-categories, called “lifeboats.” For example, under decade of birth, the facilitator calls out “1950s,” “1960s” and so on.

1. The facilitator calls out specific sub-categories. Participants scramble to find others in the same lifeboat. Informally take note of how many participants are in each sub-category.
2. After all participants have grouped themselves by sub-category, they have 10 minutes to talk with each other about what distinguishes them from people in other sub-categories. Then each lifeboat grouping has a chance to tell the full group how they are different.
3. Repeat this process with as many other categories as you would like.

Categories

- Country or region
- Decade of birth
- Cultural background
- Ethnic group
- Gender
- Race
- Occupation/work
- Opinions on a particular issue
- Religion
- Other

Discussion

This exercise can help people get to know one another and loosen up, but its usefulness depends on how it is processed. Discussion about personal differences can raise sensitivities. On the other hand, people usually enjoy talking about themselves and, in a comfortable environment, will be open.

Once participants have returned to plenary discussion, the facilitator can ask some of the following questions:

- Were there some lifeboats that were fuller than others? Why?
- What are the unique things that each lifeboat brings to the table?
- What are the implications of the imbalances in numbers and characteristics for planning?

From *Naming the Moment: Political Analysis for Action* by Deborah Barndt, The Jesuit Centre for Social Faith and Justice, Toronto, 1989.

Purpose

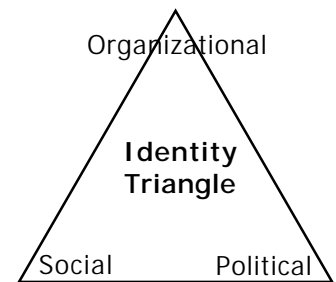
This exercise complements the *Lifeboat* exercise, but is also a useful introduction to a broader analysis of power. It helps to:

- identify who we are individually and as a group in relation to those with power in our societies;
- deepen our understanding of how identity, power, subordination, and exclusion affect our organizations, ourselves as individuals, and advocacy planning.
- illustrate how power is dynamic and relational.

Process

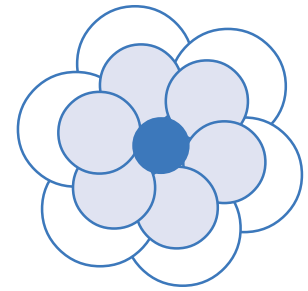
(Time: 45 minutes–1 hour)

This exercise has three steps which look at our social, organizational, and political identities. These three identities together make up what is called the identity triangle.



Social Identity

We look at social identity using the power flower. This tool looks at who we are in relation to those who have power in society. We use the outer circle of petals to describe the dominant social identity. The group usually fills in the outer circle of petals together. We use the inner petals to describe the social identity of individuals. Participants usually fill in the inner petals by themselves (see next page).



1. Before the exercise, draw the power flower on a large piece of paper and place it on the wall. Each petal represents one category, which can include: sex, race, ethnic group, language, religion, family type of arrangements (single, extended, etc.), social class, age group, education, ability/disability, geographic region (origin), geographic region (current), etc.
2. As a group, discuss each category and the characteristics of those who have most power in the society. In the outside circle of the petal, fill in these dominant characteristics. (For example, which sex or which ethnic group has the most power.)
3. Hand out pieces of paper with pre-drawn flowers on them to each person. Ask people to work individually and write in the outer circles of their flowers, the dominant characteristics that were agreed on by the group.
4. Ask each person to write their own identities for each petal/category on the flower's inner circle.

The other sides of the triangle—organizational identity and political identity—can be discussed after doing the “social flower.” The elements for organizational and political identity usually differ more than for social identity between cultures and contexts. Some possible dimensions are:

Organizational Identity

- Category of the organization: (Examples: government, NGO or type of NGO, private sector, community-based or peoples' organization, social movement, coalition, labor union, women's organization)
- Structure: (Examples: collective, hierarchical, voluntary, paid, professional, business)
- Position within the organization: (Examples: director, head of specific program, member, trainer, technical specialist, lobbyist, volunteer)

Political Identity

- It is difficult to prescribe a process for analyzing political identity. The categories -- left, right, and center -- are common in most contexts, but the shades of difference in political identity in different contexts cannot be universalized. This analysis can be broken down in terms of political tendency or political party affiliation.

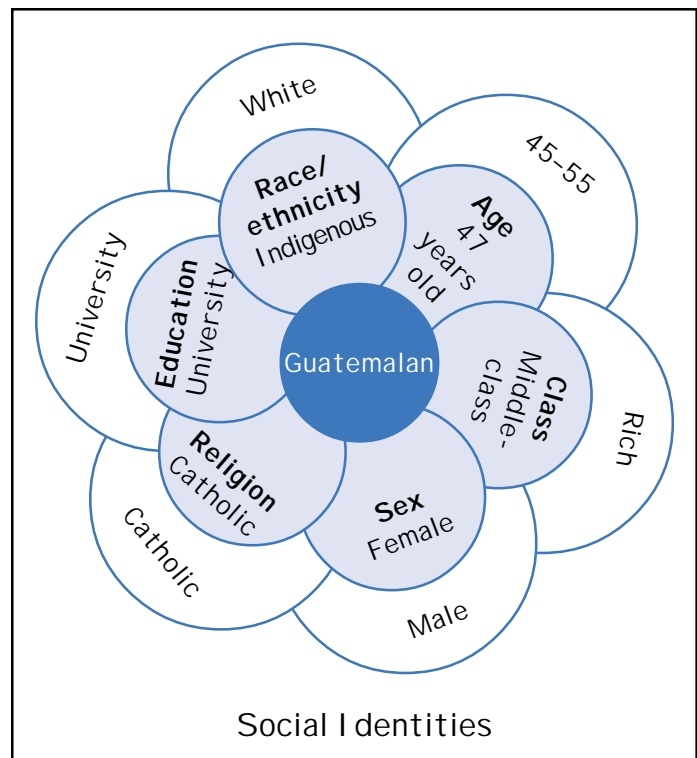
Discussion

Once each person has completed their social identity flower, the facilitator can lead discussion around questions such as:

- How many of your individual characteristics are different from the dominant identity? Which characteristics cannot be changed? What does this say about your own power or potential for power?
- What does the exercise reveal about us as a group? What are the differences and similarities in relation to the dominant power? How can that influence our work?
- What does this exercise tell us about identity and power more broadly?

The Complexity of Individual Identity

This analysis helps reveal the relationships between people involved in advocacy and the processes of subordination that affect their lives. Because each individual has many identities, individuals can be dominant in one relationship and subordinate in another. For example, being a woman or man is only one part of an individual's identity. Other aspects such as age, class, race, and ethnicity also affect that person's social relations and power. While each situation presents a unique configuration of power imbalances and dynamics, in most hierarchies of power, it is those who are wealthy males who are dominant. To be effective in advocacy, we need to take these things into consideration within organizations and in every activity.



Adapted from Barbara Thomas, *Educating for a Change: Between the Lines*, The Dorothy Marshall Institute. Toronto 1991. See also Chantal Mouffe.

Purpose

Analysis and planning is improved by being aware of the lens through which we view the world. Our lens is influenced by our assumptions and values. Because these differ among people, different people can look at the same situation and see entirely different things. The purpose of this exercise is to identify the political assumptions that shape our opinions and analysis.

Process

(Time: 45 minutes–1 hour)

1. In plenary, ask the group to brainstorm the assumptions that shape their views of politics, power and social change. If the group is large, divide into small groups to brainstorm. To help them develop a list of assumptions, participants may want to consider the following questions:
 - What do we assume to be true about processes of social change?
 - What do we assume to be true about power and conflict?
 - What do we assume to be true about political process?
2. After 10–15 minutes, ask the group(s) in plenary to make up a common list of assumptions they bring to the task of advocacy planning.
 - What are some of the assumptions we share?
 - Where are there differences?
 - How do these assumptions affect our choices about what we do?

The following assumptions were listed in the manual, *Naming the Moment*.

“When we do this analysis, we assume that . . .

...our social situation is filled with tensions between social groups and within them.”

...history is made as these groups come into conflict and resolve conflicts.”

...some groups have power and privilege at the expense of other groups.”

...this oppression is unjust, and we must stop it.”

...if we want to participate actively in history, we must understand the present as well as the past.”

...we can learn to interpret history, evaluate past actions, judge present situations and project the future.”

...because things are always changing, we must continually clarify what we are working for.”

...to be effective, we must assess the strengths and weaknesses of our own group and those working with and against us.”

...at any moment there is a particular interrelationship of economic, political, and ideological forces.”

...these power relationships shift from one moment to another.”

...when we plan actions, our strategy and tactic must take into account these forces and relationships.”

...we can find the free space that this particular moment offers.”

...we can identify and seize the moment for change!”

From Deborah Barndt, *Naming the Moment: Political Analysis for Action, A Manual for Community Groups*.
Toronto: The Jesuit Centre for Social Faith and Justice, 1989.

Step Two: Who Are We as an Organization?

Most strategic planning begins with a review of an organization's vision, mission, and overall strategy or objectives. These elements set the parameters for choosing a new strategy or expanding an existing one. However, many organizations do not have a written vision or mission or, if they do, the staff or members do not know it. Advocacy involves long-term action that will create many choices. You will need the vision, mission and strategy to help direct decisionmaking along the way.

Different people define these elements in different ways. We have found the following definitions¹ useful:

A Vision is how an organization would like the world to be in the future. Visions express ideals and may not be attainable in a given period of time. A shared vision can provide momentum for individuals working together, and can be a statement of social commitment.

A Mission is an organization's purpose given its vision for the future, and translates the vision into practical action. A mission

- *guides* policy decisions about alternative actions;
- *prioritizes* activities, demands, and the use of resources;
- *channels* collective action in one direction; and
- *provides meaning* and motivation for hard work.

Overall Strategy refers to the set of activities that the organization carries out to accomplish its mission. Strategy is broader than programs.

Our focus on strategy instead of objectives may be confusing for those who have partici-

pated in strategic planning exercises that follow the Vision-Mission-Objectives (V-M-O) framework. Defining objectives is important. However, at this stage in planning, organizational assessment is intended to define the parameters for engaging in advocacy. Redefining the organization's vision, mission, strategies, and objectives will require a more intensive strategic planning process.

The real life examples and comments on the following page can be used to better understand vision, mission and strategy.

Why Political Visions?

The project orientation of most donors and development programs has encouraged the habit of thinking only in two to three year funding cycles. Political instability, repression, and persistent poverty also discourage many people from having faith in the future or believing they have a role in running their society. In many countries, thinking beyond day-to-day survival seems a waste of time.

Some activists and educators feel that people, especially the poor and disadvantaged, can be discouraged by a vision with an ideal that they will not be able to achieve in their own lifetimes. Others believe the process can unify and motivate groups in important ways. For example, the vision of social justice articulated by the American civil rights leader, Martin Luther King, in the *I Have a Dream* speech mobilized people in the United States during the sixties, and still inspires people today. The challenge for activists and trainers is how to balance the vision with the need to set achievable goals.

But a long-term political vision is important for effective advocacy. First, a vision helps us to imagine how we want people and institutions to behave so that values like justice and equality are realized. A vision inspires. Second, advo-

Example Vision, Mission, and Strategy Statements			
	VISION	MISSION	STRATEGIES
Example #1 From a women's legal research and action network	The existence of gender equity in [specific region] where women and men are co-partners and co-decisionmakers at all levels, and governments are committed to the removal of barriers that prohibit this.	To promote understanding of and practical strategies to further gender equity through: - socio-legal research demonstrating the negative impact of inequality, and - education and advocacy to achieve informed policy and attitudinal change.	Research and analysis on crucial legal problems affecting women. The dissemination of information in different forms aimed at: -policymakers and -women with a basic educational level
Comments on #1	<i>The vision, mission, and strategy provide a clear sense of the organization's ideal future, their key purpose and their primary actions. The use of the term 'gender equity' may be confusing for people who are not aware of gender issues. However, its meaning for this particular group has been spelled out in the vision.</i>		
Example #2 From a Women and AIDS network	A society where women enjoy reproductive rights.	To increase women's knowledge and their attainment of reproductive rights for all women.	-Mobilization -Access to information and services -Programs geared towards enabling women to control resources
Comments on #2	<i>Terms such as 'reproductive rights' and 'mobilization' do not clearly describe what the organization hopes to achieve. For example, in the vision, we don't know what "enjoy reproductive rights" means. In certain cases, this may be intentional for public acceptance and to avoid backlash. But it is even more confusing because the organization's name suggests that it focuses on AIDS. The vision and mission do not explain how AIDS prevention or support fit into the reproductive rights mission. The strategies are too general. Access to what kind of information and services? For whom? To what end? Control over what kinds of resources?</i>		
Example #3 From a women's wing of a trade union federation	To defend the rights of women.	-To increase women's participation in decision-making in the trade unions. -To create gender awareness in all trade union structures. -To empower women workers to know and exercise their rights in the workplace and at home.	-To form women workers' committees. -To mobilize women workers to join and become active in trade unions.
Comments on #3	<i>This vision is more suitable as a mission statement because it states the purpose of the organization. The vision as an ideal future could be restated as: "A democratic trade union movement where women and men workers are equally represented in the leadership and the rank and file, and where the policies and benefits are equitable and adequate." The mission statement is really a list of strategies. The strategies could be activities under each of the strategies.</i>		

cacy is a never-ending series of shifting situations involving difficult choices and unexpected outcomes. A clear political vision serves as a guide for making strategic decisions. If you do not know where you are headed, it is difficult to decide which direction to go today.

The following vision exercise reinforces a core tenet of transformative politics—that politics is both a public and private matter. When we focus only on public politics, we overlook the other social institutions that perpetuate discrimination and subordination.

Purpose

To define the characteristics of political life in the ideal future as expressed in roles, relationships and values in decisionmaking at all levels.

Process (Steps 1–2)

(Time: 1½–2 hours)

1. Divide participants into four small groups of five to six people.
2. Ask each group to choose a facilitator who will guide the visioning with the following questions:
 - What would you like politics or decisionmaking to look like in ten years in:
 - the family?
 - a community or neighborhood?
 - an NGO or association?
 - the national legislature?
 - international policymaking institutions (e.g. World Bank, IMF, WTO)?
3. Ask each group to describe their vision and write it on a large piece of paper.
4. Ask groups to hang their visions around the room. Let participants walk around, read and discuss the visions with each other. This is called a gallery walk because participants view and discuss each other's work independently and informally.
5. Ask participants to return to their groups and choose one of the six areas—the couple, family, community, NGO, legislature, and international policymaking institution. Make sure that groups do not all choose the same arena. Then ask each group to develop two short plays—no more than seven minutes each—comparing how the arena operates today with their vision of the future.

You can also include the *couple* (those involved in an intimate relationship in marriage or some other form of union) as a category. Understanding this relationship of power is key for advocacy on AIDS and reproductive and sexual rights and health.

Discussion

After all the skits are presented, discuss each vision separately. Then compare the differences and similarities between the scenarios. An important point to draw out is:

- Change requires more than policy reform. There need to be changes in the underlying values and social habits that perpetuate inequality. Advocacy planning needs to take into account the structural and ideological roots of discrimination and subordination.

Facilitator's Tip

The exercise uses skits and theater to help participants look at how power works. Often people relate easily to the real-life situations presented and can learn at the same time as they enjoy the drama. Skits are a quick and easy method for people to understand vision and decisionmaking. They avoid the rhetoric that often happens in long discussions. To make skits entertaining and useful, there should be a set of guidelines—including a time limit and discussion questions. (See Augusto Boal, *Legislative Theatre*, for more suggestions)

Example: Visions of Decisionmaking*The Ideal Family*

- Decisionmaking and responsibility are shared among all family members, including children and adult women.
- No domination; everyone has the right to say “no,” argue, or negotiate.
- No discrimination within the family.
- All members know their rights.
- Women are not economically dependent; women’s household work is valued.
- Both husband and wife are involved in deciding the number of children and when to have them, and share responsibility for the children and the household.

The Ideal Community

- Decisionmaking is shared among representatives from all groups of the community irrespective of their social and cultural status, religious and political beliefs, or gender. Fifty percent of the representatives are women.
- Gender-sensitive leaders are selected by the groups in a democratic and participatory process.
- People are informed about rights and care about the ‘common good’.
- People have the skills to analyze problems and take initiative to solve them.
- People understand and are committed to democratic process.

In the Ideal NGO

- Decisionmaking is carried out in consultation with representatives from grassroots and all levels of the organization. Fifty percent of the representatives are women.
- NGOs and associations are political, they see themselves as important catalysts for change, with a strategic long-term commitment.
- There is no stereotyping of women’s roles in NGOs.
- There is less paternalism and more respect for grassroots communities and beneficiaries.

The Ideal National Legislature

- The diversity of the population is accurately reflected, with differences, concerns, and issues emerging. Fifty percent of the representatives are women.
- Women’s issues are raised as important, addressed, and solved by both women and men.

From an Asian regional advocacy training workshop. This group was not asked to think about the global policymaking arena or the couple.

The following illustrations show what people in different parts of the world have presented in the *What’s Your Political Vision?* exercise. The values and behavior illustrated in the skits are similar across cultures, although the specifics are different. These drawings can also be used as an exercise to analyze the dynamics of decisionmaking in different arenas in the present and compare them with the possible future. Such an exercise can also help find common characteristics in the different arenas of the family, organization, and Parliament.

DECISIONMAKING TODAY

DECISIONMAKING IN THE IDEAL FUTURE

The Family



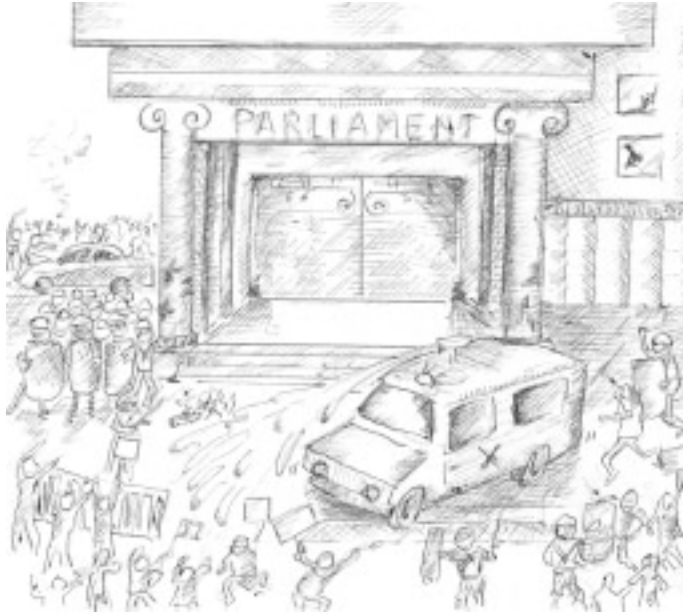
NGOs



DECISIONMAKING TODAY

DECISIONMAKING IN THE IDEAL
FUTURE

National Legislature



People demonstrate to make their voices heard



People discuss their proposal with policymakers

Facilitator's Tips about Visions and Vision Statements

There are lots of different ways to do visioning. Some facilitators prefer open-ended questions and asking people to dream. Others prefer to be concrete about the timeframe. We have found that visioning for advocacy can be facilitated by a question specifically about politics and decisionmaking, such as: *How would you like decisions to be made?* By focusing on decisionmaking, the vision makes power relations a focus for the planning process. The political vision exercise also helps groups look at the values that guide their advocacy work. Sometimes capacity-building for advocacy is reduced to a mechanistic series of universal techniques for policy change. Looking at power and values helps the vision to be grounded in the political and cultural context as well as define a social commitment.

In essence, the vision exercise asks, "What kinds of political, social, and economic systems do we want to live in?" That question often leads to another question, "What is democracy?" Sometimes a discussion about democracy is useful and at other times, not. (See Chapter 1, page ###.)

The visioning exercise provides the basis for writing a vision statement. When we assess a vision statement, we usually ask: *Does this reflect the overall dream of this organization, or does it sound more like an activity?* Other ways to help people formulate a vision statement might be:

- Imagine a world that doesn't need this project or this organization—*what would that world look like?*
- Explain that a vision is a description of society and ask them to complete the phrase beginning "*a society where . . .*"

Step Three: Where Are We Going?

Reviewing who you are as an organization lays the foundation for knowing what you can do in the short-term. Before an intensive planning process, it is helpful to discuss informally where you want the organization to go. Strategic questions can generate ideas for alternative approaches that can be explored later on in the planning process.

Strategic questions² may refer to the:

- problems the organization wants to solve;
- availability of the necessary resources;
- political space in which the organization operates;
- organization's internal capacities;
- allies and competitors.

All organizations find themselves periodically at a crossroads when they need to reexamine their vision and mission, and figure out what strategies will allow them to take advantage of new opportunities. This is the case when an organization becomes involved in or expands its involvement in advocacy. Even an advocacy organization will need to figure out where it is going when it considers new and different social problems, targets, campaigns, and arenas of policy.

The strategic questions that follow are formulated to help an organization weigh the pros and cons of engaging in advocacy.

The Pros and Cons of Getting Involved in Advocacy

When discussing with your group whether to get involved in advocacy work, consider the following questions³. Each organization will have different priority questions.

- What resources and strengths can your organization offer advocacy work? What added resources are needed?
- What skills does your organization currently have to do effective advocacy work? What additional skills are needed?
- What are the benefits to your organization?
- What are the risks to your organization?
- How will advocacy affect your organization's activities and mission?
- Will your organization need to alter its mission and programs?
- How will doing advocacy work affect your membership and your relationship to the communities you serve?
- Which other actors with whom you have a relationship—such as NGOs, labor unions, university, professional organizations, individuals—are your likely allies? (This question is difficult to answer unless you have decided on your issue.)
- With which other groups do you need to build relationships to succeed?
- How will advocacy work affect your organization's legal and financial situation?

Step Four: How Do We Look To Others? Gauging Visibility and Credibility

Assessing your organization's visibility and credibility with potential constituency groups and with official political players is another valuable part of organizational self-assessment in preparation for advocacy. This assessment will be revisited in more depth further along in the planning process once you have chosen your advocacy focus. The following two exercises, *The Official Political Credibility Checklist* and *The Constituent Credibility Checklist*, can help you assess your relationship, your reputation, and your general image.

Purpose

To assess how your organization is perceived by powerful political players as a basis for planning advocacy activities. This checklist contains criteria presented from the perspective of opinion leaders in the formal policymaking and political arena. The list may not be the same as your own views of what is important about your organization. For example, many policy players may be interested in the size of an organization. They believe that the bigger you are, the more important you are. For people in the NGO community and groups working on social justice advocacy, bigger is not always better. But this checklist assesses external credibility.

Coalitions can undertake this exercise to determine the collective strength of their member organizations.

Process

(Time: 1 hour)

This activity can be done in two ways:

- If your organization is large, do the exercise as an individual survey given to all staff, board and members. Tally all the responses and then discuss the findings with as many respondents as possible.
- If the number of people does not exceed 15–20, you can do the exercise collectively.
- Identify the primary political officials and players you are likely to encounter and deal with in your advocacy. You will have to be as specific as possible. For example, among political players you might include legislators, policymakers in different institutions and agencies, and opinion leaders (such as religious leaders or media figures) who influence relevant ideas about social justice, equality, etc.
- You may want to apply the checklist separately to different groups of players rather than more generally. For example, you can assess your credibility with legislators and then, with the bureaucracy or ministries.
- Some criteria may not be relevant to your organization. Select the criteria that are relevant and, if necessary, add your own criteria. Rate your organization from one (low or poor) to three (high or excellent) on each criterion.

Official Political Credibility Checklist			
Size of membership	_____	Contacts with political parties	_____
Status of membership (e.g., professional status)	_____	Contacts with corporate or other powerful entities	_____
Provider of quality services	_____	Quality of information (research/publications/briefings)	_____
Links with client group or community	_____	Recognized theoretical or practical expertise in given field	_____
Size/status of client group	_____	Age of organization	_____
Mechanisms of internal accountability	_____	Size of organization	_____
Links with funding agencies	_____	Wealth of organization	_____
Links with supporter or affiliated bodies	_____	Efficiency of organization	_____
Status of board members, patrons	_____	Financial transparency of organization	_____
Perception of staff integrity and competence	_____	Legally incorporated organization	_____
Perception of leaders' or officers' integrity and competence	_____	Perceived independence of organization	_____
Links/contacts with government:		Level of positive media exposure	_____
Executive	_____	Level of public recognition of organization	_____
Legislative/Parliament	_____	Controversial Issues*	
Agencies/Ministries	_____	(3 for avoiding controversy;	
Judiciary	_____	0 for being connected to	
Policy/Military	_____	controversy)	_____
Local officials/Municipal	_____		_____
Councils	_____		_____
		TOTAL	_____

Adapted from the *Advocacy Sourcebook* by Valerie Miller and Jane Covey, Institute for Development Research, Boston, 1997.

*Controversial issues vary between cultures and contexts. They are issues that are sensitive politically and socially, and that can provoke heavy debate, political embarrassment and even violent conflict. Advocacy with disadvantaged sectors such as farmers, workers, and women is often controversial. Issues that are seen as questioning power relationships and religious or cultural beliefs are almost always controversial. Usually powerful people do not like controversy because it can threaten the status quo. Organizations that have a history of engaging in controversial issues need to keep their public image as clean as possible to keep doors open. But there are times when conflict cannot be avoided and when controversy is the best way to bring attention to your issues and generate political debate.

Assessing Visibility and Credibility with Constituencies

Assessing your organization's presence and reputation with potential constituencies is as important as assessing your public image among powerbrokers. This diagnosis may need to begin with a discussion about who are potential or real constituency groups. As we discuss in Chapter 4, constituencies are the people who are most affected by the problems of poverty, social injustice and inequality that you are addressing.

Many NGOs may not have a direct relationship with the people most affected by the problems that they are attempting to address. These intermediary organizations usually provide information, training, assistance, or coordination for advocacy while their partners or beneficiaries have a more direct relationship with the constituency.

Who Are Your Constituents?

The following four questions will help to clarify who your constituencies are:

- Who does your organization serve directly?
- What role do these people and communities play in your organization and in your advocacy?
- Who benefits from your organization directly?
- Who does your organization hope will (eventually) benefit from successful advocacy?

The local constituency in advocacy is the people who will directly benefit from the changes you hope to achieve. However, your activities may also benefit other groups who are working with your constituency. For example, an agricultural education NGO helps rural extension workers to make their interven-

tions more responsive to both women and men farmers. The constituency is the farmers, but there is also a direct benefit to the extension workers.

This analysis can be useful because partners, beneficiaries, and constituents are all stakeholders, but they may sometimes have different priorities. Donors, government, other NGOs, management, and staff are also stakeholders with their own priorities that may even conflict with your own. As an organization, you will want to be aware of all these stakeholders, and responsive to them when appropriate. However, often there are so many pressures that groups forget about their constituencies, particularly if their program does not include direct contact with them.

In Chapters 4, 9, 10, and 14, we discuss constituency-building in detail.

Purpose

To assess your organization’s relationship and credibility with real and potential constituencies. The rating will give you a sense of how well you know your constituency, how well they know you, and how well you relate to each other. It may give you ideas about the strategies you need to build the trust and connection necessary to engage them in advocacy.

Process

(Time: 1 hour)

After identifying your potential and real constituencies, assess your credibility and visibility with them using this checklist. Add your own criteria that address the specific nature of your constituency. You may want to identify 2-3 major constituencies and assess your credibility with each one.

This activity can be done in two ways:

- If your organization is large, do it as an individual survey given to all staff, board and members. Tally the responses and discuss the results with as many respondents as possible.
- If there are fewer than 15–20 people, do the survey collectively.

Constituency Credibility Checklist	
Frequency of direct contact with constituents	_____
Organizational recognition by constituents	_____
Equality and reciprocity of partnership	_____
Depth of knowledge of staff about the social hierarchies and problems faced by your constituents	_____
Trackrecord (i.e. delivery on promises)	_____
Two-way information flow	_____
Joint decisionmaking	_____
Level of trust and respect	_____
Personal connections	_____
TOTAL	_____

Adapted from *Organizing for Social Change: A Manual for Activists* by Bobo, Kendall, and Max. Midwest Academy, Seven Locks Press, 1991.

Rate your organization from one (low or poor) to three (high or excellent) under each criteria. Your constituents can be a geographic community or a social grouping. Key constituents can be asked their opinions, including what they value most about the relationship and what they would change.

Discussion

- How can we adapt our community-based activities to engage constituents more directly in the planning, decisionmaking and implementation of advocacy? How will this change the timeline and budget for our programs? Will we need new skills to do this?
- How can we mobilize and maintain grassroots support and involvement in our advocacy?
- How can we prevent putting the grassroots supporters at risk from political backlash?
- How can we reduce the potential resistance by men and gain their support for increasing women’s involvement and leadership in advocacy?
- If we engage in global and regional advocacy, what kind of information technology will we need to keep ourselves, our partners and our constituents involved? Is this feasible?
- How do we educate donors about the financial and time implications of constituency-building?

NOTES

¹ Adapted from *Strategic Thinking: Formulating Organizational Strategy Workshop, Facilitator's Guide*, Institute for Development Research, Boston, 1997.

² Ibid.

³ Adapted from *The Advocacy Sourcebook* by Valerie Miller and Jane Covey, Institute for Development Research, Boston, 1997.