

# ADVOCACY TOOLKIT

INFLUENCING THE POST-2015  
DEVELOPMENT AGENDA

A partnership programme between



In collaboration with



Toolkit collaborators



**SUSTAINABLE DEVELOPMENT 2015**

Putting stakeholders at the core of post-Rio+20 processes

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Thanks to the AGNA and IFP members and all other organisations who contributed the case studies for this toolkit.

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## THE SD2015 PROGRAMME

This advocacy toolkit is an output of the Sustainable Development 2015 (SD2015) programme, a multi-stakeholder engagement programme run by Stakeholder Forum and CIVICUS, in collaboration with UN DESA.

The SD2015 programme aims to increase stakeholder participation in the process to negotiate a new global framework to eradicate poverty through sustainable development, known as the post-2015 development agenda. SD2015 provides tools and opportunities for all stakeholders to input to this agenda and help build a more sustainable future, through five focus areas: raising awareness; increasing engagement; empowering stakeholders; coordinating advocacy; and strengthening governance.

SD2015 is undertaken with the financial support of the European Union.

See [www.SD2015.org](http://www.SD2015.org) for more information and resources, or to contribute a blog outlining your own post-2015 development agenda advocacy activities.

## ABOUT THE SD2015 PROGRAMME PARTNERS



### CIVICUS

CIVICUS is a global network of civil society organisations and activists dedicated to strengthening citizen action and civil society around the world.

Founded in 1993 and proudly based in the global South, CIVICUS has members in more than 120 countries around the world, and has as its vision a worldwide community of informed, inspired, committed citizens engaged in confronting the challenges facing humanity.

CIVICUS works to strengthen civil society by monitoring, researching, analysing and influencing global events, processes and trends that impact civil society and by bringing civil society together to generate and share knowledge and to take action.

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### STAKEHOLDER FORUM

Stakeholder Forum is an international organisation working to advance sustainable development and promote democracy at a global level. Our work aims to enhance open, accountable and participatory international decision-making on sustainable development through enhancing the involvement of stakeholders in intergovernmental processes.

Stakeholder Forum works with a diverse range of stakeholders globally on international policy development and advocacy; stakeholder engagement and consultation; media and communications and capacity building - all with the ultimate objective of promoting progressive outcomes on sustainable development through an open and participatory approach.

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### UN DESA (SD2015 COLLABORATOR)

The United Nations Department of Economic and Social Affairs (UN DESA) works closely with governments and stakeholders to help countries around the world meet their economic, social and environmental goals.

Within UN DESA, the Division for Sustainable Development (DSD) provides leadership in promoting and coordinating implementation of the sustainable development agenda of the United Nations, including support for the effective participation of Major Groups (as defined in Agenda 21) in the UN political processes and its analytical and capacity development work.

United Nations Sustainable Development Knowledge Platform: [www.sustainabledevelopment.un.org](http://www.sustainabledevelopment.un.org)

### ADVOCACY TOOLKIT COLLABORATOR THE INTERNATIONAL FORUM OF NATIONAL NGO PLATFORMS (IFP/FIP)



The SD2015 Advocacy Toolkit has been produced with the support and input of the IFP, including the provision of case studies.

The IFP is a global network convening 56 national NGO platforms (gathering more than 21 000 NGOs) from 5 continents and 7 regional coalitions.

The IFP exists as a partnership to have a positive impact on poverty eradication, reduction of inequalities, and promotion of social justice and peace around the world by facilitating the collection, articulation, and exchange of information and knowledge among its members, influencing global public policies affecting development, and strengthening the capacity of regional and national NGO platforms and their members.

The 2011 IFP General Assembly identified the work around the post-2015 development agenda as one of the IFP's priorities and since then the IFP as well as its members are following and inputting into the debates, promoting the voices of the most affected by poverty and exclusion.

Contact: [www.ong-ngo.org](http://www.ong-ngo.org) / [secretariat@ong-ngo.org](mailto:secretariat@ong-ngo.org)

### FINANCIAL SUPPORT

#### THE EUROPEAN UNION

The SD2015 programme is undertaken with the financial support of the European Union.



#### FONDATION DE FRANCE

The SD2015 Advocacy Toolkit has been produced with the financial support of the Fondation de France.



The views expressed in this document solely reflect the opinions of the partners and collaborators.

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# GLOSSARY

## ACRONYMS

**CSO:** Civil society organisation

**HLP:** High Level Panel of Eminent Persons on the post-2015 Development Agenda

**HLPF:** High Level Political Forum on Sustainable Development

**ICESDF:** Intergovernmental Committee of Experts on Sustainable Development Financing

**MDGs:** Millennium Development Goals

**NGO:** Non-Governmental Organisation

**OWG:** Open Working Group on Sustainable Development Goals

**SDGs:** Sustainable Development Goals

**SD2015:** Sustainable Development 2015 Programme

**SDSN:** Sustainable Development Solutions Network

**SMART:** Specific, Measurable, Achievable, Relevant, Time-bound

**TST:** UN System Technical Support Team

**UN:** United Nations

**UNDESA:** United Nations Department of Economic and Social Affairs

**UNDG:** United Nations Development Group

**UNFCCC:** United Nations Framework Convention on Climate Change

**UNGA:** United Nations General Assembly

**UNGC:** United Nations Global Compact

**UN-NGLS:** United Nations Non-Governmental Liaison Service

**UN PGA:** United Nations President of the General Assembly

**UN SG:** United Nations Secretary General

**UNTT:** United Nations System Task Team on the post-2015 Development Agenda

## KEY TERMS

**Advocacy:** Advocacy is the strategic and deliberate process to bring about change in policies and practice. It can happen at local, national, regional and international levels.

**Capacity building:** The process by which stakeholders develop, enhance and organise their systems, resources and abilities to perform and pursue a given function.

**Civil society:** Citizens and organisations outside of the government and private sector.

**Focus areas:** The priority themes and content which the OWG will discuss and refine in order to make recommendations on goals and targets by the end of its consensus building phase.

**Human rights:** Human rights are moral principles that set out certain standards of human behaviour, and are protected as legal rights in national and international law. They are commonly understood as equal and inalienable fundamental rights to which a person is inherently entitled simply because she or he is a human being.

**The Major Groups:** The Major Groups represent nine sectors of society that act as the main channels through which citizens and organisations can participate in UN activities to achieve sustainable development.

**Millennium Development Goals:** Eight international goals that aim to accelerate development in the world's poorest countries. The Goals have the target date of 2015 and are accompanied by 21 time bound, quantitative targets and 48 indicators for measuring and monitoring progress.

**Participation:** The act of taking part or sharing in something. Participation by all parts of society on important issues is essential to make sure that views are represented and taken into account, and is an important way to ensure equality.

**Planetary boundaries:** Identified in 2009 by a group of internationally renowned scientists, the *nine planetary boundaries* define a safe operating space for humanity, within which humanity can continue to develop and thrive for generations to come. Crossing these boundaries could generate abrupt or irreversible environmental changes. Respecting the boundaries reduces the risks to human society of crossing these thresholds.

**Post-2015 development agenda:** The global framework and set of goals on sustainable development and poverty eradication which will replace the Millennium Development Goals when they expire in 2015.

**Rio+20:** Alternative name for the UN Conference on Sustainable Development (UNCSD), which took place in Rio de Janeiro (Brazil) in June 2012 and resulted in the outcome document 'The Future We Want'. The name 'Rio+20' is a reference to the original Earth Summit that took place in Rio in 1992.

**Stakeholder/multistakeholder:** Anyone who has an interest or 'stake' in something because it affects them directly or indirectly. Stakeholders include civil society, the private sector, the public sector, local authorities and trade unions and others that come together for a common purpose. Stakeholders should have the right to participate in decisions that will affect them - we are all stakeholders in the decisions made about our society and the global community.

**Sustainable development:** Often described as development that meets the needs of the present, without compromising the ability of future generations to meet their own needs. Sustainable development involves balancing human development with natural resources and the limits of the earth and environment and encompasses intergenerational responsibility. It is commonly acknowledged to consider economic, environmental and social issues as its three 'dimensions'.

**Sustainable Development Goals:** One of the main outcomes of the Rio+20 Conference was the agreement by member States to launch a process to develop a set of Sustainable Development Goals (SDGs), which will build upon the Millennium Development Goals and converge with the post-2015 development agenda.

**United Nations:** International organisation of 193 countries or 'Member States' aiming to help with cooperation in international law, international security, economic development, human rights, and working towards world peace. There are many different agencies within the UN, which each have specific responsibilities.

**United Nations General Assembly:** Main decision-making body of the UN that considers how the UN is run and looks at new policies. All 193 member states participate in the General Assembly. Each country has one vote. It has a session every year and also meets at times of emergency.

**United Nations Member States:** There are 193 UN Member States (for a full list see [here](#)). Each one is a member of, and has an equal role in, the UN General Assembly.



# INTRODUCTION

This toolkit is for civil society and other stakeholder organisations, coalitions and individuals that wish to influence the post-2015 development agenda, including the design and implementation of the Sustainable Development Goals (SDGs).

The toolkit supports advocacy activities at the national, regional and international levels. It does not assume a given level of experience in either the post-2015 development agenda or in advocacy activities. Whether you follow each section and step in turn as a newcomer to the agenda, or only consult those new or relevant to you in order to support a more established programme, we hope it will prove useful to all.

## WHAT IS THE PURPOSE OF THE TOOLKIT?

The toolkit should equip you with relevant information and tools to enable you to develop and implement an effective post-2015 advocacy strategy.

In particular the toolkit will help you to:

- Understand the key post-2015 development agenda processes, including the proposed Sustainable Development Goals (SDGs) and the distinction between goals, targets and indicators;
- Identify opportunities to influence the agenda at national, regional and global levels;
- Identify key post-2015 stakeholders and decision-makers, and their relative influence at national, regional and global levels;
- Decide on your post-2015 advocacy priorities;
- Develop a comprehensive action plan to influence your government and/or relevant intergovernmental bodies;
- Engage with the Major Groups and other key stakeholders for mutual advocacy benefit;
- Apply the adopted post-2015 framework to your national context and identify the national indicators to be adopted by your country;
- Monitor and evaluate the results of your advocacy and ultimately;
- Hold your government and others to account to deliver their post-2015 commitments.

## HOW TO USE THE TOOLKIT

Content has been divided into two parts:

**Part 1:** The post-2015 Development Agenda: What is it and how can you engage?

*Provides a full background on the post-2015 processes and identifies key entry points for engagement and influence.*

**Part 2:** Developing a post-2015 Advocacy Strategy  
*Guides you through the necessary steps for developing your own post-2015 advocacy strategy, building on the information and opportunities identified in Part 1.*

Part 2 provides eight guiding steps in sequence, but we want to emphasise that advocacy is not a linear process - it is a cycle that should be continuously reviewed, developed and adapted.

The table below should help you to navigate to the particular sections and tools which interest you most, depending on your individual needs and which stage you are currently at in the planning of your post-2015 advocacy strategy. During this process you may also wish to consider how the steps might be interpreted in relation to your own peculiar circumstances, depending on whether you are focusing on the national, regional or global level, for which we have made recommendations throughout.

The *online version of the toolkit* will also help you to navigate through the different sections and tools.

Throughout the toolkit you will also find:



**TOP TIPS:** Snapshots of ideas and hints that could help you build an effective advocacy strategy.



**TOOLS:** Planning exercises, workshop activities and templates that will help you to work through the toolkit content in practice.



**CASE STUDIES:** Helpful examples of how others have developed and implemented advocacy strategies around the world.



**FIGURES:** Processes or ideas that are displayed clearly in illustrations or flow charts for easy reference.

Annex 2 includes blank templates of the tools for you to use for developing your own post-2015 advocacy strategy.

Annex 3 includes a list of helpful websites and links where you will find further information and inspiration.



## PART 1

# THE POST-2015 DEVELOPMENT AGENDA: WHAT IS IT AND HOW CAN YOU ENGAGE?

The current global development framework, the Millennium Development Goals (MDGs; see Annex 1), expires at the end of 2015.

Consequently, the international community and stakeholders around the world are currently engaged in a process to negotiate a new global framework to eradicate poverty through sustainable development: the **post-2015 development agenda**.

This new agenda will comprise both an overall narrative and guiding principles, and a new set of global goals, targets and indicators to incentivise and measure progress - proposed to be known as the sustainable development goals (SDGs).

### 1. POST-2015 PROCESSES

The post-2015 development agenda is currently formed of two distinct processes, or 'tracks':

1. **Member State-led** (UN General Assembly) intergovernmental process to develop SDGs.
2. **UN Secretary-General-led** discussions on what should replace the MDGs, supported by global stakeholder consultations.

These two tracks will converge in September 2014 into one intergovernmental process to work towards a single framework and single set of global goals. For now, these two tracks continue to operate separately (with efforts made to ensure that they are coordinated and mutually supporting).

We will consider them in turn, first the intergovernmental process on SDGs and the UN Secretary General-led track (Sections 1.1 and 1.2), followed by detail on how they converge (Section 2).

#### 1.1 INTERGOVERNMENTAL PROCESS ON SDGS

##### ORIGINS OF THE SDGS

In June 2012, governments and stakeholders came together in Rio de Janeiro, Brazil for the United Nations Conference on Sustainable Development - also referred to as Rio+20 or Earth Summit 2012, as a reference to the first conference held in Rio in 1992.

The objectives of the Summit were:

- To **secure renewed political commitment** to sustainable development;
- To **assess progress** towards internationally agreed goals on sustainable development; and
- To address **new and emerging challenges**.

One of the most significant outcomes from Rio+20 was the agreement by governments to establish an inclusive and transparent intergovernmental process to develop a set of SDGs.

The Rio+20 Outcome Document stated that the SDGs should:

- Be a useful tool for pursuing focused and coherent action on sustainable development;
- Contribute to the full implementation of the outcomes of all major summits in the economic, social and environmental fields;
- Serve as a driver for implementation and mainstreaming of sustainable development in the United Nations system as a whole;
- Build upon commitments already made;
- Be coherent with and integrated in the United Nations development agenda beyond 2015 (post-MDG track); and
- Not divert focus or effort from the achievement of the MDGs.

Following on from the MDGs, poverty eradication remains the overarching objective of the international community and is expected to form the core of the SDGs. Poverty is multi-dimensional and there is now widespread recognition that lasting poverty eradication can only be achieved if the social, economic and environmental dimensions of sustainable development are addressed in a holistic and balanced manner, acknowledging and capitalising on their interdependencies and focusing on closing the inequality gap rather than straightforward economic growth.

Consequently - building on the MDGs, which primarily focused on the social aspects of development - the SDGs will **"address and incorporate in a balanced way all three dimensions of sustainable development and their inter-linkages."**<sup>1</sup> In addition to addressing current challenges, the SDGs are expected to anticipate future threats to human and environmental wellbeing and tackle the root causes of poverty and barriers to sustainable development. Many hope that this will include clear recognition of planetary boundaries.<sup>2</sup>

States at Rio+20 agreed that the SDGs should be:

- Action-oriented;
- Concise;
- Easy to communicate;
- Limited in number;
- Aspirational; and

1 UN General Assembly Resolution 66/288. *The future we want*, A/RES/66/288 (27 July 2012, Paragraph 246). Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/66/288&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/66/288&Lang=E)

2 For more information on the nine 'planetary boundaries', see the Stockholm Resilience Centre's website: <http://www.stockholmresilience.org/21/research/research-programmes/planetary-boundaries.html>



- Global in nature and **universally applicable** to all countries while taking into account different national realities, capacities and levels of development and respecting national policies and priorities.

Therefore, unlike the MDGs, the SDGs will need to be relevant to all countries and compel action to be taken by developed and developing nations alike, taking into account different national circumstances and starting points.

### 1.1.1 THE OPEN WORKING GROUP ON SDGS

At Rio+20 countries resolved to establish an **Open Working Group (OWG)** of the General Assembly to oversee an ‘inclusive and transparent intergovernmental process’ to propose a set of global goals for consideration by the General Assembly before the end of its 68th session (September 2014).<sup>3</sup>

#### COMPOSITION OF THE OWG

- Co-Chaired by *Mr. Csaba Kőrösi*, Permanent Representative of Hungary, and *Mr. Macharia Kamau*, Permanent Representative of Kenya.
- 30 seats shared by 70 Member States, nominated by Member States from the five United Nations regional groups (see table below).
- Each of the 30 seats of the OWG is shared by one to four countries from the same UN regional group. It is the responsibility of each grouping to decide how they will be represented during each of the meetings.

TABLE 1: *Members of the OWG*

| AFRICAN GROUP                       | ASIA-PACIFIC GROUP                            | LATIN AMERICAN AND CARIBBEAN GROUP                     | WESTERN EUROPEAN AND OTHERS GROUP (WEOG)                                       | EASTERN EUROPEAN GROUP |
|-------------------------------------|---|--|--|------------------------|
| Algeria / Egypt / Morocco / Tunisia | Nauru / Palau / Papua New Guinea              | Colombia / Guatemala                                   | Australia / Netherlands / United Kingdom of Great Britain and Northern Ireland | Hungary                |
| Ghana                               | Bhutan / Thailand / Viet Nam                  | Bahamas / Barbados                                     | Canada / Israel / United States of America                                     | Belarus / Serbia       |
| Benin                               | India / Pakistan / Sri Lanka                  | Guyana / Haiti / Trinidad and Tobago                   | Denmark / Ireland / Norway   | Bulgaria / Croatia     |
| Kenya                               | China / Indonesia / Kazakhstan                | Mexico / Peru  | France / Germany / Switzerland   | Montenegro / Slovenia  |
| United Republic of Tanzania         | Cyprus / Singapore / United Arab Emirates     | Brazil / Nicaragua                                     | Italy / Spain / Turkey   | Poland / Romania       |
| Congo                               | Bangladesh / Republic of Korea / Saudi Arabia | Argentina / Bolivia (Plurinational State of) / Ecuador |  |                        |
| Zambia / Zimbabwe                   | Iran (Islamic Republic of) / Japan / Nepal    |  |  |                        |

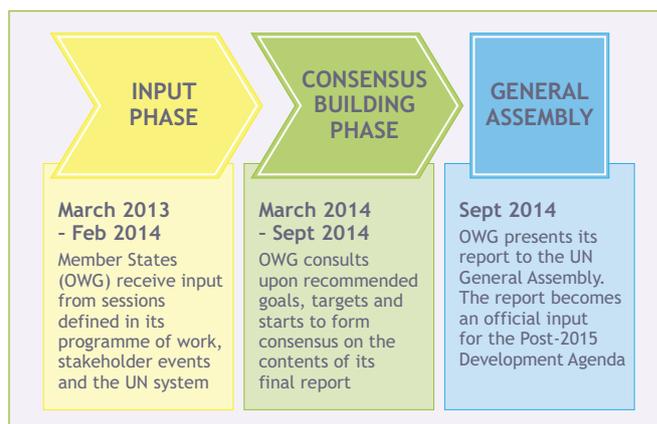
- Representatives of other Member States - those with no seat in the OWG - can still participate and speak on behalf of their countries at the meetings of the OWG.

#### AGENDA AND WORK METHODS OF THE OWG

The OWG agreed to structure its work in two distinct phases:

- **Input phase:** March 2013 to February 2014. During this phase, the OWG took stock, facilitated discussion and gathered inputs on a variety of topics in eight sessions.
- **Consensus building phase:** March 2014 to September 2014. During this phase, the OWG will negotiate and write its report, taking into account the inputs received during its sessions, consultations with stakeholders and other contributions from different initiatives, the UN system and the post-MDG dialogues.

FIGURE 1: *Decision-making process of the OWG*



<sup>3</sup> UN General Assembly Resolution 66/288. *The future we want*, A/RES/66/288 (27 July 2012, Paragraph 248). Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/66/288&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/66/288&Lang=E)



### INPUT PHASE: STOCK OF THEMATIC ISSUES

The OWG held eight meetings between March 2013 and February 2014 to gather inputs on a range of thematic and cross-cutting issues,<sup>4</sup> and produced a *progress report* to summarise the outcomes.

### CONSENSUS BUILDING PHASE: DRAFTING AND AGREEMENT ON THE OWG REPORT

As of March 2014 until July 2014 the OWG will hold five meetings to try to build consensus around themes, goals and targets and to develop its proposal for SDGs. The OWG's report will be submitted to the President of the General Assembly (PGA) and UN Secretary-General (UN SG) in August 2014. The report will be considered by the General Assembly in September 2014 and will be one of the inputs to the UN SG's synthesis report on the post-2015 development agenda, expected in November 2014.<sup>5</sup>

### GOALS, TARGETS AND INDICATORS

#### Goals and Targets

The OWG's consensus building phase will be used to develop recommendations on goals and targets for the SDGs by August 2014. The OWG will not discuss or propose indicators, which will be dealt with at a later date.

The OWG's own definitions for goals and targets are:<sup>6</sup>

**Goal: expresses an ambitious, specific and actionable commitment.**

- Concise and easy to communicate.
- Aspirational.
- Transformational.
- Limited in number.
- Global in nature and universally applicable to all countries while taking into account different national realities, capacities and levels of development and respecting national policies and priorities.

**Target: specific, measurable objective whose attainment will contribute in a major way to achieving one or more goals.**

- Aspirational yet attainable.
- Evident link between target and goal.
- Speak to all relevant stakeholders.

- Nationally relevant, adaptable.
- Time-bound.
- Evidence-, science-based.
- Adjustable:
  - as science advances
  - if countries choose to raise level of ambition.

#### Indicators

While developing indicators for the SDGs is out of the OWG's scope it will be useful to be clear on their distinction from goals and targets. The Independent Research Forum (IRF) use the following definition of an indicator:<sup>7</sup>

**Indicator: [Provides] accountability for results**

- A metric used to measure progress towards a target; generally based on available or established data.

The Sustainable Development Solutions Network (SDSN) report, "*Indicators for Sustainable Development Goals*" outlines a possible indicator framework to accompany the SDGs and their targets. This was sent out for public consultation between 14 February and 28 March 2014.

See Part 2, Section 5.1, Step 3 of this toolkit for tips on developing goals and targets as part of tailoring your advocacy messages for the OWG.

### KEY DOCUMENTS ON THE DISCUSSION TABLE

To inform and initiate discussions in the consensus building phase the OWG Co-Chairs and the UN System Technical Support Team, an inter-agency team which provides technical and analytical support to the OWG have produced a number of key documents.

#### FOCUS AREAS DOCUMENT

To begin the consensus building phase the OWG Co-Chairs captured the broad span of input phase views in *19 focus areas*. Throughout this phase the OWG will aim to make the focus areas more concise and integrated, and use them to build consensus around concrete proposals for goals and targets. At the time of writing<sup>7</sup>, ahead of the 5-9 May OWG session, the focus areas have been revised to 16, and are beginning to take the form of goals and targets. The areas and associated outputs will change as the consensus building phase progresses, so it is important to keep up to date with these outputs *here*, and to adapt your advocacy work accordingly.

4 For more details of these themes and issues, see the OWG's 'thematic clusters' and schedule of work, at: <http://sustainabledevelopment.un.org/index.php?menu=1565>

5 Governments at the Special Event on MDGs held in September 2013 called on the Secretary General to synthesise the full range of inputs on the post-2015 development agenda and to present a synthesis report before the end of 2014: <http://www.un.org/millenniumgoals/pdf/Outcome%20documentMDG.pdf>

6 Open Working Group on SDGs (2014), *A definitional note on goals and targets*. Available at: <http://sustainabledevelopment.un.org/content/documents/7417presentation.pdf>

7 IRF (2014), *Goals, Targets and Indicators: Definitions and key concepts for the post-2015 development agenda*. Available at: <http://bit.ly/1iuCBfQ>



The 16 focus areas and their subheadings<sup>8</sup>:

1. Poverty eradication, building shared prosperity and promoting equality: End poverty in all its forms everywhere;
2. Sustainable agriculture, food security and nutrition: End hunger and improve nutrition for all through sustainable agriculture and improved food systems;
3. Health and population dynamics: Healthy life at all ages for all;
4. Education and life-long learning: Provide quality education and life-long learning for all;
5. Gender equality and women's empowerment: Attain gender equality and women's empowerment everywhere;
6. Water and sanitation: Water and sanitation for a sustainable world;
7. Energy: Ensure access to affordable, sustainable, and reliable modern energy for all;
8. Economic Growth, employment and infrastructure: Promote sustainable, inclusive and sustained economic growth and decent jobs for all;
9. Industrialization and promoting equality among nations: Promote sustainable industrialization and equality among nations;
10. Sustainable cities and human settlements: Build inclusive, safe and sustainable cities and human settlements;
11. Sustainable Consumption and Production: Promote sustainable consumption and production patterns;
12. Climate change: Take urgent and significant action to mitigate and adapt to climate change. Build a climate change goal based on the outcome of COP21 of the UNFCCC;
13. Conservation and sustainable use of marine resources, oceans and seas: Take urgent and significant actions for the conservation and sustainable use of marine resources, oceans and seas;

14. Ecosystems and biodiversity: Protect and restore terrestrial ecosystems and halt all biodiversity loss;
15. Means of implementation/Global partnership for sustainable development: Strengthen global partnership for sustainable development. Means of implementation: Trade; Technology transfer, technological capabilities; Financing and debt sustainability; Capacity building; Strengthened global partnership for sustainable development; and
16. Peaceful and inclusive societies, rule of law and capable institutions: Creating peaceful and inclusive societies; Rule of law, capable institutions.

See the Co-Chairs' *official working document* for further details and proposals under these areas.

***ENCYCLOPEDIA GROUPINICA: A COMPILATION OF GOALS AND TARGETS SUGGESTIONS FROM OWG-10***

Lists all the goals and targets suggested by Member States, Major Groups and other stakeholders in response to the original 19 Focus Areas. This also included proposals for crosscutting targets.

***COMPENDIUM OF EXISTING GOALS AND TARGETS UNDER THE 19 FOCUS AREAS***

Compiles existing international commitments to support the OWG's development of goals and targets, and ensure that the SDGs proposal is consistent with international law and builds on existing commitments.

***MAJOR GROUPS AND OTHER STAKEHOLDER'S COMPILATION DOCUMENT ON GOALS AND TARGETS***

Statements and proposals made at the Major Groups and Other Stakeholders Dialogue with the Co-Chairs on 2nd April, 2014.

***INTERLINKAGES DOCUMENT***

Highlights the interlinkages between each of the 19 focus areas originally identified.

***A DEFINITIONAL NOTE ON GOALS AND TARGETS***

Provides guidance on the scope and purpose of the SDGs and on the definition and design of goals and targets.

<sup>8</sup> From the Working Document for the 5-9 May Session of Open Working Group. Available at: <http://sustainabledevelopment.un.org/content/documents/3686Workingdoc.pdf>



TABLE 2: *The OWG's programme of work for the consensus building phase (March - September 2014)*

| 3 - 5 MARCH  | 31 MARCH - 4 APRIL   | 5 - 9 MAY  | 16 - 20 JUNE  | 14 - 18 JULY  | AUGUST               |
|--|--|--|---|---|----------------------|
| Focus area document adopted and reviewed/ amendments suggested | Indicative debate based on clusters related to focus area document | Consultations based on revised focus area document | Consultations on SDGs and targets<br><br>Produce refined SDGs and targets | Consultations on SDGs and targets<br><br>Agreement and adoption of report on SDGs and targets | SDG report to PGA/SG |
| Doc revised  |  | Doc revised  | Doc revised   | Edited and tweaked document   |                      |

Source: [http://sustainabledevelopment.un.org/content/documents/3622PoW\\_OWG\\_2014\\_sessions.pdf](http://sustainabledevelopment.un.org/content/documents/3622PoW_OWG_2014_sessions.pdf)

### 1.1.2 CIVIL SOCIETY AND OTHER STAKEHOLDERS' PARTICIPATION AND ENGAGEMENT

The primary mechanism for civil society and other stakeholders to engage with the OWG is via the **Major Groups** system.

The UN Commission on Sustainable Development (CSD) and the nine Major Groups were introduced in Agenda 21, a voluntary action plan agreed by governments at the Rio Earth Summit in 1992. The Major Groups represent nine sectors of society that act as the main channels through which citizens and organisations can participate in UN activities to achieve sustainable development.

The nine Major Groups are:

- Women
- Children and youth
- Indigenous peoples
- NGOs
- Workers and trade unions
- Local authorities
- Business and industry
- The scientific and technical community
- Farmers

Each of the Major Groups is coordinated by **Organising Partners (OPs)** who disseminate information, provide guidance, help prepare written statements, and facilitate participation and interventions at the OWG and other intergovernmental processes, such as the High Level Political Forum (HLPF) (see Section 3). A list of OPs and their contact details can be found [here](#).

Representatives of each of the Major Groups are given a seat at the OWG sessions as official observers and may intervene in the discussions when invited to do so by the Co-Chairs. Observers are usually given the floor to speak after political groups and governments have had a say. Stakeholder interventions must be coordinated through the OPs.

The UNDESA Secretariat provides a coordination point for the Major Groups and other stakeholders to engage in the OWG sessions. During the input phase, Major Groups and

other stakeholders formed thematic clusters to produce briefings, statements and presentations for and during OWG sessions. These documents may be found [here](#).

During the consensus building phase, based upon the *Focus Areas document*, the Major Groups and revised thematic clusters prepared a compilation and summary of statements for the ninth session of the OWG that can be found [here](#). At the tenth session, the Co-Chairs proposed that the focus areas be considered in *eight clusters*, on which the Major Groups and other stakeholders made *thematic and constituency-based statements*. Once completed, the results of the eleventh, twelfth and thirteenth sessions may be found [here](#).

## 1.2 UN SECRETARY-GENERAL-LED POST-MDG TRACK

The post-MDG track was established following a mandate by *the 2010 High-level Plenary Meeting of the General Assembly on the MDGs* requesting the UN Secretary-General to report annually on progress in the implementation of the MDGs until 2015 and make recommendations for further steps to advance the UN development agenda beyond 2015. A series of work streams and stakeholder consultations started in late 2011 as part of this process. The consultations form the methods for stakeholder participation and engagement in this track.

### 1.2.1 WORK STREAMS AND KEY OUTPUTS UNDER THE UN SECRETARY-GENERAL-LED TRACK

The work streams and key outputs that have emerged so far from the post-MDG track are summarised below:

- **UN SYSTEM TASK TEAM (UNTT)**  
Established by the UN Secretary-General the UNTT brings together over 60 UN entities and agencies and international organizations and support the post-MDG deliberations by providing analytical inputs, expertise and outreach.

The UN System Technical Support Team (TST), which provides support to the OWG, sits within the UNTT.



- < Report for UN Secretary General: *Realizing the Future We Want for All* (June 2012)
- < *Thematic think pieces*
- < *Other outputs.*
- **REGIONAL CONSULTATIONS**  
Led by the five UN Regional Economic Commissions.
  - < Report: *Regional perspective on the post-2015 UN Development agenda* (June 2013)
- **GLOBAL, THEMATIC & NATIONAL CONSULTATIONS**
  - Led by the UN Development Group (UNDG)
  - Online Global Survey - *My World*
  - 11 thematic and 88 national consultations.
  - < Synthesis report: *A Million Voices: The World We Want* (Sep 2013).
- **THE HIGH LEVEL PANEL OF EMINENT PERSONS ON THE POST-2015 DEVELOPMENT AGENDA (HLP)**  
Comprised of 27 leaders from governments, civil society and the private sector and co-chaired by President Susilo Bambang Yudhoyono of Indonesia, President Ellen Johnson Sirleaf of Liberia, and Prime Minister David Cameron of the United Kingdom.
  - < Report to UN Secretary-General: *A New Global Partnership: Eradicate Poverty and Transform Economies through Sustainable Development* (May 2013).
- **SUSTAINABLE DEVELOPMENT SOLUTIONS NETWORK (SDSN)**  
Mobilises scientific and technical expertise from academia, civil society, and the private sector.
  - < Report to UN Secretary-General: *An Action Agenda for Sustainable Development* (June 2013)
  - < *Other outputs.*
- **UN GLOBAL COMPACT (UNGC)**  
Encourages and seeks the views and reports of business leaders.
  - < Report to UN SG: *Corporate Sustainability and the United Nations post-2015 Development Agenda* (June 2013).
- **UN NON-GOVERNMENTAL LIAISON SERVICE (UN-NGLS)**  
Gathered critical analysis from civil society on the UN post-2015 development agenda.

- < UN-NGLS consultation report: *Advancing Regional Recommendations on the post-2015 development agenda* (November 2013).

- **UN SECRETARY GENERAL'S REPORT**

- Informed by the above work streams
- Provides the UN SG's recommendations for the UN development agenda beyond 2015.
- < *A life of dignity for all* (presented to the General Assembly Sep 2013).

### 1.2.2 ONGOING CONSULTATIONS UNDER THE UN SECRETARY-GENERAL-LED TRACK

#### PRESIDENT OF THE GENERAL ASSEMBLY (PGA) EVENTS ON THE POST-2015 DEVELOPMENT AGENDA

During the 68th session of the United Nations General Assembly, from September 2013 to September 2014, the President, H.E. Dr. John W. Ashe and his team will work to promote greater engagement with Member States and all relevant stakeholders to set the stage for defining the post-2015 development agenda. In order to promote dialogue and increase engagement the PGA is holding three high level events and three thematic debates throughout 2014:

- *Water, sanitation and sustainable energy*: 18-19 February 2014 (thematic debate)
- *Contributions of women, the young and civil society*: 6-7 March 2014 (high-level event)
- *Role of partnerships*: 9-10 April 2014 (thematic debate)
- *Ensuring stable and peaceful societies*: 24-25 April 2014 (thematic debate)
- *Contributions of North-South, South-South, triangular cooperation, and ICT for development*: 20-21 May 2014 (high-level event)
- *Human rights and the rule of law*: 17-18 June 2014 (high-level event)
- A high level stocktaking event will be held in September 2014

Action-oriented summaries of each event will be fed into the OWG, the Secretary-General's synthesis report and the Committee of Experts on Sustainable Development Financing (please see other relevant intergovernmental processes in the following sections).

Stakeholders can provide inputs *online* prior to each event and can attend as observers.



## UNDG NATIONAL DIALOGUES ON IMPLEMENTATION OF THE POST 2015 DEVELOPMENT AGENDA

The UN Development Group (UNDG) will be holding a second round of consultations at the national level from April 2014 to April 2015 with the aim of engaging a diverse range of stakeholders worldwide to voice their ideas and positions for the post-2015 development agenda, with a focus on implementation.

The dialogues will be a series of public meetings and online discussions where policy planners, civil society representatives, academics, community and private sector leaders can discuss how to best deliver the next sustainable development agenda.

The areas for consultation are:

- Localising the post-2015 development agenda;
- Helping to strengthen capacities and institutions;
- Participatory monitoring, compromising of existing and new forms of accountability;
- Partnership with civil society and other actors;
- Partnership with the private sector; and
- Culture and development.

All stakeholders are invited to participate in the public meetings and the online discussions. Keep an eye on [worldwewant.org](http://worldwewant.org) for more information.

## 2. CONVERGENCE OF THE SDGS AND POST-MDGS TRACKS

In September 2013 governments agreed to bring the two tracks of the post-2015 development agenda together to work towards a **single framework and single set of global goals**.

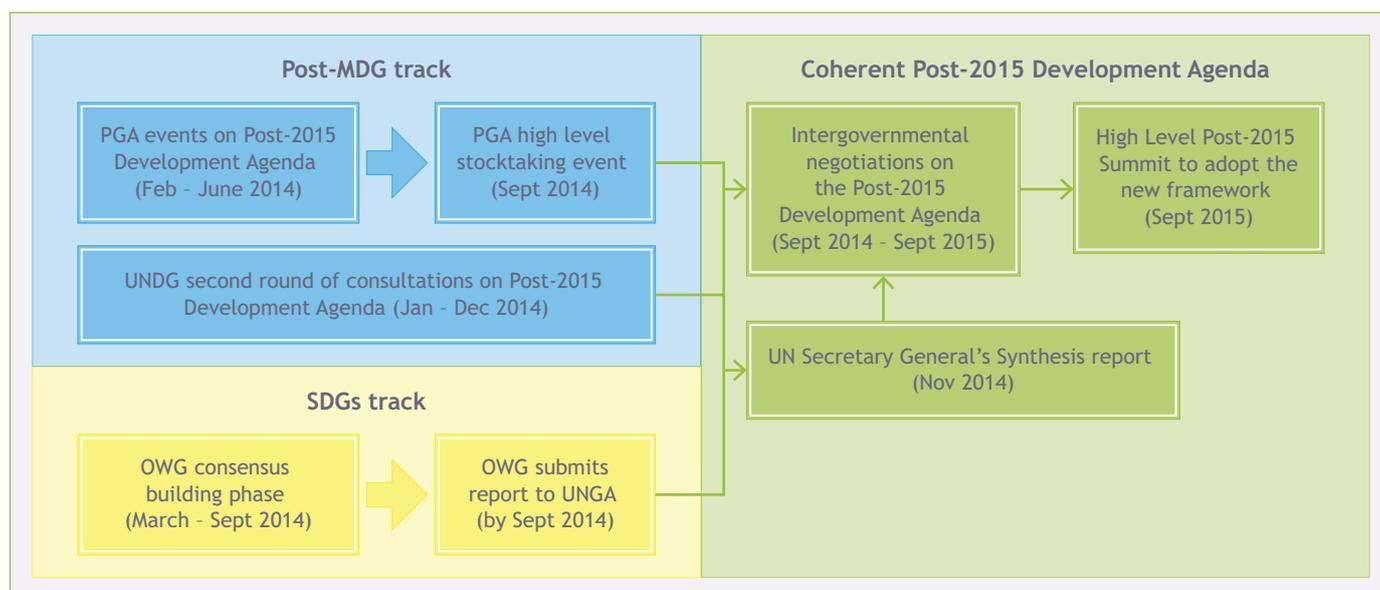
The key arguments for convergence of these processes are:

- Minimise duplication of effort;
- Reduce confusion and inefficiencies around participation and facilitate an inclusive, open and transparent process; and
- Bring together the environment, development and financial sectors at all levels: within governments, regional bodies, the UN, and other stakeholders.<sup>9</sup>

A **new intergovernmental process** to agree the post-2015 development agenda will begin in September 2014 and culminate in a **high level summit in September 2015**.

In November 2014 the UN Secretary-General will produce a **synthesis report** that will pull together the **full range of inputs** from both tracks.

FIGURE 2: Convergence of the post-2015 processes



9 Stakeholder Forum/CAFOD (2013), *post-2015 Development Agenda: Realising the convergence of the Post-MDG and SDG decision-making processes*. Available at: [http://www.stakeholderforum.org/fileadmin/files/Post-2015\\_Development\\_Agenda\\_Convergence.pdf](http://www.stakeholderforum.org/fileadmin/files/Post-2015_Development_Agenda_Convergence.pdf)



### 3. OTHER RELEVANT INTERGOVERNMENTAL PROCESSES

In addition to the Open Working Group on Sustainable Development Goals, two intergovernmental bodies launched at Rio+20 will play crucial roles in the post-2015 development agenda:

- **INTERGOVERNMENTAL COMMITTEE OF EXPERTS ON SUSTAINABLE DEVELOPMENT FINANCING**
  - Responsible for preparing a report assessing different options for financing sustainable development and highlighting innovative mechanisms for finance.
- **HIGH LEVEL POLITICAL FORUM**
  - The highest level UN body on sustainable development
  - Likely to be involved in the monitoring and implementation of the post-2015 development agenda which will include the development of national indicators at the country level.

#### 3.1 INTERGOVERNMENTAL COMMITTEE OF EXPERTS ON SUSTAINABLE DEVELOPMENT FINANCING

Heads of State and Government agreed at Rio+20 to establish an Intergovernmental Committee of Experts on Sustainable Development Financing (ICESDF) to evaluate and propose options for effective financing for sustainable development. The ICESDF works in parallel to the OWG on SDGs under the auspices of the General Assembly and is tasked with preparing a report by September 2014 proposing options on an effective financing strategy to facilitate:

- The mobilisation of resources and
- Their effective use in achieving sustainable development objectives.

#### RESPONSIBILITIES

The ICESDF will:

- Assess financing needs;
- Consider the effectiveness, consistency and synergies of existing instruments and frameworks; and
- Evaluate additional initiatives.<sup>10</sup>

#### COMPOSITION OF THE ICESDF

- Co-Chaired by *H.E. Ambassador Pertti Majanen* from Finland and *Mr. Mansur Muhtar* from Nigeria.
- The Committee is comprised of 30 experts nominated by the five UN regional groups, with equitable geographical representation:

#### AFRICAN GROUP

1. *André Lohayo Djamba* (Democratic Republic of the Congo)
2. *Admasu Nebebe* (Ethiopia)
3. *Karamokoba Camara* (Guinea)
4. *Ahmed Jehani* (Libya)
5. *Joseph Enyimu* (Uganda)
6. *Mansur Muhtar* (Nigeria)
7. *Lydia Greyling* (South Africa)

#### ASIA-PACIFIC GROUP

1. *Zou Ji* (China)
2. *Khalid Al Khudairy* (Saudi Arabia)
3. Takeshi Ohsuga (Japan)
4. *Amjad Mahmood* (Pakistan)
5. *Sung Moon Up* (Republic of Korea)
6. *Lukita Dinarsyah* (Indonesia)
7. *Rajasree Ray* (India)

#### LATIN AMERICAN AND CARIBBEAN GROUP

1. *Gaston Lasarte* (Uruguay)
2. *Saúl Weisleder* (Costa Rica)
3. *Dulce María Buergo Rodríguez* (Cuba)
4. *Chet Neymour* (Bahamas)
5. *Reginald Darius* (Saint Lucia)
6. *Samuel Moncada* (Venezuela)

#### WESTERN EUROPEAN AND OTHERS GROUP (WEOG)

1. *Nathan Dal Bon* (Australia)
2. *Pertti Majanen* (Finland)
3. *Anthony Requin* (France)
4. *Norbert Kloppenburg* (Germany)
5. *Liz Ditchburn* (United Kingdom of Great Britain and Northern Ireland)

#### EASTERN EUROPEAN GROUP

1. *Emiliya Kraeva* (Bulgaria)
2. *Tõnis Saar* (Estonia)
3. *Viktor Zagrekov* (Russian Federation)
4. *Dragan Županjevac* (Serbia)
5. *František Ružička* (Slovakia)

<sup>10</sup> UN General Assembly Resolution 66/288. *The future we want*, A/RES/66/288 (27 July 2012, Paragraph 255). Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/66/288&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/66/288&Lang=E)



## ORGANISATION OF WORK

- The ICESDF has agreed to organise its work in three thematic clusters, facilitated by Committee members, on the following topics:
  - Assessing financing needs, mapping of current flows and emerging trends, and the impact of domestic and international environments;
  - Mobilisation of resources and their effective use;
  - Institutional arrangements, policy coherence, synergies and governance issues.
- The work of the ICESDF began in August 2013 and will continue until September 2014; and
- Summaries of previous sessions and dates of upcoming meetings of the ICESDF can be seen [here](#).

## ICESDF REPORT

- The ICESDF will produce its report by the end of 2014 (expected August 2014);
- The recommendations of the ICESDF will have important implications for the financing and implementation of the post-2015 development agenda and the SDGs; and
- Accordingly, the ICESDF report will be one of the inputs that the UN Secretary-General will synthesise in his post-2015 synthesis report due at the end of 2014.

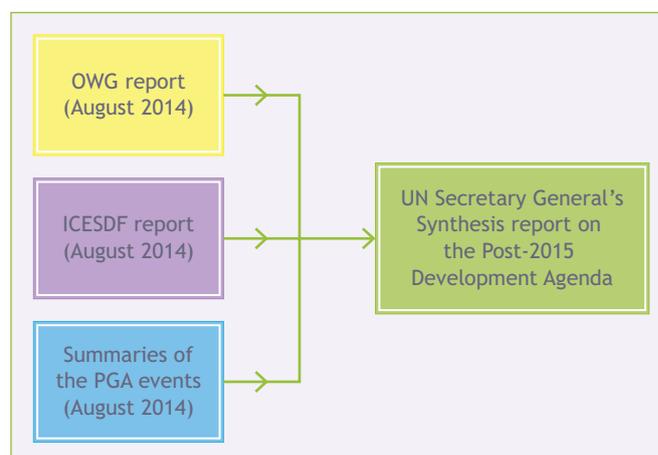
## CIVIL SOCIETY AND OTHER STAKEHOLDERS' PARTICIPATION AND ENGAGEMENT

The ICESDF has committed to working in open and broad consultation with relevant international and regional financial institutions and other relevant stakeholders<sup>11</sup> and a **Working Group on Financing for Sustainable Development** has been set up under the UN System Task Team (UNTT) to support the ICESDF.

The sessions of the Committee shall normally be closed, unless decided otherwise, however mechanisms have been put in place to gather stakeholder inputs and facilitate engagement:

- **Interactive multi-stakeholder dialogues** that are open to all are held alongside the closed ICESDF sessions. These dialogues consist of:
  - A briefing from the Co-chairs and thematic co-facilitators on the work of the Committee.
  - Presentations from a panel composed of three to five representatives from NGOs, the private sector and

**FIGURE 3: The UN Secretary-General's synthesis report and its inputs**



other Major Groups engaged in the Rio+20 Conference and the Financing for Development process, followed by an open interactive dialogue.

- Stakeholders can also provide **written input into the work of the thematic clusters** via the *UN Sustainable Development Knowledge Platform*.
- A **steering committee** has been constituted as an interface between the ICESDF and non-state actors, for example by organising the selection process for speakers during multi-stakeholder dialogues held within the formal sessions of the Committee. The steering committee is composed of eight members - four from the Major Groups and four from the *Financing for Development Process*.
- Details of all the above mechanisms can be found in the 'stakeholder inputs' tab of the *ICESDF section of the UN Sustainable Development Knowledge Platform*.

## 3.2 THE HIGH LEVEL POLITICAL FORUM

At Rio+20, governments agreed to establish a universal intergovernmental high-level political forum (HLPF) as the new institutional home and highest level body for sustainable development within the UN system. The forum replaces the Commission on Sustainable Development (CSD), the body that held this role for the preceding 21 years. The establishment of the HLPF is seen as a strengthening of the institutional framework for sustainable development within the UN. It is anticipated that the HLPF will become the home of the SDGs and the body responsible for their implementation and monitoring.

<sup>11</sup> Intergovernmental Committee of Experts on Sustainable Development Financing (2013), *Modalities of work*.

Available at: <http://sustainabledevelopment.un.org/content/documents/1999FINAL%20Modalities%20of%20work-ICESDF-revised%2028%20August%202013-2.pdf>



## MANDATE AND FUNCTIONS

The HLPF is to:

- Provide political leadership and recommendations for sustainable development;
- Follow-up and review progress in implementing sustainable development commitments, including the post-2015 development agenda and SDGs;
- Enhance the integration of economic, social and environmental dimensions of sustainable development;
- Have a focused, dynamic and action-oriented agenda;
- Consider new and emerging sustainable development challenges.

## PROCEDURES AND DECISION-MAKING

- HLPF will meet annually for eight days (including a three day ministerial segment), under the auspices of the Economic and Social Council (ECOSOC).
- In addition, the HLPF will meet every four years at the level of Heads of State and Governments, for two days, under the auspices of the General Assembly.
- The Meetings at both levels will result in a negotiated declaration - intended to provide high-level policy guidance and raise the bar for action and results - to be submitted to the General Assembly for its consideration.
- The *inaugural meeting* of the HLPF took place on 24th September 2013 under the auspices of the UN General Assembly.
- The next meeting of the HLPF will take place under ECOSOC on the following dates:
  - Regular meeting: **30 June - 3 July 2014**
  - Ministerial segment: **7-9 July 2014**
- A regional preparatory process will take place in the lead up to the regular meeting.

## CIVIL SOCIETY AND OTHER STAKEHOLDERS' PARTICIPATION AND ENGAGEMENT

The HLPF will build upon the arrangements and practices for stakeholder engagement that were observed by the UN Commission on Sustainable Development (CSD) and accordingly will be open to other stakeholders, e.g. education and academic entities, persons with disabilities and volunteer groups, in addition to the Major Groups.

Major Groups and other stakeholders will have the opportunity to:

- attend all official meetings of the forum;
- have access to all official information and documents;
- intervene in official meetings;
- submit documents and present written and oral contributions;
- make recommendations; and
- organise side-events and roundtables, in cooperation with Member States and the UN Secretariat.

The HLPF resolution also acknowledges the importance of the regional dimension of sustainable development. It invites the United Nations regional commissions to contribute to the work of the forum, including through annual regional meetings, and have the HLPF act as a platform for partnerships with the involvement of Major Groups and other relevant regional entities and stakeholders as appropriate.<sup>12</sup>

Furthermore, Major Groups and other stakeholders are encouraged to “autonomously establish and maintain effective coordination mechanisms for participation in the HLPF,”<sup>13</sup> - inviting stakeholders to propose further modalities for engagement.

UNDESA has commissioned several studies on the HLPF and the role of Major Groups that include:

12 UN General Assembly Resolution 67/290. *Format and organizational aspects of the high-level political forum on sustainable development*, A/RES/67/290 (9 July 2013, Paragraph 13). Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/67/290&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/67/290&Lang=E)

13 UN General Assembly Resolution 67/290. *Format and organizational aspects of the high-level political forum on sustainable development*, A/RES/67/290 (9 July 2013, Paragraph 16). Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/67/290&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/67/290&Lang=E)



- *Strengthening Public Participation at the United Nations for Sustainable Development: Dialogue, Debate, Dissent, Deliberation*, Barbara Adams & Lou Pingeot, June 2013;
- *The Role and Place of the High-Level Political Forum in Strengthening the Global Institutional Framework for Sustainable Development*, Steve Bernstein, September 2013;
- *Participatory democracy - HLPF laying the basis for sustainable development governance in the 21st Century*, Jan-Gustav Strandenaes.

The following working paper has also been published:

- *The Future HLPF Review: Criteria and ideas for its institutional design*, Marianne Beisheim, German Institute for International and Security Affairs, March 2014.

#### OVERVIEW OF KEY INTERGOVERNMENTAL PROCESSES

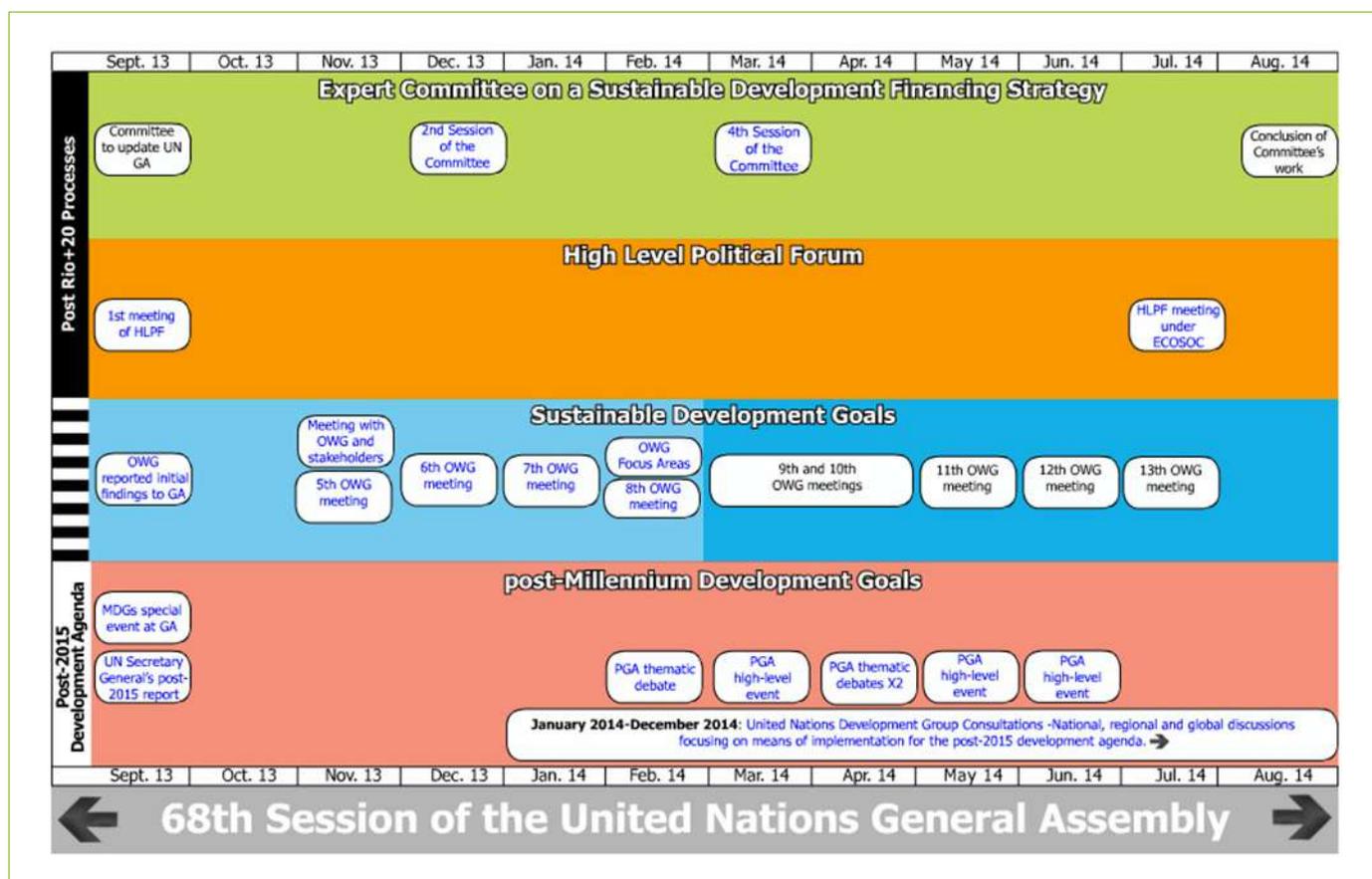
For an overview of the key milestones in the intergovernmental processes mentioned in this section please see our *Interactive Timeline of post-2015 and Post-Rio+20 Processes*.

## 4. OTHER CIVIL SOCIETY AND STAKEHOLDER INITIATIVES ON THE POST-2015 DEVELOPMENT AGENDA

In addition to the formal mechanisms mentioned, a number of informal mechanisms and initiatives have been established to feed into, and coordinate advocacy and influence around, the post-2015 processes.

Stakeholders are encouraged to join initiatives that align with their values and areas of interest, and to contribute to the post-2015 processes through relevant formal and informal mechanisms and initiatives.

Some key stakeholder initiatives focusing on the post-2015 development agenda will be posted and updated on [www.SD2015.org](http://www.SD2015.org) as part of the online version of this toolkit, with the option for you to add your own. We hope that this will provide a useful resource to help build your post-2015 network.





## PART 2

# DEVELOPING A POST-2015 ADVOCACY STRATEGY

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### 1. WHAT IS ADVOCACY?

Advocacy is the strategic and deliberate process to bring about change in policies and practice. It can happen at local, national, regional and international levels, and an advocacy strategy that seeks to achieve comprehensive change should involve coordinated activity at all levels.

Advocacy can go beyond aiming simply to change policies, to challenge and change how people perceive their ability to influence decision-making processes.

In the case of the post-2015 development agenda, advocacy should aim to directly and indirectly influence decision-makers and other stakeholders to support and implement actions that contribute to the fulfilment of an ambitious, universal and inclusive policy framework and set of Sustainable Development Goals (SDGs).

For an overview and more detail on the key structures and processes involved in the post-2015 development agenda, please refer to Part 1 of this toolkit.

### 2. WHY DEVELOP AN ADVOCACY STRATEGY?

An advocacy strategy is a prescribed course of action to achieve your advocacy objectives. Being strategic in advocacy is key to ensuring maximum impact and effectiveness.

Developing a strategy can help you to:

- Put resources (time, funds and skills) to their most effective use;
- Minimise risks and maximise opportunities;
- Identify opportunities for coordination and collaboration, and minimise duplication of effort;
- Align advocacy with other areas of work and organisational objectives, both long term and short term.

### 3. STAKEHOLDERS' ROLES AND RESPONSIBILITIES

Governments will decide what the SDGs are to contain and will be ultimately responsible for achieving these goals at the national level. But civil society and other stakeholders need to make sure that there is the political will to make this happen by holding governments and other key actors to account. There are many important ways that civil society and other stakeholders can play an effective role in shaping and influencing the post-2015 development agenda, including:

- Raising wider stakeholder awareness about post-2015 processes and the SDGs;
- Engaging in actions to put pressure on decision-makers and monitoring what governments are doing;
- Providing research and information to support relevant state actors or UN bodies, through research outputs, consultations, or translating discussions and agreements from international to national contexts, or vice versa;
- Providing expert input and solutions directly to decision-makers through advisory roles or expert discussion groups;
- Providing a communications and engagement link between the public and decision-makers;
- Strengthening local and national campaigns by establishing networks and partnerships that are linked to the global level, providing examples of how to make the agenda relevant and grounded in local action;
- Training relevant stakeholders and decision-makers in implementation and enforcement practices;
- Working together to strengthen all of our efforts by building credibility and sharing expertise and lessons learned.



## 4. BUILDING THE FOUNDATIONS FOR SUCCESSFUL ADVOCACY

### 4.1 UNDERSTAND THE AGENDA: DO YOUR RESEARCH AND GATHER YOUR EVIDENCE

As you can see from Part 1, post-2015 development agenda processes are numerous, extensive and complex. There are multiple key stakeholders and decision-makers across governments, UN agencies and civil society, and key milestones at national, regional and global levels.

Having a detailed understanding of the issues on which you will be building your advocacy strategy is critical in the earliest planning stage. You need to decide what and who you want to influence in the post-2015 development agenda by conducting research and analysis to understand the context and to identify problems, priorities and target audiences. Only then can you develop a robust argument, and provide the necessary evidence to back it up.

Research and analysis also supports many stages of the advocacy process, as gathering data and evidence enables you to build messages, expand support, and monitor and evaluate progress. Your research can take many forms, for example internet or desk-based research, conducting small focus group discussions or interviewing stakeholders already working on the agenda, and be as light or as in depth as your time and resources allow.

#### TOP TIP: CONDUCTING CREDIBLE RESEARCH



Research should be:

- Objective, not biased
- Representative of the whole group on whom it is focused, not a single viewpoint
- Accurate and reliable
- Methodical and systematic

Water Aid (2007), *The Advocacy Sourcebook*. Available at: [www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx](http://www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx)

Evidence will also give your work legitimacy, which is critical to successful advocacy. There are two pillars commonly recognised for advocacy legitimacy:

- **Cause-based legitimacy** draws its strength from the ‘morality’ of a cause the advocacy project stands for, and not necessarily from a number of individuals or various groups of people it represents. Many causes started with only minimal support from the public, yet succeed through their ‘moral strength’.
- **People-based legitimacy** means having the backing of a sufficiently large number of individuals or different groups of people: a constituency.

#### CASE STUDY 1: CIVIL SOCIETY WATCH MECHANISMS DRIVE ANTI-GRAFT MOVEMENT AT A LOCAL LEVEL IN NEPAL



*Contributed by the NGO Federation of Nepal*

##### The campaign:

Amidst its active engagement in several social movements in the country, the NGO Federation of Nepal (NFN), an umbrella organisation of NGOs in Nepal with more than 6000 members, in 2011 launched a campaign entitled “*Strengthening participation of CSOs to improve economic and public finance governance in Nepal*”. The major objective of the campaign is to improve transparency, accountability and integrity of economic and public finance governance at local level for citizen-centred local governance. The project has been implemented in 10 districts and 50 Village Development Committees (VDCs) across the country.

##### The actions:

To support this people-driven initiation, NFN has formed Citizen Networks for Public Service Accountability (CNPSAs) and Citizen Watch Groups (CWGs) at district and VDC level as citizen watch mechanism in order to strengthen the demand-side and support to make the public service providers accountable and transparent.

These bodies promote good governance at the local level by monitoring every aspect of public finance management, and advocating for and coordinating the transparency and integrity of local public service providers, such as public schools, local government bodies and NGOs. They have also succeeded in checking irregularities and misconducts in many cases and raising the awareness of local citizens of bribery, commission, trouble making and cumbersome practices of service agents.

##### The results:

Because of the watch mechanisms, participatory development planning and budgeting processes have increased and council meetings have been conducted in a timely manner. Citizen Charters have been installed in the premises of public offices, the practice of keeping project notice boards at project sites has increased and the quality of development works has been controlled.



Your work on the post-2015 development agenda should certainly draw on both cause-based legitimacy - given the morality of developing a successor framework to the MDGs and to eradicate global poverty - and people based legitimacy, through developing support and partnerships with others engaged in the agenda.

#### PRIMARY AND SECONDARY EVIDENCE

It is important to gather the evidence to support your work from both **primary** (original studies, accounts and experiences) and **secondary** (interpretations of your own or others' primary research) sources.

#### CASE STUDY 2: GAINING LEGITIMACY AND INCREASING POLICY INFLUENCE IN THE POST-2015 AGENDA THROUGH PARTICIPATORY RESEARCH IN BOLIVIA



*Contributed by UNITAS*

##### The campaign:

Discussions of civil society have made it clear that the development of a new global agenda must not repeat the 'closed door' approach - lacking the participation of the poor - that prevailed in the formulation of the Millennium Development Goals (MDGs). From November 2012 to March 2013, UNITAS, the national network of institutions for development and human rights in Bolivia, conducted research in seven poor municipalities in Bolivia titled "Poverty and paths for change: visions from the subjects".

##### The actions:

A participatory methodology - with workshops and in-depth interviews as the primary tools - was used to collect the perspectives of small farmers, artisan owners, small businessmen, employees and unemployed urban and rural. The aim was to analyse the relative changes experienced in the last twelve years in their living conditions, the causes of the current situation and prospects for transformation.

##### The results:

Research was presented at various meetings and national and international fora, serving as the basis for discussions and decision-making. It informed the position of civil society in Bolivia and Latin America in four cornerstone areas:

- Access to productive resources (land, water, capital, technical training and market access for products of small units);
- Access and improvement of working conditions and the protection of the rights of rural and urban workers;
- Protection and social security oriented to optimise conditions of urban and rural lives, along with substantial improvement in education and health services; and
- Full social participation overcoming the limitations (political patronage, corruption of officials and authorities) that lead to social disruption and public invisibility of youth, women, the elderly and other vulnerable populations.

##### Success factors:

- The participatory methodology generated favourable conditions for participants to express themselves in an environment of trust and safety.
- The methodology sought not only to collect information but also to generate an interactive process that helped participants identify the causes and alternatives to their living conditions, making them owners of the proposals made in the research.
- The geographic, demographic and socioeconomic variety of municipalities consulted in the study gave legitimacy and representativeness to the proposals.



**TOOL 1: PLANNING RESEARCH TABLE**



A simple research planning tool that you could use throughout your advocacy planning and implementation:

| TOPIC/ RESEARCH QUESTION  | SUB-TOPIC/ RESEARCH QUESTION   | WHERE CAN YOU FIND THE INFORMATION?   | WHO WILL CONTRIBUTE TO THE RESEARCH?  | HOW WILL YOU COLLECT AND ANALYSE THE INFORMATION?  |
|---|--|---|---|--|
| How has the issue of water and sanitation been addressed in post-2015 discussions so far? | Which post-2015 processes have addressed water and sanitation to date- which haven't?                          | UN Sustainable Development Website  | Lead researcher will be Maria Sanchez (from the Save Water Campaign) from the coalition | Maria and her team will produce an Excel spreadsheet mapping / comparing post-2015 processes and government positions on water and sanitation by Monday 28th July                                |
|   | Which governments have voiced strong support / opposition for water and sanitation to be a post-2015 priority? | Speaking to contacts at the Water Alliance<br>Meet with a government representative from the Ministry for the Environment |   | Maria will draft and circulate a short report summarising the information from the spreadsheet mapping to all partners by Monday 4th August, and arrange a follow up call to discuss the results |

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

**4.2 UNDERSTAND THE AGENDA FROM NATIONAL TO GLOBAL LEVEL**

To develop and deliver an effective post-2015 advocacy strategy at the national, regional or global level, you need to understand and analyse the context for your work. Your voice will also be much stronger if you can make the links and share lessons between these levels.

This external context can also be conceptualised as the 'enabling environment' for civil society, the conditions that affect the capacity of citizens or organisations and their actions to participate and engage in society. These conditions include the governance and policy factors that directly affect civil society, and the socio-economic and socio-cultural conditions which affect individuals. Gauging the enabling environment will better inform civil society organisations on how the legal framework and capacities, funding, political and social conditions can impact them and their participation in self-regulation initiatives at all levels.

For a more detailed explanation of the enabling environment and more information on how it can be applied in each different context, particularly at the national level, consult the *CIVICUS Enabling Environment Index report*.

**National level:**

Every national policy environment is different and will have varying constraints and opportunities. Governments have different degrees of legitimacy and power, and political decisions will be made differently according to the nature of the state, politics, media and the strength of civil society.

Consequently, governments will have different post-2015 development agenda priorities. Therefore an advocacy strategy in one country might look quite different to one in another. It is important also to note that countries have different levels of freedom and access to the public sector, which will have an impact on the activities that an organisation can carry out.

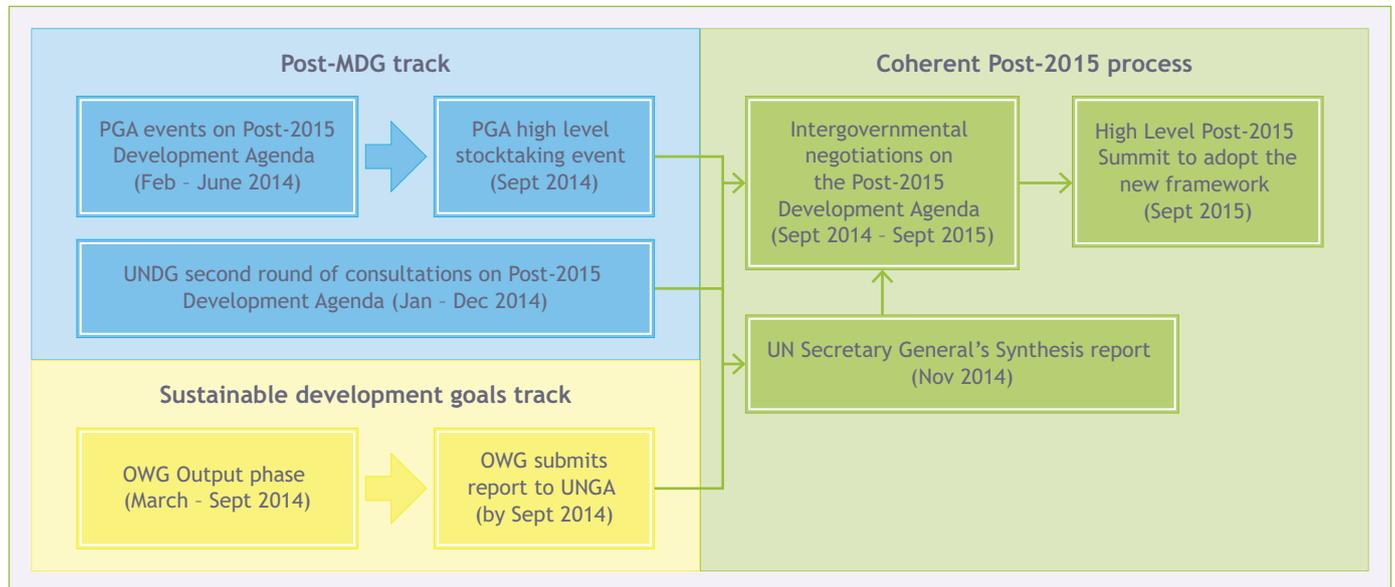
*The SD2015 programme will provide briefings and guidance notes on engagement with national parliamentary processes, and a scorecard on intergovernmental organisations' engagement of civil society in post Rio+20 and post 2015 processes. Keep an eye on the SD2015 website's 'Engagement Tools' section for more details.*

**Regional level:**

Governments and other stakeholders come together in different ways in different regional contexts. The UN's five Regional Commissions, the regional outposts of the United Nations, provide one means of coordinating advocacy at this level. The Commissions aim to promote multilateral dialogue, knowledge sharing and networking for sustainable development between governments and stakeholders, and could be approached to act as conveners or mediators to support your regional activities. This could involve convening nearby national level actors to work on common priorities, and delivering those messages to key fora at the global level. In particular, the Regional Commissions have been invited to contribute to the work of the HLPF (see Part 1), including through annual regional meetings.<sup>14</sup>

14 UN General Assembly Resolution 67/290. *Format and organizational aspects of the high-level political forum on sustainable development*, A/RES/67/290 (9 July 2013, Paragraph 13). Available at: [http://www.un.org/ga/search/view\\_doc.asp?symbol=A/RES/67/290&Lang=E](http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/67/290&Lang=E)

FIGURE 4: Overview of the post-2015 development agenda processes



The SD2015 programme is holding capacity building workshops alongside the Regional Commissions' own consultation events in 2014, from which lessons and suggestions for ongoing regional collaboration will be shared on the SD2015 website.

**Global level:**

The primary processes to influence the post-2015 development agenda, including the Open Working Group on Sustainable Development Goals (OWG), and the most effective methods to do so, including the UN Major Groups, are set out in more detail in Part 1.

The figure above simplifies the overall decision-making process, for ease of reference. Further details and dates for these constituent processes are also outlined in the SD2015 *Interactive Timeline of post-2015 and Post-Rio+20 Processes*.<sup>15</sup>

**4.3 WORKING IN PARTNERSHIP**

Building strong partnerships which include a broad range of actors and constituencies can help to increase the legitimacy and effectiveness of your post-2015 advocacy strategy.

Working in partnership with others has many **advantages**, including:

- Creating opportunities to learn and share skills, resources and experience;
- Building new and improved opportunities for influencing potential donors, decision-makers, media contacts and other key stakeholders;

- Coordinating activities to reduce duplication and reinforce one another's work;
- Increasing credibility and legitimacy in the eyes of decision-makers and other stakeholders by creating 'one strong voice';
- Broadening national and regional level presence and therefore increasing opportunities to have an impact on public opinion and mobilise a public campaign.

However, it is still important to be aware of some of the **risks** of working in partnership, including:

- Progress may be slower due to greater time spent convincing each other on issues, instead of convincing decision-makers;
- Your strategy may be limited to 'lowest common denominator' consensus in order to ensure partner agreement;
- Some partners may gain more than they give;
- If partners are to leave, the strategy might fracture or disintegrate;
- Individual organisational profile may be lost and some partners could utilise the shared profile for self-gain.

<sup>15</sup> SD2015 Interactive Timeline of post-2015 and Post-Rio+20 Processes. Available at: <http://www.sustainabledevelopment2015.org/index.php/timeline>



### TOP TIP: CHOOSING PARTNERS



Choosing the right partners can be based on a number of factors, including:

- Can they influence our target audience?
- Do we have shared interests and objectives?
- Do they increase the legitimacy, credibility and effectiveness of the advocacy strategy?
- Do they bring evidence, knowledge or technical expertise?
- Do they bring other resources to the advocacy initiative?
- Do they have global, regional, national or local presence?
- Are their strengths and abilities complementary to ours?

UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

Finally, some key principles and actions to bear in mind for building effective partnerships that will lead to effective collaboration:

#### SHARED PRINCIPLES:

Vision - Values - Expectations - Respect - Strategy - Responsibilities - Accountability - Flexibility - Open Communication<sup>16</sup>

#### ACTIONS:

Complementarity (different sets of expertise) - Roles clearly defined - Outcomes clearly defined (and measured with partners and donors) - Good communication between partners and internally - Balancing outputs and outcome.

### TOP TIP: WORKING IN PARTNERSHIPS



To limit some of the potential risks you might encounter working in partnership you might want to consider some of the points below:

1. Partnerships should be tactical and strategic. Although a broad range of strategies are available, choices must be made as to which tactics and/or partners can exert the maximum pressure on decision-makers. Decision-makers rarely respond to only one direction of pressure and will therefore need to be the focus of a number of tactics.
2. Partnerships need to focus on the common space among partners for messaging and agreement, in spite of likely differing mandates and operational procedures, in order to leverage power and affect change.
3. Partners should be involved in all aspects of advocacy. Often, the best partners are ones which have been engaged right from the beginning, during the situation analysis, as they share the responsibility for identifying the problem and the development of solutions to address the problem.
4. Partnerships will bring risk if they fail, it is therefore critical to be 'risk-aware'.
5. Consideration of organisational style and culture can help working relationships and collaboration.
6. Some partners will be active partners in advocacy work. Others need to be 'cultivated' before they become active partners and true resources. How these partnerships are approached must be planned strategically.

UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

<sup>16</sup> You may consult CIVICUS' proposition of Partnerships Principles for a set of examples. Available at: <http://civicus.org/images/stories/Partnership%20Principles.pdf>



### CASE STUDY 3: BUILDING ALLIANCES FOR THE POST-2015 DEVELOPMENT AGENDA: AN INDONESIAN CSO EXPERIENCE

Contributed by INFID

#### THE CAMPAIGN:

Since 2012, the International NGO Forum on Indonesian development (INFID) has worked towards building an Indonesian CSO alliance to campaign for the post-2015 development agenda.

The alliance focuses on two “common enemies”:

- Indonesia’s MDG achievements - which, according to their members, are far from satisfactory. The impact of post-2015 development framework must therefore be better;
- The lack of Southern voices in the discussions - the voices of countries such as Indonesia need to be heard and shape the direction and content of development agreements commitments in the future.

The alliance aims to:

- Promote information sharing, analysis and joint formulation of demands;
- Increase the involvement of diverse groups and communities;
- Provide different avenues for diverse groups to voice their concerns, according to their aspirations and needs;
- Engage state and non-state agencies and individuals;
- Produce various spokespersons to represent different expertise and approaches.

#### THE ACTIONS:

- Establishment of a mailing list with a membership of more than 250 individuals and regular member meetings;
- 10 spokespersons representing different policy aspects and issues, including: gender justice, the environment, good governance, rights of people with disabilities, migrant workers and inequality;
- Publication of a special report on the MDGs and the post-2015 development agenda, “Indonesia’s Journey in Achieving MDGs” (2013);
- Contribution from a variety of communities and groups, such as the women’s movement, disabled community, agrarian reform advocacy groups and environmental groups;
- Publication of a book titled, “Injustice, Gap and Inequality: Long Road to Post 2015 Sustainable Development” (2013);
- Regular meetings with government institutions and officials, including the Ministry of Foreign Affairs, the Presidential Working Unit for Supervision and Management of Development (UKP4) and Ministry of National Development Planning (BAPPENAS).

## 4.4 TIMEFRAMES

The post-2015 development agenda process is time bound and the window to influence is narrowing.

When developing your advocacy strategy, you need to ensure that all of your proposed activities fit with the fixed post-2015 timelines at the global, regional and national level. Refer to Part 1 and SD2015’s ‘*Interactive Timeline of post-2015 and Post-Rio+20 Processes*’ for an overview of key calendar dates at the global and regional levels, and look to research and create a timeline for the national level in your own country. There would be no point in designing an excellent advocacy strategy on paper that would only come into play in the middle of 2015, as this would be too late to influence the post-2015 processes.

Beyond September 2014, the process to adopt the post-2015 development agenda, through intergovernmental negotiations, is still relatively unclear. This is likely to be a key time for advocacy aimed at your national government and intergovernmental bodies, for which you should start planning as early as possible. Our Tool, ‘Identifying and planning opportunities’ (Section 5, Step 5) provides some guidelines on when may be best to deliver your advocacy messages at global, regional or national levels, and the *SD2015 programme* will provide briefings and updates to the online version of this toolkit as more information becomes available.

## 5. STEPS TO DEVELOP YOUR POST-2015 ADVOCACY STRATEGY

This section presents eight steps that could form your advocacy strategy. As mentioned in the introduction, these steps **do not** have to be taken in sequence as advocacy planning is a cycle, rather than a linear process. You can pick and choose which steps you focus on, depending on your existing level of planning.

The steps are:

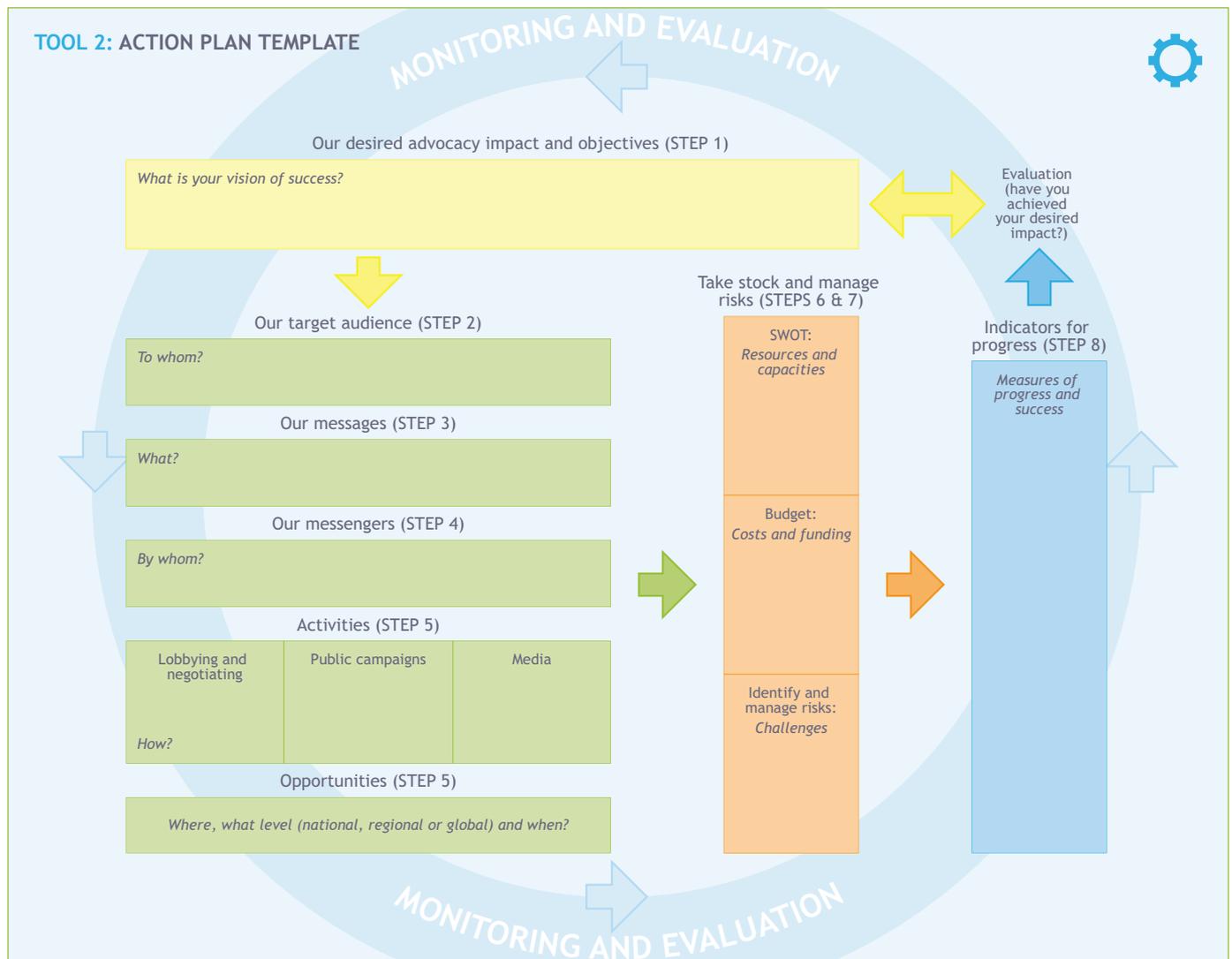
1. Select your post-2015 priorities;
2. Identify your target audience;
3. Develop your message(s);
4. Choose your messenger(s);
5. Identify opportunities and activities for delivering your messages;

6. Take stock and identify gaps;
7. Manage risks; and
8. Monitor and evaluate progress and impact.

These steps are included in the following action plan template. This planning tool will help you build your strategy as you work through the steps and fill in the different sections. You should make adjustments to your action plan over time as more information becomes available.

**With any action planning, make sure you agree and assign responsibilities to partners and individuals working together on the strategy. This will ensure that all activities get done, fairly.**

Some of the information and steps will be more relevant to advocacy planning and influencing at a global level, whereas others will be more relevant for national and regional levels.





## STEP 1: SELECT YOUR POST-2015 PRIORITIES

Every advocacy strategy needs to start with a decision on what it is that you want to accomplish.

### Narrow down your choices

If you are yet to decide upon your post-2015 advocacy strategy priorities, there may be many potential issues you could address. To ensure your advocacy is effective and targeted, you will need to agree with your partners and networks which are your main priorities.

Deciding how many issues you want to address will also depend on the partners you are working with, and the capacities of you and your partners to implement a national, regional or global - or combined - advocacy strategy.

Tackling a small number of strong, focused issues will have much greater impact in the short and long term. Addressing a long list of different issues can stretch your capacities and dilute the effectiveness of your work.

### TOOL 3: ISSUE CHOICE MATRIX



This is one tool you can use to analyse and prioritise advocacy issues relating to the post-2015 development agenda. It works by rating each issue you identify against given criteria. As a first step you need to identify three or four possible priority issues, using your research and analysis, upon which you can base your post-2015 advocacy strategy. Then, discussing each issue in turn, work through your chosen criteria to rank each from 1-5 (5 = maximum effectiveness). Finally, add up the totals: the issue with the most points should in theory become your advocacy strategy priority.

The criteria used below are just examples, which you can amend according to your own situation and perceived level of importance.

Note: While in theory you do just add up the points, in practice it is the discussion that is crucial and not just the numbers. It shouldn't be a mechanical process where you just add up numbers. Ideally you and your partners should decide the most important issue(s), by consensus. You may choose to focus on more than one key issue, depending on your aims, resources and capacities.

Below is an example of an issue choice matrix that a coalition working at the national level to influence their government might produce:

| CRITERIA  | ISSUE 1:<br>The rights of future generations is not seen as a priority for inclusion in the sdgs | ISSUE 2:<br>Depletion of natural resources has not been properly acknowledged, there is no attempt to address consumption and production patterns | ISSUE 3:<br>Climate change will affect all of the sdgs, though this is not seen as an overarching issue |
|---|--|---|---|
| Your level of concern for this issue (how important is it that it should be addressed?)   | 4  | 4   | 4   |
| Does the issue align with your organisation's/ coalition's aims and mission?  | 3  | 3   | 4   |
| Potential for you and your partners to add value to other stakeholder voices (are many others already working on this issue, is the space overcrowded?) | 2  | 3   | 5   |
| You have the resourcing to tackle this scale of issue   | 4  | 4   | 4   |
| This issue fits with the expertise of you and your partners   | 2  | 3   | 4   |
| <i>More criteria here...</i>  |  |   |   |
| <b>TOTAL</b>  | <b>15</b>  | <b>17</b>   | <b>21</b>   |

VSO (2012), *Participatory Advocacy: A Toolkit for VSO Staff, Volunteers and Partners*. Available at: [www.vsointernational.org/Images/advocacy-toolkit\\_tcm76-25498.pdf](http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf)



**TOP TIP: CHOOSING A ‘GOOD’ ADVOCACY ISSUE**



The following list of considerations can also help you to identify which post-2015 advocacy issues you should prioritise.

Will working on the issue:

- Contribute to global poverty eradication and sustainable development?
- Have relevance for both high and low income countries?
- Build on the work of the MDGs?
- Be widely and deeply felt?
- Build lasting organisations and alliances?
- Provide opportunities for women to learn about and be involved in the agenda and wider politics?
- Develop new leaders?
- Promote awareness of, and respect for, rights?
- Link local concerns with global issues?
- Provide potential for raising funds?
- Enable your organisation to further its vision and mission?
- Be winnable? Does it have a clear impact, timeframe and objectives?

Adapted from: VeneKlasen, L., Miller, V., (2002)  
*Power and empowerment*. PLA Notes

**TOP TIP: ANALYSING YOUR PRIORITY ISSUE(S)**



Once you have identified your top priority issue(s) and have collected the relevant information through research, you should subject the issue(s) to a detailed analysis.

There are a number of different tools you can use to analyse your priority issue(s) and break the issue(s) down into smaller parts. This will help increase understanding on each issue, the context in which the issue operates and how you can bring about change.

We recommend three common tools:

- **Problem tree**  
The problem tree is a visual method of analysing a particular problem, based around mapping the different aspects of the problem. It works particularly well when analysing an issue in a group.
- **RAPID framework**  
The RAPID framework helps to develop an understanding of the policy and political influences on a particular issue, as well as to identify that issue’s relevant stakeholders and policy actors.
- **PESTLE analysis**  
A PESTLE analysis offers a framework for examining the external environment and trends that may affect the issue you are working on.

Templates and examples for these are widely available online.



### DEFINE YOUR DESIRED ADVOCACY IMPACT AND OBJECTIVES

Once you have agreed your priority issue(s), you should set out how your post-2015 advocacy strategy will address it (them).

You need to decide what you want to happen, and by when. Setting your desired ‘impact’ will enable you to be clear about what you are trying to achieve, and will assist you in your planning and design of ‘objectives’ along the way. In the longer term, clearly prescribed objectives will also allow evaluation and monitoring of your advocacy strategy and understand where your work has been successful and whether you have achieved your intended impact.

This next tool helps you to think about the desired impact you want to have on the priority issue(s) you have identified:

#### TOOL 4: NEWSPAPER COVER STORY



This is a creative visioning exercise that asks you to imagine what a successful outcome would look like in September 2015, when the post-2015 development agenda and its associated goals have been agreed and announced to the world by global leaders

The exercise is to build a newspaper front cover story, depicting what the headlines would be in 2015 if everything you wanted from your advocacy strategy had been agreed upon.

For example:

**\*\*NEWSFLASH\*\***

16th September 2015

**World Leaders Agree Ambitious, Transparent and Universal Sustainable Development Goals - Renewable Energy For All Will Finally Become A Reality by 2030**

People all over the world stand still today to watch world leaders finally agree to deliver the future we want and need. These new global goals will alleviate poverty by 2030, they will stop us consuming more resources than our planet can sustain and they will be driven by partnerships with civil society.

\*\*\*

Make sure you store these front covers in a safe place - in September 2015 you can compare them to the actual new stories reported and this can be a helpful measure of success.

Using the example from the Issue Choice Matrix Tool 3, “Climate change will affect all of the SDGs, though this is not seen as an overarching issue”, and working through the visioning exercise to determine the outcome you want to achieve, a SMART impact and some possible advocacy objectives could be:

Impact: ‘By 2015, ensure climate change is embedded in all SDGs at the target and indicator level.’

Objectives:

- Every set of SDG targets suggested by the OWG in their September report includes at least one target that relates specifically to addressing climate change;
- Increased support for the inclusion of climate change within the post-2015 framework and SDGs, particularly among Member States;
- Raised awareness of relationship between climate change and poverty eradication/ sustainable development, and relationship reframed;
- Examples provided to OWG/national government of how climate change could be integrated into the post-2015 development agenda e.g. example targets.

#### TOP TIP: BE SMART



A common method to ensure you have an ambitious yet realistic desired impact and set of objectives is to use the SMART analysis:

- Specific: what exactly do you want to happen?
- Measurable: will you know when you have achieved it?
- Achievable: is it realistic or even possible to achieve your objective, given your resources and time?
- Relevant: is it relevant and appropriate to all stakeholders, and to the problem itself?
- Time-bound: by when do you want it to happen?



## STEP 2: IDENTIFY YOUR TARGET AUDIENCE

Once you have agreed what you want from your advocacy, the next step is to understand which people and institutions you need to influence to make sure your impact is achieved.

### Identifying and analysing stakeholders

Through research and analysis you should build an understanding of the key post-2015 decision-makers influential stakeholders in order to identify your advocacy target audience. Then you can work out how to influence them.

See **Part 1** for a full overview of the key post-2015 decision-makers.

Conducting a stakeholder analysis (see Tool: Mapping and analysing your target audience) will help you to understand which institutions and individuals have a 'stake' in your issue, as well as their interests, support or opposition (to you and your priorities), influence and importance. Finding where different stakeholders stand on your post-2015 priority issues will help to protect your advocacy efforts from any unforeseen surprises and false assumptions.

#### TOP TIP: BE SPECIFIC WHEN SELECTING YOUR TARGET AUDIENCE



- Pick only a few targets to direct energy and focus;
- Pick ones that might be able to influence each other;
- Pick ones that you have the ability to influence.

A simple stakeholder analysis will also provide relevant information for later steps in your advocacy planning - particularly for **Steps 4, 5 and 6** on developing appropriate and effective messages and choosing who and how to deliver these messages - in order to influence your target audience.

Start by identifying the institutions and individuals involved in post-2015 decision-making (see Part 1), for example:

- decision-makers (major players at local, national, regional or global levels)
  - e.g. a Co-Chair or member of the OWG for the global level, or a representative from a government ministry at the national level;
- advisers to decision-makers;
- influencers (e.g. newspaper editors);
- disadvantaged people;
- allies and supporters;
- opponents;
- undecided on the issue (who you may be able to influence).

Next, think about how much they are already associated with your advocacy goal or issues by researching their objectives and recent activities (for example using websites, publications or event summaries), to uncover:

- relationships and tensions between the players;
- their agendas and constraints;
- their motivations and interests;
- what are their priorities - rational, emotional, and personal.

It is important to identify who are the real change-makers on your chosen agenda, who has the power and influence to deliver what you want, and whether entry points for advocacy are realistic.



### TOOL 5: IDENTIFYING AND ANALYSING YOUR TARGET AUDIENCE



This tool helps to identify and analyse decision-makers and other key targets.

Once you have identified your priority issue(s) (see Step 1), then you can start to identify key individuals and institutions, and analyse their influence, attitude and level of support in relation to your priorities. The table below can be used to record this analysis. This information can then clarify who may be allies, adversaries or targets, and help you prioritise and strategise.

- Those who have most influence but are most anti- your priority issue(s), will be those where the key convincing will need to take place;
- Those with the most influence and who are most in favour of your priority issue(s), are likely to be key allies.
- Those with high influence, who are neutral on your priority issue(s), could well be your key targets.

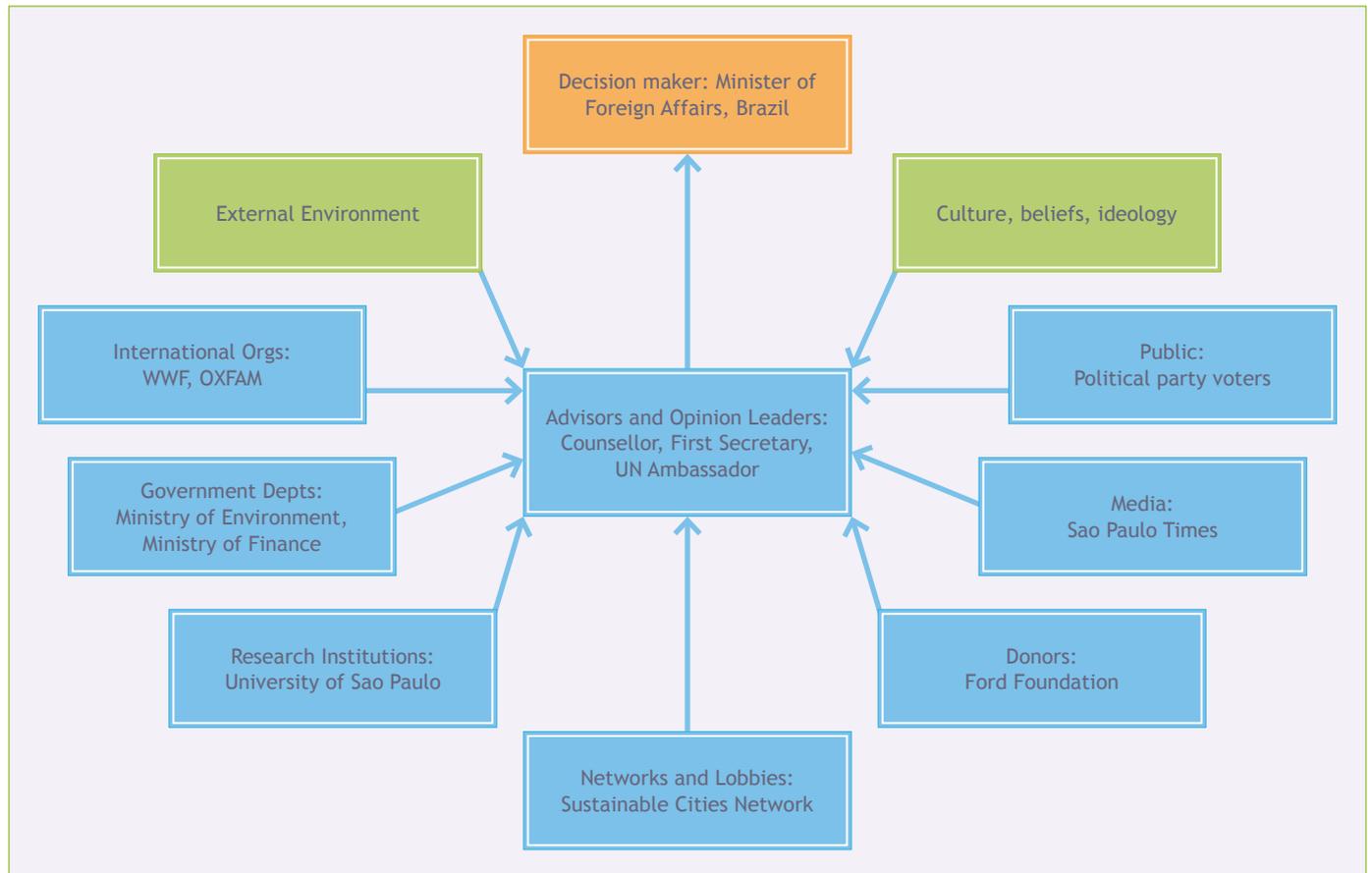
| GOVERNMENT/<br>ORGANISATION/<br>NAME<br><small>(plus contact<br/>details)</small> | HOW MUCH<br>EXPERTISE DO<br>THEY HAVE<br>ON YOUR<br>PRIORITY<br>ISSUE(S):<br><small>Rate 1 (low) -<br/>5 (high), or<br/>qualitatively</small> | HOW MUCH<br>INFLUENCE DO<br>THEY HAVE ON<br>YOUR<br>PRIORITY<br>ISSUE(S)?<br><small>Rate 1 (low) -<br/>5 (high), or<br/>qualitatively</small> | WHAT IS THEIR<br>ATTITUDE TO<br>YOUR<br>PRIORITY<br>ISSUE(S)?<br><small>Rate 1 (very<br/>anti) - 5 (very<br/>pro), or<br/>qualitatively</small> | HOW<br>IMPORTANT<br>IS YOUR<br>PRIORITY<br>ISSUE TO<br>THEM?<br><small>Rate 1 (low)<br/>- 5 (high), or<br/>qualitatively</small> | TOTAL SCORE/<br>SUMMARY OF<br>QUALITATIVE<br>JUDGEMENTS<br><small>(Highest = likely<br/>target)</small> | LIKELY TO<br>BE AN ALLY/<br>OPPONENT/<br>TARGET?<br><small>(see criteria<br/>above)</small> |
|---|---|---|---|--|---|---|
| Minister of Foreign<br>Affairs, Brazil  | 4   | 5   | 3   | 3  | 15  | Target  |
|   |   |   |   |  |   |   |
|   |   |   |   |  |   |   |
|   |   |   |   |  |   |   |

Adapted from VSO (2012), *Participatory Advocacy: A Toolkit for VSO Staff, Volunteers and Partners*. Available at: [www.vsointernational.org/Images/advocacy-toolkit\\_tcm76-25498.pdf](http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf) and Water Aid (2007), *The Advocacy Sourcebook*. Available at: [www.wateraid.org/~/media/Publications/advocacy-sourcebook.ashx](http://www.wateraid.org/~/media/Publications/advocacy-sourcebook.ashx)

Once you have identified your target audience(s), it is important to conduct further research on them. Successful advocacy strategies invest considerable time in really understanding their target audiences, to gain a good

understanding of how to influence them and tailor messaging and activities for the biggest impact. A mapping exercise, like the one shown in Figure 5, can help you to identify who might have influence over your key targets.

**FIGURE 5: Target and influence mapping**





### STEP 3: DEVELOP YOUR MESSAGE(S)

A strong overarching message will hold your entire advocacy strategy together. If you really want to influence decision-makers you should invest time in developing this message early in your advocacy planning. If your messages are numerous, vague or too complex they might not grab the attention of your target audience or have real memorable impact.

In advocacy there can be two types of message:

- **Primary message:** usually the most universally compelling message for your target audience. It should include the following:<sup>17</sup>
  - **Statement:** your central idea or the analysis/cause of the problem. It outlines why the change is important;
  - **Evidence:** supports the statement with (easily understood) facts and figures, using tailored language;
  - **Example:** adds a human face when communicating;
  - **Goal:** highlights what you want to achieve; and
  - **Action desired:** the solution (or partial solution) to the problem. This forms the core of an advocacy message and distinguishes it from many other types of communication.
- **Secondary message:** explains how the objectives of the primary message will be met. You can have several secondary messages. These may be tailored to wider, more specific audiences e.g. decision-makers, the media, professionals, the general public.

SD2015's guide, *Engaging with the media*, provides further advice on developing messages for different audiences. It also provides step-by-step advice on how to develop messages for, and engage with, the media to increase the impact of your advocacy strategy.

#### TOP TIP: EFFECTIVE MESSAGING



Clear and effective messages:

- Should summarise the change you want to bring about.
- Should be simple, short and punchy, just one or two sentences.
- Should be jargon free.
- Tailored for your audience(s).
- Should include a deadline for when you want to achieve your objective.
- Should include the reasons why the change is important.
- Should include any action you want the audience to take in response.
- Should be memorable.
- Should be repeated until they gain influence.
- Should be consistent.
- Should combine the emotional and the rational.

Adapted from Water Aid (2007), *The Advocacy Sourcebook*. Available at: [www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx](http://www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx) and UNDP (2004), *The Blue Book: A Hands On Approach to Advocating for the Millennium Development Goals*. Available at: [www.undg.org/archive\\_docs/6813-Blue\\_Book\\_a\\_hands-on\\_approach\\_to\\_advocating\\_for\\_the\\_MDGs.pdf](http://www.undg.org/archive_docs/6813-Blue_Book_a_hands-on_approach_to_advocating_for_the_MDGs.pdf)

<sup>17</sup> Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)



**TOOL 6: DEVELOPING EVIDENCE BASED, SECONDARY MESSAGES**

This tool will help you to summarise and present your advocacy message for different audiences.

**PRIMARY MESSAGE: STATEMENT + EVIDENCE + EXAMPLE + GOAL + ACTION DESIRED**

e.g. Climate change is the greatest threat to lasting poverty eradication and sustainable development. Poor and marginalised communities worldwide are already feeling its effects and expert opinion indicates that the window of opportunity for avoiding dangerous impacts is rapidly closing. A sustainable development goal on climate change will signal to the international community the need for accelerated and coordinated action on this crucial issue.

| AUDIENCE (EXAMPLES)   | CONCERNS  | POSSIBLE MESSAGES   |
|---|---|---|
| Decision-makers<br>(government ministers, legislators, administrators, corporation heads) | International cooperation is needed to tackle climate change and agree on a universal goal. Climate change in the post-2015 development agenda will interfere with other international processes on climate change (e.g. UNFCCC). | Development gains will be lost without urgent action on climate change. Governments need to take the lead and agree on a global goal on climate change.   |
| General public  | Climate change is an intangible issue that is out of their control.   | Climate change will have an impact on all of us, and is already causing suffering amongst the world's poorest and most vulnerable. By putting pressure on your government you can influence international action to tackle this urgent challenge. |
| Journalists   | See SD2015's guide, <i>Engaging with the media</i> , for advice on developing messages for the media.   |   |
| Civil society organizations   |   |   |
| Donors (foundations, bilateral agencies, multilateral agencies)                           |   |   |
| Issue-related practitioners such as trade unions  |   |   |
| Opinion leaders (religious leaders, chiefs and traditional/community leaders)             |   |   |

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)



**TOP TIP: TAILORING MESSAGES FOR THE OWG - DEVELOPING GOALS AND TARGETS**

The OWG’s consensus building phase (see Part 1.1.1) will be used to develop recommendations on goals and targets for the SDGs by August 2014. The OWG will not discuss or propose indicators, which will be dealt with at a later date.

We recommend developing and advocating for specific goals and targets to influence the OWG’s negotiations, which should be aligned with the OWG’s latest discussions under their ‘focus areas’. For definitions of goals and targets, see Part 1.1.1. You could, for example, take your proposed goals and targets to your national government for them to advocate to the OWG; present them directly to the OWG as a member of the Major Groups; or run a public or media campaign to raise their profile (see Step 5: Identify opportunities and activities for delivering your messages).

To help you develop goals and targets, we recommend using:

**SD2015’s SDGs e-Inventory**

Houses nearly 300 open-access stakeholder visions and proposals, many of which contain goals and targets. Proposals are searchable by sector, stakeholder type, nation, region, or any key word. Stakeholder Forum has produced an analysis of these proposals under the OWG’s original 19 focus areas, both as a tool for the OWG itself and for you as stakeholders. Use the report and the wider e-Inventory to get a sense of existing proposals which you could either:

- Use as examples to develop your own.
- Align with consensus or regional/stakeholder specific views.
- Collaborate with those advocating related positions or ideas, such as those below.

Access the e-Inventory here: [www.sdgeinventory.org](http://www.sdgeinventory.org)

**SD2015’s “Tests of Success for the SDGs”**

Stakeholder Forum has produced a tool to aid decision-makers and other stakeholders in the design and selection of sustainable development goals and targets. The tool can also be used to assess a complete framework of goals and targets. The tool comprises five key ‘filter’ categories: universality and differentiation; integration; transformation; communicability; and measurement and accountability, based on key principles and criteria

agreed at Rio+20. The tool highlights some key areas that should be considered when developing your goals and targets and can provide guidance throughout the design process.



Access the Tests of Success [here](#).

**The Major Groups**

The Major Groups (see Part 1) are developing and articulating proposals for goals and targets under the OWG’s focus areas, using a participatory approach with an open ‘Google doc’ for constituents to suggest and amend proposals; and regular meetings in New York and via each constituency’s Organising Partners, to discuss content. The Major Groups have the ability to advocate directly to the OWG through official channels during its consensus building phase (See Part 1.1.1). For contact details for Major Group Organising Partners, see: <http://sustainabledevelopment.un.org/majorgroups.html>

**Beyond2015**

A ready-made coalition to join, Beyond2015 is hosting a proposed set of targets in a ‘bottom-up’ approach by assigning values to targets rather than sitting targets under proposed goals, in a bid to avoid a ‘siloed’ approach. The coalition invites your comments, proposals and support here: <http://www.beyond2015.org/document/beyond-2015-values-and-targets>

**A note on indicators**

As indicators are beyond the OWG’s scope and the process for their development is as yet unclear, the SD2015 toolkit will be updated when further details are provided. It is still worth your while considering indicators to align with your own goals and targets, or with the OWG’s eventual proposals, ready to prepare messages around these for engagement at the national level. For a definition of indicators, see Part 1.1.1.

To be clear on the distinction between goals and targets, the Independent Research Forum (IRF) uses the following definition of an indicator:<sup>18</sup>

**Indicator: [Provides] accountability for results**

- A metric used to measure progress towards a target; generally based on available or established data.

The Sustainable Development Solutions Network (SDSN) report, “Indicators for Sustainable Development Goals” outlines a possible indicator framework to accompany the SDGs and their targets. This was sent out for public consultation between 14 February and 28 March 2014.

18 IRF (2014), *Goals, Targets and Indicators: Definitions and key concepts for the post-2015 development agenda*. Available at: <http://bit.ly/1iuCBfQ>



## STEP 4: CHOOSE YOUR MESSENGERS

Your message can have a very different impact, depending on who is delivering it. Messengers are those who may not have the direct power to make decisions or achieve your goals themselves, but have influence over your target audience and therefore may be best placed to deliver your message.

You should choose your messengers strategically and you may wish to have different messengers for different forums or audiences, and at different geographical or political levels. For example, a well-known celebrity could be very effective at delivering your message to the general public, whereas a scientific expert could bring credibility in a political forum. Journalists cannot change post-2015 policy directly, but a striking or high-profile media campaign can have a real influence on those who can. See SD2015's guide, *Engaging with the media*, for more on how to use the media as a messenger.

### CASE STUDY 4: 'THE GIRL WHO SILENCED THE WORLD FOR 5 MINUTES'



At the age of nine Severn Cullis-Suzuki founded the Environmental Children's Organization (ECO), a group of children dedicated to learning and teaching other young people about environmental issues. In 1992 aged 12, Cullis-Suzuki raised money with members of ECO to attend the Earth Summit in Rio de Janeiro where she presented environmental issues from a youth perspective at the summit. She was applauded for her speech to the delegates, with some moved to tears. The video became a viral hit, popularly known as "*The Girl Who Silenced the World for 5 Minutes*", and has been viewed by millions of people all around the world and influenced many, including key decision-makers, on the importance of protecting our environment.

### TOP TIP: CHOOSING MESSENGERS



Your choice of messenger should provide credibility, clarity or empathy to the message and the issue. A celebrity or community leader, for example, may speak from personal experience and sometimes be more effective at raising profile and being heard by decision-makers; or a recognised professional with technical or scientific expertise may provide a level of authority and impartiality.

Some things to consider when choosing messengers strategically:

- What has the messenger said or written about this issue?
- Where does the messenger stand in relation to the advocacy issue?
- What level of influence does the messenger have over the target audience?
- How much does the messenger know about the issue?
- How credible is the messenger in the eyes of the target audience?
- Do you have the capacity to engage with the messenger?
- How and when does the messenger interact with the target?
- What will the advocacy strategy encourage the messenger to do?
- What are the risks of engaging the messenger?
- Can the messenger deliver the message with clarity and with empathy?

UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)



## STEP 5: IDENTIFY OPPORTUNITIES AND ACTIVITIES FOR DELIVERING YOUR MESSAGES

### Identifying opportunities

Where possible you should analyse the post-2015 processes (see Part 1) at national, regional and global levels to decide how best to get your message heard by your target audience. It will simply not be possible to engage in all opportunities at all levels, and spreading your messages too broadly can result in them losing clarity and appeal.

### Delivering your messages

It is important to make sure you select your messaging format carefully and be aware that multiple communication strategies might be needed if you have different target audiences or are engaging at different levels. Advocacy is often most effective when messages are delivered in a variety of ways that reinforce and complement each other.

### TOOL 7: IDENTIFYING AND PLANNING OPPORTUNITIES



To decide which post-2015 development agenda opportunities are most appropriate and relevant for making sure your messages are heard, the following information - which builds on the information in Part 1 - should act as a guide. Do adapt and consider other means to influence, as you see fit and as engagement opportunities arise.

| LEVEL                            | PROCESS   | FOCUS   | END DATE  | MEANS TO INFLUENCE   |
|----------------------------------|---|---|---|--|
| Global                           | Open Working Group  | Decision-making: intergovernmental negotiations on the SDGs   | July 2014 (Final session = 14-18 July)  | Stakeholder input through the Major Groups; participation at UNHQ side events?                     |
| Global                           | Intergovernmental Committee of Experts on SD Financing        | Decision-making: intergovernmental discussions on financing the post-2015 framework   | August 2014 (Final session = 4-8 August)  | Stakeholder input through the Major Groups; participation at UNHQ side events?                     |
| Global                           | Intergovernmental process on the post-2015 development agenda | Decision-making: Intergovernmental negotiations on one set of global goals and an overarching narrative   | September 2015  | Will be confirmed when the process launches in September 2014. Anticipated to be the Major Groups. |
| Global                           | PGA thematic debates and high-level events                    | Stakeholder engagement: Gather government and stakeholder perspectives to feed into ongoing intergovernmental processes on the post-2015 agenda | June 2014 (Final event: 9-10 June)  | Participation in events/online consultations   |
| Regional                         | UN Regional Commissions                                       | Stakeholder engagement: taking regional perspectives to the global level  | September 2015  | SD2015 regional capacity building workshops; direct engagement                                     |
| Global/<br>Regional/<br>National | UNDG dialogues on the implementation of the post-2015 agenda  | Stakeholder consultation: Gathering global-regional-national perspectives   | April 2015  | National public meetings and online discussions  |
| National                         | National Government   | Decision-making: Taking national perspectives to global fora; developing national policy  | August 2015 to influence the global post-2015 framework; Ongoing to influence national policy | Direct engagement/ lobbying; media/ public campaigns   |
| National                         | National advisory bodies                                      | Advice and influence: Developing national policy and positions  | August 2015 to influence the global post-2015 framework; Ongoing to influence national policy | Direct engagement/ lobbying; media/ public campaigns   |



### TOP TIP: DELIVERING YOUR MESSAGES

- Every time you need to get your message across, focus on the target audience for that message.
- Identify the specific characteristics for that audience, including their interests.
- Think about how your target audience normally ‘consumes’ other messages. Which mediums are typically used by this audience, and what sort of language do they use.

SD2015 (2014), *Engaging with the media: A companion to the Advocacy Toolkit for influencing the post-2015 development agenda*. Available at: <http://www.stakeholderforum.org/fileadmin/files/Engagingwiththedia.pdf>

There are a number of different mediums you can use to deliver your advocacy messages, for example briefing papers and meetings, websites or press releases. The case studies in this Step share some good examples of successful advocacy messaging, which could help to inform which medium might be most appropriate for your advocacy strategy.

Three of the most common ways for delivering an advocacy message are:

1. lobbying/negotiating;
2. public campaigns; and
3. working with the media (see SD2015’s guide, *Engaging with the Media*).

### CASE STUDY 5: “VENEZUELA, WHERE ARE YOU GOING?” A PARTICIPATORY APPROACH TO AN ADVOCACY CAMPAIGN

*Contributed by Sinergia*

#### THE CAMPAIGN:

In 2007, the Venezuelan Government proposed a reform of the Constitution, which would severely affect people’s rights to freedom of association, expression and participation. In response, Sinergia, the Venezuelan Association of Civil Society Organisations, promoted a public, informed debate on the potential effects of the proposed reform, in terms of the realisation and exercise of human rights.

#### THE ACTIONS:

Sinergia created a task-force to devise an awareness campaign that could reach the broadest possible audiences, particularly among the large urban lower-income communities. With support from constitutional lawyers, the eight main points restrictive of rights were identified from the articles proposed for reform. Then, a specialist in political communication turned those eight issues into dialogues and debates among characters that were fictional but derived from real people from the communities. These dialogues and debates were then validated by members of community-based organisations, who gave them their final form.

The dialogues were then turned into a comic format, in which the characters, once designed by a graphic artist, were also validated to represent the diversity of people in the communities. The dialogues were also turned into videos, counting on the support of the Venezuelan Association of Actors.

A press conference was held with the final products, in which the artists played the roles of the characters in the stories. Videos of the press conference and the dialogues, together with 1,250,000 brochures were distributed, half of them as inserts in national and regional newspapers, and half as person-to-person handouts in many outreach activities around the country.

Distribution of the campaign materials and debates regarding developed into forms beyond those initially devised: youth groups staged the dialogues in metro stations and public squares, while schools and apartment-building dwellers copied the brochures and posted them in different public spaces for others to see.

Videos related to the campaign can be seen at <http://www.youtube.com/user/fjreygan/videos>

#### THE RESULTS:

The proposed reform was defeated by popular referendum, and media reports as well as surveys demonstrated that “Venezuela, where are you going?” was one of the factors that prevented the reform bill from passing, helping, in turn, to preserve the human rights guarantees of the Venezuelan Constitution.

#### SUCCESS FACTORS:

The participatory methodology was key in making the campaign not only successful in terms of the results achieved in influencing public opinion - promoting the rights to freedom of association and participation in public affairs, and plural, democratic and peaceful debate - but also regarding the appreciation of it by the people, as the evaluations carried out through focus groups demonstrated.



There are already a number of good examples of organisations effectively influencing the post-2015 development agenda through these approaches. See Part 1.4 for some examples of organisations or coalitions you could consider joining for mutual benefit.

### 1. LOBBYING AND NEGOTIATING:

Lobbying is about trying to influence decision-makers on your chosen issue. Negotiating involves advancing your issue by presenting a position and debating with opposition. Developing good relationships is really important to both.

Lobbying can be formal (e.g. arranging a meeting with a key decision-maker) or informal (e.g. meeting decision-makers in the corridors or during the margins of an event).

#### CASE STUDY 6: “YOU GET WHAT YOU GIVE” (JE KRIJGT WAT JE GEEFT): AN INTEGRATED ADVOCACY CAMPAIGN IN THE NETHERLANDS



*Contributed by Partos*

##### THE CAMPAIGN:

In 2012, the Dutch Cabinet met to discuss how to implement the necessary budget cuts. There were strong indicators that development aid was going to be cut severely. Partos, the Dutch national platform for civil society organisations (CSOs) engaged in international development, decided a broad campaign was needed to prevent the aid budget from being cut.

##### THE ACTIONS:

The campaign used several advocacy methods in an integrated manner. A steering group composed led the process with three working teams: a lobby team, media team and online team. Each had their own strategy:

- **Lobby:** provide content for the campaign and influence politicians.
- **Media:** provide publicity
- **Online:** influence online, using guerrilla tactics (make messages go viral)

Some of the actions taken:

- Press releases about the campaign;
- A website, Facebook page and Twitter account;
- Letters from famous Dutch persons and well-known (ex) politicians highlighting the consequences of cutting the aid budget published widely in national newspapers;
- Research published demonstrating that the majority of Dutch citizens that wanted to maintain the budget, which was also picked up by media.
- Gained support of prominent persons such as Bill Gates, Bob Geldof and Annie Lennox; and
- Activated members of key political parties to convince their politicians in parliament not to cut the budget.

##### SUCCESS INDICATORS:

- Political discussion and public debate were ongoing during the campaign, including discussion about the effectiveness of development aid. A lot of media hits were generated;
- Greater interest and mobilisation around the development aid discussion was achieved in a short time;
- The campaign can claim to have had an influence on the resignation of the Cabinet in April 2012. Thanks to the ‘implosion’ of the Cabinet, budget cuts were avoided;
- The coalition of members around the campaign enhanced the cooperation between members and led to a more unified group. Organisations looked beyond the borders of their own organisation-related goals and made efforts on behalf of sector level interests.



**TOP TIP: LOBBYING DOS AND DON'TS**



**DO...**

- Be prepared
- Be polite
- Be engaged
- Build relationships and trust - this takes time, so you might start by drinking coffee (or tea) with the delegates
- Offer insight and solutions
- Smile

**DO NOT...**

- Interrupt a meeting
- Approach a government when they are speaking at an event/meeting
- Sit in a government seat at a meeting - unless you are on that government's delegation
- Target a government with a meeting intervention

Negotiating requires a good understanding of where your target audience stands on an issue and a good justification or argument for what can be done to improve the situation.

**TOP TIP: GOOD NEGOTIATING**



Some steps to prepare for negotiation:

1. Take stock: Be clear on your position and the issue you want to address.
2. Learn as much as you can: Conduct research and gather evidence that backs up your position, and have some key facts to hand. Learn as much as you can about the person or organisation you are meeting to understand their position.
3. Develop alternatives: Think about a compromise you would be happy with reaching.
4. Get fresh perspectives: Share your position with colleagues or allies ahead of your meeting, to get feedback on your approach and negotiating tactics.

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

Sometimes, a choice has to be made about working 'inside' or 'outside' official UN or government processes. A number of organisations are very effective at working both inside and outside, but this is a careful balance to strike. The following Top Tip shares some of the advantages and disadvantages of attending UN meetings. It is up to you to balance these and decide where to focus your advocacy efforts and assess whether you have the resources to engage at this level.

**TOP TIP: WHY ATTEND UN MEETINGS?**



If your advocacy strategy is focused on influencing global level processes, you should consider targeting your efforts right where the post-2015 framework negotiations will take place, potentially through becoming an accredited member of the Major Groups (see Part 1.4). This could enable you to:

- offer new insight and constructive criticism, and to influence the negotiations;
- build and cultivate alliances for future work;
- showcase studies of your successes;
- learn about how intergovernmental negotiations work;
- connect with, get to know, and provoke governments, including your own;
- raise funds for your work;
- bring the result of the negotiations home, and follow up the decisions and see how they are being implemented;
- disseminate information about decisions taken;
- see if decisions taken at UN level should be brought to other sectors of the decision-making process in your country/region, in addition to the participating ministry.

But bear in mind that travelling to UN meetings can be expensive and time consuming, particularly if you are not based in New York near the UN Headquarters. Your time may therefore be better spent focusing on influencing your national government (see below).



### TOP TIP: ORGANISING YOUR TIME AT UN MEETINGS



If you decide to attend a post-2015 development agenda event or meeting, depending on its scale, you could:

- Designate point contacts for all key people e.g. G77, EU, US, key countries, Bureau members, UN officials
- Designate floor managers in each negotiation room
- Use 'coffee bar diplomacy' at receptions
- Use any informal possibilities: drinks/dinner/dancing

If you are spending more than 20% of your time with other civil society organisations, partners and other stakeholders you are losing important time for influencing your target audience! Remember to retain focus on your advocacy objectives.

Whilst engaging at the UN level on the post-2015 development agenda is important, it is at the national and regional levels where you can often have the most direct impact on a government and their position in post-2015 processes. The negotiating positions of governments at the UN will be decided upon and agreed at the national level, so if you can engage with your government in advance of global post-2015 meetings you have a concrete opportunity to influence the outcome of the global post-2015 development agenda.

### TOP TIP: NATIONAL LEVEL LOBBYING



When lobbying at the **national level**, have you:

- Met with your government?
  - With departments? E.g. Environment, Economic affairs, Development, Head of State or government...
- Initiated a debate in your parliament?
- Met with other national level stakeholders?
- Met with and briefed the national press?
- Tried to get your members or partners on official government delegations for UN events or pre-event meetings?
- Organised several meeting in capitals with key governments (perhaps as a regional coalition)?



**TOOL 8: LOBBY LOG**

The Lobby Log is a useful tool to help you keep track of who you meet, their contact details, the outcome of the meeting and any follow up that is needed. When working in coalition or partnership the Lobby Log can also be used to share information on the advocacy efforts that have been undertaken by individual members - to ensure that members are updated on the latest developments, that new contacts are shared, and that members are able to continue/follow up on discussions initiated by others within the coalition or partnership.

The Log should be completed after each meeting. Be as comprehensive as possible. Add more rows to the table if needed.

| NAME AND POSITION OF REPRESENTATIVE  | PLACE AND DATE OF MEETING                   | WHAT WAS DISCUSSED  | FOLLOW UP/ ACTION POINTS   | CONTACT DETAILS |
|--|---|---|--|-----------------|
| [Name, position]:<br>Ministry of Foreign Affairs, [Country]<br><br>Member of the OWG | Wednesday 2nd April 2014 at the OWG session | <ul style="list-style-type: none"> <li>• Is supportive of the work of the coalition and welcomes any input</li> <li>• Universality does not mean 'one size fits all' - differentiation should be at national level</li> <li>• Supportive of means of implementation under each goal</li> <li>• Keen for the involvement of multiple actors: 'governments cannot do it alone'</li> </ul> | <ul style="list-style-type: none"> <li>• Keep in touch on an informal basis.</li> <li>• Send over further information about the work of the coalition and post-2015 position</li> <li>• Arrange a follow up meeting at the next OWG</li> </ul> | [Email/phone]   |
|  |   |   |  |                 |
|  |   |   |  |                 |
|  |   |   |  |                 |



## 2. PLANNING A PUBLIC CAMPAIGN:

A campaign is an effort to bring about change. It is not one single action, but a combination of a number of actions, reports and events put together in a sequenced plan. It should be big enough to make a difference, but manageable enough to get short-term results. It should build the base for future campaigns and actions.

Running a campaign can be time-consuming and costly, so before you get stuck into plans, run a reality check:

- How will public support help you achieve your advocacy goals - do you really need a campaign?
- Can you get what you want with other means without involving the public?

### TOP TIP: HOW TO RUN A SUCCESSFUL CAMPAIGN



1. The best public issue campaigns are based on hopes and dreams, rather than fears and problems. If you want to involve people you must inspire them and generate enthusiasm for the campaign. They must feel that something will improve if they support your campaign. Negative approaches that exploit emotions like fear or anger can sometimes mobilise people for a short period, but are much harder to use to build organisations or transform society.
2. Campaigns will only succeed if you can make your target audience identify with your issue - make sure you know your target audience and have done research about their concerns, values and views on the issue.
3. Every successful campaign needs a clear identity and a message that the public understands. This means you need logos and slogans that people identify with the campaign. You also must be clear about the message that you want to get across in all the speeches you make or media you produce. The message sums up the key things that you want the public to understand around your issue.
4. Once your target audience identifies with the issue, you have to move them to take action. To do this you need a mobilising and organising strategy.
5. A successful campaign never moves off its message. Do not get diverted by other issues, especially by opposition attacks. Stick to the positive message you want to get across, regardless of what other people say. This enables you to set the agenda.

CIVICUS (2011), *MDG Campaigning Toolkit*.  
Available at: [www.civicus.org/new/media/MDG\\_Toolkit\\_complete.pdf](http://www.civicus.org/new/media/MDG_Toolkit_complete.pdf)

## CASE STUDY 7: PETITIONING PUBLIC CAMPAIGN IMPROVES AID TRANSPARENCY IN KOREA



*Contributed by KoFID*

### THE CAMPAIGN:

In 2013, the Korea Civil Society Forum on International Development Cooperation (KoFID) increased its advocacy efforts to raise awareness of aid transparency and urge the Korean government to join the International Aid Transparency Initiative (IATI). KoFID member organisations that belonged to the thematic working group for aid transparency jointly organised a task force and launched the campaign “Tracking whereabouts of 34,900 Won”. The slogan of this campaign came from the fact that total amount of the ODA per capita in 2012 was about 30 USD (34,900 Korean Won).

### THE ACTIONS:

The task force engaged in various advocacy activities to reach policy makers, professionals, civil society, and the public at large. Petition campaigns on the streets and online campaigns through Tumblr, Facebook and YouTube were held simultaneously for approximately a week. To attract media attention, the task force held a press conference announcing the launch and the end of the campaign. Public accessibility to information on aid transparency was increased through the publication of issue briefs and newsletters. Lastly, the task force held a policy forum targeted at the members of the National Assembly, government officials and other stakeholders, to urge the necessity for greater transparency and joining the IATI.

### THE RESULTS:

After six months of concentrated efforts, more than 8,600 signatures were collected demanding the Korean government to join IATI. Through their participation in the campaign, various development actors and the public were able to gain a better understanding of aid transparency and ODA. This campaign has created public interest and pressure on the Korean government, which contributed to the announcement that the KOICA (Korea International Cooperation Agency) will join IATI as part of its action plan for 2014.

**CASE STUDY 8: MAASAI VICTORY IN KENYA**



*Contributed by Avaaz*

**THE CAMPAIGN:**

For 20 years, the Tanzanian government has been trying to evict the Maasai community from its traditional lands to make room for a big game hunting company to bring in tourists to shoot wildlife. In 2012, the Avaaz community launched a campaign calling on the Tanzanian President to stop the evictions - and after many months of working closely with the Maasai community, they finally won!

**THE ACTIONS:**

It was a massive effort - 1.7 million people signed the petition and, with the Maasai, Avaaz rallied the international media, getting CNN and Al Jazeera to visit the area and break the story to the world. Then Avaaz members funded hard-hitting adverts in local papers calling out the government. When news of an impending eviction surfaced, Avaaz members supported a Maasai march on the capital - there traditional leaders camped outside the Prime Minister's office for three weeks, forcing him to listen to their case.

**THE RESULTS:**

The pressure built and, in late September, the Tanzanian Prime Minister visited the area and told the Maasai that the President had confirmed that they would not be evicted.

**3. WORKING WITH THE MEDIA:**

SD2015's guide, *Engaging with the media*, is designed to help you get your advocacy message(s) across to a wider audience through strategic use of the media, with advice and guidance on activities such as writing a press release, identifying and engaging journalists, holding press conferences and using social media.

**TOP TIP: WHY USE THE MEDIA?**



- Get your issue onto the political public agenda;
- Make your issue visible and credible in policy debate;
- Inform the public about your issue and proposed solutions;
- Recruit allies among the public and decision-makers;
- Change public attitudes and behaviour;
- Influence decision-makers and opinion leaders;
- Raise money for your cause.

Water Aid (2007), *The Advocacy Sourcebook*. Available at: [www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx](http://www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx)

Once you have identified your advocacy activities it is useful to record 'indicators of progress' (see Step 8).



### STEP 6: TAKE STOCK AND IDENTIFY GAPS

To be efficient and effective, before putting your advocacy strategy into action you should take careful stock of your advocacy resources. This includes previously established advocacy work, partnerships and alliances; the capacities of staff and other partners; and information and political intelligence available to you.

### Budgeting

To avoid developing advocacy plans that require more resources than you have available, it is important to set out a realistic budget. When budgeting for your advocacy strategy, include the core costs of maintaining and strengthening advocacy capacity, as well as resources needed for specific actions.

#### TOOL 9: SWOT ANALYSIS



This is a commonly used matrix that can provide an objective and critical self-assessment as a background to strategic planning.

The SWOT analysis examines the Strengths, Weaknesses, Opportunities and Threats of your strategy.

Once the SWOT factors are identified, you should be able to better ascertain what are the gaps you need to fill to implement a successful advocacy strategy, and where capacity building might also be needed.

The SWOT analysis is a versatile tool that can be returned to at many different stages of a project.

Here is a brief example of some answers that you and your partners might come up with when considering your post-2015 advocacy strategy capacities as part of a SWOT analysis:

|   | Helpful<br>to achieving the objective  | Harmful<br>to achieving the objective   |
|---|--|---|
| Internal origin<br>attributes of the organisation | <p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Strong links to the Government’s UN Mission in New York</li> <li>• We have a broad coalition of partners with expertise in the priority issues</li> </ul>         | <p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Our organisation has little reputation in other parts of government at the national level;</li> <li>• We have only a small active core group</li> </ul>   |
| External origin<br>attributes of the environment  | <p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• The High Level Political Forum has invited us to participate in a post-2015 panel discussion</li> <li>• Other CSOs from our region will support us</li> </ul> | <p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Do we have enough funding to deliver all of our proposed advocacy activities up until September 2015?</li> <li>• There is limited interest from governments at the UN on our advocacy priority issues</li> </ul> |

It is important to keep an eye on possible actions or solutions that emerge and round up with an action-oriented discussion. How can our group build on strengths to further our aim and strategy? What can be included in the strategy to minimise our weakness? And so on.

Adapted from Overseas Development Institute’s SWOT Analysis briefing.  
Available at: [www.odi.org.uk/sites/odi.org.uk/files/odi-assets/publications-opinion-files/7199.pdf](http://www.odi.org.uk/sites/odi.org.uk/files/odi-assets/publications-opinion-files/7199.pdf)

## TOOL 10: BUILDING A BUDGET



Some general categories to consider in an advocacy budget are included in this working template:

| Project:                             |                                  | Post-2015 Advocacy Campaign   |          |               |  |  |
|--------------------------------------|----------------------------------|---|----------|---------------|--|--|
| Budget Period:                       |                                  | e.g. Developing advocacy plan and materials June-August 2014; ongoing advocacy to June 2015 |          |               |  |  |
| Budget Currency:                     |                                  | xxx   |          |               |  |  |
| Total Budget:                        |                                  | 66,292  |          |               |  |  |
| All figures in (STATE CURRENCY USED) |                                  |   |          |               |  |  |
|                                      | Unit                             | Unit Cost   | Quantity | Total Cost    | Notes  |  |
| <b>A</b>                             | <b>Staff Costs</b>               |   |          | <b>23,450</b> |  |  |
| A1                                   | Project Manager (PM)             | Month   | 800      | 12            | 9,600  | No. of days at prescribed hourly rate for e.g. Grade 12; spending 33% of her time on this project. |
| A2                                   | Administrator                    | Month   | 900      | 12            | 10,800   | No. of days at prescribed hourly rate for e.g. Grade 10; spending 50% of his time on this project. |
| A3                                   | Recruitment costs                | Unit  | 50       | 1             | 50   | No. of days at prescribed hourly rate for e.g. consultant  |
| A4                                   | Consultant                       | Month   | 1,000    | 3             | 3,000  | For developing materials Jun-Aug   |
| <b>B</b>                             | <b>Administration Costs</b>      |   |          | <b>12,045</b> |  |  |
| B1                                   | Stationery                       | Month   | 50       | 12            | 600  | Estimate, based on past costs.   |
| B2                                   | Phone/fax                        | Month   | 200      | 12            | 2,400  | Estimate, based on past costs.   |
| B3                                   | E-mail                           | Month   | 50       | 12            | 600  | Estimate, based on past costs.   |
| B4                                   | Courier                          | Month   | 20       | 12            | 240  | Estimate, based on past costs.   |
| B5                                   | Office rent                      | Month   | 500      | 12            | 6,000  | 50% share of total costs   |
| B6                                   | Electricity                      | Month   | 30       | 12            | 360  | Estimate, based on past costs.   |
| B7                                   | Bank charges                     | Transfer  | 30       | 10            | 300  | Estimate, based on past costs.   |
| B8                                   | Audit                            | Item  | 1,500    | 1             | 1,500  | 50% of audit fee paid by this project  |
| B9                                   | Books, manuals, publications     | Lump sum  | 45       | 1             | 45   | Estimate   |
| B10                                  | Other                            |   |          |               |  |  |
| <b>C</b>                             | <b>Travel</b>                    |   |          | <b>13,740</b> |  |  |
| C1                                   | Local travel                     | Per trip  | 10       | 24            | 240  | Travel by PM to 2 local meetings per month   |
| C2                                   | National travel                  | Per trip  | 100      | 12            | 1,200  | Travel by PM to 1 national meeting per month   |
| C3                                   | International travel             | Per trip  | 300      | 6             | 1,800  | Travel by PM to 1 international meeting every 2 months   |
| C4                                   | Per diems                        | Per day   | 250      | 42            | 10,500   | Assuming 2 days for national trips, 3 days for international                                       |
| C5                                   | Other                            |   |          |               |  |  |
| <b>D</b>                             | <b>Capital Equipment</b>         |   |          | <b>2,000</b>  |  |  |
| D1                                   | Computer hardware (inc. printer) | Item  | 2,000    | 1             | 2,000  | For PM   |
| D2                                   | Other                            |   |          |               |  |  |
| <b>E</b>                             | <b>Training</b>                  |   |          | <b>8,400</b>  |  |  |
| E1                                   | Training materials               | Workshop  | 200      | 12            | 2,400  | Stationery, reproduction etc. for e.g. a monthly workshop  |
| E2                                   | Workshop costs                   | Workshop  | 500      | 12            | 6,000  | Venue, food, transport etc of participants at e.g. monthly workshop                                |
| E3                                   | Other                            |   |          |               |  |  |
| <b>F</b>                             | <b>Materials Development</b>     |   |          | <b>3,500</b>  |  |  |
| F1                                   | Design work                      | Unit  | 1,000    | 1             | 1,000  | Professional design for campaign materials to be produced.   |
| F2                                   | Reproduction                     | Unit  | 500      | 5             | 2,500  | Reproduction of 5 campaign reports   |
| F3                                   | Other                            |   |          |               |  |  |
| <b>Z</b>                             | <b>Contingency</b>               |   |          | <b>3,157</b>  |  |  |
|                                      |                                  |   |          |               | 5% of total budget up to this line (factored in automatically) |  |
| <b>TOTAL</b>                         |                                  |   |          | <b>66,292</b> |  |  |

## STEP 7: MANAGE RISKS

No matter how much you plan, there are still a number of risks you could face. For example, when you ‘go public’ with your post-2015 advocacy strategy there is always the risk that reputations, relationships and partners will be affected.

Before you will be able to manage risk in your advocacy strategy, you should spend some time identifying and analysing potential risks:

**Identifying risks:** Conduct research at the start of your advocacy planning to identify potential risks in operating at your proposed geographical and political levels. Think about barriers to success, tricky timescales and other stakeholders’ activities in the field. Rethink these risks each time you make a proposal or decision.

**Analysing risks:** Examine the likelihood of a possible threat occurring and the impact that it might have on your activities and success. This assessment, made early on in your strategy development, can in turn help you to determine how best to plan and implement your advocacy in order to minimise risks through careful selection of activities, messages and messengers.

Tool 11 can help you to assess what risks you might encounter and how you might mitigate these risks in your strategy.

**Managing risks:** Risk management is often about weighing opportunity costs, and certainly about working in partnership as much as possible. For example, sometimes deciding to speak out may be better than missing an opportunity or losing your legitimacy by remaining silent; whereas speaking out when not properly prepared or without the right channels could result in you appearing naïve. Draw on your partners’ and network’s experience as much as you can in making decisions, or follow the lead of others if you’re confident you can add value.

Also remember that although forming partnerships is a great way to make your advocacy more effective, it does not come without risks. Check back to Section 4.2 (Working in Partnership) to remind yourself of some of these risks.



### TOOL 11: RISK ANALYSIS



This tool provides guidance on how to analyse risks to your advocacy strategy - i.e. to assess what problems you might encounter, and how you may manage or mitigate these.

It requires you to consider both **internal** and **external** risks to your strategy - the problems you might encounter within your partnerships or coalition (for example, lack of resourcing or additional associated costs), and the issues you might face externally, problems that are may be out of the control of the strategy team (for example a government losing in an election or changes in the formal UN-led post-2015 processes).

External risk is in most cases harder to predict or control, but it is important to try and factor both into your risk analysis.

Once you have spent time identifying possible internal and external risks to your post-2015 advocacy strategy, you need to assess the probability that they might occur, the impact they could have on the strategy and decide how to manage or mitigate these risks as much as possible.

This simple planning table will help you to work through potential problems and think about how best to ensure your post-2015 advocacy strategy is protected as much as possible from risk. We have included an example of an internal and external risk you might account for in your advocacy strategy planning.

| RISKS<br><i>Possible threat</i>                              | PROBABILITY<br><i>Likelihood of occurring<br/>(1=low,5=high)</i> | IMPORTANCE<br><i>(1=low,5=high)</i> | TOTAL RISK LEVEL<br><i>(importance x likelihood)</i> | MITIGATION<br><i>Steps to mitigate</i>   |
|--|--|-------------------------------------|--|--|
| <b>INTERNAL RISKS</b>  |  |                                     |  |  |
| Lead partner pulls out of the strategy                       | 2  | 4                                   | 8  | Ensure all partners feel ownership of the campaign from the start.<br><br>Review all partner capacities to commit time and resources to the strategy- from start to finish.  |
| <b>EXTERNAL RISKS</b>  |  |                                     |  |  |
| New Member of Parliament elected to lead on post-2015 agenda | 1  | 3                                   | 3  | Build relationships with civil servants in Government department, who will be in office for entire post-2015 process.<br><br>Ensure we have excellent strategy briefing materials available to share with any new MPs, to bring them quickly up to speed on our issue. |

Adapted from VSO (2012), *Participatory Advocacy: A Toolkit for VSO Staff, Volunteers and Partners*. Available at: [www.vsointernational.org/Images/advocacy-toolkit\\_tcm76-25498.pdf](http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf)



## BEFORE IMPLEMENTING YOUR ADVOCACY ACTION PLAN

### TOOL 12: PLANNING CHECKLIST



As a first step after completing your action plan, you should carry out a **reality check**. You need to assess whether your proposed plan is realistic and appropriate to achieve the desired impact.

1. Are you ready to implement your plan? Are you clear about your objectives? Do you have your evidence in place? Do you know your audience(s)? Do you have good contacts? Do you know what activities you are going to carry out? Have you decided what type(s) of advocacy campaign you are going to use (e.g. lobbying/negotiating; public campaigns; or working with the media)?
2. What are you expecting from your partners/contacts? Are you sure of their aspirations, added value and preparedness? What will happen if they drop out?
3. What resources - financial, technical, human - are available? What are the resource implications for your plan? Do you need to include some capacity building?
4. Are there any risks? How will your activities affect the reputation of your organisation? How might it affect your funding to do other activities? Might you lose valuable staff? Could other current partners no longer wish to work with you? What can you do to mitigate any negative outcomes?
5. What would you do if things don't go to plan? What are your alternatives, contingency plans or fall-back positions? External conditions may change and you may have to rethink your plans - build in flexibility so you are prepared for this.

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)



## STEP 8: MONITOR AND EVALUATE PROGRESS AND IMPACT

You need to incorporate a system into your advocacy plan by which you can check whether your strategy is working to achieve your intended impact.

Monitoring and evaluation is all about learning from what you are doing and how you are doing it, and taking action to

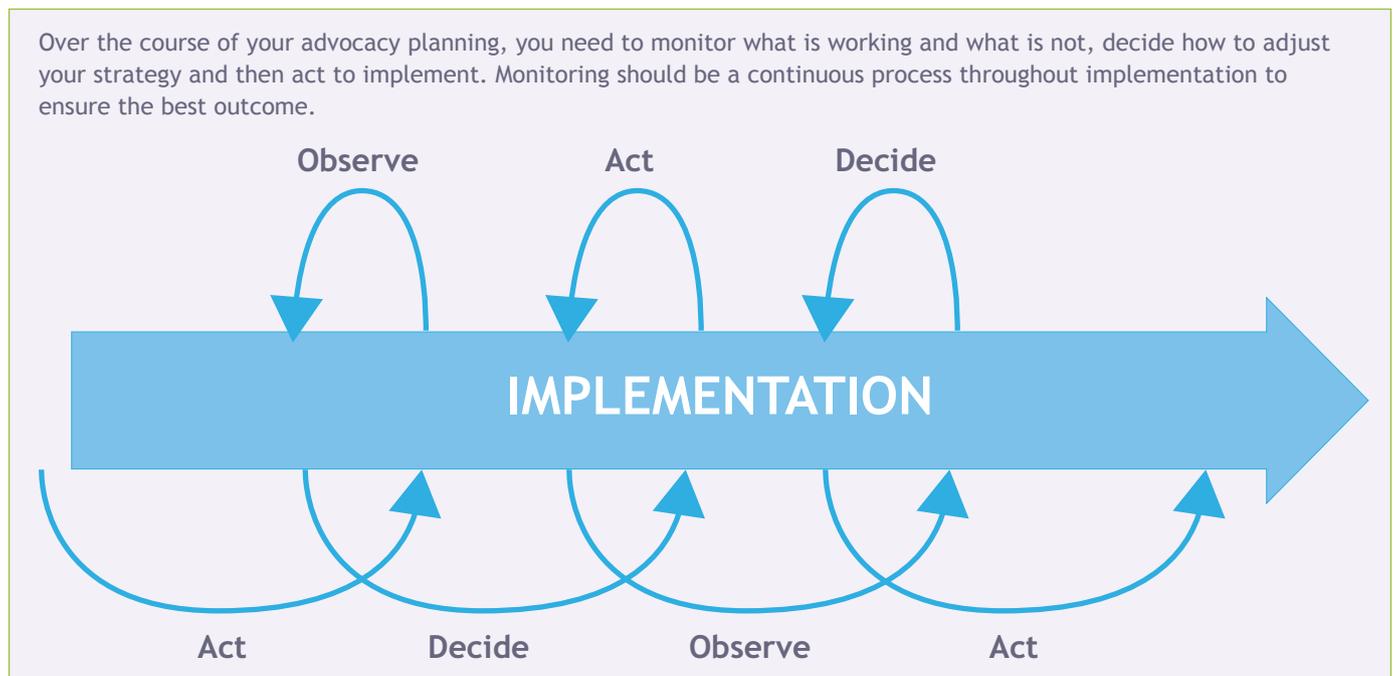
adjust your strategy accordingly. Regular monitoring and evaluation will help you to assess how well you are doing against the objectives and impact you have set, and ensure you use your time and resources effectively.

This table summarises some key differences between monitoring and evaluation:

|                   | MONITORING   | EVALUATION  |
|-------------------|--|---|
| TIMING            | Continuous throughout the project  | Periodic review at significant point in project progress - end of project, midpoint of project, change of phase |
| SCOPE             | Day to day activities, outputs, indicators of progress (see Top Tip)                     | Assess overall delivery of outputs and progress towards objectives and impact                                   |
| MAIN PARTICIPANTS | Project staff and partners, stakeholders   | External evaluators/facilitators, project staff, donors, stakeholders   |
| PROCESS           | Regular meetings, interviews - monthly, quarterly reviews etc.                           | Extraordinary meetings, additional data collection exercises etc.   |
| WRITTEN OUTPUTS   | Regular reports and updates to project management, partners and stakeholders; and donors | Written report with recommendations for changes to project - presented in workshops to different stakeholders   |

Adapted from Water Aid (2007), *The Advocacy Sourcebook*. Available at: [www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx](http://www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx)

FIGURE 6: The monitoring cycle



Adapted from Handicap International (2008), *Making PSRP Inclusive*. Available at: [www.making-prsp-inclusive.org/en/download.html](http://www.making-prsp-inclusive.org/en/download.html)



### Monitoring and evaluation criteria

- **Efficiency** tells you if the input into the work is appropriate for producing the maximum output. This could be input in terms of money, time, staff, equipment and so on, and should assess both quantity and quality.
- **Effectiveness** is a measure of the extent to which your advocacy activities and outputs are achieving your defined objectives (from Step 1).
- **Impact** tells you whether or not what you did made a difference, relating back to your desired impact from Step 1. Before you undertake any advocacy activities, you should consider potential risks to achieving your impact (Step 7) and be sure that what you are going to do makes sense in terms of your intended impact. Once you have implemented your advocacy plan, you should evaluate whether and how you've achieved against your impact.

### Types of Monitoring and Evaluation

Monitoring and evaluation can be performed by different parties, internal and external. The following types would be most appropriate for your post-2015 advocacy strategy:

- **Self-monitoring and evaluation:** Involves holding up a mirror to yourself and assessing how your strategy is going, as a way of learning and improving practice. In order to do this effectively, you need to be both self-reflective and honest.
- **Participatory monitoring and evaluation:** Draws on stakeholder experience and participation. The intention is to involve as many people with a direct stake in your strategy as possible, from partners to users or targets of your strategy.

#### TOP TIP: INDICATORS OF PROGRESS

To simplify your monitoring and evaluation and make sure you truly measure your progress, set indicators so that you can check whether or not you have completed tasks or achieved objectives which work towards your desired impact.

Your indicators should be based on your:

**Activities/outputs:** What you do to influence your target audience and achieve your desired impact. The results of activities are commonly known as outputs - they are 'measures of effort' and count what and how much advocacy activities or tactics produce or accomplish. You need to come back to these activity/output pairs regularly in your monitoring work, so that adjustments can be made if you find that the implemented activities are not generating expected outputs.

**Outcomes:** Strategic results achieved between activities/ outputs and your advocacy objectives, which can include policy changes, changes in government positions, or changes in coalition dynamics which affect courses of action on the post-2015 development agenda. Advocacy objectives can sometimes take years to achieve; outcomes signal important progress along the way. Unlike outputs, which are measures of effort, indicators associated with outcomes are 'measures of effect' and demonstrate changes that happen as a result of advocacy activities.

**Impact:** Success against your desired impact, which is about change in the state of affairs. Remember, your influence at this level is even less under your control than the outcome level, but good advocacy work can always be a contributing factor to the achievement of impact.

Your monitoring and evaluation work needs to assess progress on all three levels; however, your monitoring work should focus on the activity-output link, whereas your evaluation work - whether this happens mid-cycle, at the end of an advocacy stage, or at the end of the advocacy project - should focus on whether your advocacy work is making progress at the impact level. 

As much as possible your indicators should be SMART (see Step 1), and you should consider using baseline and ideal scenarios.

For example, if working towards the impact: 'By 2015, ensure climate change is embedded in all SDGs at the target and indicator level' your indicators for progress could include:

- **Activities/outputs:** Initiate a 'Friends of Climate Change Group' in New York, by June 2014, that has at least 15 government representatives and meets every month to discuss climate change and the SDGs;
- **Activities/outputs:** Host at least one side event during the OWG in June 2014 on climate change and how to embed it in SDGs targets and indicators;
- **Outcomes:** Every set of SDG targets suggested by the OWG in their September 2014 report includes at least one target that relates specifically to addressing climate change.

Your monitoring and evaluation exercises can then check whether these indicators have been met sufficiently and to schedule, giving you a clear understanding of the degree of success, and help you to think about adjustments and/or next steps.



**TOP TIP:**

**MONITORING AND EVALUATION QUESTIONS**



Questions to ask yourself (self-monitoring and evaluation) or for your stakeholders to respond to (participatory monitoring and evaluation) regularly and against your indicators for progress include:

- What worked, and how well?
- What did not work, and why not?
- What could be improved, and how?
- What worked better than expected?
- How and where have your partners/stakeholders been helpful?
- How and where have your partners/stakeholders been a hindrance?
- What disappointed partners/stakeholders?
- What messages have resonated, and have they helped to achieve our objectives?
- What were barriers to success (external and internal)?
- What facilitated success, including scenarios which were not anticipated?

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

Bear in mind that monitoring and evaluation work can be technical and filled with jargon and different perspectives and opinions, and it is often difficult to determine precisely which actions have led to a given result. Therefore, it would help to consult with evaluation experts if you have someone in your coalition who can lend a hand. You may also wish to consult online tools dedicated to monitoring and evaluation, for example UNICEF's companion to its own advocacy toolkit, "*Monitoring and Evaluating Advocacy*" or Linda G. Morra Imas and Ray C. Rist's "*The Road to Results: Designing and Conducting Effective Development Evaluations*," published by The World Bank.

**FINAL THOUGHTS**

You now have all the information and tools you need to start developing your own post-2015 advocacy strategy, with our eight steps to advocacy success:

1. Select your post-2015 priorities;
2. Identify your target audience;
3. Develop your message(s);
4. Choose your messenger(s);
5. Identify opportunities and activities for delivering your messages;
6. Take stock and identify gaps;
7. Manage risks; and
8. Monitor and evaluate progress and impact.

We wish you success in your advocacy activities and do keep checking the SD2015 website for all of the latest news and reports on all aspects of the post-2015 agenda going forward: [www.SD2015.org](http://www.SD2015.org)

Please also refer to the list of useful websites and further information in Annex 3.

We want to end with a case study of advocacy success, to hopefully inspire you that you too can bring about the change you want to see in the world by implementing your post-2015 advocacy strategy:



## CASE STUDY 9: LAW FOR PROMOTION OF CSOS IN MEXICO: A CASE OF ADVOCACY SUCCESS



*Contributed by the Mexican Centre for Philanthropy*

### THE CAMPAIGN:

Civil Society Organisations (CSOs) constitute a vital space for the discussion of social issues and a crucial actor for social development in Mexico. Therefore a legal framework was needed not only for the recognition of CSOs, but also to set the basis and design the mechanisms for their participation in public policies.

In 1994, a group of organisations called the “Promotion Group” - consisting of the Centro Mexicano para la Filantropía (CEMEFI), Convergencia de Organismos Civiles, Foro de Apoyo Mutuo, and Fundación Miguel Alemán - worked on a bill draft that was presented for the first time in 1995 to the House of Representative’s Citizen Participation Commission.

The Promotion Group advocated persistently during various legislative periods and government regimes until the bill was enacted in February 9, 2004 as the Ley Federal de Fomento a las Actividades Realizadas por Organizaciones de la Sociedad Civil (Federal Law for the Promotion of Activities Undertaken by Civil Society Organizations or “Promotion Law”) [[Spanish](#)] [[English](#)]

### THE RESULTS:

The “Promotion Law” has had twofold implications: fostering organised citizenship participation in social development, as well as improving accountability of CSOs and government action. The Law clarifies CSOs rights and obligations and creates governmental mechanisms and structures - such as a Technical Consultative Committee composed of CSOs, academics and congressmen, and an Interministerial Commission to establish new dialogue mechanisms between government and CSOs and concrete actions for the public disclosure of subsidies and other support received by CSOs. The government is obliged to annually make public the incentives and public funds given to CSOs in a report presented by the President.

### SUCCESS FACTORS AND LESSONS LEARNT:

#### 1. Stick to clear and simple objectives

Building a consistent bill project and the first draft by the Promotion Group took almost two years of discussions, information gathering and expert planning. However, the key element, notwithstanding the importance of having a draft, was to have simple and clear objectives that could be adopted by any CSO.

#### 2. Build consensus

Over the 10 years of lobbying the Government, as well as the Congress, the Promotion Group held more than 50 events across the country to present and open the bill project for the discussion of non-profit organisations.

#### 3. Build relations and the importance of sector positioning

It was important to convey to government officials that it was in their interests to support CSOs which provide additional resources in the field of health and housing, provide a source of employment, and foster mechanisms that sustain a participatory democracy.

#### 4. Be persistent

The Promotion Group never gave up in its lobbying with legislators at different stages of the different legislative periods and its success was the result of 10 years of persistent and strategic advocacy.



## ANNEX 1: THE MILLENNIUM DEVELOPMENT GOALS

The Millennium Development Goals (MDGs) are eight international goals that aim to accelerate development in the world's poorest countries. The Goals focus primarily on the social aspects of development - such as improving health and access to education - and have the target date of 2015 for their achievement. The goals are accompanied by 21 time bound, quantitative targets and 48 indicators for measuring and monitoring progress towards the goals and targets.<sup>19</sup> Unlike the SDGs, which will be universally applicable to all countries, the majority of the MDGs - all except MDG 8 - apply only to developing countries. MDG 8 is different in that it concentrates on the financial, technological and trade support that will be provided by developed countries to developing countries to help them achieve the goals.

The MDGs have proved highly successful in rallying public, private and political support for global poverty reduction and provided an effective tool to stimulate the production of new poverty-related data and additional aid commitments. They have also fostered greater coordination of international development efforts between nation states and other development actors. Absolute bilateral Overseas Development Assistance (ODA) - aid transferred from one country to another - during this time, for example, has risen significantly, doubling from \$60 billion per year in 2000 to \$120 billion by 2005.



The latest UN progress report on the MDGs celebrates the significant development gains that have been made in some areas - in particular the reduction of extreme poverty and hunger, and the improvements made in health and access to drinking water. However, the report also highlights that progress made towards the MDGs has been uneven, both among and within countries, and that bolder action and accelerated process is needed in many areas in the lead up to 2015.<sup>20</sup> The report also notes that ODA declined for the second consecutive year in 2012, with least developed countries being most affected by the fall in aid.<sup>21</sup> The main cause of this decline is thought to be the global financial crisis, in particular the fiscal austerity measures being implemented in Europe.<sup>22</sup>

Governments have also expressed their concern at the unevenness and gaps in the achievement of the MDGs, in particular acknowledging the lack of progress in most African countries and the challenge faced by conflict and post-conflict countries in achieving any of the Goals by 2015. Taking this into account, countries have reiterated their commitment to the MDGs and stated their resolve to maintain and accelerate progress, with a particular focus on those Goals, countries and population groups that are most off-track.<sup>23</sup>

The MDGs have received a remarkable level of political commitment, showing that the format of international goals, targets and indicators can generate action towards a core set of development priorities. The MDGs provide a great precedent for the SDGs to build on, and the process to develop the new set of goals should draw upon the successes and lessons learned from both the creation and implementation of the MDGs. Some of the key strengths, weaknesses and lessons learned from the MDGs framework are summarised in the Table 1 below.

19 For a full list of the MDG targets and indicators, see: <http://mdgs.un.org/unsd/mdg/host.aspx?Content=indicators/officialist.htm>

20 United Nations (2013), *The Millennium Development Goals Report 2013*. Available at: <http://www.un.org/millenniumgoals/pdf/report-2013/mdg-report-2013-english.pdf>

21 United Nations (2013), *The Millennium Development Goals Report 2013*. Available at: <http://www.un.org/millenniumgoals/pdf/report-2013/mdg-report-2013-english.pdf>

22 MDG Gap Task Force Report 2013 Press Release. Available at: [http://www.un.org/millenniumgoals/2013\\_Gap\\_Report/2013%20MDGs%20Gap%20Task%20Force%20Repor%20press%20release.pdf](http://www.un.org/millenniumgoals/2013_Gap_Report/2013%20MDGs%20Gap%20Task%20Force%20Repor%20press%20release.pdf)

23 Outcome document from the Special Event Towards Achieving the MDGs, 25 September 2013: <http://www.un.org/millenniumgoals/pdf/Outcome%20documentMDG.pdf>



TABLE 1: *Strengths, weaknesses and lessons learned from the MDGs framework*<sup>24</sup>

| STRENGTHS  | WEAKNESSES   | LESSONS FOR THE SDGS   |
|--|--|--|
| <b>CONCEPTUALISATION AND CHARACTERISTICS OF THE MDG FRAMEWORK</b>  |  |  |
| <ul style="list-style-type: none"> <li>Influenced policies by giving priority and operational meaning to various dimensions of human development;</li> <li>Focus on moral and practical issues</li> <li>Provided a common reference point for diverse actors, thereby, strengthening the global partnership for development and directing global and national resources towards poverty reduction and human development;</li> <li>Generated interest on poverty issues and strengthened international commitments to address the needs of developing countries.</li> </ul> | <ul style="list-style-type: none"> <li>Lack of consultations at conception led to lack of ownership and perception of a donor-centric agenda;</li> <li>Excluded some important issues outlined in the Millennium Declaration, e.g. peace, governance, human rights;</li> <li>Inadequate incorporation of other important issues, such as environmental sustainability, productive employment and decent work, inequality;</li> <li>Defined human development outcomes, rather than opportunities to overcome poverty;</li> <li>Three dimensions of sustainable development were poorly integrated and interlinkages not acknowledged;</li> <li>Focus limited to developing countries and aid, not universal.</li> </ul>                    | <ul style="list-style-type: none"> <li>Should be based on broad consultations and facilitate ownership and broad acceptance;</li> <li>Governance, the rule of law and peace and security should be reflected in the SDGs;</li> <li>Acknowledge role of development, growth and structural transformation in poverty eradication;</li> <li>Integrate the three dimensions of sustainable development and acknowledge interlinkages and synergies;</li> <li>Should be universally applicable and reflect challenges relevant to all countries e.g. sustainable consumption and production patterns.</li> </ul> |
| <b>FORMAT</b>  |  |  |
| <ul style="list-style-type: none"> <li>Clear definition of goals, targets and indicators helped to guide and motivate policy decisions and improve accountability;</li> <li>Simple, transparent, concise framework that is easy to communicate;</li> <li>Supported the development of countries' statistical capacity and the use of robust data in support of development policies;</li> <li>Improved statistical coordination at national and international levels.</li> </ul>   | <ul style="list-style-type: none"> <li>Lack of attention to disaggregated monitoring of progress among vulnerable groups, qualitative aspects, and interdependencies;</li> <li>Treatment of national and international responsibilities seen as unbalanced;</li> <li>Lack of emphasis on underlying structural causes of poverty and enablers of development;</li> <li>Imprecise targets were set for some dimensions e.g. for the reduction of slum-dwellers and those related to MDG 8;</li> <li>Lack of clarity of how to tailor global targets to national/regional circumstances and priorities;</li> <li>Did not recognise differences in initial conditions of countries;</li> <li>Did not consider population dynamics.</li> </ul> | <ul style="list-style-type: none"> <li>Reflect equality, inclusion and rights approaches;</li> <li>Focus on the poorest and most marginalised;</li> <li>Indicators and data should be disaggregated by gender, geography, income, disability, and other categories;</li> <li>Need to address underlying societal drivers like consumption, lifestyles; also address values</li> <li>SDG process is multilateral, and universally applicable but detailed targets probably from expert process;</li> <li>Attention needs to be given to national realities and starting points.</li> </ul>                    |
| <b>IMPLEMENTATION</b>  |  |  |
| <ul style="list-style-type: none"> <li>Incentives for more data and better data on poverty;</li> <li>Promoted concrete actions to address human development shortfalls;</li> <li>Facilitated various forms of intra-regional cooperation and improved coordination between development actors;</li> <li>Some countries tailored the MDG framework to reflect their own realities.</li> </ul>   | <ul style="list-style-type: none"> <li>Focus on monitoring can eclipse analysis of reasons for success/failure;</li> <li>Resulted in rigid national policy agendas being set, following international benchmarks rather than national realities;</li> <li>Policies and programmes did not consider the synergies between achieving the different goals and targets;</li> <li>Few quality measures and relatively weak accountability mechanisms;</li> <li>Measuring 'on/off-track' progress failed to adequately account for progress made by countries despite not reaching targets.</li> </ul>   | <ul style="list-style-type: none"> <li>New data needed, including on quality, beyond GDP;</li> <li>Need to disaggregate data to reflect underlying inequalities. More clarity on how to tailor global targets to national realities;</li> <li>Need for science-based information building and knowledge sharing.</li> </ul>  |

24 Adapted from UN System Task Team on the post-2015 UN Development Agenda (2012), Review of the contributions of the MDG Agenda to foster development: Lessons for the post-2015 UN development agenda. Available at: [http://www.un.org/en/development/desa/policy/untaskteam\\_undf/mdg\\_assessment.pdf](http://www.un.org/en/development/desa/policy/untaskteam_undf/mdg_assessment.pdf) and UN Technical Support Team (2013), *Issues Brief: Conceptual Issues*. Available at: <http://sustainabledevelopment.un.org/content/documents/1729tstissuesconceptual2.pdf>



## ANNEX 2: TOOL TEMPLATES

The tools presented throughout this advocacy toolkit are included below as blank templates for your own use.

### TOOL 1: PLANNING RESEARCH TABLE (p21)

This simple research planning table can be used throughout your advocacy planning and implementation.

Discuss and formulate the research questions you need answered and break down your questions into more specific research questions. The tool also encourages you to record what possible sources of existing information might answer your questions and how you might collate further information.

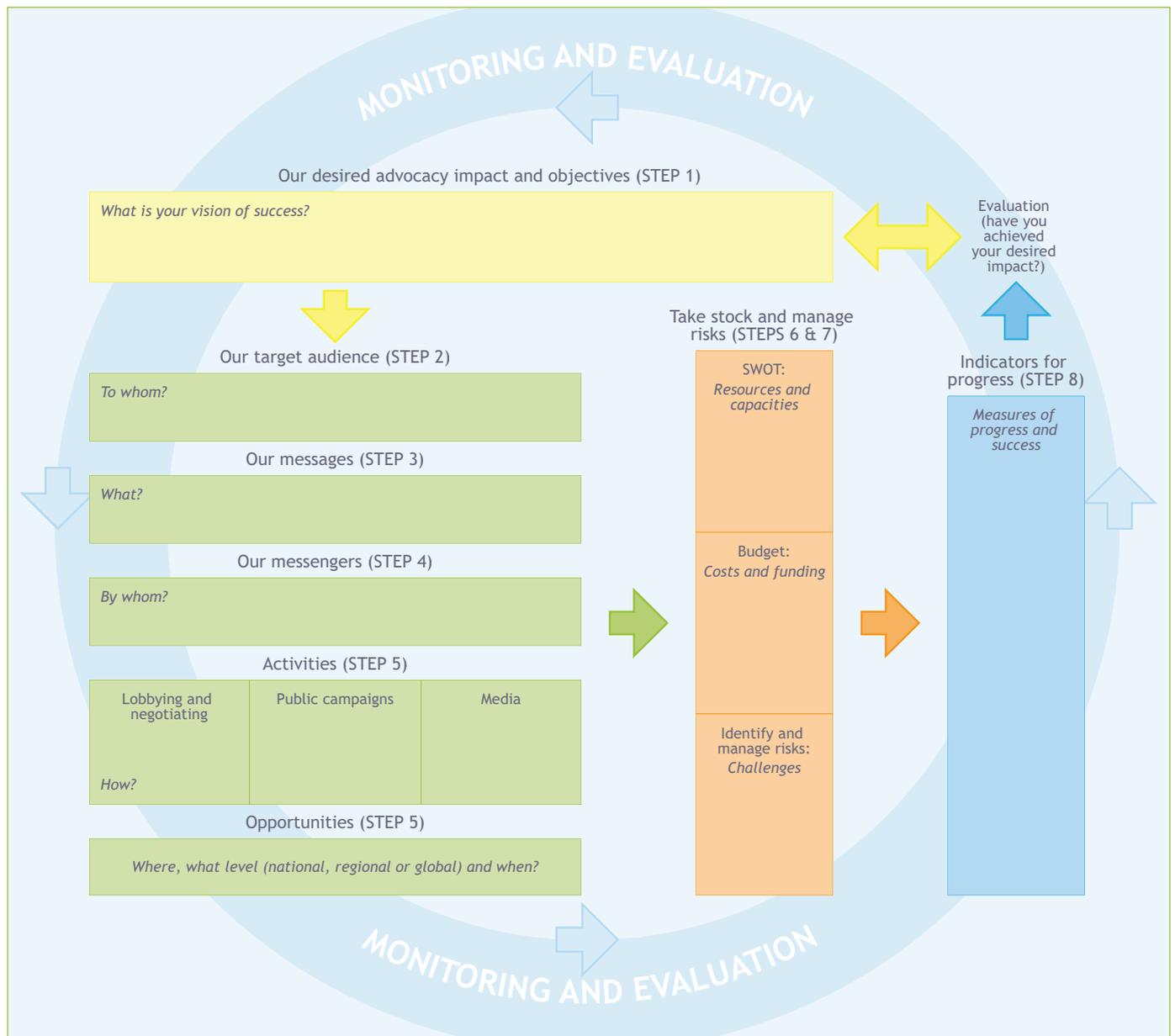
| TOPIC/<br>RESEARCH<br>QUESTION | SUB-TOPIC/<br>RESEARCH<br>QUESTION | WHERE CAN YOU FIND<br>THE INFORMATION? | WHO WILL<br>CONTRIBUTE TO<br>THE RESEARCH? | HOW WILL YOU COLLECT AND<br>ANALYSE THE INFORMATION? |
|--------------------------------|------------------------------------|--|--|--|
|                                |                                    |  |  |  |
|                                |                                    |  |  |  |
|                                |                                    |  |  |  |
|                                |                                    |  |  |  |
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|                                |                                    |  |  |  |

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*.  
Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)

**TOOL 2: ACTION PLAN TEMPLATE** (p25)

This action plan template frames your advocacy strategy in clear and results orientated steps.

Complete each part of the action plan as you work through the advocacy toolkit steps. Once you have completed this template, you will have a clear overview of how you will implement your strategy and reach your desired advocacy impact and objectives.



### TOOL 3: ISSUE CHOICE MATRIX (p26)

The issue choice matrix enables you to analyse and prioritise possible advocacy issues. It works by rating each issue you identify against given criteria.

Firstly identify three or four possible priority issues, based on your research and analysis, which you can build your post-2015 advocacy strategy on. Then, discussing each issue in turn, work through your chosen criteria to rank each from 1-5 (5 = maximum effectiveness).

Finally, add up the totals: the issue with the most points should in theory become your advocacy strategy priority. However, in practice it is the discussion that is crucial and not just the numbers. It shouldn't be a mechanical process where you just add up numbers. Ideally you and your partners should decide the most important issue(s), by consensus.

You may choose to focus on more than one key issue, depending on your aims, resources and capacities.

| CRITERIA  | ISSUE 1: | ISSUE 2: | ISSUE 3: |
|---|----------|----------|----------|
| Your level of concern for this issue (how important is it that it should be addressed?)   |          |          |          |
| Does the issue align with your organisation's/ coalition's aims and mission?  |          |          |          |
| Potential for you and your partners to add value to other stakeholder voices (are many others already working on this issue, is the space overcrowded?) |          |          |          |
| You have the resourcing to tackle this scale of issue   |          |          |          |
| This issue fits with the expertise of you and your partners   |          |          |          |
| <i>More criteria here...</i>  |          |          |          |
| <b>TOTAL</b>  |          |          |          |

**TOOL 4: NEWSPAPER COVER STORY** (p28)

This creative visioning tool requires you to imagine what your successful impact would look like in September 2015 if everything you wanted from your advocacy strategy has been agreed upon. It works well also as a team building exercise, to establish a common vision between partners.

Build the front page of a newspaper with an eye-catching headline and accompanying news stories that depict the outcome you want to see from your advocacy strategy.

|              |                |
|--------------|----------------|
| [HEADLINE]   |                |
| [LEAD STORY] | [DATE]         |
|              | [TEXT CONT...] |

Make sure you store these front covers in a safe place - in September 2015 you can compare them to the actual new stories reported and this can be a helpful measure of success.

## TOOL 5: IDENTIFYING AND ANALYSING YOUR TARGET AUDIENCE (p30)

This tool helps you to identify and analyse decision-makers and other key targets for your advocacy strategy.

Once you have identified your priority issue(s) (using Tool 3), identify key individuals and institutions, and analyse their influence, attitude and level of support in relation to your priorities. Collating this information can then clarify who may be allies, adversaries or targets, and help you prioritise and strategise.

Rate key individuals and institutions from 1 to 5 to prioritise your targets- those with the highest scores will become your target audience(s).

Consider in your analysis:

- Those who have most influence but are most anti- your priority issue(s), will be those where the key convincing will need to take place;
- Those with the most influence and who are most in favour of your priority issue(s), are likely to be key allies;
- Those with high influence, who are neutral on your priority issue(s), could well be your key targets.

| <b>GOVERNMENT/<br/>ORGANISATION/<br/>NAME</b><br>(plus contact details) | <b>HOW MUCH<br/>EXPERTISE DO<br/>THEY HAVE<br/>ON YOUR<br/>PRIORITY<br/>ISSUE(S):</b><br>Rate 1 (low) -<br>5 (high), or<br>qualitatively | <b>HOW MUCH<br/>INFLUENCE<br/>DO THEY<br/>HAVE ON<br/>YOUR<br/>PRIORITY<br/>ISSUE(S)?</b><br>Rate 1 (low) -<br>5 (high), or<br>qualitatively | <b>WHAT IS<br/>THEIR<br/>ATTITUDE<br/>TO YOUR<br/>PRIORITY<br/>ISSUE(S)?</b><br>Rate 1<br>(very anti) -<br>5 (very pro),<br>or qualitatively | <b>HOW<br/>IMPORTANT IS<br/>YOUR<br/>PRIORITY<br/>ISSUE TO<br/>THEM?</b><br>Rate 1 (low) -<br>5 (high), or<br>qualitatively | <b>TOTAL SCORE/<br/>SUMMARY OF<br/>QUALITATIVE<br/>JUDGEMENTS</b><br>(Highest =<br>likely target) | <b>LIKELY TO BE<br/>AN ALLY/<br/>OPPONENT/<br/>TARGET?</b><br>(see criteria<br>above) |
|---|--|--|--|---|---|---|
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |
|   |  |  |  |   |   |   |

Adapted from VSO (2012), *Participatory Advocacy: A Toolkit for VSO Staff, Volunteers and Partners*.  
Available at: [www.vsointernational.org/Images/advocacy-toolkit\\_tcm76-25498.pdf](http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf) and Water Aid (2007), *The Advocacy Sourcebook*.  
Available at: [www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx](http://www.wateraid.org/~media/Publications/advocacy-sourcebook.ashx)

**TOOL 6: DEVELOPING EVIDENCE BASED, SECONDARY MESSAGES** (p33)

This tool will help you to summarise and present your advocacy message for different audiences. It focuses on building strong secondary messages which will explain how the objectives of your primary message will be met.

You can have several secondary messages and these may be tailored to wider, more specific audiences e.g. decision-makers, the media, professionals, the general public.

| PRIMARY MESSAGE: STATEMENT + EVIDENCE + EXAMPLE + GOAL + ACTION DESIRED                |          |                   |
|--|----------|-------------------|
| AUDIENCE (EXAMPLES)  | CONCERNS | POSSIBLE MESSAGES |
| Decision-makers (government ministers, legislators, administrators, corporation heads) |          |                   |
| General public   |          |                   |
| Journalists  |          |                   |
| Civil society organizations  |          |                   |
| Donors (foundations, bilateral agencies, multilateral agencies)                        |          |                   |
| Issue-related practitioners such as trade unions                                       |          |                   |
| Opinion leaders (religious leaders, chiefs and traditional/community leaders)          |          |                   |

Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)



**TOOL 8: LOBBY LOG** (p41)

The Lobby Log will help you keep track of who you meet, their contact details, the outcome of the meeting and any follow up that is needed.

Share information on the advocacy activities that have been undertaken, to ensure that members are updated on the latest developments, that new contacts are shared, and that members are able to continue/follow up on discussions initiated by others within the coalition or partnership.

The Log should be completed after each meeting. Be as comprehensive as possible and add more rows to the table if needed.

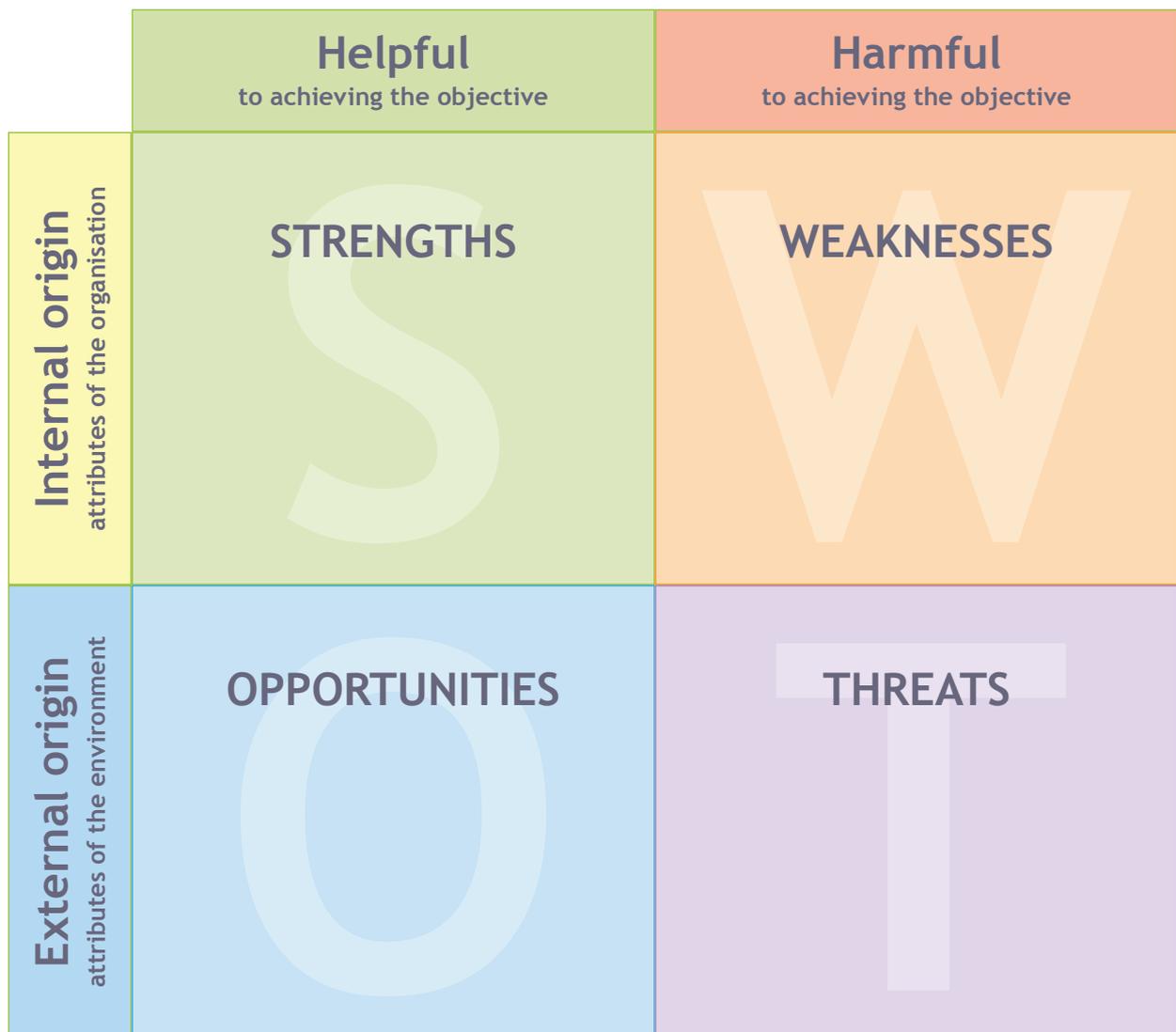
| NAME AND POSITION OF REPRESENTATIVE | PLACE AND DATE OF MEETING | WHAT WAS DISCUSSED | FOLLOW UP/ ACTION POINTS | CONTACT DETAILS |
|-------------------------------------|---------------------------|--------------------|--------------------------|-----------------|
|                                     |                           |                    |                          |                 |
|                                     |                           |                    |                          |                 |
|                                     |                           |                    |                          |                 |
|                                     |                           |                    |                          |                 |
|                                     |                           |                    |                          |                 |
|                                     |                           |                    |                          |                 |

**TOOL 9: SWOT ANALYSIS** (p44)

This is a commonly used, simple matrix that can provide an objective and critical self-assessment as a background to planning.

Discuss and assess the Strengths, Weaknesses, Opportunities and Threats of your advocacy strategy. Once the SWOT factors are identified, you should be able to better ascertain where are the gaps you need to fill to implement a successful advocacy strategy, and where capacity building might also be needed.

This is a versatile tool that can be returned to at many different stages of a project.



Adapted from Overseas Development Institute's SWOT Analysis briefing.  
Available at: [www.odi.org.uk/sites/odi.org.uk/files/odi-assets/publications-opinion-files/7199.pdf](http://www.odi.org.uk/sites/odi.org.uk/files/odi-assets/publications-opinion-files/7199.pdf)

## TOOL 10: BUILDING A BUDGET (p45)

To avoid developing advocacy plans that require more resources than you have available, it is important to set out a realistic budget for your anticipated activities.

Remember to include the core costs of maintaining and strengthening advocacy capacity, as well as resources needed for specific actions. Some general categories to consider in an advocacy budget are included in this template.

Access the template via the SD2015 website [here](#).

| <b>Project:</b>                      |                                  | <b>Post-2015 Advocacy Campaign</b>  |           |          |               |  |
|--------------------------------------|----------------------------------|---|-----------|----------|---------------|--|
| <b>Budget Period:</b>                |                                  | e.g. Developing advocacy plan and materials June-August 2014; ongoing advocacy to June 2015 |           |          |               |  |
| <b>Budget Currency:</b>              |                                  | xxx   |           |          |               |  |
| <b>Total Budget:</b>                 |                                  | 66,292  |           |          |               |  |
| All figures in [STATE CURRENCY USED] |                                  |   |           |          |               |  |
|                                      |                                  | Unit  | Unit Cost | Quantity | Total Cost    | Notes  |
| <b>A</b>                             | <b>Staff Costs</b>               |   |           |          | <b>23,450</b> |  |
| A1                                   | Project Manager (PM)             | Month   | 800       | 12       | 9,600         | No. of days at prescribed hourly rate for e.g. Grade 12; spending 33% of her time on this project. |
| A2                                   | Administrator                    | Month   | 900       | 12       | 10,800        | No. of days at prescribed hourly rate for e.g. Grade 10; spending 50% of his time on this project. |
| A3                                   | Recruitment costs                | Unit  | 50        | 1        | 50            | No. of days at prescribed hourly rate for e.g. consultant  |
| A4                                   | Consultant                       | Month   | 1,000     | 3        | 3,000         | For developing materials Jun-Aug   |
| <b>B</b>                             | <b>Administration Costs</b>      |   |           |          | <b>12,045</b> |  |
| B1                                   | Stationery                       | Month   | 50        | 12       | 600           | Estimate, based on past costs.   |
| B2                                   | Phone/fax                        | Month   | 200       | 12       | 2,400         | Estimate, based on past costs.   |
| B3                                   | E-mail                           | Month   | 50        | 12       | 600           | Estimate, based on past costs.   |
| B4                                   | Courier                          | Month   | 20        | 12       | 240           | Estimate, based on past costs.   |
| B5                                   | Office rent                      | Month   | 500       | 12       | 6,000         | 50% share of total costs   |
| B6                                   | Electricity                      | Month   | 30        | 12       | 360           | Estimate, based on past costs.   |
| B7                                   | Bank charges                     | Transfer  | 30        | 10       | 300           | Estimate, based on past costs.   |
| B8                                   | Audit                            | Item  | 1,500     | 1        | 1,500         | 50% of audit fee paid by this project  |
| B9                                   | Books, manuals, publications     | Lump sum  | 45        | 1        | 45            | Estimate   |
| B10                                  | Other                            |   |           |          |               |  |
| <b>C</b>                             | <b>Travel</b>                    |   |           |          | <b>13,740</b> |  |
| C1                                   | Local travel                     | Per trip  | 10        | 24       | 240           | Travel by PM to 2 local meetings per month   |
| C2                                   | National travel                  | Per trip  | 100       | 12       | 1,200         | Travel by PM to 1 national meeting per month   |
| C3                                   | International travel             | Per trip  | 300       | 6        | 1,800         | Travel by PM to 1 international meeting every 2 months   |
| C4                                   | Per diems                        | Per day   | 250       | 42       | 10,500        | Assuming 2 days for national trips, 3 days for international                                       |
| C5                                   | Other                            |   |           |          |               |  |
| <b>D</b>                             | <b>Capital Equipment</b>         |   |           |          | <b>2,000</b>  |  |
| D1                                   | Computer hardware (inc. printer) | Item  | 2,000     | 1        | 2,000         | For PM   |
| D2                                   | Other                            |   |           |          |               |  |
| <b>E</b>                             | <b>Training</b>                  |   |           |          | <b>8,400</b>  |  |
| E1                                   | Training materials               | Workshop  | 200       | 12       | 2,400         | Stationery, reproduction etc. for e.g. a monthly workshop  |
| E2                                   | Workshop costs                   | Workshop  | 500       | 12       | 6,000         | Venue, food, transport etc of participants at e.g. monthly workshop                                |
| E3                                   | Other                            |   |           |          |               |  |
| <b>F</b>                             | <b>Materials Development</b>     |   |           |          | <b>3,500</b>  |  |
| F1                                   | Design work                      | Unit  | 1,000     | 1        | 1,000         | Professional design for campaign materials to be produced.   |
| F2                                   | Reproduction                     | Unit  | 500       | 5        | 2,500         | Reproduction of 5 campaign reports   |
| F3                                   | Other                            |   |           |          |               |  |
| <b>Z</b>                             | <b>Contingency</b>               |   |           |          | <b>3,157</b>  | 5% of total budget up to this line (factored in automatically)                                     |
| <b>TOTAL</b>                         |                                  |   |           |          | <b>66,292</b> |  |

### TOOL 11: RISK ANALYSIS (p46)

This tool provides guidance on how to analyse risks to your advocacy strategy, i.e. to assess what problems you might encounter, and how you may manage or mitigate these.

Firstly, consider both internal and external risks to your strategy - the problems you might encounter within your partnerships or coalition (for example, lack of resourcing or additional associated costs), and the issues you might face externally, problems that are may be out of the control of the strategy team (for example a government losing in an election or changes in the formal UN-led post-2015 processes).

Once you have identified possible internal and external risks to your post-2015 advocacy strategy, assess the probability that they might occur, the impact they could have on the strategy and decide how to manage or mitigate these risks as much as possible.

| RISKS<br><i>Possible threat</i> | PROBABILITY<br><i>Likelihood of occurring<br/>(1=low,5=high)</i> | IMPORTANCE<br><i>(1=low,5=high)</i> | TOTAL RISK LEVEL<br><i>(importance x likelihood)</i> | MITIGATION<br><i>Steps to mitigate</i> |
|---------------------------------|--|-------------------------------------|--|--|
| <b>INTERNAL RISKS</b>           |  |                                     |  |  |
|                                 |  |                                     |  |  |
|                                 |  |                                     |  |  |
| <b>EXTERNAL RISKS</b>           |  |                                     |  |  |
|                                 |  |                                     |  |  |
|                                 |  |                                     |  |  |

Adapted from VSO (2012), *Participatory Advocacy: A Toolkit for VSO Staff, Volunteers and Partners*. Available at: [www.vsointernational.org/Images/advocacy-toolkit\\_tcm76-25498.pdf](http://www.vsointernational.org/Images/advocacy-toolkit_tcm76-25498.pdf)

**TOOL 12: PLANNING CHECKLIST** (p47)

This planning checklist will help you to assess whether your proposed plan is realistic and appropriate to achieve the desired impact.

1. Are you ready to implement your plan? Are you clear about your objectives? Do you have your evidence in place? Do you know your audience(s)? Do you have good contacts? Do you know what activities you are going to carry out? Have you decided what type(s) of advocacy campaign you are going to use (e.g. lobbying/negotiating; public campaigns; or working with the media)?

.....

.....

.....

2. What are you expecting from your partners/contacts? Are you sure of their aspirations, added value and preparedness? What will happen if they drop out?

.....

.....

.....

3. What resources - financial, technical, human - are available? What are the resource implications for your plan? Do you need to include some capacity building?

.....

.....

.....

4. Are there any risks? How will your activities affect the reputation of your organisation? How might it affect your funding to do other activities? Might you lose valuable staff? Could other current partners no longer wish to work with you? What can you do to mitigate any negative outcomes?

.....

.....

.....

5. What would you do if things don't go to plan? What are your alternatives, contingency plans or fall-back positions? External conditions may change and you may have to rethink your plans - build in flexibility so you are prepared for this.

.....

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Adapted from UNICEF (2010), *Advocacy Toolkit: A Guide to Influencing Decisions that Improve Children's Lives*. Available at: [www.unicef.org/evaluation/files/Advocacy\\_Toolkit.pdf](http://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf)



## ANNEX 3: FURTHER READING

### PART 1: POST-2015 DEVELOPMENT AGENDA

Beyond2015 (2014), *Think piece on the post-2015 agenda*. Available at: <http://bit.ly/SD7ObX>

Beyond2015 (2014), *Values and targets working document*. Available at: <http://www.beyond2015.org/document/beyond-2015-values-and-targets>

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### PART 2: DEVELOPING AN ADVOCACY STRATEGY

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## KEY WEB RESOURCES:

SD2015: <http://www.SD2015.org/>

UN Sustainable Development Knowledge Platform:  
<http://sustainabledevelopment.un.org/>

## OTHER USEFUL WEBSITES:

Beyond2015: <http://www.beyond2015.org/>

End Poverty 2015 Millennium Campaign:  
<http://www.endpoverty2015.org/>

Independent Research Forum 2015: <http://www.irf2015.org/>

General Assembly of the United Nations:  
<http://www.un.org/en/ga/>

International Forum of National NGO Platforms (IFP):  
<http://www.ong-ngo.org/en>

International Institute for Sustainable Development (IISD):  
<http://www.iisd.org/>

Sustainable Development Goals e-Inventory:  
<http://www.sdgseinventory.org/>

Sustainable Development Solutions Network (SDSN):  
<http://unsdsn.org/>

United Nations Development Group: <http://www.undg.org/>

United Nations Millennium Project:  
<http://www.unmillenniumproject.org/goals/>

United Nation Regional Commissions:  
<http://www.regionalcommissions.org/>

World We Want 2015: <http://www.worldwewant2015.org/>

[www.SD2015.org](http://www.SD2015.org)

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Produced with the financial support of:



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