

LACCASO

ADVOCACY MANUAL A PRACTICAL GUIDE FOR ORGANIZATIONS OF THE CIVIL SOCIETY

Nº 2 Red Series of LACCASO

HIV/AIDS and Human Rights Community Manuals

2



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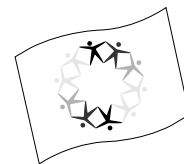
This Advocacy Manual as a “Practical Guide for Organizations of The Civil Society” is part of the results obtained during the development of the Community-Based Advocacy and Networking to Scale Up HIV Prevention in an Era of Expanded Treatment Project, coordinated by LACCASO since 2004 and sponsored by ICASO, Melinda & Bill Gates Foundation, GSK, DANIBA (Denmark) and CIDA (Canada).

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ICASO



This manual is dedicated to:

Through the publishing of this Manual, we want to acknowledge the work of Richard Burzynski, executive director of the International Council of Organizations with Services in HIV/AIDS – ICASO and the team of women and men, which, from the office of the International Secretariat in Canada, support various initiatives from around the world, committed to the human rights of the most vulnerable people to the epidemic of HIV/AIDS.

LACCASO, Who Are We?

Mission

- Facing the HIV/AIDS epidemic in Latin America and the Caribbean, by promoting and defending the Human Rights, through coordination, integration and training of the organized civil society, in order to strengthen articulated and effective community-multisectoral responses.

Vision

- All people from Latin America and The Caribbean live in a solidary society, free of stigma and discrimination, exercising their full human rights, with emphasis on health, education, work and private life, within a frame where the states and the governments guarantee life, justice and equity, respecting the human dignity and the social diversity.
- People living with HIV/AIDS and people affected by the epidemic, as well as vulnerable populations, have the opportunity to be benefited by and participate in all aspects of integral care, prevention, investigation, developing of public policies, and be part of all decisions.
- Communities and their organizations mobilize with capacities and resources, in accordance to their interests and needs, acting from equitable levels with governments and international organizations.
- This response is given in an effective, transparent and articulated way.



Presentación



L A C C A S O

This Manual is the direct result of the Advocacy Workshops, held in Belize and Jamaica, in the context of the Community-Based Advocacy and Networking to Scale up HIV Prevention in an Era of Expanded Treatment Project, coordinated by LACCASO. This workshop intends to develop skills among the community organizations, so they can make an impact in the public agenda, in a timely and effective manner.

This Manual does not pretend to theorize or revise the already existing multiple visions, it is not even its intention to review definitions or concepts; this manual seeks the simple objective of guiding the civil and activist organizations or movements in how to implement a plan of action that allows them to position the issues, which, from a social perspective, are relevant to be part of the public policies, at very diverse levels.

The manual takes into consideration the various levels of knowledge and skills that would exist within the organizations or groups who might use it and it is designed based on the experiences that LACCASO has had during the training and skill's development processes with different organizations, under diverse contexts.

⌘ This Manual is designed to strengthen the skills of the communities involved in HIV/AIDS in order to develop strategies for advocacy, based on their knowledge and experiences.
⌘ It offers basic guidance to for achieving political impact in HIV/AIDS prevention and care programs.

Therefore, the manual offers some practical exercises which are recommended to be executed by the organization or the group which will implement the Advocacy Plan, so they can develop their skills and increase their capacities on this matter.

This Manual perceives the following Objectives:

⌘ Increase the capacities of the community organizations in order to develop and implement an advocacy plan, including a monitoring and evaluation plan.
⌘ Improve the skills of the manual's readers so they are able to develop an advocacy community agenda.
⌘ Identify the needs of the communities, real and perceived ones, and define the key concepts related to HIV/AIDS within an advocacy agenda.
⌘ Increase the knowledge of the participants on advocacy in relation to HIV/AIDS.

This Manual is the result of the implementation of some workshops focusing on the issue that concerns us, being therefore a practical Manual by all means. The Manual is based on the HIV/AIDS Advocacy Guide edited by ASICAL (Association for Comprehensive Health and

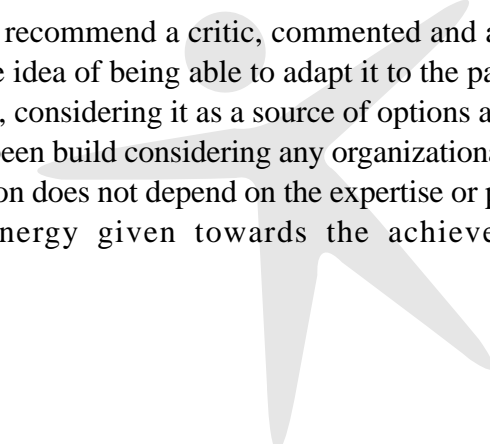


Latin-American Citizens), which was taken as the origin and inspiration for the above mentioned workshops and which can be complemented by this Practical Manual.

The manual is based on workshops which were held using participative methodologies, which facilitates the participation of those engaged and allows them to give an opinion without necessarily having much knowledge on the issue. For this reason, the didactical participative sense is maintained by suggesting exercises that can be carried out by the people or organizations involved and interested in the issue. In the final chapter the role of the facilitators of a planning process is explained; this manual will provide guidance and support for them to successfully fulfill their tasks.

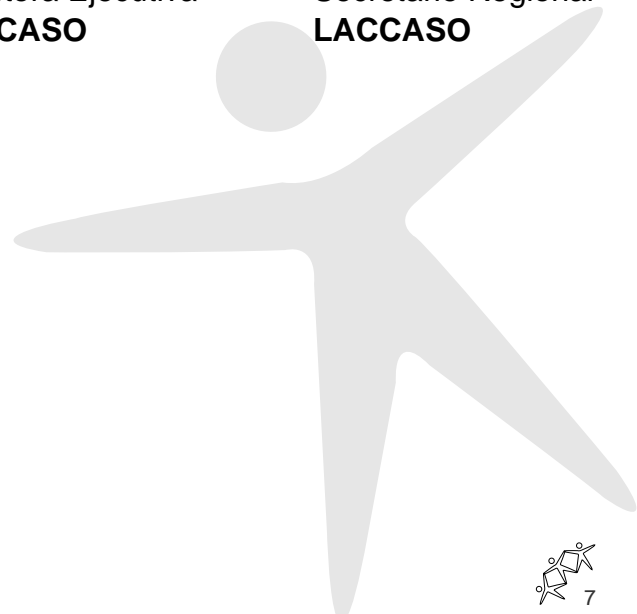
The Manual can be used in different ways, however, the creation of a multidisciplinary working group is suggested, and so that members of these groups are able, after several sessions, to build an Advocacy Plan. The Manual suggests a series of exercises to be carried out by the participants, who will then, step by step, build the above mentioned plan.

It is, therefore, dear reader, that we recommend a critic, commented and active reading of this manual, always keeping in mind the idea of being able to adapt it to the particular needs and to the reality of your own organization, considering it as a source of options and proposals, always adaptable to the local reality. It has been build considering any organizational development level; therefore the audacity in its adaptation does not depend on the expertise or previous experiences, but on the compromise and energy given towards the achievement of its goal.



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CHAPTER I

ADVOCACY AND HIV/AIDS



1. Prevention in the Era of Expanded Access

While HIV/AIDS continues to spread around the world and it persists as one of the most relevant challenges on a global level, the expanded access to the antiretroviral treatments has become the possibility and hope of millions of people that live with HIV/AIDS, all over the world. The possibility of more access to treatments has the enormous potential to save millions of lives around the world, particularly in less favored regions. Some global efforts, like the “3 X 5” initiative of the combined program of the United Nations for AIDS, ONUSIDA and the World Health Organization, as well as the establishment of the Global Fund for AIDS, Malaria and Tuberculosis, are making the expanded access to adequate treatments attainable for those who live with HIV/AIDS (PLHIV).

According to the Global HIV Prevention Group the increase of access to treatments, also represents big challenges.

In fact, without major improvement of prevention strategies, the emphasis on access to treatment will not be successful in the fight against AIDS. An example of this is that the PLHIV, who are currently undergoing treatment, will live for much longer and can be sexually active, therefore having much more opportunities to transmit the virus that causes AIDS. The efforts on prevention, including programs of behavior change for the promotion of the use of condoms and safe sex, testing and voluntary counseling (VCT), prevention of vertical transmission (mother to child), harm reduction services for IDU's (Injection Drug Users), are now more relevant than ever in order to be able to control the epidemic and diminish its impact.

Continuous prevention and assistance are the fundamental milestones in the response to HIV/AIDS. In order to make the efforts to be effective in the fight against HIV/AIDS, they must be implemented at the same time. In a long term vision, an improvement to the prevention and care strategies is the only hope to contain the epidemic.

In order to achieve an improvement in those strategies, the role of the communities, their organizations, activists and the fundamental role played by the people affected, is essential as part of the response to the epidemic; And it is therefore, that advocacy becomes an essential tool to achieve political commitment with the allocation of adequate resources through the building of public policies which consider the needs of the communities, coming from the government and other agencies. It is here where this manual finds its reason to be, it is necessary for the communities to understand and develop plans which allow them to make an impact to the political agenda, by becoming part of the solution by transforming themselves into valid interlocutors and finally translate their needs into concerted actions, it is there where the decisions are made.

¹ HIV Prevention in the Era of Expanded Treatment Access. Global HIV Prevention Working Group. June 2004, p.7



2. Public Policies

It is essential for the communities to understand what public policies are, how they are constructed and which actors are related to their construction, application, monitoring and surveillance.

Definition:

They are considered as a group of activities of the government institutions, acting directly or through agents, and which are directed to have a determined influence on the citizen's lives.

Some Considerations:

There are some considerations to be kept in mind in order to be able to make the adequate planning for an impact to its construction or to its implementation by the governments, particularly in the context of public health.

Public policies should be considered as a “decisional process”, i.e. by a group of decisions to be made along a certain timeline; these decisions are usually presented in a rational sequence.

The cases of “*inaction*” are also a public policy. “*A policy can also consist by something that is not being done*”, Heclo (1972).

For a policy to be considered public, it must have been “generated or at least processed up to a certain point in the ambiance of the procedures, institutions and governmental organizations”.

- Ideally, they should arise from the needs of the citizens and in response to common benefit.
- They must count with a legislative frame and with an appropriate budget.
- They must be established in relation to the capacities of the state and the size of the problematic to be solved.
- They must be prioritized in accordance to their seriousness and impact, on a long term base.
- Ideally they must be defined based on evidence and with scientific sustenance and not based on believes of any kind.
- In a matter of public health, they must respond to health needs and not to any other kind of interests.



The public policies have been build around HIV/AIDS and its effects, they have been full with believes more than evidence, in most of the occasions they have been formulated under the best of intentions, but many times they are based on prejudice and protecting some unclear interests and in general, they do not respond to the real needs of the population, it is therefore necessary for the organizations to consider these factors before getting started on the issue; The results of an Advocacy Plan will be the one of formulation and reformulation of related public policies, and once the civil society has started with its participation in this process, they will continue to convert them into strategies and correct actions, with the corresponding allocation of resources..

The knowledge of policies (those written or those taken “for granted”, i.e., for example, those which have not been written but are executed and, in occasions, are being applied without legal support), as well as the omissions, are necessary for the construction of an Advocacy Plan. It is highly recommendable for the civil society to apply to their citizen rights during the whole process, for the demand of adequate policies for the citizens needs, in its contest, its formulation as part of the response (essential for them to be build based on the realities of the communities) and they must participate in the application process, watching the adequate and transparent assignment of resources, demanding the corresponding accountability and monitoring its application.

The building of a plan requires the contest of different actors; they could come from an organization or be the leaders of different organizations who work with HIV/AIDS related topics (Women, self-support groups, gay men groups, human rights organizations, sexual and reproductive rights organizations, activists, affected communities, among others). The currently introduced topic related to Public Policies will demand from some of the members of this workgroup or from the once leading the same, some work prior to action, therefore, it is suggested to carry out one first exercise prior to start the work meetings.

Exercise: Public Policies and HIV/AIDS

Instructions:

A small team or group of people will be assigned to do a search on HIV/AIDS related Policies directly associated to the Advocacy Plan topic. Although further on in this manual indications will be outlined, the topic could be: increase of resources for the prevention among vulnerable communities, care improvement in a maternity and child care center, among others.

These Public Policies can be expressed through laws, programs, budgets or services to specific groups. They can even be pronouncements coming from the service leaders, complaints about the quality of care, the denial of services, the work program of the national or local AIDS program, the annual budgetary assignments for AIDS, which are for prevention, which are for care,



antiretroviral expenses, among others.

Once the policies have been gathered, a brief analysis of the same will be done, noticing its weaknesses and lacks as well as the areas that need to be strengthened.

It is recommended to issue a very simple document which details your observations.

Example:

Policy	Observation	Needs	Proposed Strategies
Annual Prevention Budget for the local AIDS program	No budget is available for vulnerable populations The promotion of the use of condoms is not taken into consideration	Propose specific budgets Include resources for the promotion of the use of condoms as a public policy	
Complains raised about denial of services	No policy exists that doesn't allows discrimination	Promote a law against discrimination	

Once the document has been elaborated, it is recommended that the same group fills in the 4th column of the chart below with some very general proposals, in order to be presented to the workgroup who will build the Advocacy Plan.

Policy	Observation	Needs	Proposed Strategies
Annual Prevention Budget for the local AIDS program	No budget is available for vulnerable populations The promotion of the use of condoms is not taken into consideration	Propose specific budgets Include resources for the promotion of the use of condoms as a public policy	Work with legislators in order to allocate resources Sensitizing of the AIDS Program personnel
Complains raised about denial of services	No policy exists that doesn't allows discrimination	Promote a law against discrimination	Promote the formation of a national Advocacy movement on this regard

This material will be of great help for the building of the Plan, it is therefore very important to make this prior to start or for it to be shared with the participants during the actual construction of the plan.

3. How to Build an Advocacy Plan?

The construction of an Advocacy Plan requires one fundamental element:

COMMITMENT

The people affected directly and indirectly by the epidemic know by hearth and soul the need of a better response. Only the commitment of the organizations, activists, affected communities, among others, can convert the response to the epidemic to an effective response by being a part of it and by counting with the Commitment of their own communities. This element is essential for the commitment to build an Advocacy Plan, at, either macro levels, like achieving the construction of a national law against discrimination, or at micro levels, when we make political impact in order to improve the services of the health clinic in our community or because of denial of services to vulnerable populations.

The civil society organizations with work in HIV/AIDS are fully aware of this commitment and are therefore the most capacitated and legitimate to perform the work to improve the response to the epidemic. An Advocacy Plan can help them to achieve their goals and convert them to reality, benefiting the communities they are part of or the ones they represent.

The construction of a Plan requires the participation of a group of people convinced that the use of this tool will support the reach of their work. It is suggested that they are people participating in the movement or are involved in some way; they can be independent activists, members and representatives of the organizations working with genders, childhood and HIV/AIDS, gay groups and men having sex with men, organizations which provide care services and/or those implementing preventive strategies, organizations of sexual workers, among others. One strong recommendation which speaks about the commitment of the civil society, is to make sure about the involvement of People living with HIV/AIDS, this will assure the voice and direct involvement to the construction of the plan and during the implementation stages. This will guarantee that their needs and proposals will be part of the Plan and it allows them to get completely involved and be part of the solution and not part of the problem to be solved.

It is recommended to invite those who are considered good candidates to be part of this group, it could be a small group or, if a bigger group is considered, then the Plan could be constructed during an at least 3 to 4 day workshop.



Step by Step

For the formation of the group the following steps are suggested:

1 Formation of the workgroup

- Candidates list
- Planning of a work meeting
- Consignment of Invitations

2 Presentation of the proposal

- Presentation of the faced problematic
- Explanation of the existing public policies
- Showing of the exercise document: Public Policies and HIV/AIDS
- Possibilities are discussed in order to elaborate a plan

3 Definition of the work system

- It is highly recommended to establish group agreements and work rules, starting at the first session. This will facilitate the latter work.

4 Work dates

- It will be determined during work meetings or during a 3 to 4 day workshop and dates and schedules will be established, a facilitator will be chosen as well. It will be assured that all the required material for the work meetings or workshops is accountable for: workplace, flipcharts, markers, paper sheets, etc.

The group formation phase is very important, as this allows the work to be legitimated. On occasions the practicality obligates to convene small but highly efficient groups, particularly within contexts of strong opposition; it is convenient for the group not to be isolated from the communities, their organizations and leaders in order to assure the adaptation of the Plan to the rest of the actors involved.

4. What is Advocacy?

Advocacy is interpreted in different ways by different actors. The communities have their own perceiving about it, so it is very important that during the construction process of an Advocacy Plan all community visions are considered, so no concept or definition is imposed and the full understanding of the topic and its adaptation is facilitated.



Starting from the most simple definitions or concepts, it is recommended to carry out an exercise with the group members. For this exercise it is recommended that the facilitator has a complete knowledge of the general related concepts:

Advocacy is defined as organized efforts to achieve systematic changes (from the government system of some institution, from some organizations, as well as from a local or national government or agencies and regional or global instances) or gradual changes which at the end affect the policies, either public (like the recognition of rights of some vulnerable populations) or private (for example labor policies). Whichever the topic of the advocacy is, the plans or campaigns seek the citizen's participation or involvement in the constructing or implementation process of the policies.

Advocacy is an effort organized to influence the decision making. In many occasions the organizations, activists and other organized forms of the community, carry out isolated Advocacy actions, directed to the internal forum of their organizations as well as to the decision making entities. You might easily recognize some of the terms which involve community actions, such as: intercede, create consciousness, sensitize, mobilize, generate support, changes or interests, lobbying, to advocate, among others. These terms are frequently applied to explain actions taken by the community on an everyday base and which are in occasions not recognized as Advocacy. It is therefore imperative to condense a concept that is understandable to all participants in the process.

Exercise: Understanding Advocacy

For this exercise a facilitator will be required (see chapter VI, Methodological Aspects). This exercise will be executed in three steps:

- *Brainstorming*. The participants are asked to share their ideas on the Advocacy concept with the rest of the group. They can be vague concepts, synonymous or specific definitions. If the group has no knowledge on the topic, the facilitator could provide them with successful or unsuccessful local examples, which might be familiar to the participants. On occasions, the process of a law (against tobacco, consumer protection, or any other issue) has had its origin in some community movement or the changes within a company resulting from the effort of the workers through their union, or at close range, the change of policies within a civil society organization, due to the action of their members.
- *Work in small groups*. Once the brainstorming has concluded and it has been made sure

² Institute for Sustainable Communities, A guide to preparing advocacy case studies.1992.

<http://www.advocacy.org/publications/index.htm>

³ Policies and Actions on HIV/AIDS Prevention, Family Health International, USAID, 2001, p.6



that all group contributions are fully visible, the workgroup is divided into smaller groups, so they can have a participative group discussion in order to build a group definition for Advocacy. Each group will then present their work in plenary.

- *Building a common concept.* Once the concepts have been established by the small groups, the facilitator tries to build on consensus a concept that involves the visions and contributions of each group, looking for coincidences and avoiding mishaps, if any. Once consensus has been reached, a theoretical definition is shared and the group contribution is enriched.

The building of a definition by the workgroup, makes the adoption, the sense of ownership and adaptation much easier and it limits, in many ways, the group actions for the construction of an Advocacy Plan and does not facilitates any detours towards other actions, it allows to focus the energy and group efforts towards one common goal. If you are working with a bigger group, let's say a coalition of civil society organizations or a national organizations forum or any extended movement, it is recommended to build a common concept with representatives of the collective, leaders or with a focalized workgroup and then share the built concept with the rest.

5. How to use the information on HIV/AIDS?

The building of an Advocacy Plan considers the full knowledge of the problems situation which is intended to be reversed, solved or to get its impact reduced; therefore, the definitions established by the work plan of an Advocacy, must be based on facts and evidence. This does not allow a work of good intentions and terrible approaches, it does not facilitates the involvement of believes, some times assertive and other times completely out of the necessary focus to be effective in the fight in question, a topic that could be read like the impact of an epidemic with a major reach. The topic that concerns us is...Life, human rights, the possibility of equity in a equitable world; the epidemic and its impact is not only a public health issue, it is the issue that best reflects the differences, the stigma and the discrimination, the culture of inequity and where human beings are being affected without distinction.

It is therefore essential that the construction of an Advocacy Plan contemplates the information on the topic, in its highest relevance, without the need of becoming an expert in each of the topics involved by HIV/AIDS; But the communities are “experts” in their own issue, the communities, and from there on they can understand any statement within the excellent frame of the Human Rights, which are the rights of each person, of each citizen who is part of a community.

It is therefore that I need to emphasize the need of understanding the impact of HIV/AIDS in each location, on a national and even a global context Therefore a critical vision of epidemiology allows the workgroup to establish their proposals with data and evidence, which not only allows the community to understand the reach of their plan, but it also allows other actors to understand



the reason of the necessity for appropriate public policies.

The information on HIV/AIDS epidemiology must be used, on one hand to perform an efficient prevention or control in the quest to eliminate the illness; and on the other to provide adequate care for the affected population. In other words, the epidemiology must guide the use of preventive and aiding resources; and the Advocacy seeks to solve or to propose policies which are always related to the impact of the epidemic. Therefore it is essential to use “Information for the Action” and to understand what epidemiology is and to learn to read it in a critical way.

Epidemiology and HIV/AIDS, some useful concepts:

The word Epidemiology owns Greek etiology, where the root means:

- Epi – on, over
- Demos – Population
- Logos – Science or agreement

Therefore it is defined as the study of illnesses affecting a lot of people on a determined site; it is the study of the distribution and the determining of illnesses in specific populations. The community definitions are relevant to bring the concept closer to the workgroup, for example:

When an unsuspected number of cases of any specific illness start to appear.

The medical definitions can also contribute to facilitate the understanding of the issue:

It is the branch of medicine that handles the causes, distribution and control of the illnesses within a specific population.

It is important to share the uses of epidemiology with the workgroup and it is recommendable to launch at least one brainstorm session on this regard:

Exercise: Uses of epidemiology.

The facilitator explains the definitions about epidemiology, which are closest to the workgroup and asks the group to comment on the uses that he/she knows about and understands, for the daily work of the organization as well as for the construction of an Advocacy Plan, the facilitator needs to make sure that the following uses are included:

⁴ Advocacy Guide in HI/AIDS, gay men and other msm, ASICAL. p.2



- Decision making
- Public Policies
- Budgets
- Establishment of Priority
- Sensitizing of the media
- Other

The perceptions of the collective are important, as they serve to define how to use key information on the epidemic and its direct impact on the Plan, as well as at different stages of its implementation.

The epidemiological patterns pretend to describe the characteristics of time, place and person: e.g. who, where and when. In the case of HIV and AIDS, there are different forms to measure these epidemics. For AIDS, the number of cases diagnosed is registered, while for HIV the prevalence is estimated (see definition in the following paragraphs) in populations or groups of affected or interested populations. It is, therefore, relevant that the team be explained some of the most common epidemiological concepts, to allow them to fully understand the issue in order to make better use of it.

⌘ Case – (AIDS case) In almost all parts of the world, AIDS cases are of mandatory notification: however, not those of HIV infection. It is possible that in each country there are some differences related to the diagnosis, though they are in line with patterns or scientific recommendations established by globally highly recognized research centers. A physician considers to be in front of an AIDS case according to a test result (viral load and CD 4), and international parameters (<250 CD4 and > 100,000 viral copies); and an HIV+ result to a detection test, or else the presence of 3 opportunistic infections (OIs) without obvious (etiological) reason.

⌘ Rate – this is the measurement of a part with respect to the whole: a proportion. It is used, for example, to explain AIDS cases in relation to the total of a population, taking any number as basis, for example rate per million.

⌘ Incidence – the number or rate of frequency: it refers particularly to the number of new cases of an illness in a specific population in a given time, for example, the number of new cases in housewives in the year 2005.

⌘ Prevalence – the total number of cases of an illness in a specific population in a given time.

This classification, which is used on a global level to understand the patterns of the epidemic and its impact, justifies in many occasions the amount of resources which are assigned to a given

⁵ Compilation: Epidemiology and VIH/SIDA, AVE de México, 2005.



region or country: however it is also the reason for Advocacy Plans, in order to avoid an unreasonable growing of the epidemic, or for opportune interventions. It is, therefore, and according to a proposal of UNAIDS, that the epidemics are classified as follows:

- Incipient or emerging: less than a 5% in any specific group
- Concentrated: higher than a 5% in any or several groups of specific populations.
- Generalized: higher than a 1% of women attending maternity services.

This classification helps to better understand the dynamics of HIV and its terminal expression in AIDS cases in differentiated populations in the regions of the world.

Using correct information, based on evidence, an Advocacy Plan is comprehensive and justified, so that recipients of this plan fully understand why the community proposal is relevant. If the plan is not well documented, it might be difficult to add further evidence in the future. It is, therefore, indispensable to employ evidence to define actions, taking into consideration available information, the social perception, and priorities in health and on social level as well.

Additionally, it is necessary to employ a clear and non-discriminatory language; thus allowing communities to take ownership of the plan, and being included and respected.

The mechanism that cause the infection, ways of transmission, attention and access to treatment and monitoring tests; counseling and testing to detect HIV; confidentiality, and stigma and discrimination, are issues intrinsically related to Advocacy Plans. The working group has to have general knowledge on these issues, and specifically on the topic related to the plan. On occasions, it is recommendable that a consultant assists in the development of the plan, to ensure the correct treatment. It would also be convenient to look for a consultant who works in partnership with communities, thus guaranteeing his objectivity, as well as his critical vision of the problem. Depending on the focus of the plan, it will be necessary to be knowledgeable of topics related to funding received by the government and other agencies, local and international as well. Respective information should be available. It is recommended to socialize this information among the members of the team, to define which and how much of this information can be used for the plan and the resulting outputs. It is recommendable that a defined person or a designated working group takes on the investigation.

The legislative framework is also important for the development of an Advocacy Plan. Therefore, the following exercise can be implemented with the topic of the actual legal framework, thus improving the knowledge of the team in this respect. This is particularly important when advocacy actions are taken that address changes in legislation, or the application for resources to programs depending on governments. In this respect, it is important to review the legislation of the country,



and the laws and normative resulting from this legislation, as well as revise the situation of human rights and the covenants and treaties signed by the respective country.

Exercise: Epidemiology and HIV/AIDS

This exercise is recommended to increment the knowledge and the skills of the working team to ensure that their Plan of Advocacy is employing valid information, understandable for them, and that this is based on evidence.

The exercise requires participation of an expert on national or local epidemiology: this person could, inclusively, be from the National AIDS Program; or else a researcher from a university, or an epidemiologist. It would be ideal that this task would be taken on by a partner of the team or else an activist knowledgeable of the topic.

⌘ Presentation of the local general epidemiology: e.g. total number of cases: most frequent ways of transmission; estimate of HIV cases: categories by age and sex of the epidemic.

⌘ Share with the group the following definitions:

1. Case, Rate, Prevalence and Incidence

⌘ Constitute working groups

⌘ Each group calculates and presents in plenary the following:

1. Number of AIDS cases in a province (parish, state, department) or defined region
2. Rate of persons affected by AIDS in relation to the general population (local or national)
3. Prevalence of AIDS in the country
4. Incidence of AIDS in any specific group (housewives, men who have sex with other men (MSM), sex workers, etc.)

⌘ In a wider group (plenary?) the participants define if the epidemic in their country or on local level is - according to UNAIDS classification – incipient, concentrated or generalized. The reasons for the classification should be explained.

⌘ Following, the expert takes over again and corrects, if necessary, the appreciation of the working group, explaining reasons.

⌘ Discussions and clarifications.

This suggested exercise offers the possibility to go further into the issues related to the Advocacy Plan: and though the community expertise is essential, on occasions research on one of the issues of advocacy are in itself advocacy actions, or lead to the visibility of the problem.

6. Some thoughts to be taken into consideration in order to be able to build an Advocacy Plan

In order to assure the success of the construction of an Advocacy Plan and that its impact will



be able to modify the inertia against the plan was created for, it is necessary to take into consideration some reflections, prior to begin with the construction of the Plan.

⌘ Strategies versus Actions

The success of a plan is proportional to the quality of the planning, it will depend on the strategic vision of its designers and of course, on the surroundings, its conflicts, external factors and on occasions even on luck.

Leave the efficiency of our plan to external factors or to chance, means to concede power to the inertia that has not been able to give a more appropriate answer to our communities; it would be like assuring failure right from the beginning since we started planning our shores.

We can state multiple examples of failed Advocacy plans and campaigns; we realize how much vitality and energy organizations and activists have consumed, wearing and tearing and practically devoting their lives to the advocacy cause. It is very frequent to know an enormous amount of activities, which somehow connect, but their intention is to achieve a change, these are some times strong activities, others are impressive, but at the end of the road, they does not achieve the desired change. It is therefore essential no to confuse Advocacy Actions, which are on occasions not well planned as they are mostly the response to an emergency, and have then a strong reaction, sometimes coming from your guts and most of the time sheltered by feelings of anger.

Those feelings are useful when we can channel them to strengthen our plan with a well-aimed vision; but they can easily convert into a tremendous obstacle by not allowing us to see a clear and objective vision of the situation that we are facing; it is highly recommended to keep your head cool and the focus of our attention in order to achieve a strategic Plan.

The word strategy comes from the Greek word “Strategos”, army commanders: this word was traditionally used on the battle fields during war operations. Nowadays we understand under strategy the adaptation of resources and skills of the organization to the changing environment, taking opportunities and evaluating risks towards objectives and goals. We apply to strategy on different uncertain, unstructured, uncontrollable situations, i.e. when there is another side whose behavior we can’t control.

To have a strategic purpose implies to have vision about the future; it must allow you to orient, discover and explore. The orientation sense must respond: How much reach are we planning to have? One of the clues is to have clarity on the current situation and the change we are willing to achieve with the best possible accuracy. If we manage to make a plan, which more than just grouping advocacy actions, locates them in a logical way, with the necessary flexibility to confront



the various responses it might face, if it is build with the necessary strategic sense, we will be sure about its reach and its feasibility.

To develop strategic thinking requires the development of skills concerning the implementation of the best community capacities and on many occasions the perceivings from the sessions we could hold in order to reach our objective. By sessions we understand the internal or external negotiations which could result in agreements and reaches for the Plan.

This consideration is fundamental to construct the Plan, to develop it, to implement it and to follow-up on it, it is not just a planning focus, it is necessary for it to be a constant to Advocacy.

⌘ The Political Climate

An Advocacy strategy needs a clear image of the political scenario. This is the only way to find the most appropriate “moments” to launch, for example, a campaign. Is the weakness of our opponents the most adequate moment to try to negotiate a legislation change? The answer might seem obvious, but a clear vision sometimes let us understand that in situations of honest weakness or fracture, the politicians and legislators does not listen and are not willing to make any changes, although, on other occasions this would the right moment to act and achieve our objective.

The reading of the political climate needs de good senses of our communities, about the perception of the situation, the disposition to negotiate from the different actors and the offers that they could propose to us. On occasions the political climate favors our achievement without any further concessions, at other times, a negotiation and agreement is expected, so that our objective will be partially reached. And even though, and for the most radical people, this could be understood as a failed strategy, this is sometimes the first step for many others who will, on a long term, allow to reach of the proposed objective.

Therefore, a plan must be developed contemplating this climate and never in an isolated way; sometimes we must propose an unreachable goal from the beginning, so that it and at the moment of the negotiations, can hit the objective we are really seeking.

We can recommend our readers to listen carefully to very diverse actors, allies and opponents, in order to reach conclusions and get to know the climate, which will give us a better guideline.

Newspapers, comments of the street, official declarations, the assignments and definitions of the government, are clear signs of this climate. And, although, we will always expect warm weather and winds blowing in favor to our course, we will generally find dark clouds and storms on our way to find social commitment.



It is essential to develop our skills for both sides so we can identify the hidden agendas: from the participant's side, so they can make them transparent, and from the opponent's side; this is the only way we can move forward with firm steps, knowing the motives and causes of the opponent. From this point of view, it is necessary to identify incomplete information, objectively separate the messages showing both sides values and be cold enough to fight ideologies and know how to solve conflicts in a non-violent way. This last issue requires specific skills, it is therefore highly recommended to be familiar with them in order to be able to make negotiations without falling into aggressions, unless no other way is possible, which can impede the reach of our objectives. This becomes then our main objective, not the winning of a debate or being recognized for our bravery, but to reach our goal.

⌘ The Strength of the Communities

It is essential to consider the size and the changing characteristics of the politic scenery, but it is also necessary to know our capacities in order to carry out our Plan.

The strength of a community, of the organizations and their activists, can be defined as the combination of internal factors, such as their strengths in human resources, substantial and financial, the capacities and experiences, the recognition of the community or the general population, the availability or not of a workspace, equipment, expertise about a particular issue, among others. The weaknesses, which can be looked at with a very auto-critical vision and can consist in very vertical structures when it comes to the decision making point, the lack of transparency of some processes, lack of view from the communities, inexperience in certain fields, lack of specific skills and capacities, difficulties in our negotiation capacities, in other words, a package of aspects related to our own organization. In order to reach clarity concerning our own size, it is necessary to consider the context where the organization develops, coalition or movement; the outside limits or favors in terms of strength.

The opportunities offered to us from the outside, can be a relevant factor to change the capacities of our organization, for example, the existence of human resources, substantial's and financials, available in some way to our workgroup or organization, become into a promise that can improve the conditions of our work, the participation through invitation to dialog or negotiation roundtables with various public, private or social actors, gives us options for advocacy. We understand the external limitations as threats. They can consist in strengthening of conservative ideas, dictatorial governments, budget cuts involving the organization, in other words, a series of conditions that threat our duties.

An analysis of the organizations current situation, which considers the ideas exposed above, will give us a clear idea of the organizations or collective capacities in order to implement a Plan, or if to do so in a small or big range, depending on how we appreciate the internal capacities and



the context.

Exercise: SWOT

A flipchart is divided into four parts, and each compartment will contain a title as describe below, making sure that the internal factors are placed on the left and the external factors on the right.

The team is given a considerable amount of time to analyze, describe and list the Strengths, Opportunities, Weaknesses and Threats that are part of the daily work of the workgroup, organization or coalition they are intending to work with on the Advocacy Plan. A moderator needs to be available in order to facilitate the process, impeding sterile discussions and making sure that the contributions of the participants are reflected on the flipchart.

Strengths (internal)	Opportunities (external)
Weaknesses (internal)	Threats (external)

Once the chart has been set and the Strengths, Opportunities, Weaknesses and Threats have been listed in each section, the participants are asked to share their feelings on this regard, maintaining an auto-critical vision. It is also requested to reason about the team’s possibilities to build an Advocacy Plan, considering their capacities and observing the existing political climate.

It is important to mention that the community strength does not directly depend on its financial capacity, neither nor its size or number of members, the strength comes from its legitimacy, meaning, to have emerged from the community itself, the containment of the community base



or being conformed to offer actions and strategies to same. The legitimacy of a community is not under discussion, but it is necessary for the team to perceive the safety of their work as legitimate, seeking to improve the conditions or situations, either of a person or a community in relation to some issue requiring an advocacy action. Keeping the strategic thinking in mind, this exercise will allow, not to define if it can be done or not to carry out an Advocacy Plan, but the how and with whom to do so in order to assure the reach of their objectives.

- The Establishment of Coalitions

“Coalition” is defined as the group of organizations sharing common objectives and showing their support to (or against) a political proposal. The coalitions can strengthen or prompt a proposal, can balance the weaknesses of some organization or group of organizations and legitimize and strengthen the proposal.

The coalitions are generally established among similars, but they could be build with entities that share part of our objective; and example of this are the union federations, professional associations, forums for civil society organizations, groupings of academics or the mixture of unions and civil society organizations in lieu of a specific goal.

On occasions, the coalitions are built as a permanent association with common objectives or, they can be created to perform a one time task and then dissolve. Taking into consideration the above mentioned facts, its establishing can be promoted in order to prompt a proposal, to enlarge the community base that supports the Plan, to balance deficiencies, to engage others to our mission and to reach a support level that strengthens us in front of our opponents.

The decision to establish a coalition depends on the vision of the political climate, the analysis of the workgroup’s strength and the proposed work format; a coalition can be established only for its support, leaving the plan’s implementation work to the proposing team. It is essential to insist on the participation of people living with HIV/AIDS, as well as the most vulnerable populations, this will guarantee that their voices, proposals and contributions become a fundamental part of the Plan.

- Essential Skills

During the development of this manual, a large number of skills, essential for the design and implementation of an Advocacy Plan, have been mentioned. We could build an even larger list, but we are sure this would be self-defeating, creating the effect of chasing away a broad majority

⁶ Policies and Actions on HIV/AIDS Prevention, Family Health International, USAID, 2001, p. 7



of people, and last but not least, we would be lying to the readers, considering that many of the good advocacy strategies have been implemented by people who were supposedly lacking of this skills, but their commitment rendered to be enough to reach their goals. Maybe we should remember that this manual intends to join those who choose so and to spare them from the “learning by mistakes” process, using multiple experiences and trusting that this will become a guide for those who decide to walk this line. Therefore, a skills inventory exercise has been proposed, which more than allowing comparisons with needs, skills and specific capacities, facilitates the team’s, organization’s or coalition’s understanding of their enormous potential.

Exercise: Inventory of Skills

The participants are asked to face each other in a circle (i.e. two circles, one inside the other facing each other) or in two lines (i.e. one half in front of the other). Each participant is given a piece of paper and a pencil.

The facilitator will give the instructions and will make sure to maintain a certain rhythm and timeline in order to make the process run smoothly.

If the members of the team are familiar with each other, the external circle (or one of the lines) will be asked to write down known skills and capacities of the participant standing in front of him/her. The internal circle or the line that is not writing will remain silent, even though, and if a clarification is necessary, they will be allowed to answer specific questions from the external circle or the line writing down; Once the time is up (two to three minutes), the external circle will move on to the next person (the same procedure will apply to the lines). After a while all participants will have traveled along the circle and will return to face the first person who interviewed them.

In the case that the participants do not know each other, it will be necessary to prepare key questions in order to facilitate the identification of skills that could be useful during the development of the Plan. At the end some expected skills (depending on the Plan’s topic) are listed and key questions will be prepared (no more than 3) and distributed among the external circle or the line that will be performing the interview.

The extraction of the skills of each participant, in a short and playful time, depend on the agility and rhythm of the facilitator; after some time the roles will switch, i.e. the internal circle or the opposite line will make the questions. The facilitator will make sure to note the skills on the same page, in order to achieve continuity.

Once the exercise has been completed, the facilitator will write down the skills, without mentioning who they pertain to. Once they start repeating itself, the facilitator will add a check mark to the



skill. The facilitator will then try to organize the skills by the relevance they might have for the Plan, for example, the filing skills are essential for an expert strategist who is messy. It is important to keep in mind that every person has skills that can be used for the Plan, even the most simple ones, can strengthen the Plan.

Proposed List of Skills for Advocacy:

Active listening
Filing
Public Speaking
Document organization
Documentation
Wording
Planning
Project design
Graphic design
Investigation
Community investigation
Political studies
Similar careers (technical or university)
Paperwork delivery
Journalistic investigation
Elaborate Informative Notes

Technical Skills:

Investigation and strategic planning
Gathering, analysis and use of the information
Analysis and identification of problems
Development and establishing of goals and objectives
Negotiation, lobbying and law
Facilitation and group dynamics
Formation of support nets
Design of communication strategies, which include:

- argumentation
- message structuring
- development of communication materials
- handling of speech



- effective use of the media
- the making of low cost products

Monitoring and Evaluation

Handling of resources (transparent and efficient)

The list is not exhaustive and contains some skills which might seem useless, but once the building of the Plan starts, they become an essential need. Let us remember that the learning capacity is essential to learn from others and be able to improve our individual and group skills.

Once the inventory has been finished, it is highly recommended to keep it visible at all times, so it can be taken into consideration at the time of the design and implementation of the Plan.

• Establishing Roles and Responsibilities

Establishing initial agreements for the planning and implementation process is necessary in order to make sure that all responsibilities are clear for the participants. It is important for every participant to understand his/her role in the process, so he/she can support the process effectively, without creating conflicts that could damage the process.

As we are talking about a strategy specifically targeting groups and individuals who are opposing, it is necessary to establish in certain sense more vertical roles, an exception compared to decision making strategies, however not for emerging issues.

If the strategy requires fast or emergency decisions at some point, it will render useless and will bring consequences to the Plan's success, aside from the internal conflicts, to maintain a broad consulting process (particularly if it comes from big coalitions).

To establish a hierarchical order that contemplates fast decision making moments requires the full trust of the team; this is achieved with dedication, transparency and commitment. On occasions, the planning process of the Plan, allows time to know the participants, the recognition of skills and capacities and the discovery and development of leaderships.

Ideally the roles and responsibilities are proposed by the work team and are chosen in accordance to the necessary profiles, for example and in a minimalist way, it is necessary to count with a general Plan coordinator, a person responsible for Communications and somebody else for the monitoring and evaluation of the process; their attributions and obligations to the team and the Plan, must be clarified and voted on consensus in order to avoid conflicts, confusions and the overlapping of tasks. It is recommended to review the roles and responsibilities during the process, in order to make sure that the team is keeping the agreement and to use the monitoring



to establish that everything is running correctly towards the advance and the benefit of the project.

On some occasions the leadership gets in the way of negotiation processes and it will be necessary to change the coordination of the Plan, without giving in to specific requests from the opponents, but as part of the strategy.

The Plan itself will define its own requirements and the size of the team will allocate responsibilities to different people or concentrate them in some minor group. It is not recommended to define roles and responsibilities before building the project otherwise a structure is enforced which will then complicate the issue unnecessarily.

Some organizations apply to the daily jobs pre-established roles, others horizontalize the process assigning work roles, without a vertical structure for the making of decisions. We can confirm that no specific rules are written on this regard; the important part is to discuss these topics openly with the participants and to have at least one session to define roles and responsibilities based on the needs of the Advocacy Plan.

L A C C A S O



CHAPTER II

BUILDING AN ADVOCACY PLAN



During the last chapter we discussed the necessary aspects to build a plan; we checked concepts, analyzed situations and defined roles. Now it is time to face the specific work of building our plan, a Plan that assures, starting from its design, and real possibilities of success. Therefore, we must devote our energy, creativity, sensitivity and courage to crystallize achievements for the communities we are part of and who we work for.

Our creativity and keeping a good sense of humor during the process will carry our energy to the required level to create an extraordinary Advocacy Plan.

7. Elements of the Advocacy Plan

Every plan requires a series of elements that once implemented in a strategic logic, increase our feasibility of success. The basic elements must be owned by the executing team of the Plan, it is therefore very important for them to know them, understand them and be able to describe them. Therefore, the following exercise is recommended to be carried out in order to familiarize with the description of each element and its location within the building frame of the Advocacy Plan.

Exercise: The Elements of an Advocacy Plan

The elements of a plan are written down on individual cards (in different colors, if possible and in easy-to-handle sizes) and the participants are then divided into small groups; the facilitator delivers the elements in random order and asks each small group to order them in a logical way, by consensus; the facilitator will have to make sure that each card is explained by the participants, to the best of their knowledge, during the discussion; all participants will be encouraged to participate and a space to move the cards will be provided, until consensus is reached. One representative of each group will explain the agreed order in plenary.

Elements of the Advocacy Plan:

- o Problem Identification
- o Data Gathering
- o Discussion of Alternative Solutions
- o Objective Definition
- o Identification of Audiences
- o Identification of Allies and Opponents
- o Building of Alliances
- o Establishing of a Communication Plan
- o Establishing of Communication Strategies
- o Search for Financing
- o Monitoring, Evaluation and Follow-Up



The elements in the list are arranged in a logical way according to the development. Using data and information from the previous step, it is necessary to make sure that the order proposed by the groups follows a correct logic; if a different order is proposed we need to keep an open mind and flexibility while trying to communicate the necessary strategic thinking. For example, monitoring is a constant in an Advocacy Plan, but some people will keep it out of the list, without affecting the order of the list; another example would be to locate the search for financing at the beginning of the list, which will not work considering that the reach, objectives and necessary steps have not been defined. The exercise seeks for the participants to know and handle the essential elements, making the planning process much easier by establishing a common language. The facilitator must not impose the above proposed list as a rule, but as an option that has worked for other groups.

Finally, the facilitator explains each of the steps and the reason for the above proposed sequence. The team will adopt the scheme that better meet their needs, after an internal group consensus has been reached. The following are some elements to be used during this discussion:

- o Problem Identification

This step is fundamental and creates the need to build an Advocacy Plan. Without an identified problem there will be no need for an Advocacy Plan to be built.

- o Data Gathering

It is essential to have ample information about the problem, its impact and reaches. Besides of facilitating the ownership of the topic, it allows to define specific solution actions, based on evidence.

- o Discussion of alternative solutions

This is a central step which can only be debated once the problem has been identified and has been completely understood. It allows the participation of the community adding different visions and points of view, enabling the team to identify the best solution proposals.

- o Object Definition

This step clarifies the defined strategy and allocates a common goal; it gives certainty to the Plan's direction.

- o Identification of Audiences

The audiences are the target populations and usually the decision makers, towards whom the Plan's actions are directed. Once identified and being familiar with their structure, work formats and protocols, we can start planning the next steps, in order to make our Plan more efficient.

- o Identification of Allies and Opponents

It is essential to know the people we will work with, not within our team, but the actors who have a closer position to our objective and are neutral on the topic, but could be key elements for the achievement; or could oppose to our objective; and last but not least, those who are opposed, without being our enemies. For this step it is necessary to know who



will be the audience the Plan is directed to; the actors allocate themselves on one or the other side or in an uncertain “in between”, once we have identified who decides on our topic.

- o Building of Alliances

Once we have recognized the influence of the actors involved, the decision makers, opponents and allies will know the real reach of our objective and we will know with whom we should establish an alliance in order to balance our efforts.

- o Establishing of a Communication Plan

The Advocacy Plans require a communication strategy which will have to be defined once the targeted actors involved have been identified, based on their status and size.

- o Establishing of communication strategies

The strategies need to be refined in order to hit the target. They will be directed to the weakest point of our opponents, the point that triggers the making of decisions or the strongest point which allows our allies to visualize the results facilitated by their support.

- o Search for Financing

Once the objective has been established and the strategies designed, the needs can be identified and a budget can be build allowing us to dedicate energy and time to search for resources (financial, substantial, human or political).

- o Monitoring, Evaluation and Follow-Up

The constant monitoring process during the project, allows us to adjust on time and strengthen the Plan. A critical evaluation allows a better development of skills for future plans and facilitates the recognition of mistakes and the strengthening of good moves. It explains why and how we have reached the current point.

It is recommended to keep the elements visible at all times, so that the team can keep the proposed and agreed order. Now that the team knows the elements, they can start on the development.

8. Identifying Community Problems

The Advocacy Plan topic cannot be the result of a “whim” or ideas from the group or from one of its members attending the individual needs of some person, even though sometimes the needs of an individual reflect the community needs. The sensitivity and work of the activists, as well as the community experience congregated in their organizations, is an inexhaustible source of topics requiring attention, therefore it would be redundant to mention that this is the reason of existence for these organizations and activists.

The participative community methodologies facilitate the identification of real and felt needs. Both possibilities are mentioned, because they are part of the reality faced by groups and populations. We understand under real needs, those who are effectively needed by the people,



medication, monitoring tests, adequate care, and capacitated personnel, among others. The felt needs refer to those needs perceived by the community, for example, warmth during care services, free prevention material, etc., they are the needs perceived by the communities as helpful, although it is unclear to them if they are part of the rights they have as a citizen, They are also perceptions of the affected, which on occasions can't be proved, but and if they get the adequate attention, result most of the times into human right issues. An example of this is the subtle discrimination; the community perceives (for example) that the medical personnel is kind, but always leaves the people with HIV/AIDS until last.

It is therefore recommended to use some methodology to identify the Advocacy needs or to confirm and base on evidence the chosen topic, as well as to enrich the aspects to be exposed during the development of the Advocacy Plan.

When is Advocacy really necessary?

This question might seem silly, but is necessary in order to clearly define if the implementation of a Plan is necessary or if other actions are required.

It is recommended to develop policies when discrimination or omission exists, when some disposition or the lack of a program affects a whole country, a region or location; when the government work is unclear; when the quality of care is deficient; when there exists a lack of preventive strategies addressed to vulnerable communities; when the resources are distributed under uncertainty; when special attention situations show up; when a population group is being affected by the lack of or the inadequate definition of the government; when there exists discrimination in a work environment; when the attention to the issue will create real benefits; whenever the community determines so and considers it as necessary.

Once a motive has been found or the possibility of the need has been noticed, we proceed to the identification of the problem. Focus groups, surveys, community situation analysis, participative community diagnosis, and any available tool can be used to assure that the community participates in the diagnosis and problem identification phase.

Exercise: Identifying Community Problems

The work team builds a preliminary list of problematics, assuring the participation of community representatives in this process. It is possible that the team already has an issue in mind, but it is always better to go through an identification and priority process.

The list is build with everyone's participation and the facilitator is asked to lead the participants



to reflect on the problems that affect the community and to extract three of the most frequent ones or those that are more relevant for the participant, keeping in mind that these problems will require local, regional, national, public or private policy changes.

After a while, a list of the problems that are susceptible to Advocacy and relevant for the community and the work team is build.

The team is divided into small groups and asked to choose two problems from the list in a priority order and create a discussion.

A moderator is chosen from each small group, who will then write down the problems on a flipchart (one per group); they will then look for the immediate causes of the problem, i.e. through a guided discussion, the participants will try to find the immediate cause of the problem and the moderator will list them under the problem described. In general and during the discussion, more profound causes appear. For example, the discrimination for sexual orientation related to care in HIV/AIDS or the need of prevention campaigns for gay men and other men having sex with men (MSM).,Among the immediate causes we can list ignorance and institutional homophobia and for the more profound causes (which are more cultural related), internalized homophobia, prejudice, among others. In this case, legislations and omissions which allow seeing both levels of the cause are frequent.

It is probable that the most profound causes are common to various problems due to its relationship to cultural aspects, which are much eradicated in the society, as well as in the institutions.

Once the identification has been made, the problems and causes are explained in plenary. The participants are asked to assign priorities based on three factors: seriousness of the problematic, knowledge or evidence of the problem and if the problem needs Advocacy to be solved or to guide its solution or to diminish its impact. With this information on hand, the team will be able to define with certainty the topic of the Advocacy.

The last step of this exercise requires a brief description of the problem, but with clear explanation of the problematic to be faced. This is presented in plenary and the necessary changes are made.

Example:

The team identified violations of confidentiality in the local clinic against People living with HIV; the immediate cause was identified as a lack of a related regulation for the health care personnel of this clinic and as a profound cause for discrimination and ignorance of the public servers.



Wording of the Identified Problem:

The lack of regulations for the personnel of the local clinic attending HIV/AIDS facilitates the violation of confidentiality of people affected by the virus.

Immediate Cause: Lack of obligation of the personnel to keep information confidential.

Profound Cause: Ignorance and discrimination

The above mentioned exercises will give perspective to the work team, because of their influence in choosing a topic, considering the political climate and the strength of the organization.

It is important to mention that not all of the problems find their solution in Advocacy; some are solved with training or with a brief negotiation with the responsible people, particularly in the case of open minded and good listening decision makers. Some other problems, which could be solved with an adequate policy, are not chosen because of the feasibility of the policy to become just one more written rule without producing the expected consequences. Although and with this last case, it could be considered as a first step that with the passing of time and our efforts could provoke a real change, as we expected. It is important to point out that it is necessary to maintain acceptance and patience; the expected changes will not be achieved within a day.

9. Defining Our Strategies

Once the program has been defined and the team has recognized the need of an Advocacy Plan as the best way to solve the problem or to reduce the damage it is producing to the community, it is necessary to define the strategies to be implemented in order to modify the situation. For this, it is necessary to use the talent, creativity and experience of the participants, in order to assure the success of the Plan. Although the communication strategies will be defined later on, it is highly recommendable to have a clear vision of “what” will be done in order to confront the identified problem.

Therefore it is essential to have all the information around the problem. But...What kind of information do we need? Does the information involve the problem or the involved actors?

It is necessary to count with the best information possible, on both aspects: on the specific



problem and the involved actors. The team can build an exhaustive list of information and data needs. Sometimes the list is so extensive that an enormous period of time needs to be invested into gathering and analyzing the information, therefore it is essential to keep the strategic thinking and to define actions in order to avoid the get lost in a sea of information or an eternal list of data, which, on occasions, are not very useful for the development of an Advocacy Plan. In order to improve the team's effectiveness and to gather useful data for the strategy, the following exercise is recommended.

Exercise: Gathering Data.

The identified problem is written down on the center of a flipchart; the wording can be written down or a picture can be drawn outlining the problematic, facilitating the use of creativity among the participants by representing the problem graphically, reflecting their needs and feelings. This image is located inside a circle in the center of the flipchart; a second circle is drawn. Inside this circle we will write down or draw the factors influencing the political climate, considering the issues that affect or favor the development of the root causes, the immediate and the profound ones. Therefore, it is recommended to locate the description of the problem on top and the causes on the bottom.

The lack of regulations for the personnel of the local clinic attending HIV/AIDS facilitates violation of confidentiality of people affected by the virus.



Immediate Cause: Lack of obligation of the personnel to keep information confidential.

Profound Cause: Ignorance and discrimination

Note: the figures are schematic representations, which represent the politic climate.

Once the scheme is finished, it will be presented in plenary (it can be done in small groups) and each drawing is thoroughly explained. Next, and based on this internal explanation, two lists are created, one on what they need to know about the problem in front of the political actors (still not thoroughly described, but who are somehow outlined in the political climate). The key question to trigger the participation of the group is: Why is this problem not understood by the political actors? And looking at the immediate and root causes, a brainstorming is started, answering this question. Parting from this brainstorm, a list is build containing the information unavailable to the actors

This first list shows topics as follows:

- Exact description of the problematic
- Impact of the problem on public health
- Size of the problematic
- What generates this problem
- What factors support the problematic?
- Vision of the directly or indirectly affected people by the problem.
- Among others.

The other question is: What does the team need to know about the political climate? A brainstorming is made, always considering the profound causes and trying to understand what they need to know about the context.

The result of the brainstorming and then the building of a list identified topics, is as follows:

- Existent legislative frame
- Situation of the human rights in relation to the problem
- General public's knowledge of the problematic
- Situation of the problem on a national or international scope.



- Positioning of the media in relation to the problem
- Among others

The facilitator needs to make sure that the first list contains the information needs of the problem and the second one all information about the context. Once done, 3 to 5 issues are prioritized from each list and roles and responsibilities are defined in order to look for the pertinent information, which will then have to be added to the Advocacy Plan, in a concise and brief way. The data gathering should not take much of our time; useful data must be located, always making sure to keep a registry of the consulted sources and confirm that no information coming from gossips is used. On occasions, a fast survey of the community provides this information with a community sense of the problem, information that can be safely used.

Once the information needs of the problem and the context have been checked and keeping the scheme of the former exercise and the lists handy, it is necessary to hold a strategic debate in order to decide which would be the best alternative solution for the problem. It is recommended to keep a documented register of the proposals, in order to discuss each one of them as well as to increase the sense of participation of each member of the team.

Using the former example, this discussion can generate concrete proposals to be used as the best solution alternatives, for example:

Problem:

The lack of regulations for the personnel of the local clinic attending HIV/AIDS, facilitates the violation of confidentiality of people affected by the virus

Alternatives proposed during the discussion:

- Demands before the human rights national or local instance
- Negotiation with the clinic's director in order to assure a different process concerning the handling of information
- Proposal to build a care guide which considers confidentiality as a priority
- Legislation or regulation project that states confidentiality as mandatory for the health personnel

Once different proposals have been made, the one that affects the immediate causes in the most direct possible form and the one that best helps the modification of the profound ones should be chosen.



Following the chosen example, it is suggested for the team to select only one of the alternatives, as already mentioned, the one that solves the problem in the most efficient possible way, at the present moment and on a long term base, and that takes care of the causes of the identified problem.

Immediate Cause: Lack of obligation of the personnel to keep information confidential.

Profound Cause: Ignorance and discrimination

It is important to mention, as indicated in Section 2 of Chapter I, that the public policies are the tool of the state to affect the population in a positive way, and it is therefore essential for our Advocacy Plan to aim to the solution of the problem in a definitive way; the suggested alternatives do not generate permanent changes as they are not stated in a public policy, as for example, to negotiate with the director of our supposed clinic, can be able to generate a very good result and attend the problem efficiently, if sensitivity from his side is found, but and whenever this director is replaced or the settlement is broken, there will be no way of enforcing the fulfillment of the agreed, in benefit of the affected.

It is therefore that the legislation program, which requires a longer process, is chosen; this is a solution that confronts the immediate cause in a massive way and does not allow discrimination. Choosing the following alternative does not impedes that others are put in place in order to attend the emergency, or to use them in a combined way, for example, one first step of the Plan, in order to avoid to continue with the breaking of confidentiality of the people living with the virus, would be to negotiate with the clinic's director, without leaving the goal of the Plan aside:

- Legislation or regulation project that states confidentiality as mandatory for the health personnel

Exercise: Identifying Our Strategies.

Observing the flipchart from the Data Gathering Exercise, the chosen solution alternative and the aspects related to the political climate, the team can select the best strategy to be implemented. We cannot make an exhaustive list of strategies per problem type, therefore, the team will have to suggest the strategy to be implemented and describe it, giving it the appropriate tone in order to know the strategy in depth.

Therefore a brainstorming is held, which and for the selected example, could be as follows:



Brainstorming:

Approach and negotiation with the legislators
Approach and negotiation with the political parties
Proposal for the National AIDS Program
Proposal and negotiation with the person responsible for Public Health in the country.

Use or tone of the strategy:

Aggressive and public strategy
Low profile strategy
Negotiation and public strategy
Large social mobilization strategy

In this case, and by observing other experiences (although unrelated to our issue), the team will recognize its Strengths and Weaknesses and the situation of the Context (opportunities and threats – SWOT Exercise), and will have to choose the most appropriate strategy and the best tone for it to be handled.

On occasions we carry out strategies that do not reach the right actors, for example, we will have to ask them if the corresponding regulation lays in the hands of the person responsible for Public Health or if this is a matter of the Chambers of Congress and/or Senate; each country owns legislations and processes for the corresponding law range. It is possible that the regulation process depends on the person mentioned and, depending on the politic will shown on previous occasions or the sensitivity to the identified problem, a very strong and more aggressive strategy is defined, or a low profile move is chosen, allowing to achieve the change without mayor public and social effects. The selection of the strategy is not definitive for the time being, as it is still related to the following steps and the tests to be performed in order to be conclusive.

Let us say that a strategy as follows, has been chosen:

Proposal and negotiation with the person responsible for Public Health in the country

And which tone will be:

Negotiation and public strategy

During the next steps and the corresponding exercises it can be modified or improved.



10. Building Objectives for an Advocacy Plan

The objective building for our Advocacy Plan requires a concrete wording that allows a sufficiently clear vision of the solution to be executed by any of the members of the team, even without the presence of the editor or the person who knows it the best.

In order to clearly draw up the objectives, it is suggested to use the AMORSS concept; which allows to include the following considerations:

- **A Achievable**, if we propose a policy change among the group of the 8 richest countries in the world, we will most certainly require time, a lot of money and a more than considerable effort; if we choose a reachable goal, we will be able to continue to carry out strategies, until the desired change is reached.
- **M Measurable**, this consideration allows us to measure our advances or failures; if we propose an objective which does not allow us to measure our advance, we will get lost in the rhetoric we so much suffer from.
- **O Opportune**, it refers to the opportunity in time and context; performing a change in legislation during a civil war is not the most appropriate time and will have little chances of success. The Advocacy Plans must be carried out during feasible and opportune moments for the actors involved.
- **R Realistic**, it makes no sense to propose modification strategies for all the laws in our country, within two months of work. It is essential to keep reality as our best advisor and somehow to balance our ambitions with the feasibility.
- **S Specific**, the more specific our objectives are, the more transparent they will be for the people involved during its execution, becoming achievable and measurable. The specifics refer to the time, the place and the exact change we wish to achieve.
- **S Simple**, if we draw up objectives in a complex and fancy way, they are not only impossible to understand, but they will impede the approach of possible partners to our goal; if we keep them plain and simple they will be easier to understand as well as to reach.

In order to draw up our objectives it is necessary to look at the wording of our identified problem. A positive wording is strongly suggested, i.e., what would happen if we would have the solution to the problem? This facilitates the vision of “CHANGE” that we want to achieve:

Identified problem:

The lack of regulations for the personnel of the local clinic attending HIV/AIDS, facilitates the violation of confidentiality of people affected by the virus



Positive wording helps us to identify the change we want to achieve; therefore it is necessary to review the proposed solution alternative:

Proposed alternative:

- Legislation or regulation project that states confidentiality as mandatory for the health personnel

Therefore it is drawn up as follows:

The personnel of the local clinic counts with the necessary regulations to avoid the violation of confidentiality of people living with HIV/AIDS, attending this clinic.

Once we have this settled, we suggest to build the objective of the Advocacy Plan using the AMORSS approach using verbs indicating change; verbs as follows, are suggested:

- **Increase**
- **Raise**
- **Decrease**
- **Reduce**
- **Expand**
- **Enlarge**
- **Improve**
- **Refine**
- **Reinforce**
- **Promote**
- **Strengthen**
- **Change**
- **Modify**
- **Elaborate**
- **Create**

Therefore, the objective of the chosen example could be drawn up as follows:

Promote the building and approval, by the Health Ministry, of a regulation which will control the care of people living with HIV/AIDS, guarantying the confidentiality of their status for a 10 month period



The objective complies with the considerations mentioned above, and although this regulation could be expanded and include another series of relevant aspects, it maintains the identified problem that affects the community. Once the objective of the Advocacy Plan has been drawn up, it is suggested to add the strategy and the tone to be given to it.

Proposal and negotiation with the person responsible for Public Health in the country

Negotiation and public strategy

11. Identifying Key Actors

The actors to be involved in the process can come from different sectors, public, social or private and could include various institutions or instances. When we talk about Advocacy, we separate the actors to be addressed by our strategy, into two categories:

- o **Primary Audience**, it refers to the key actors in charge of making the decisions, i.e., they approve or disapprove our proposals. These are people capacitated to make the decisions and are therefore the goal audience of our Advocacy Plan.
- o **Secondary Audience**, it refers to the people who have direct influence on the perception of the primary audience, considering the issue involved.

The Primary Audience for our example would be the Ministry of Health or the authorized body defining the policies related to AIDS. For some Countries, National Councils, presided by the person responsible for Public Health, are created, being in charge of the building and application of the local and national related policies. On occasions, they include representatives of the organized civil society or the affected people.

The Secondary Audience, could be de Minister's advisors, the Vice-Minister in charge of HIV/AIDS related topics and, in case of existence of a Council, the advisors of their members or the people they listen to in order to make the decisions.

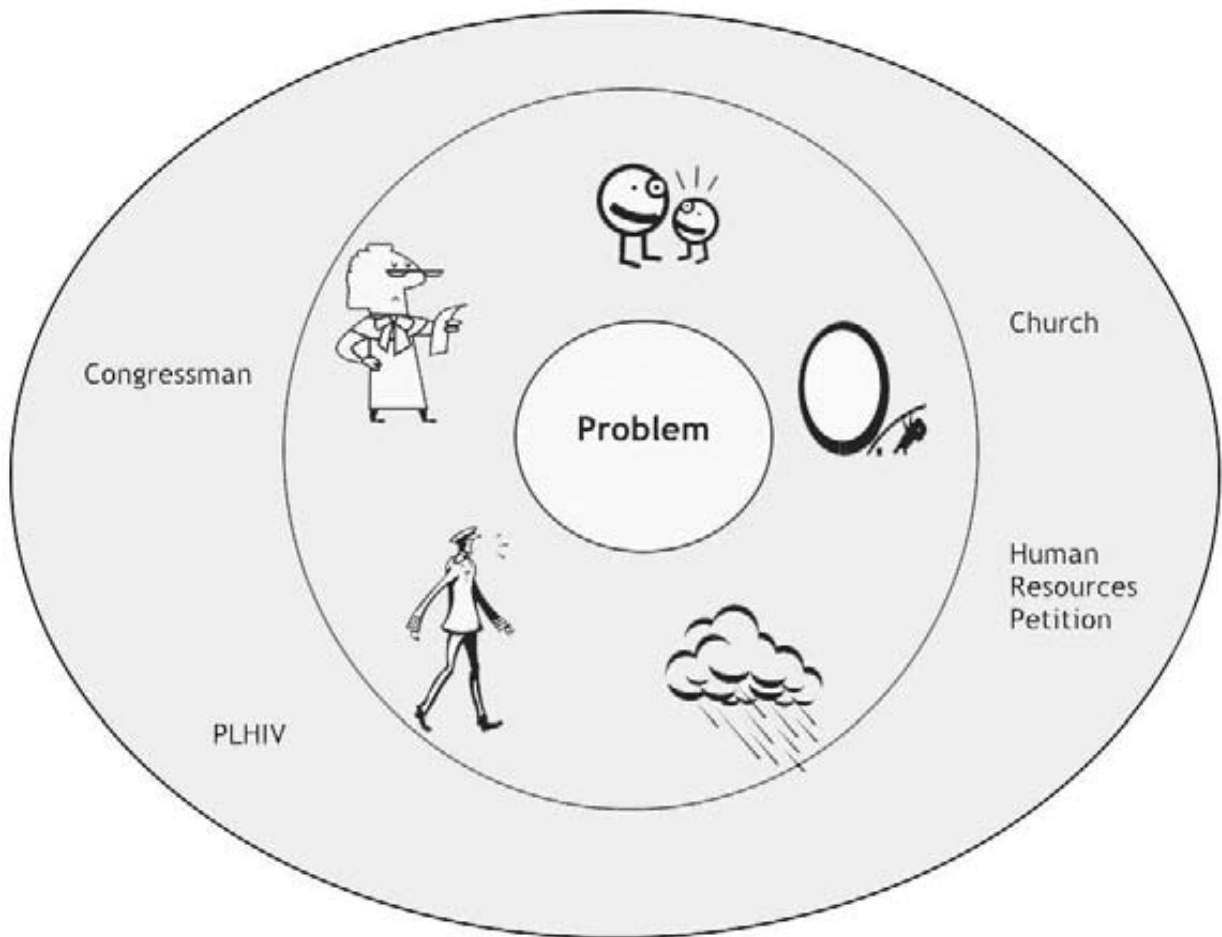
Exercise: Identifying Key Actors.

The proposed example is simple and due to our follow up during the last exercises, familiar to us. Therefore it could be obvious who our key actors are, but in other problems with different



objectives, it is not a simple fact to identify key actors; therefore the following mapping exercises are proposed.

Using the flipchart of the Data Gathering exercise, a third circle is added to the two concentric circles. Inside the third circle we will add the key actors, regardless of being primary or secondary audiences, we will locate all of those related to the political context inside the immediate circle. The exercise will also be useful for the following steps and therefore, it is not necessary to separate them by type of audience. This can be started by a brainstorm. Afterwards, the Primary and Secondary Audiences are chosen and written down on cards.



This exercise facilitates the view of all actors who could be involved in the topic and therefore with the Advocacy Plan (the graphic only includes some examples). It is recommended to keep the map visible in order to facilitate the identification of the actors on crucial moments of the

execution or the change of strategies for unexpected reasons. The mapping exercise allows a multiplicity of uses that can be enriched through time. The facilitator will have to watch the selection of actors closely; it is frequent for the media to be mentioned and confused with decision makers, although and on occasions, the media are key as a secondary audience or as part of the actors to be considered; they can influence the decisions, but they are rarely those who are in charge of making the decisions, they are, as their name states, a “media” to inform the general public. It is therefore very important to be thorough and careful during the selection of the actors.

12. Allies and Opponents

Once the actors have been identified and a Primary and Secondary Audience has been chosen, we proceed to identify them as allies, neutrals or opponents to our cause.

To use the map to identify them will result very useful.

The development of the following exercise is essential for the execution of the Advocacy Plan as well as for the monitoring and evaluation of our strategy; it is recommended to carry out this exercise using long lasting materials which allow constant modification. The strategies during war use scaled models in order to locate the movements of the troops. The advances and withdrawals, and the areas gained or lost, where the terrain and the actors there represented move like they would in a game.

Exercise: Political Mapping

Once the actors have been identified, they will be listed in a table considering the level of support or opposition; both situations are evaluated from previous situations or similar topics, evidences (if possible) and opinions of the members or associates of the community. In occasions, the political specialists, the political science students and the editorial writers are a source for proper allocation of the actors.

The table must allow space to move the actors from one end to the other and consider an area in the middle for the neutral actors.

On the first column the name of the actor will be written down, either as an institution or, ideally, with the name of the leading person within this institution. The next column expresses the power owned by this actor, i.e., If a civil society organization supports us and is our ally, it will be located under the Allies topic, but their power is not that large as the one coming from the Church, who will hypothetically and in some cases, be our opponent, and a very strong one; in



another example, an enormous international agency with available resources and open to our cause, could be our ally, but its decision making could be very limited; it is therefore essential to analyze every actor and to fill in the corresponding spaces with movable elements, because the discussion could sometimes be complex and no agreement can be reached until we compare them to others, as well as because during the development process of the Plan and depending on the political climate, an actor can change its related strengths to the issue and even its location on the table from one side (allies) to the other side (opponents) or vice versa. It is important to mention that both audiences (primary and secondary) are to be included in the table, marking them with different colors. For our example we used pink for the Primary Audiences and Orange for the Secondary Audiences, always following the example used on the previous exercises.

	^o <i>Power</i>	ALLIES			NEUTRALS			OPONNENTS		
<i>Hierarchy of the Catholic Church</i>	+++++									
<i>Ministry of Health</i>	++++									
<i>Organizations with work in HIV/AIDS</i>	++									
<i>PLHIV Groups</i>	+									
<i>Vice-Minister of Health</i>	++									
<i>Regulations Advisor</i>	+									
<i>National Health Council</i>	++									
<i>Directors of specialized clinics</i>	+									
<i>Health Workers Union</i>	+++									

Once the table has been filled with the names of the actors, the level of power in relation to the identified problem and our objective and the view of the political climate for the moment, we proceed to locate them in accordance, in the allies and opponents columns. In our hypothetical case it will be settled, as follows (we have added an indication on the top of the table, in order to identify mayor alliances or mayor opponents):





	Power	ALLIES			NEUTRALS			OPONNENTS		
Hierarchy of the Catholic Church	+++++			*						
Ministry of Health	++++						*			
Organizations with work in HIV/AIDS	++	*								
PLHIV Groups	+	*								
Vice-Minister of Health	++							*		
Regulations Advisor	+					*				
National Health Council	++					*				
Directors of specialized clinics	+				*					
Health Workers Union	+++					*				

Now that the political mapping has been established, (this is a hypothetical case and the places and the power of the actors will be different for each context), it is time to confront our example with the previous steps:

Objective of the Advocacy Plan:

Promote the building and approval, by the Health Ministry, of a regulation which will control the care of people living with HIV/AIDS, guaranteeing the confidentiality of their status for a 10 month period

Chosen Strategy:

Proposal and negotiation with the person responsible for Public Health in the country

Tone of the Strategy:

Negotiation and public strategy



This is a good time to observe the results from each of the previous exercises, from the SWOT through the Data Gathering and Maps to the Elements of the Plan; this will facilitate the adjustment of our strategy and the revision of the political climate and it could indicate if any other information is required. For example, and if we are considering to contact the person responsible for Public Health, it is desirable that our data is not only exact, but also expressed in medical language. Using our example we could try to move our opponents from one end to the other, which will require all of our strengths, but a more strategic vision will allow us to define with which actors we should work, using less energy and resources and adding strength to our objective.

Moving a “Neutral” actor, rather than an “Opponent”, could create a better counterbalance when it comes to the time to create an impact with the Secondary and finally with the Primary Audience. Following our example, it will be relatively easier to get the Health Council, the Directors of the clinics and the Workers Union to move up to some level of support, than moving the Ministry of Health, in just one impulse. At the same time, and following our example, we will require only a certain amount of energy to move the ecclesiastical hierarchy to a higher level of support, as opposed to move the Vice-Minister just one step towards our side.

Of course, not all of the situations are like the one here represented and there will be cases where it will be necessary to directly approach the Primary Audience and *attack* with all of our strength. A more strategic thinking allows us to visualize gradual changes and a better balance of our strengths before approaching the main target of our hunt: *the decision maker*.

This phase will define the steps to follow during the next chapter of our manual, being the communications the spine of our Advocacy Plan, therefore it is recommended to revise the steps taken during the exercises and the lessons learned and to take the necessary time to visualize our objective and the allies-opponents table. If we have the necessary clarity, it will be much easier to hit the target and to achieve strategies which allow us to *move* the key actors and the audiences.

13. Building of Alliances

The alliances are key to success for any Advocacy strategy; they can be built during any step of the process, and are therefore highly recommended. It is best to have them planned so they can be applied with the necessary strategic approach.

Once the previous exercises have been done and the level of power for each of the actors has been set, it is recommended to identify the actors who could create an alliance with our strategy. Achieving this does not only depend on the sensitivity that we could have with these actors, but also and specifically in the complex field of politics, it will require a much more ample vision than usual.



The human relationships in the western hemisphere have been centered on Win-Lose situations, where the highest competition is defined by winning or losing. The political arena in particular, responds to this logic and therefore, the establishment of alliances is not always simple; it requires a lot of intelligence, negotiation abilities and a different proposal: to establish Win-Win relationships.

To associate implies a two way relationship, meaning that we cannot expect to establish an alliance that only benefits us or our interlocutor. If we manage to apply this focus to our negotiations, we will be able to establish long term relationships, benefiting all parties involved.

Following our example and taking into consideration that we have not identified any actors who might strengthen us, it is feasible for us to establish alliances with new or non-traditional actors in order to prompt our strategy and of course, to strengthen the strategies of other actors.

The reading of the context will allow us to visualize those actors who usually have not been associated with the fight against HIV/AIDS, but who are located in a good visibility or privileged spot, at the political moment when our Advocacy action is taking place; or it might be the moment to call actors who have participated with us on other problems or that we have accompanied during their own strategies. Other movements could match with our objectives due to the similarity in social justice causes and are then eligible when it comes to choose allies and establish relationships that could provide benefits in both ways, in terms of learning, exchanges, visibility, sharing of agendas and key information and the sharing of the media and the relationships with other actors. It is therefore essential to establish an open, clear and honest dialog with them and explain our intention to establish an alliance, pointing out the benefits for each of the involved parties and the desire to share a Win-Win relationship with them.

It is almost unnecessary to mention that the limit of our relationships are our community commitments, the transparency and the legitimacy, and that those are the key values that open doors to more positive negotiations and to establish long term relationships. It is important to mention that the political arena is complex and filled with shortcuts, obstacles and questionable leaderships, because it is surrounded by power and not exactly the POWER TO DO, therefore it is essential to count with politeness, patience and diffidence when proceeding with unknown actors.

We can make a list of proposed actors; the organizations working with human rights and/or genders, those who work with issues involving the relevance of confidentiality (continuing with our example), the medical associations and the universities, among others, are good candidates to strengthen our strategy.

The alliances could be the key to make the difference between a successful and a failed Plan; it is therefore highly recommended to work on a related work session and fulfill the resulting duties,



before we implement our Plan.

14. The Fireproofs

Once reaching this point and having analyzed the previous exercises, we need to make sure (using simple community tools) that the chosen strategy, in relation to the context and the involved actors, is the most appropriate to reach our objective. Therefore we will have the selected strategy pass certain fireproofs, and if necessary, change it, adjust it or exchange it for some alternative; or, in the best of the scenarios, advance with more conviction.

Exercise: Fireproofs.

This exercise helps, without being definitive, to guide the team in being sure of the selected strategy or strategies; It is about performing a subjective evaluation of the selected strategy, first, giving numeric values to subjective situations and then crossing this values; this should be presented on a graphic, which will then allow us to compare and assess, and if necessary to make adjustments to our strategy. If more than one has been chosen, we can then select the one with the greatest possibilities.

The first graphic refers to Feasibility; which is understood as the viability, the possibility to reach achievements in our Plan by applying this strategy.

First, a numeric value needs to be given to the INTERNAL situations that could aid the development of the Plan, for example and observing the SWOT, we can identify our strengths and weaknesses and then give them a numeric value; for example, if we continue using the example used for the previous exercises, we will know by observing under a critic view, how much the group of weaknesses and strengths are worth from 1 to 10, where 1 represents the lowest value, 5 represents the presence of strengths with weaknesses who balance our possibilities and 10, when our strengths are superior.

1 2 3 4 5 6 7 8 9 10

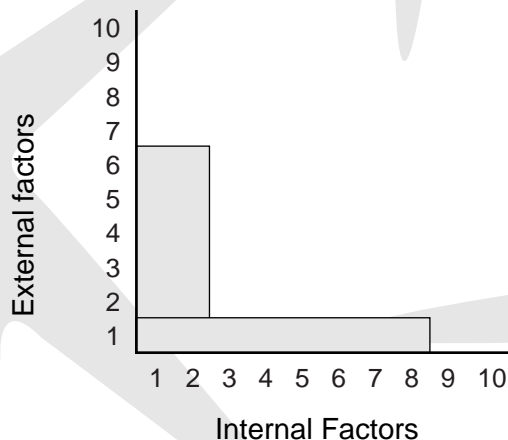
A group discussion can be held in order to define a rating in consensus; afterwards a second discussion is started, but this time, observing the external factors, using SWOT and analyzing the particular situation of the Advocacy Plan in relation to the EXTERNAL aspects, those that does not depend on us, threats and opportunities of the context, obviously considering the political climate. For example if there exist good opportunities for a given strategy, but our strongest



opponent is undergoing a moment of strength with the political climate against us, it will be necessary to assign a higher numeric value and a much lower one if the situation favors us, repeating the same situation as for the internal aspects, i.e. applying the 1 to 10 rule.

Then we proceed to cross them in a graphic, as follows:

a) Feasibility

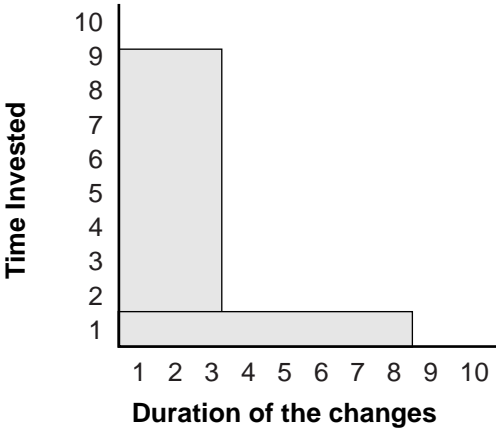


Two strategies are compared on the graphic, one where the Internal Factors are strong (nominal value 8) and the External Factors are weak (nominal value 1), against another where the Internal Factors are valued 2 and the External Factors are valued 6; once the comparison is made, it is obvious that the first strategy should be chosen, but they are not always this contrasting and other elements will need to be evaluated.

For the next fireproof it is necessary to apply numeric values in order to get close to the sustainability, which is understood as the possibility to achieve changes that will remain in time, either in a permanent way or that will influence to achieve structural changes; it is very important for Advocacy actions, not to lose your patience; on occasions our strategy hardly achieves minor changes, but these changes will build up, and added to other efforts, achieve changes in a nearly to or a definitive way. In this case we will cross on the graphic the Time INVESTED by us during its building, against the Duration or impact possibility for CHANGES in a nearly to occur or a definitive way, always considering that this policy will be registered into a program, law or regulation, becoming permanent. A policy is not feasible if it falls under the will of a decision maker.

A group discussion is suggested, and, using the same scale as in the previous exercise, numeric values should be applied to both issues, and then crossed on the graphic.

b) Sustainability



Two strategies are compared on the graphic, one showing durable changes and a low investment of time and the other showing a large investment of time and less durable changes; the option would be the first strategy, but the reality will have to be considered in terms of time investment needs. Finally and comparing the two graphics, the team can make the necessary adjustments and choose the most convenient strategies, for their impact and viability.

Once we have seen the two graphics, or having compared them in the case of using various strategies, we can reinforce them making the necessary adjustments to make them feasible or more sustainable; we can reject them or search for others and once more, pass them through the fireproofs or use them with more confidence and a sense of certainty. It is recommended to hold a group discussion about the lessons learned on this exercise and about the adjustments to be applied to our strategies. This also allows a discussion about the viability and the long term impact of the Plan itself.

L A C C A S O

CHAPTER III

THE COMMUNICATIONS: ESSENTIAL FOR OUR PLAN



An Advocacy Plan centers its impact On the communication plan designed just for this purpose; therefore the communications are the spine of the Plan in all senses. The actions arising from the Plan are transmitted to the audiences through the *Communications*; therefore this topic requires the development of skills and/or the participation of those who have experience with the design and implantation.

15. Communications and the Advocacy Plan

In essence, communication is the way we use to share, socialize or influence others with our thoughts, emotions and ideas and its efficiency is vital when it comes to make the receiver understand the meaning of it. In Advocacy we understand as communication the capacity to transmit our ideas, to deposit our values in the receiver of our message and influence their agenda; it is essential to develop management skills, i.e., the use of language as well as its accompanying factors, meaning other forms of communication, the silences, the non-verbal language, the things written between lines, among others, are part of the message in both ways, from those who send it to those who receive it. To improve our symbol reading capacity and not just the textual reading, will improve our communication skills.

The flexibility capacity is essential; the adaptation we could make out of the same message, depending on the interlocutor to whom we intent to transmit our ideas, leads the expressed message to have the desired impact, for example, It cannot be the same to transmit medical information to legislators than to members of a rural community and although we are not trying to use medical vocabulary it is our intention, and the flexibility to adapt it to each context and to each population is what gives effectiveness to communication.

The result of the communication depends on what the receptor understood and not by what the messenger tries to communicate, i.e. we could have intentions, not only genuine but also adequately expressed, but if we do not secure its planned “understanding” by the receptor, we will have, in terms of efficiency, failed in our purpose, it is therefore recommended to carefully plan the communication strategy and to put in motion our and our allies best skills, in order to get the communications to achieve the foreseen purposes.

To communicate also implies a constant listening exercise, active listening, this is not only to hear but to “listen” with all concepts therein involved, it is to answer to what the messenger is sending, it is to understand their point of view and then to make an analysis of the transmitted information. It is therefore recommended to be empathic with the messenger, without being obligated to think like them. Empathy, understood as the capacity to comprehend from the “others” point of view, this allows us to understand from their own paradigm and from their understanding of the world and it allows us to learn their strengths and believes, but also their



weaknesses and needs, which enables us, in terms of Advocacy, to perceive how to advance with the Plan and to achieve our objectives. This requires from our side, desire and disposition to learn from others and to be flexible.

16. Communication Strategies

We communicate on a daily base and in very different ways with different interlocutors who go from individuals to groups and communities, doing so using different tools. We communicate sending messages, which go from silence to the use of electronic means, smiling or sending a gesture of anger, applauding or signing the receipt of a letter. This only means that we have vast experience in communicating and we have done so to influence on various decisions.

A clear example of this is when children want to ask their parents for permission to do something and in order to achieve this they gather and define a plan. They achieved much more than the permission, they managed to develop a strategy with a clear objective and then created a communication plan using their best abilities, influencing the decision making. Examples like this happen on a daily base and they are a clear sample for the use of tools, going from the communication of a desire, blackmailing and even half thought true's, human beings are able to influence those who have the power to decide for us. We are experts! and to recognize this skills makes us use them for the targets motivating this manual.

Exercise: Communications, decisions and our skills

This exercise has as objective to sensitize the group participants about the need of a planned process as well as to recognize the group abilities on regard of communications.

The team is divided into two groups. If the group is very big, we will have to form various groups divided into two sub-groups.

The group named 1 is given the following instructions: The group has been formed by a group of peasants who work for a company, well known for its discipline and rigidity, although they always comply with their agreements and pays the peasants more than other companies of the same region. The company (group 2) will be constituted by the owners and the personnel who make the decisions. They are a foreign company who is not aware of local traditions. Group 1 has as an objective to ask group 2 for permission to celebrate a popular annual festivity which is celebrated on the venue every year and the decision depends on group 2, who have been designated for this. The game is divided into two phases, the first one, when instructions are handed out followed by a break for them to plan the actions, and the second one, when a meeting takes place and each team defines their roles.



It is clarified to group 2 that they are the owners of the productivity goal of the company and a disciplined and strict group, being as well the employers sharing their wealth with their workers, but they are asked, during the session with the peasants, to maintain their position unless they find strong reasons to agree with their petition.

Finally time is given for the social-drama to be planned, and where every group will define their roles, i.e., the director or manager, the prime stockholder, etc., and among the workers, their leader, the representative of the traditional festivities, etc., any role considered necessary according to the creativity of the group.

While group 1 and 2 interact, the facilitator will observe the skills used by each group, as a whole or individually. He/she will observe, while encouraging the discussion, the plan established by each group, the listening capacities, the empathy and the understanding. Being the result not really important, the group shares their feelings; learning's and evaluates the strategy of the opposite group. Finally, the group reflects on their observations, lists the observed abilities in each group and with particular emphasis, analyses the communication strategies, the phrasing, the body language, the listening and the key aspects that facilitated or obstructed the process. These aspects can be considered during the next steps.

The optimal application of our capacities and the clarity of our objective, will allow us to support the Advocacy Plan with a planned Communication process, facilitating the reach of the impact and influence the decisions of the actors entrusted with the decision on the matter of our Advocacy.

17. Construction of an Advocacy Plan

The matter of communications, which includes the elaboration of materials, from letters to pamphlets and others, is directed to various actors, to the audiences previously identified and to the necessities of the Advocacy Plan itself, therefore the communication strategy needs to be adapted to each case and to the moment the Plan is living and also to the constantly changing political climates which require emerging actions or a change of tone in response to the way our messages and strategies advance in time.

In the case of Advocacy and although the strategic planning is the guide based on which the advances are made step by step, the communications will indicate us the sudden changes and the various movements we will have to make in order to assure the reach of our objectives, we therefore reiterate that this is a flexible plan and not a recipe for success. Our creativity, energy and even our intuition, will guide us to assure success.



Exercise: The Main Message.

Therefore the first step is to choose the main message to be transmitted. This process which appears to be just a reflection of our objective, identified based on the community problematics, is a rationalized process of what we want to communicate as our main message. Using the selected example, it is necessary to bring the resulting materials from our exercises in order to center the attention to all those matters influencing the planning of the communication plan. The main message will be intimately related to the planned objective, although the objective will not necessarily become the message.

Let us review the objective, the strategy and the selected tone:

Promote the building and approval, by the Health Ministry, of a regulation which will control the care of people living with HIV/AIDS, guaranteeing the confidentiality of their status for a 10 month period

Proposal and negotiation with the person responsible for Public Health in the country

Negotiation and public strategy

Therefore and considering the results of our exercises, our primary and secondary audiences, the characteristics of our team, the political climate and all other factors, it is recommended to choose a main message in accordance to its possibilities of success.

The team is divided into small groups, being asked to establish a main message for a campaign, in order to achieve the objective.

Each group defines their message in accordance to what they believe can be more effective in terms of the selected audiences and their objective considering the actors related to the Plan.

It is recommended to hold a creativity and imagination exercise, in accordance to the previous work. Once a message has been selected in plenary, it is adjusted taking the best out of the messages developed by the rest of the group.

The message can respond to sensitivity, human rights, situations creating empathy with other populations, legislation aspects, among others, and it should be the main message that during



the public campaign (a negotiation and public campaign had been chosen), can reach our audiences and the actors who are able to support us the most, according to the list established before; on many occasions the focus of the strategy gets lost and is addressed to a captive audience or to those who already support our cause and this situation makes us believe that we are influencing the general population, when in reality it is not reaching the decision makers.

Example of main message:

“Confidentiality is essential to protect the human rights of the people living with HIV/AIDS”.

This example of a main message, once selected, needs to be analyzed by the team in order to be consistent with the following aspects:

- o It is legit
- o It represents community interests
- o It is based on the human rights of the affected population
- o It is consistent with our Advocacy Plan
- o It produces proximity and not fear among our audience
- o It is clear enough to be understood by people foreign to our community.

Based on the above we precede to adequate the message and adjust it to the necessities of the Plan, which could be established as follows:

“The protection of the human rights of those living with HIV/AIDS includes the right to keep their situation confidential”.

The next part of the exercise consists in using the same message applying different meanings to it so it suits different audiences, for example for the Ministry of Health and for Health Workers Union:

- Ministry of Health: it is essential to protect the confidentiality of those living with HIV/AIDS favoring the impact in public health and helping the fact of not keeping the epidemic in secret, but most of all because it is a human right.
- The Health Workers Union: The workers have the right to maintain their health status confidential from their employers, assuring the avoidance of discrimination situations.

The exercise facilitates the building of messages and allows us to know the different actors by discussing their characteristics.



The next step consists in presenting three different proposals for three different audiences; three different audiences are selected and three different and adequate formats are chosen.

The team is divided into three groups and each one is given a different audience, so they can create an appropriate format for the communication of the message. Then they will be presented to the collective and a brief constructive critic of each proposal will be made, most of all with the intention to establish if the selected format is the most adequate for the corresponding goal public.

The exercise uses previous steps that will be covered during the Communications Plan, notwithstanding, to work in advance with the process facilitates for the plan to be build with previous sensitivity and the knowledge of the obstacles that could be faced. Once the main message has been selected, we proceed to allocate it within the group of a Communications Plan.

18. How to Make a Communication Plan?

A communication plan is the one build following the Advocacy Plan and that can be restructured and adjusted during each phase of the implementation. It is essential to make these adjustments in accordance to our advances or, on the contrary, the lack of them, based on achievements or on changes observed in the political climate; the tone can also become more rigid or softened, as appropriate, during the process.

It is necessary, before we continue our Plan, to consider that not all of our efforts must concentrate in our primary audience, but also in moving our allies and opponents on the table until we finally achieve our goal. It is also important to maintain a communications system within the team, that allows us to rapidly exchange information and facilitates for the group to be aware of any situation that might present itself in relation to the Plan, therefore, it is necessary to keep our allied actors close. In our example, the users of the clinic will have a prevailing place in order for us to be aware of any changes and to be able to report any change of attitude or facts as little or less relevant they might seem.

A contingency plan also needs to be considered in order to be able to respond to the impact of the messages coming from our opponents. In our example, the Ministry of Health could launch messages to the general public that frightens the population by accusing us of trying to hide the epidemic and that in order to have a sanitary encirclement; it is a priority to openly inform the status of the affected people. Even though the issue is not even disputable from a human rights perspective, it is important to prepare the reasons why this option is unrighteous. We must prepare in order to make sure to sensitize the relevant actors and foresee the related issues with legal and ethical aspects and so be able to disarticulate this kind of messages.



This last point makes us return to the reflection about the needs to maintain a strategic and flexible thinking, be alert and know how to “listen” to the answers and silences.

The Communications Plan must reflect concrete actions, specific formats and moments of action.

Some issues to be considered for the diffusion of a message are:

The following is essential to be considered, so that our plan can be precise when it comes to hit the target:

- Who communicates the message?
- Is the source trustful for the interlocutor?
- Is the process visible?
- Is it adequate for the audience it is directed to?
- Is the format competent?
- Is it the right moment to communicate the message?

The means to transmit our message are, as pointed out before, a relevant factor. Usually, we immediately think about massive communication media, but they are not always the ideal means to transmit our messages, and their use is not always possible or the result of its management, not always the one expected. Of course, and if the media is already on our side as an ally, it will be much more simple to work with them; if this is not an option or in the case of having media in favor and against us, it is necessary for this to be considered within the Plan.

Therefore we share the following list of formats to be used for the Communications Plan:

- Press conference
- Press notes
- Personal interviews
- Group meetings
- Information pages
- Public dialogs
- Private discussions
- Political forums
- Citizen encounters
- Meetings with international and regional presence
- Symposiums
- Support or complain letters
- Raising of community complains
- Direct lobbying



- Posters
- Handouts
- Petitions
- Press newsletters
- Conferences
- Festivals
- Informal chats
- Electronic information
- E-mails
- Public mobilizations

The plan must be built making sure that the following needs are covered, considering the work done on previous exercises; this allows an ample vision of the Advocacy Plan, the context and the related actors:

Choosing of the main message

Justification and data regarding the message

Choosing an audience

Choosing a format

Development of the materials

Definition of schedules or timings

Internal communication

Alignment of efforts with the rest of the allies

Emerging situations

Key moments of the plan

Exercise: Developing a Communication Plan.

The team is asked to cover all of the previous steps, using the selected Main Message. First they will need to search for all of the required information regarding the main message, if it is a legal



matter, the laws sheltering it, international agreements, international consensus, recommendations from relevant agencies, opinions from the affected, human rights, among others. This point includes the consideration of possible answers from our opponents and the availability of information based on evidence to counteract the impact of those messages.

Afterwards, the audience to whom the message will be directed is chosen, taking into consideration the table of Allies – Opponents, the objective of the Advocacy Plan and the chosen strategy and tone.

The selection of the format must consider various options; even if one appropriate format has been chosen, some budget matters could lead us to change our selection. The development of the materials will require major group creativity, it is therefore recommended to dedicate time and energy to this matter, because and even though, sometimes experts are hired for its development, it is the team who will have to define the content of the message and its formats.

The team can be divided to focus on the following points, making sure that they are considered within the plan and to discuss the results with the rest of the group. The plan needs to remain simple in order to assure that all of the team members clearly understand it. A communications plan, without considering the development of materials, should be documented in no more than 3 to 4 pages, and could be settled as follows:

Main message: “The protection of the human rights of those living with HIV/AIDS includes the right to keep their situation confidential”.

Justification and data related to the message: it refers to the issues related to the human rights of the affected, the corresponding legislations, international recommendations, complaints from the users of the clinics, among others.

Selection of the audience: the Ministry of Health and the Health Workers Union

Selection of the format: Formal meeting with the Minister and information sheets for the union. They refer to the first step of the plan only, once the results are observed the planning of further formats is held.

Development of materials: the teams plan the meeting and develop the information sheets.

Definition of schedules or timings: the team defines when and how to set up the meeting with the Minister and the schedules and methodologies to hand out the information sheets.



Internal communication: the team defines an internal fortnight meeting strategy with users of the clinic and a constant e-mail or other electronic means communication system.

Alignment of efforts with the rest of our allies: monthly information meetings will be hold and partial information's will be given through email.

Emerging situations: the team plans emergency actions for situations that require them; it is recommended to keep the contingency plan brief and to be used in full only when really needed.

Key moments of the plan: the team builds a chronogram of the actions for the communication plan.

It is necessary for the team to work on the plan without any restrictions, meaning, without any financial challenges having been set yet so the imagination and creativity of the group can be endless, afterwards, it is adjusted to the realities imposed by the costs.

Once the plan has been built, it is recommended to make the following strategic questions and to perform the appropriate adjustments, if any.

What is the idea of the message?

Is it clearly founded, is the used information based on evidence?

Is the content appropriate for the audience receiving the message?

Is all of this information necessary or would it be strategic to omit some of it?

Does the plan consider the impact to the receiver in order to assure its efficiency?

Is the plan coherent to the objective of the raised Advocacy?

Does it respond to the community interests?

Are the selection of the format, the messenger and the moment, appropriate?

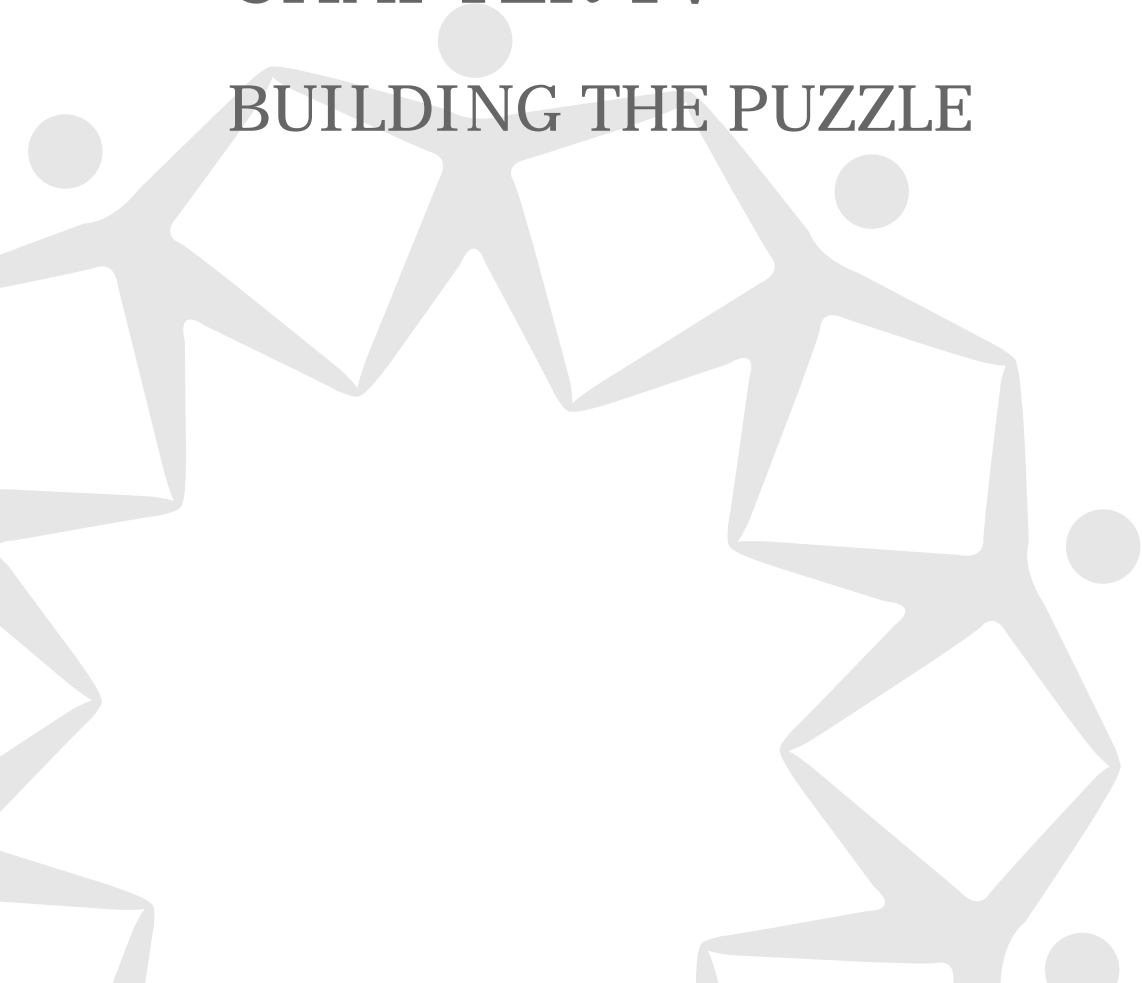
A brief discussion using the previous questions as strategic guides, will make the team feel confident about their duties and will allow them to make the necessary adjustments.

The strategy and the communications plan are the soul of the Advocacy Plan and therefore, need to be re-planned during the advance of the process, in accordance to the responses of the audience and considering the political climate. In many ways, they need to grow and undergo constant modifications and need to be controlled by people taking fast decisions and who proficiently select the moment of the Plan and consider the factors that surround it.



CHAPTER IV

BUILDING THE PUZZLE



The Advocacy Plan is almost finished, therefore it is now time to gather the proposals, exercises and previous maps and to review every product; adjustments should be made as appropriate and advances should be planned for the essential aspects of the Plan (those that have an impact on its effectiveness and that allow for its creation).

19. Monitoring and Evaluation of the Strategy

The strategy of an Advocacy needs to be measured; in some way, activists and the civil society in general are very sensitive to measure the changes, advances and recessions, challenges and obstacles, unexpected changes and changes in the political climate, in other words the adjusting of the Plan to reality, but this possibility will be developed with experience, time and the full knowledge of the involved actors; it is therefore essential to count with the possibility to measure advances based on evidence, so the team gains clarity and will not base their decisions on the subjectivity of one of their members. It is recommended not to disregard the opinions of those who have the experience and to add them to the evidences arisen from the monitoring; therefore indicators need to be created, showing us where the project is standing and where the obstacles have been located, so they can act accordingly.

The Monitoring and Evaluation process is based on the establishment of indicators: *quantitative*, to count with evidence and *qualitative*, to be able to measure the quality of the process and by adding both factors, know the situation of the process, allow us to contribute with concrete elements for evaluation and to understand if the proposed objectives have been reached or which is the cause that they have not, to learn from experience and be able to improve future plans.

The indicators are no more than parameters; specific created criteria that will help us to value our project. There exist *result* indicators, those linked to the main goal of our Advocacy Plan and *process* indicators that measure the result and achievement of key activities.

In order to be able to develop them, it is important to ask ourselves if something turned out as expected. It is therefore very important for the team to focus on the analyzing of the Advocacy Plan and to ask themselves which will be the expected results, the change of a law, a new policy or the final results are not always achieved rapidly; the reach of our goal is achieved by advancing with less ambitious objectives or in each established activity.

The indicators will help with the observation process; they will need to be observable and measurable and are generally expressed in numbers, rates and percentages. It is important to have an indicator for each expected result and to ask yourself if it is specific enough to give us clarity on the advances of the project and to make sure to have clarified the concepts and subjective aspects of the indicator. Certain aspects can be interpreted in different forms, being able to entirely modify the understanding of the indicator, it is therefore necessary to develop the most objective possible indicators, easy to understand for the entire team.



It is recommended to develop quality indicators, understood as those measuring the satisfaction of the team on this regard, evidently a subjective aspect, but necessary to value the quality of the strategy, combined with the perception of the rest of the members of the team.

Process Indicators:

The process indicators determine activities and therefore are developed in relation to concrete activities, for example:

Objective: To express the standing of the civil society organizations in a public letter addressed to the Ministry of Health in regard to the National AIDS Program, in a context of the Program reduction on a Directorship level, in order to avoid this decision.

Various activities can be hold:

- o Write a letter addressed to the Ministry of Health
- o Gather the signatures
- o Publish it in massive media

This example, although simple is very illustrative for the developing of the indicators, for the process as well as for the results.

In relation to the Objective, we must ask ourselves what and how much we want to achieve, so we will define the EXPECTED RESULT, i.e. what, according to our Plan and in relation to the activities to achieve our objective, we want and need to achieve. In this example we want to achieve the issuing of a letter and its publishing by some of the media; so we can develop one quantitative and one qualitative indicator.

Indicator:
Of letters to make.

Even though it seems logical and after reading the desired objective that we want to produce only one letter, it is necessary to express this in “numbers”, without stating the number we want to reach, so and if we would be talking about various letters, the goal would be expressed under the expected result.

Indicator:
Of letters to make.

Expected results:
1 published letter



A second indicator could refer to the number of obtained signatures for the letter from various organizations.

Indicator: # Of letters to make	Expected results: 1 published letter
Indicator: # Of letters to make.	

The expected result is the goal of organizations we want to reach, assuring the impact of the letter once published, i.e., the team must set a goal, that even though reachable must be strong enough to achieve an impact to the media and mobilize the Ministry of Health, within the frame of the Advocacy Plan.

Indicator: # Of letters to make	Expected results: 1 published letter
Indicator: # Of letters to make.	Expected results: 50 organizations sign the letter

In order to create quality indicators, we could create an indicator that gives us an idea of the quality of our objective, i.e., if we are able to reach it. For example, we could choose an indicator reflecting the impact in terms of quality and that is able to impact the Minister once it has been published by an important number of media. We also could consider that not only the number of media where it has been published will show the impact, but also the own quality of the media, therefore the indicator could be:

L A C C A S O



Indicator: # of media publishing the letter % of media with national reach	Expected results: 5 media publish the letter, 50 % have national reach
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It is therefore important to create the indicators and after observing the process, to establish the expected results, always maintaining the ambition but assuring their reachability; this will allow to compare the achieved against the proposed. It is important for the expected results to show the TIMING they will have to be reached and the audiences they are directed to. For example:

Indicator: # of media publishing the letter % of media with national reach	Expected results: 5 media publish the letter on March, 2006 3 media have national reach, one is a leftist's, one is center and the other one identifies itself with the right and the conservatism.
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Usually every activity owns a product, which can go from a report or a list of participants to, and using this example, the condensed letter for the organizations.

The above developed indicators reflect the activities and work to verify the moment we are in our Advocacy Plan, if these concrete actions have been achieved and what products we can count on.

Result Indicators:

The result indicators will inform us on the achieved impacts, and are more complicated to establish, particularly when we want to change or modify a policy; using the previous example, our objective is:

To express the position of the civil society organizations in a public letter addressed to the Ministry of Health in regard to the National AIDS Program, in a context of the Program reduction on a Directorship level, in order to avoid this decision.

Therefore the results indicator must refer to the desired CHANGE, in this case, the avoidance of a decision through public pressure, but the objective does not pretend to achieve this change with the letter only, i.e., this is about an Advocacy action, not a complete strategy; this example was chosen to facilitate the development of the indicators, therefore the results indicators that will be established, must relate with the expected change and the possible impact of expressing the vision of the civil society on this regard. Therefore we will choose some indicators that show us if we created an impact on the Ministry of Health, and not necessarily if we managed to reverse the decision about the program reduction on a lower level.

<p>Indicator: # Achieved adherence from the civil society # of responses from the Ministry of Health # of adherences to the posture through the media</p>	<p>Expected results: 50 organizations signed the letter 1 response from the Ministry requesting a meeting with the signing organizations 2 related articles in the media</p>
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Even though the change is not achieved with isolated actions, in this way we can measure the result of a concrete action.

To build a Monitoring and Evaluation Plan requires the development of Process indicators for the key activities of the Advocacy Plan, the establishing of Result indicators for the Goal of the Plan and a process defined by the group to evaluate the advances and the necessity to make adjustments during its implementation and a final evaluation session for the Plan in general, identifying the lessons learned and making recommendations for the follow-up or the start of another Advocacy Plan.

The Monitoring and Evaluation Plan can use a table like the one pictured below, to recollect pertinent information and to add the quality comments and relevant documentation. It is pertinent that a few people of the team dedicate to the monitoring and the bigger part of the group to the evaluation and wording of at least one or two lessons learned and the recommendations. This process of briefly documenting the experience, Allows to guarantee the learning process, to share the experience with others and to keep a file of the Advocacy actions for the future. It is



recommended not to plan a bigger effort than the own Advocacy Plan or to waste too much energy on the monitoring.

The table has a column to note down the verification sources, i.e., the places, documents and sources of the information, so we can demonstrate that the achievements have been reached or not; for example the letter, it is the source of a concrete activity, the documents (faxes and e-mails), are the verification of the organizations who joined the proposal and it is important to suggest the verification sources, in order to be aware of where to find the information and demonstrate concrete results to the rest of the team.

Goal of the Advocacy Plan	Result Indicator (s) (changes)	Expected Achievement (s)	Verification Source (s)
Key Activity (ies)	Process Indicator (s)	Expected Achievement (s)	Verification Source (s)

The evaluation session can be focused on the review of the table already containing the necessary information, the verification sources and the fulfillment of the monitoring plan; for example, if meetings were held every certain time, if adjustments were made or if the Goal was not reached the review of the causes.

1. Budget and Funding Strategy

Our Plan is now almost ready; this is the moment to review it and estimate the cost for implementation. Most of advocacy actions are undertaken based on the passion of the activists and with the efforts of people affected and experience in related issues; but in many occasions without financial support. However, it has to be taken into consideration that the success or the failure of the actions often depends on the financial support; that each of the actions has a price, from local transport on, materials we use, and even the time and efforts we employ.



Even if an Advocacy Plan is implemented by volunteers, it is recommendable to establish a budget, to know how much it would cost, and thus appreciating even more our work.

A budget is the estimate of cost of each of the activities, human resources, materials and infrastructure necessary for the realization of an Advocacy Plan.

To establish a budget, it is necessary to consider the basic elements for the entire process of Advocacy, and add those which are specific to our Plan. Actually, some of the elements are not applicable to every day's reality, as for instance payment of honoraries; however, if there is a possibility to get funding, it is necessary to assure that everything is included in order to make our work more professional.

It is recommendable to first identify the general elements, which refer to human resources (most important element for Advocacy); resource materials (infrastructure – place of work, office furniture, among others); office materials, business cards; brochures; banners; and for the workshops (paper, pens, flip charts, etc.); communication (related cost, phones, internet, messenger service, and others): transport and incidentals (e.g. purchase of newspapers, meetings of representatives – lunch or dinner with certain key actors, mobilization and public demonstrations, contingencies, and others).

It is therefore important to have the Plan on hand while establishing the budget, and draw a square with the elements and the origin of the resources; in case of working with resources of a funding agency, it is important to know their requirements and the respective percentages allowed for employees, for administrative cost, and in general the entire policy of the funder with respect to the use of the funds, transparency, financial reporting. We always have to remind ourselves that we as civil society have to be credible and accountable for our work at any moment.

It is recommended to put the elements in a format, as proposed hereunder:

L A C C A S O



	Amount requested to a financing entity	Contribution of the Organization	Contribution from other instances		Total cost by item
			Yes ___	No ___	
ADMINISTRATIVE EXPENSES					
Professional fees, salaries and wages	0	0	0		0
Voluntary work (the value is an approximate of your contribution)	0	0	0		0
Stationary, office articles and computer and photocopy consumables	0	0	0		0
Furniture and office equipment	0	0	0		0
Maintenance for office space and equipment			0		
Services (energy, telephone, etc.) and connectivity	0	0	0		0
Rent for office space	0	0	0		0
Subtotal	\$	\$	\$		\$
INVESTMENT EXPENSES					
Representation expenses (meals with key actors, work breakfasts, visits, among others)	0	0	0		0
Financial Aids (scholarships, support for voluntary workers, payments for consulting, etc.)	0	0	0		0
Workshops, forums, events	0	0	0		0
Photographic material	0	0	0		0
Communications and diffusion (Communication campaigns, newspaper and magazine announcements, etc.)	0	0	0		0
Various materials (blankets, posters, design and making of triptychs, etc.)	0	0	0		0
Maintenance for transportation equipment	0	0	0		0
Viaticum (meals and transportation)	0	0	0		0
Monitoring and Evaluation (plan and implementation)	0	0	0		0
Documentation, systematization and sharing of the experience	0	0	0		0
Miscellaneous (various expenses and unexpected)	0	0	0		0
Subtotal	\$	\$	\$		\$
TOTAL	\$	\$	\$		\$
Percentages	%	%	%		%



The planning exercise has to include the exercise of establishing a budget, though we know that in Advocacy there are frequently changes and that not adverted situations might come up (it is therefore that we include the element of incidentals). In order to assure the achievement of our goal and the anticipated political impact, it is important to diversify the funding sources, as working with just one funder makes us much weaker, as it might happen that one funder retains the support, thus putting in danger the achievement of our goal. It is also important that the organization or team are aware of their contribution, even though there are no economic resources involved; however, organizations always contribute with space, experience and a great number of support we never consider. When presenting our budget to a funder, it is more feasible that they see this as a co-investment, instead of considering the budget their entire responsibility.

Seeking for Funding

It is not easy to look for funding: it is a complicated process, which requires time, patience, skill, experience and contacts. Additionally, Advocacy is not always well seen by funding agencies, some of them for not being part of the action and unable to interfere for being foreigners, or because Advocacy is not on the top of their agenda; others might consider the objective delicate which could cause confrontations with the government. However, it might also be a key issue for some funders, particularly when they are presented with a well realized plan, which shows a clear strategy and a realistic opportunity to achieve its objective, specifically when they address changes in politics which have influence on a long term.

There is also the possibility that Advocacy be a part of a wider plan or a specific Project. This does not mean that it would be hidden, but to include it conveniently to be considered as part of the whole, and thus avoid the complexities explained in the former paragraph.

There are funding agencies that much appreciate to work on Advocacy within programs aimed to achieve permanent changes or political changes. It is, therefore, very important to establish a list of agencies, organizations and governments which fall under these criteria.

Looking for funding requires a very well elaborated Advocacy Plan, with clear justification and evidence that demonstrates the problem, as well as proof to sustain that the proposal is viable. Documenting of this whole process is, therefore relevant. We should elaborate a short but convincing document, which should contain the following elements:

- a) Letter of intent – This letter should not be longer than three pages, and should contain the presentation of the group, network, coalition or organization that presents the proposal; a short justification, sustainable data, and a short version of the proposal.
- b) Justification – in a few short paragraphs, you should explain why an Advocacy strategy



is necessary, it should be evidence-based and contain concrete data on the problem. It should also draw for the reader a picture on the general panorama, the particular problem, and its actual impact, and the impact it would have on a long term if actions would not be taken.

- c) General Goal – description of the problem and its fundamentals.
- d) Objectives
- e) Strategies – including the results of the emergency trials
- f) Audiences – the process is important, and not always you have to name the audiences, just describe the actions.
- g) Political climate – introduces into the general context in which the Advocacy Plan will be implemented
- h) Communication Plan
- i) Monitoring and Evaluation Plan
- j) Resources – skills and experience of the group or coalition that presents the proposal
- k) Budget
- l) Chronogram of Activities – a table that reflects the timelines in which the key activities of the Plan are executed.
- m) Executive Summary – Everything compiled in just one page.

This option would be the result of the documentation of the process; it reflects the final construction of all the former exercises and recompiles the ideas of the team in a document, which should be short and easy to read, always having in mind that the readers might be persons who might not know necessarily the situation we are talking about, and might be far from the reality we face. It is, therefore, that we have to write with clarity, simple, and without assuming that others understand what we are talking about.



CHAPTER V

BUILDING A COMMON AGENDA



The community perceptions of the problems are diverse, for some care is essential and it is, and for others prevention is essential, and it is as well. For some one population is more relevant than another and on occasions a situation that seems urgent to us, for others is just important, it seems like our priorities clash, that important comes after essential and that our agendas collide.

20. What is an Advocacy Agenda?

Due to the facts stated above it is recommended to work on an agenda, a consented listing that touches the diverse visions of the organizations, people and key actors confronting a common topic; an agenda is the opportunity to build our priorities in consensus and in a strategic way.

An Advocacy agenda is a flexible agreement that can be adjusted in accordance to our advances, changes in the political scene, recourses and related situations, but we do not recommend an accommodating agenda that goes with the ups and downs of the agencies or other agendas; it is about a Community agenda, with all of its implications. To build it requires maturity, disposition and capacity to dialog and negotiate with precision and most of all with the capacity to recognize that the problems of the community are the most relevant and not the person who proposed or implements.

An Advocacy agenda is a need when the resources are insufficient, when confrontations due to different views of the topic exist, like for example on HIV/AIDS, because its complexity not always allows us to understand the epidemic and its impact in the same way, when the state does not responds adequately, when the communities and its organizations, leaders and activists have different agendas and collide.

In reality, and for those involved in community issues, we relate with different relevant actors and therefore keep a priority agenda which we represent; on occasions these group or even personal agendas, remain hidden, affecting the development and the community work. By building a community agenda we allow the transparency of the agendas and the possibility to reach clear agreements on the issues to work and to be worked on.

In order to define the problematics and the order they will be worked on, due to the fact that it is impossible to do everything at the same time, we do not only need to think about the essential democratic processes, but also the priorities and define the reason why a topic will be considered a priority, The urgency?, The number of affected people? The representation of these groups? The person with the most influencing voice? To decide on this is not a matter of tossing a coin or to define it during a democratic voting process that will not respond to the necessities and possibilities of the topic in our agenda. Therefore it is recommended not to decide or to fall into temptation by choosing one topic over another when we really could not decide so. We could



only define, in accordance to our possibilities on how to work one topic after another, so one opens the door to another but always maintaining equity within the human resources frame, to make sure that the state works for each one of them and for each of their qualifications.

21. The Universe of the Communities and its Problems

In order to advance on the construction of a community agenda, it is necessary to visualize the communities, the problematics they confront and the universe where they are located. This is the only way to obtain clarity on their priorities and the possibilities to make impact to a particular issue or to define the best and most competent moment for each one of them; therefore the community work as a whole is necessary.

This possibility depends on the existing organized community work and the invitation of organizations and members of the community to participate on the related issues we will work on, for example the organizations and people who work with or have concerns about the issue of HIV; they could work with affected communities and others impacted by the issue; therefore a work meeting can be held in order to start the construction of a community agenda, inviting organizations, leaders and activist representatives that are not represented within the organized community, working on issues like gender, health, masculinity, unions, shelters for the ill on terminal stages, self-support groups, among others and always assuring a space for the people living with HIV, a fundamental principle while working on this topic.

The selection of a moderator is recommended, as well as to make some minimalist agreements for the session to flow: the objective of the meeting: expected results, methodology, the consequences and possible panoramas and work lineaments.

The methodology for the construction of the agenda can vary; we recommend the following exercise that will contribute with material for discussion and group definition on the issue.

Exercise: The Universe

The group is asked to discuss in plenary, the utility to count on a community agenda for Advocacy. The session will tend to elongate, therefore the presence of a moderator will be essential in order to control the time and the issues to be discussed, a session of 20 minutes should be sufficient. The idea is to discover if the grouped communities have any use for the common agenda, by this time.

Once an agreement has been reached, the team is divided into small groups, trying to mix the people coming from different thematics. The facilitator will ask each group to brainstorm on the problematic affecting the community and requiring Advocacy actions, i.e. problematics like



poverty require a response and action from the state, but problematics related to the distance between the organizations of the civil society or destructive rivalry between them, and although this could be solved through a similar plan, it would have to be implemented through other actors.

The idea is to find problems that the group has in common, in the case of the sexual and reproductive rights, HIV is a consequence and a problem, and so is gender inequity, among others.

Then the members of each group are asked to assume the role of the decision makers acting under a limited budget; they will define which topics will be handled first and which parameters will be used for the decision making.

This part of the exercise is very delicate, first because it is not part of the communities duties to decide in this way and most of all because we are creating a direct dependence to economic reasons, situations that from our vision respond to a human rights frame and not a budget; notwithstanding the idea is to put ourselves on the same level with the decision makers and to analyze which is the decision format considered by them, starting from there the reasons and visions of each participant will show.

Three or four topics are chosen as a result of the exercise and are listed in accordance to the priority given by the decision makers; they will be written down on a flipchart and the groups will be asked to change positions with one another, meaning that each group will end up with the flipchart created by another group, and so they will move on through all the flipcharts, but the one created by them. From now on they will return to their role of community members, being their duty to prioritize the topics from another vision and to relocate the priorities on the flipchart in a competent way, from most important to less important, or from the most competent in terms of best possibilities to achieve changes with an Advocacy strategy, and so on. A small amount of time is given for them to move from flipchart to flipchart.

Afterwards, and once the original group has returned to their flipchart, all groups will prepare their flipchart to be presented in plenary, among all the lists the 10 or 15 most relevant topics are prioritized. Finally and in plenary it could be agreed to add some more topics or to modify the order based on group consensus.

The group is asked to create a Universe on a big paper sheet (4 flipcharts standing side by side); the represented communities will be placed in the center and, being the theme the Universe, they could be represented by the sun. The next concentric circle will be filled with symbols representing the selected community problems, surrounding the sun

Then other elements, ideally prepared beforehand, will be added: other planets in different sizes,



comets, suns, nebulous, etc. The main idea is for the team or in small groups if we have a large amount of participants, to choose the correct actors for the response of each topic, the media or the church, a Minister or an institution, other relevant social organizations or relevant leaders, etc. They will then have to locate them, according to their perception and in accordance to their closeness or distance from the communities; the size of the elements will somehow represent their size and influence; for example, in many countries the Catholic Church plays a very important role, therefore it will be represented as a big planet, and if the communities perceive it as close it will be located near the Sun; if we select an influential organization that is rarely close, it can be represented as a comet and the distance will depend on their closeness or distance from the communities and its size will be chosen by debate and, consensus from the group.

The exercise will increase the skills of the participants, related to the knowledge of the political context and the recognition of the actors and by including them to THEIR universe, the situation around the problematics, the actors participating on the response or who ideally would participate and the communities, become very clear.

Once the Map has been finalized, the participants are asked to present it in plenary. This exercise might seem useless, but it allows a better ownership, improves and clarifies the vision of the map and allows the dark spots of the same to become clear. It is recommended to allow only a few minutes to present it in order to increase the synthesis skills of the participants, besides of the fact that the fast reading will facilitate the explanation to other members of the community that are not present at the moment. The map can be presented over and over again in order to increase the number of associates to the cause of our Advocacy Plan.

The Map itself is a powerful tool that facilitates the visualization of the community and its context, it is therefore recommended to keep and modify it, when its elements “move”.

L A C C A S O



22. Building a Common Agenda

Once the previous exercise has been held, we proceed to build an agenda; and agenda is build based on the definitions selected and prioritized by the communities. An agenda is much more than a list; it is the representation of topics, actions, pending and urgent issues, work agreements and related actors.

Therefore time needs to be allowed for the construction of the agenda and a work committee for its wording needs to be defined, as well as its diffusion among the community actors.

This is a work that requires negotiation capacities; to fall into confrontations must be avoided at all times; it helps when the main topic are the problems and the communities and not the attendees of the work meeting.

The map of the universe will be of great help on these issues because it was build by the entire group and because it allows the visualization of the size and closeness or distance of the actors of the response. Each element on the map somehow indicates us the possibilities of the selected topics to be resolved in case of an Advocacy strategy and each topic handled by a strategy will move the universe of actors, they will become closer or more distant and will even change their sizes.

The fact of prioritizing some topics does not mean to leave the other topics out of the agenda. As mentioned before, an agenda must be flexible and can change from one instant to the other, not because the state or the government gives us opportunities, but because the civil society is alert to the possibility to act in defense of their legit reasons; It is therefore that an agenda is so useful, it marks the way to be walked, achieves agreements and adds strength to their strategies. In fact, to make an Advocacy Plan, means to start with one of the topics in order to follow with the others; if some of the exercises recommended in this manual are hold, we will be able to advance to any topic as the results apply to the majority of the issues.

23. The Advocacy Plan and the Agenda of Communities

We already have an Advocacy Plan; therefore it is now important to consider the agenda as part of our Plan. Usually and when the team or the organization meets with the decision makers, contacts are build or ways are learned which are very useful if the entire agenda is contemplated and not only the exclusive topic of the Plan. It is therefore essential to learn to handle the agenda, maintain its presence and link it to the Plan at all times; for example, if our Advocacy Plan refers to access to medications, to visualize prevention on the agenda is essential to achieve changes in care quality; therefore to talk about universal access can be understood as the access to the best available care, unrestricted access to medication and access to preventive strategies and



prevention consumables.

In this way the agendas will tie one topic to the other, converting them into links of the work chain of the organizations of the civil society. Those who implement the Plan acquire different responsibilities when they meet and identify themselves with a broader agenda. On occasions and when we collide with strong obstacles that adjourn the possibility to achieve the Plan, it can be substituted by a topic with easier access for the audiences, or, one or two topics can be handled in parallel, if one of them is not on the right road, we will have the other one handy, and this means to know the topic thoroughly in order to continue the effort. Besides, and if some of our associates are building another Plan, we will be able to compare visions, contacts and results in order to strengthen our experience.

The possibility to build a community agenda becomes the option to have a solid and articulated response from the civil society allowing strengthening, the sharing of experiences and the assignment of a broader sense to the Plan. It makes possible for other topics to accompany us and therefore allows us to accompany the Plans of others, it gives us a sense of broad vision on the human rights topic and it will not allow us to be come short of sight when handling one issue only.

24. Next Steps

The Plan is ready to start the implementation phase! We have advanced from the definition of Advocacy to the building of a common agenda with the communities; it is time to agree on the following actions, to promote enthusiasm and get to work.

To define the next steps is such a simple issue that it is, most of the time, left for later; this will delay or cancel the implantation processes. Of course each coalition or group defines their agenda, but it is highly recommended to keep in mind that the punctual follow up of our Advocacy Plan depends on them.

Among other things, the following need to be defined:

- o Roles and responsibilities
- o Establishing a contact list
- o Delivery dates for some results
- o Sharing of the plan with other community actors
- o Documentation of the process
- o Dates and formats of the next meetings
- o Internal communication system
- o What to do in case of emergencies or unexpected situations



Once the above have been agreed, it is time to act, to make sure that we will reach the foreseen goal and to rest, yes, to rest; when the process is hard and complicated, we need to rest and regain our forces with a renewed spirit, this will grant us with the legitimism of our work, allow us not to forget the benefit the changes in policies will bring to the communities and most of all to allow us to make a small but significant advance to construct a more fair and equitable society, to accustom our audiences to need our points of view and to secure the place occupied by the community or better to say the one it should occupy on the solution of the problems they face; the civil society is a source of solutions.



CHAPTER VI

METHODOLOGICAL ASPECTS



For a *Practical Advocacy Manual* to work, it will depend on those who give it life. We will be able to achieve Advocacy in many ways and even without a strict methodology, but we can assure our achievements if we plan doing so by following a guide. This Manual does not pretend more than that, to be an accessible guide for those who want to implement an Advocacy Plan in a simple way, enabling them to participate in a process of change.

The experience of some organizations or people is not always easy to transmit, we can attend a magna conference about an admirable and well achieved Advocacy strategy and we will for sure learn a lot about this experience, but we will hardly replicate it, we will hardly remember the steps masterly explained by the conferencist after a month or two and we will hardly reach the achievements he shared with us, but we do can get inspired and use some of the marvelous ideas that remained recorded in our minds.

25. The Participative Methodologies

Therefore and based on our experience we have chosen to work in this manual with participative methodologies, which are those based on the knowledge and capacity of the participants. It is from there on, that the methodologies facilitate the ownership of the topics increasing, at the same, their abilities trough the exercises. They are based on learning by doing, which differences them from the traditional methodology centered on an expert, who, by being listened to, communicates his/her experiences and who after an explanation allows an exercise on the lesson learned, so it bases much of its learning capacity on the memory; when we learn with participative experiences, more than learning we comprehend, i.e. we capture and therefore we are able to execute, always as ourselves, not imitating, not copying, but creating.

For me, a very good example was how and through my profession I learned to use and handle dental materials. I was on my first semester in a traditional University, therefore the teacher, expert in the use and handling of these materials, explained to us in detail how teeth and molar impressions were taken with an elastic material which was prepared by mixing a powder made of seaweed and a portion of water; he explained how to put this mixture on the spoons once it had a specific texture and consistency and how long it had to remain inside the mouth and how, once hardened, it had to be removed and immediately after, be used to make a plaster cast , once again mixing the dust with water and making the spoon vibrate in order to eliminate the air bubbles.

Once we had listened to the lesson, we were allowed to pass to the laboratory and try to repeat the recently heard lesson. It is important to mention that it took us more than three or four lessons to adequately manage the technique. Years later another way to learn was brought to my attention: One University and before any explanations were given, asked their students to enter the laboratory, and without having any precise knowledge, to “play” with the materials: water, spoons, spatulas



and other products. After an hour of manipulating, mixing and knowing the materials, they would enter the classroom, where the teacher would explain what each of the products they “played” with was about. The students had already mixed the powder with the water, they knew the textures and consistencies produced by the material, they understood what a spoon was, in other words, they understood by experience, what they were being told. They, as opposed to us, learned in one or two sessions the most, the adequate handling of the technique.

In this way, the participative approach allows for faster advances, it facilitates for groups with different education levels to learn without this to become a barrier and most of all it allows for the knowledge to become practical, useful and understandable and to remain for more time. The exercises presented in this Manual are based on participative methodologies, where we learn from developing the exercises and do not depend on the explanations of an expert, it does not exclude them but they are not essential.

In community based groups or in academic groups, the methodology works the same way, and if we use mixed groups, it will be equally successful and applicable to a large number of community issues. The chosen visualization exercises facilitate the process of “realizing” and create the possibility to increase the skills among the participants. They help so all participants contribute to the process and allow a special place for constructive discussions, consensus and for the search of solutions as a team, not allowing for an individual to take over the process, but facilitating the visibility and empowerment of the leaderships, improving their development. Of course a combination of methodologies is highly recommended, so we can also count with the support of experts in some issue.

The here proposed methodologies, allow a certain level of play and encourage creativity, facilitate communication and education among similars and they also carry low costs and as a general rule do not require sophisticated equipment, and therefore can be used in a rural environment as well is in a big metropolis with access to top technology.

26. The Facilitator’s Role

In order to use these methodologies it becomes essential to have a facilitator, whose role is, as reflected on the name, to facilitate the learning process. Therefore it is not necessary for this person to be an expert in the art of facilitating. The facilitator needs to balance and conduct the group towards an objective, without taking leadership and disappearing once the group has taken over. To be transparent when appropriate and take charge when needed; it is desirable for her/him to have negotiation capacities, to listen more than talk, to mobilize and not conduct and to be respectful with the process of the group.

It is essential for the facilitator to thoroughly know and be fully proficient with the exercises of



this manual; to be able to answer the doubts of the process and to be very clear on its explanations. It is important for the facilitator to be respectful of the group alignments and to lead the group to control the compliance of these alignments instead of him/her to take control. This person must be flexible and look further to see where the group action is leading to and always keep in mind the objectives and results to be reached in order to prompt and motivate the group. The facilitator must be someone with leadership, but with one of those leaderships enabling processes and not heading them.

The facilitator is key for the exercises to produce the foreseen reaches, it is therefore very important for him/her to own abilities to help the group to hold discussions and land them in useful conclusions for the process and not to allow deviations from the work axis.

Facilitators exist in all latitudes, but this manual is also an opportunity for the organizations to habilitate their members in the fascinating possibility to facilitate processes and learn from them, as much or more than those participating on them.

27. Documenting Our Experience

An Advocacy action can many times be a complicated experience, filled with confrontations, losses and of course, winnings. Once we reach the objectives, it seems like we forget the devious and complex process we lived through, leaving aside the investment we made in terms of time, resources, materials, energy and creativity. When it fails or when we over-analyze the reasons for not achieving our objective, we tend trying to find who to blame or to justify ourselves.

It is therefore and in order to save time and energy to others and because of the need to learn from our experiences, that documenting is an essential process. It also becomes the best memory refresher for future agreements we might make and the best tool to re-walk our steps and adjust our Plan.

It is suggested to produce some documents in order to start the field work of our Advocacy Plan. The following are recommended:

- o Report of the Advocacy planning workshop
- o Results of the exercises (objectives, selected strategies, SWOT, maps, among others)
- o Work agreements
- o Roles and responsibilities
- o Next steps
- o Communications plan



All of the above in easy-reading, brief and simple documents, that can be consulted at any time; The Advocacy in particular, needs to be readjusted and different readings of the political climate and the placing of the audiences, as allies and opponents, need to be done

The insistence on the documentation issue is actually essential due to the persisting lack of information on this regard; this manual could be enriched in many ways if we could count with the stories of the Advocacy actions that so many activists and organizations have made, from the guidance of a formal methodology to a strategy based on experience.

The richness of these experiences has achieved for the fight against AIDS to become different, for impacts to reach even global achievements. Undocumented facts technically do not exist.

This last note is just a reminder, so we are able to print out, from a document all the way to the Change we have reached.



CHAPTER VI

METHODOLOGICAL ASPECTS



28. Acknowledgements

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29. About the Author

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