

Advocacy and Communication for Research Transparency Workbook

Joint workshop by
Universities Allied for Essential Medicines and AllTrials
USA

Adapted from [Advocating Open Access – a toolkit for librarians and research support staff](#) by [JISC](#) and [A Workshop Curriculum on Policy Advocacy Strategy Development](#) by [PATH](#).



Choose an advocacy issue.

What is the main problem you wish to address?

- Write 2 sentences describing a problem you care about:

Assess + prioritize potential advocacy issues

	Root cause #1			Root cause #2			Root cause #3		
Identify 3 root causes that lead to your problem.									
	Yes	No		Yes	No		Yes	No	
Can a policy change improve this root cause?									
Do you have experience with this root cause?									
Can a policy change happen in 3 years?									
Assess your root cause for:	Low	Med	High	Low	Med	High	Low	Med	High
Clarity									
Specificity									
Evidence-base									
Partnership potential									
Political will									
Risk									
Impact									
Based on your assessment, pick a root cause to address through advocacy. This is your advocacy issue!							My advocacy issue is:		

Choose an advocacy goal.

- My advocacy issue is:

Brainstorm 3 possible solutions to your issue.

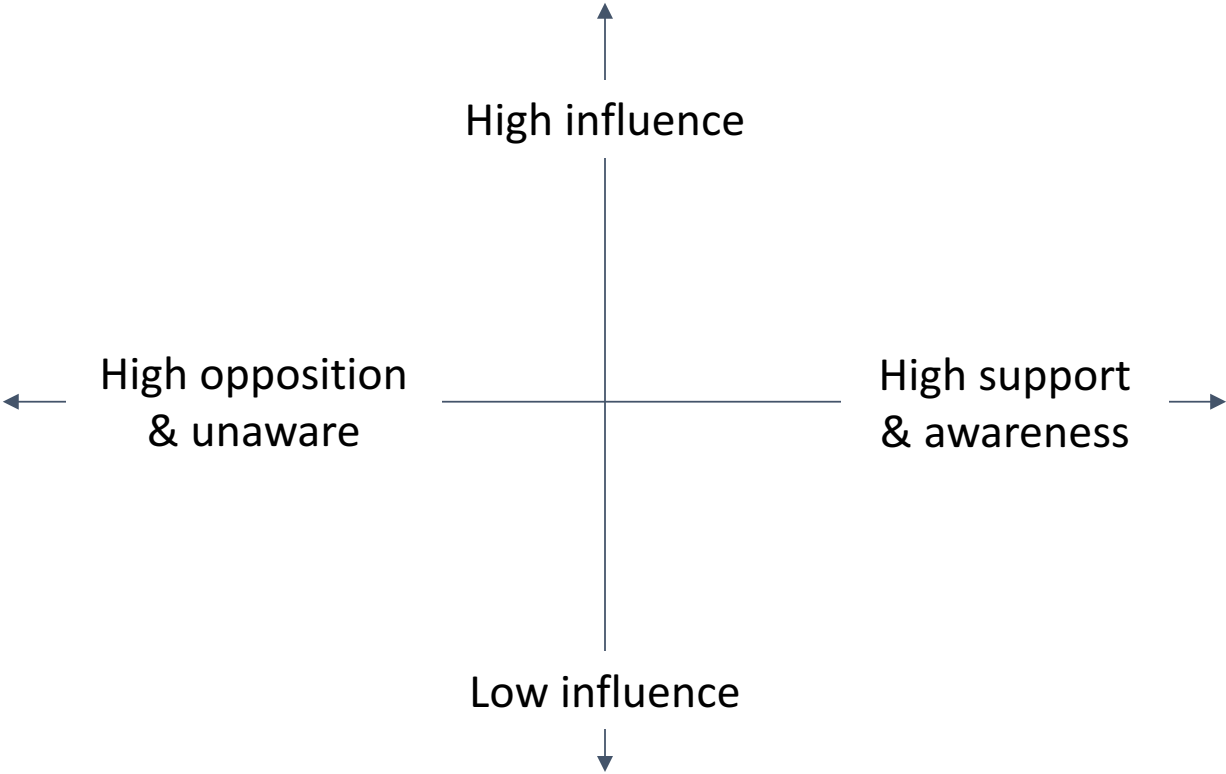
	Solution #1			Solution #2			Solution #3		
What: What is the big change you would like to see?									
How: What is the action a decision-maker can take to improve your issue?									
Who: What is the decision-making institution or individual with the power to take that action?									
When: What time frame is best for your action to be a success?									
Assess each solution for:	Low	Med	High	Low	Med	High	Low	Med	High
Clarity									
Specificity									
Evidence-base									
Partnership potential									
Political will									
Risk									
Impact									
Based on your assessment, pick a goal & write an advocacy goal statement:									
<div><div>_____ will _____ to ensure _____ by _____ .</div><div>WhoHowWhatWhen</div></div>									

Identifying influencers.

Brainstorm decision-makers and influencers.

Category of decision-makers	Specific decision-makers	Category of influencers	Specific influencers

Plot the influence vs. position of your influencers as they relate to your advocacy goal.



Identifying opponents + partners.

Brainstorm likely opposition and mitigation options.

Individuals or groups who oppose advocacy goal.	Reason for opposition.	Influence on decision-makers.			Ways to mitigate their influence.
		Low	Med	High	

Brainstorm advocacy partners.

Individuals or groups who complement your team.	Strategic reasons to partner.	Potential risks to partnership.	Ways you might collaborate.

Create an advocacy plan.

Define 3 SMART advocacy objectives. Objectives are the specific actions and steps you want decision-makers or influencers to take in support of your advocacy goal.

Advocacy objective.	Specific?	Measureable?	Achievable?	Realistic?	Timeframe?

Create an advocacy plan.

Begin with a logical framework.

Objective # 1	Verifiable indicators.	Means of verification.	Critical assumptions.
Objective			
Outcome			
Outputs			
Activities			
Objective # 2	Verifiable indicators.	Means of verification.	Critical assumptions.
Objective			
Outcome			
Outputs			
Activities			
Objective # 3	Verifiable indicators.	Means of verification.	Critical assumptions.
Objective			
Outcome			
Outputs			
Activities			

Create compelling messages.

Identify 4 communication objectives related to your activities and advocacy objectives.

Communication objective	Audience	Interests & motivation	Needs	Awareness	Support	Priority	Misconceptions
1							
2							
3							

For each objective and audience, frame and tailor information in a way that will resonate and motivate.

	What is the problem?	Why should the audience care?	What is the solution?	What do you want this audience to do?
1				
2				
3				

Consolidate into one key message per objective and audience. Identify a messenger with high expertise and high influence on your audience.

	Message	Timing	Channel	Messenger
1				
2				
3				