



Advocacy Under Constraint

A PRACTICAL FIELD TOOLKIT FOR
GRASSROOTS CIVIL SOCIETY IN SOUTH ASIA



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Table of Contents

Section 1: Introduction	3
Section 2: Modules	5
Module 1 — Issue Identification and Strategic Framing	5
Module 2 — Stakeholder and Power Analysis	23
Module 3 — Advocacy Strategy Design	35
Module 4 — Digital Advocacy and Strategic Use of Technology	47
Module 5 — Coalition and Network Building	59
Module 6 — Monitoring, Learning, and Adaptive Advocacy	64
Module 7 — Documentation, Learning, and Institutional Memory	75
Module 8 — Sustainability and Advocacy Continuity	87



Section 1: Introduction

Advocacy in Politically Sensitive Environments

Advocacy plays a central role in enabling civil society organisations to influence policy, protect rights, and promote accountability. However, in many parts of South Asia, advocacy rarely takes place in a neutral or predictable environment. Organisations working on issues such as governance reform, democratic participation, digital inclusion, and digital rights often operate in contexts where political sensitivities are high and institutional responses can be unpredictable.

In such environments, advocacy decisions carry real operational consequences. Public campaigns may attract attention from powerful actors. Policy engagement may expose organisations to legal scrutiny or regulatory pressure. Digital advocacy can invite harassment, misinformation attacks, or surveillance. At the same time, avoiding advocacy altogether can limit the ability of civil society organisations to address systemic issues affecting their communities.

This toolkit has been designed to help grassroots organisations navigate this tension. It does not attempt to provide theoretical guidance on advocacy or broad principles of civic engagement. Instead, it offers a structured set of practical tools that help organisations think through advocacy decisions carefully before taking action.

The central premise of this toolkit is that effective advocacy in sensitive environments requires deliberate strategy. Organisations must understand the issues they are addressing, the power structures that influence decision-making, the risks associated with visibility, and their own institutional readiness to engage in advocacy. By approaching advocacy as a structured decision-making process rather than a reactive activity, organisations can increase their chances of achieving impact while protecting their operational stability.

The tools in this toolkit are designed to support that process. They guide organisations in identifying strategically viable issues, mapping stakeholders and power relationships, assessing risks, choosing appropriate advocacy tactics, and responding adaptively when circumstances change.

How to Use This Toolkit

This toolkit has been designed as a practical field manual rather than a traditional advocacy guide. Its primary function is to support decision-making by providing structured worksheets, templates, and analytical tools that organisations can apply directly to their work.

Organisations may use the toolkit in two different ways depending on their needs.

The first approach is to use the toolkit sequentially when planning an advocacy initiative. In this case, organisations can move through the modules step by step, beginning with issue identification and strategic framing, then analysing stakeholders and power dynamics, assessing organisational readiness, and designing advocacy strategies. This approach supports systematic campaign planning.

The second approach is modular use. Organisations may consult individual modules when they encounter specific challenges during ongoing advocacy work. For example, an organisation preparing to launch a digital campaign may consult the module on digital advocacy and technology use. Similarly, organisations experiencing backlash or increased pressure may refer to the crisis response module for guidance.



Each module contains practical tools designed to support specific decisions. These tools are intentionally structured to be simple and adaptable so that they can be used in low-resource environments and applied across different thematic areas.

Users are encouraged to adapt the tools to their own organisational contexts. Not every worksheet will be relevant for every organisation or advocacy situation. The value of the toolkit lies in helping organisations pause, analyse their context, and make informed strategic choices before acting.

Risk-Aware Advocacy

A defining feature of this toolkit is its integration of risk awareness throughout the advocacy process. In politically sensitive environments, advocacy decisions should not be made solely on the basis on issue importance. Organisations must also consider their exposure to potential backlash, legal constraints, reputational risks, and digital threats. Ignoring these factors can place staff, partners, and beneficiaries at risk.

Rather than treating risk assessment as a separate exercise, this toolkit embeds a “risk lens” within each stage of advocacy planning. As organisations identify issues, map stakeholders, form coalitions, and design communication strategies, they are encouraged to consider the potential consequences of increased visibility and political engagement.

This approach does not discourage advocacy. Instead, it promotes strategic pacing and thoughtful decision-making. In some situations, public campaigns may be appropriate and effective. In others, quiet engagement, coalition-based advocacy, or indirect influence strategies may achieve better results while reducing exposure.

By integrating risk awareness into each step of the process, organisations can pursue advocacy goals while maintaining greater control over how and when they engage.

Structure of the Toolkit

The toolkit is organised into eight modules that correspond to different stages of advocacy planning and implementation.

- The first module focuses on issue identification and strategic framing. It helps organisations move from broad concerns to clearly defined advocacy targets and policy entry points.
- The second module focuses on stakeholder and power analysis. It provides tools to map decision-makers, influencers, and gatekeepers who shape policy outcomes.
- The third module examines organisational readiness and risk exposure. It helps organisations assess whether they possess the institutional capacity, legal preparedness, and internal systems required to engage in advocacy.
- The fourth module focuses on digital advocacy and the strategic use of technology. It guides organisations in determining when digital engagement can amplify impact and when it may increase risk.
- The fifth module explores coalition and network building. It provides tools to help organisations evaluate potential partners, clarify roles within coalitions, and manage collective advocacy efforts.
- The sixth module focuses on evidence, learning, and advocacy reporting. It introduces practical tools for documenting advocacy actions, tracking institutional responses, and capturing lessons learned.
- The seventh module addresses adaptive advocacy and crisis response. It helps organisations identify escalation patterns and respond strategically to backlash, harassment, or political pressure.



- And finally, the eighth module focuses on integrating advocacy into project implementation. It helps organisations align advocacy efforts with program objectives and reporting requirements.

Together, these modules provide a structured pathway for navigating advocacy in complex political environments. The toolkit is designed to function as a practical companion for organisations seeking to influence policy and public debate while maintaining organisational resilience.

Section 2: Modules

Module 1 — Issue Identification and Strategic Framing

Advocacy often begins with a broad sense that something is wrong. Civil society organisations frequently encounter multiple problems within their areas of work, ranging from policy gaps and regulatory failures to implementation weaknesses and systemic barriers affecting communities. However, not every problem can be addressed through advocacy, and not every issue is strategically viable in politically sensitive environments.

Effective advocacy begins with clarity. Organisations must identify issues that are both meaningful and realistically actionable within the existing political and institutional landscape. Attempting to advocate on too many issues at once can dilute resources and increase exposure without producing meaningful results. This module helps organisations move from broad concerns to clearly defined advocacy priorities. It provides structured tools that help organisations examine the nature of the issue, identify underlying causes, and determine whether there is a realistic policy or regulatory entry point for engagement.

In sensitive environments, issue selection is also a risk management decision. Some issues may be highly important but politically volatile. Others may present opportunities for incremental progress that can strengthen credibility and open doors for future engagement. The tools in this module help organisations evaluate these dynamics before committing to advocacy action.

When to Use This Module

Organisations should use this module at the earliest stage of advocacy planning, particularly when they are deciding which issue or policy area to focus on. It is useful when multiple potential issues exist and a strategic choice must be made about where to concentrate organisational effort. This module can also be revisited when an organisation feels that its advocacy efforts are becoming unfocused or when the external political environment changes and previously selected issues need to be reassessed.

Decision Pathway

The tools in this module are designed to guide organisations through a simple sequence of analytical steps. The first step is to identify and prioritise potential advocacy issues. This allows organisations to compare different problems and determine which ones are strategically viable. The second step is to analyse the underlying causes of the selected issue. Advocacy is more effective when organisations address root causes rather than surface symptoms. The third step is to identify potential policy or regulatory entry points where advocacy could realistically influence decision-making. By moving through these steps sequentially, organisations can ensure that their advocacy priorities are grounded in strategic analysis rather than reactive decision-making.

Tool 1 — Issue Prioritisation Matrix

Purpose of the Tool



This tool helps organisations compare multiple potential advocacy issues and determine which ones are strategically viable. It supports decision-making by assessing urgency, legitimacy, feasibility, and potential backlash risk.

When to Use This Tool

Use this tool when your organisation has identified several issues that require attention, but must decide which issue should become the primary focus of advocacy efforts. The main objective of this tool is to allow organisations to focus on their advocacy resources on the lowest-hanging fruit.

Instructions for Use

Keep these simple pointers in mind when using the tool. Remember, the objective is to help organisations determine the strategically viable issue.

- Begin by listing the issues your organisation is considering for advocacy.
- Assess each issue across the criteria provided in the matrix.
- Use a simple scoring scale such as low, medium, or high.
- Compare the overall balance between impact potential and risk exposure.
- Identify the issue or issues that appear both meaningful and strategically feasible.

Worksheet

The following sample worksheet can be used. The worksheet elements are explained below:

Issue / Problem	Urgency (1 - 5)	Public Legitimacy (1 - 5)	Policy Entry (1 - 5)	Organisational Capacity (1 - 5)	Backlash Exposure (1 - 5)	Visibility Sensitivity (1 - 5)	Strategic Viability

Issue Prioritisation Matrix: Use a simple scoring system where each criterion is scored from 1 to 5. For instance, 1 = very low, 3 = moderate, and 5 = very high. High urgency and legitimacy increase priority, and similarly, high backlash and visibility sensitivity increase risk.

Elements of the Worksheet:

The following are the key elements of the worksheet described above. Please consider each individual element as a contributing factor to be assessed in isolation from others.

1. Advocacy Issue:

This column identifies the specific issue being considered for advocacy. Organisations should describe the issue clearly and concisely so that everyone involved understands the problem being evaluated. Each issue should represent a distinct problem rather than a broad thematic area.

2. Urgency:



This measures how immediate and serious the issue is. Organisations should consider whether the problem is affecting communities right now, whether it is worsening, and whether delaying action could lead to greater harm or missed opportunities.

Sample Assessment:

- Is the issue currently affecting communities or stakeholders in a significant way?
- Is the situation deteriorating or likely to worsen if left unaddressed?
- Would delaying advocacy reduce the chances of meaningful intervention?

3. Public Legitimacy:

This assesses whether the issue is likely to be perceived as credible and socially legitimate by the public, media, and policymakers. Issues with strong legitimacy are easier to advocate for because they are widely understood as valid concerns rather than niche or controversial agendas.

Sample Assessment:

- Is the issue likely to be recognised as a legitimate concern by the public?
- Can the issue be explained clearly and convincingly to policymakers and the media?
- Is there an existing public debate or awareness around the issue?

4. Policy Entry Point:

This evaluates whether there is a realistic opportunity to influence policy, regulation, or institutional behaviour. Organisations should consider whether relevant policies exist, whether decision-making processes are accessible, and whether there are identifiable institutions that can act on the issue.

Sample Assessment:

- Is there a government institution or authority responsible for this issue?
- Are there policy processes such as consultations, reviews, or legislative debates where engagement is possible?
- Is there a realistic opportunity for advocacy to influence decisions?

5. Organisational Capacity:

This measures whether the organisation has the expertise, credibility, networks, or resources required to advocate effectively on the issue. Even important issues may not be suitable if the organisation lacks the knowledge, evidence, or partnerships necessary to engage decision-makers.

Sample Assessment:

- Does the organisation have expertise or experience related to this issue?
- Are there staff, partners, or networks that can support advocacy on this issue?
- Does the organisation have access to evidence or data needed to support the advocacy position?

6. Backlash Exposure:

This assesses the likelihood that advocacy on the issue could trigger resistance from powerful actors such as government institutions, political groups, or influential stakeholders. Organisations should consider potential legal pressure, reputational attacks, or other forms of retaliation.

Sample Assessment:



- Could advocacy on this issue attract legal scrutiny or regulatory pressure?
- Are there powerful actors who may actively oppose this issue?
- Could the organisation face reputational attacks or public criticism as a result?

7. Visibility Sensitivity:

This evaluates whether public campaigning on the issue could increase risk to the organisation, its staff, or its partners. Some issues may require careful engagement through private dialogue or coalition work rather than highly visible public advocacy.

Sample Assessment:

- Would public campaigning significantly increase risk to the organisation?
- Could visibility expose staff, partners, or beneficiaries to harassment?
- Would quieter forms of engagement be safer or more effective for this issue?

8. Strategic Viability:

This is the overall judgement about whether the issue should be prioritised for advocacy. It reflects the balance between impact potential and risk exposure, helping organisations decide which issues are meaningful, achievable, and manageable within their operating environment.

Sample Assessment:

- Does the issue present a realistic opportunity for positive change?
- Is the organisation reasonably prepared to engage on the issue?
- Are the potential risks manageable within the organisation's current capacity?

Interpretation Guide

This section describes how to interpret the scores as a holistic output. The idea is simple. Issues that score high on urgency and legitimacy but also carry high backlash exposure may require indirect advocacy strategies such as coalition engagement or quiet policy dialogue. Issues that demonstrate moderate urgency but strong feasibility and organisational capacity may present opportunities for achievable advocacy progress.

Risk Lens

The risk lens does not modify the scoring in the Issue Prioritisation Matrix. Instead, it acts as a reflection checkpoint to ensure that organisations consider potential exposure before committing to advocacy on the selected issue. Selecting an advocacy issue is not only a strategic decision but also a risk management decision. In politically sensitive environments, the issue an organisation chooses to engage with can influence how institutions, political actors, and the public respond to its work. Before committing to advocacy on a particular issue, organisations should take time to consider the potential consequences of increased visibility and political engagement.

Some issues may attract strong public support but also provoke resistance from influential stakeholders. Others may involve institutions or policy areas that are closely monitored or politically contested. Even when an issue appears legitimate and urgent, advocacy actions can trigger unintended responses such as regulatory scrutiny, reputational attacks, digital harassment, or pressure on organisational partners. This reflection step encourages organisations to pause and assess the potential exposure associated with each issue before moving forward. The



objective is not to avoid advocacy but to ensure that organisations are aware of the environment they are entering and are prepared to manage possible reactions.

Sample Checklist to Assess Risk:

- Could advocacy on this issue attract legal or regulatory scrutiny toward the organisation?
- Are there powerful institutions, political actors, or interest groups that may oppose this issue?
- Could public engagement on the issue trigger harassment, smear campaigns, or digital attacks?
- Would increased visibility expose staff, partners, or beneficiaries to risk?
- Does the organisation have internal systems and support mechanisms to manage potential backlash?

Action Prompt

After completing the Issue Prioritisation Matrix and reflecting on the associated risks, organisations should pause to translate their analysis into a clear decision. The purpose of this step is to ensure that the assessment carried out in the worksheet results in a deliberate strategic choice rather than remaining an analytical exercise.

At this stage, organisations should review the overall balance between urgency, legitimacy, feasibility, organisational capacity, and potential backlash. Issues that demonstrate strong strategic viability may be selected as priority advocacy areas, while others may be set aside temporarily or revisited later when conditions become more favourable. In some cases, organisations may decide to pursue an issue but adopt a more cautious advocacy approach, such as coalition engagement, research-based advocacy, or quiet policy dialogue. This step also provides an opportunity to document the reasoning behind the final decision. Recording why certain issues were prioritised helps maintain organisational clarity, supports internal coordination, and provides a useful reference for future reflection and learning.

Sample Checklist:

- Which one or two issues will the organisation prioritise for advocacy during the upcoming period?
- What factors influenced the decision to select these issues?
- What potential risks must be monitored as advocacy work begins?
- What type of advocacy approach appears most appropriate given the current environment?

Note: This tool moves from analysis to decision. The Issue Prioritisation Matrix helps compare potential advocacy issues, while the Interpretation Guide helps understand the results.

The Risk Lens is a reflection step and does not affect the scoring. The Action Prompt is used to record the final advocacy decision and its rationale.

Consider the following flow: Matrix → Interpretation (based on the scoring) → Risk Lens → Action Prompt

Sample Worksheet (Filled):

Issue / Problem	Urgency	Public Legitimacy	Policy Entry	Organsational Capacity	Backlash Exposure	Visibility Sensitivity	Strategic Viability
	(1 - 5)	(1 - 5)	(1 - 5)	(1 - 5)	(1 - 5)	(1 - 5)	
Internet Shutdown in Elections	5	5	3	4	5	5	Moderate Viability



Access to Public Information Data	3	4	4	3	2	2	High Viability
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How to Read the Matrix:

After completing the matrix, organisations should review the scores to identify which issues appear most suitable for advocacy. Issues that score high on urgency, public legitimacy, policy entry points, and organisational capacity are generally strong candidates, as they indicate both importance and feasibility. At the same time, organisations should carefully consider backlash exposure and visibility sensitivity. If these risks are high, the issue may still be important but may require a more cautious advocacy approach, such as coalition engagement, research-based advocacy, or quiet policy dialogue.

In the final column, ‘the strategic viability’, the organisations should record an overall qualitative judgement about the strategic viability of each issue. High viability indicates that the issue is suitable for direct advocacy engagement. Moderate viability suggests the issue is viable but may require a cautious or indirect strategy. Low viability indicates that the issue carries high risk or limited feasibility and may not be suitable for advocacy at this stage.

Tool 2 – Problem and Root Cause Mapping

Purpose of the Tool

This tool helps organisations analyse the underlying causes of the advocacy issue identified in tool number one. While many advocacy efforts focus on visible problems, effective advocacy requires understanding the structural and systemic factors that produce those problems. This tool helps organisations move beyond symptoms and identify the deeper drivers that sustain the issue.

When organisations clearly understand why a problem exists, they are better positioned to design advocacy strategies that target the real points of influence rather than temporary or superficial fixes.

When to Use This Tool

Use this tool after selecting a priority advocacy issue using the Issue Prioritisation Matrix. The purpose at this stage is to unpack the selected issue and understand the different layers of causes that contribute to it. This tool is particularly useful before developing an advocacy strategy, as it helps organisations avoid addressing only the symptoms of a problem and instead focus on the policy, institutional, or systemic drivers that can realistically be influenced.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to understand the problem structure before designing advocacy interventions.

- Begin by clearly defining the central issue selected in Tool 1.
- Identify the visible consequences or effects of the issue.
- Map the immediate causes that directly contribute to the problem.
- Identify deeper structural or systemic causes that sustain the issue.
- Note the institutions, actors, or systems connected to these causes.
- Use this analysis to identify where advocacy engagement could realistically influence change.



Problem and Root Cause Mapping Worksheet

This worksheet helps organisations break down the selected advocacy issue into its visible effects, immediate causes, and deeper structural causes. The objective is to identify the systemic drivers of the problem and the points where advocacy could realistically influence change.

Central Issue	Observable Effects	Immediate Causes	Structural Causes	Actors / Institutions Involved	Advocacy Leverage Points	Evidence / Information Gaps

Problem and Root Cause Mapping: Use a structured mapping approach to analyse the selected advocacy issue. Begin by stating the central issue, then identify its observable effects, the immediate causes contributing to it, and the deeper structural causes that allow it to persist. Next, map the actors or institutions connected to these causes and identify potential advocacy leverage points where change may be influenced. Finally, note any evidence or information gaps that may need further research before advocacy engagement.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations analyse the issue from a different perspective so that advocacy strategies target the most meaningful leverage points.

1. Central Advocacy Issue:

This section identifies the core issue selected for advocacy through the Issue Prioritisation Matrix. The issue should be clearly defined and written as a specific problem that requires intervention. A precise problem statement helps ensure that the root cause analysis remains focused and relevant.

Sample Assessment:

- What is the exact problem the organisation wants to address?
- How does this issue affect communities, institutions, or governance systems?
- Can the problem be described in one clear sentence?

2. Observable Effects:

Observable effects refer to the visible consequences of the problem. These may include social impacts, governance failures, service delivery gaps, or harm experienced by communities. Understanding these effects helps organisations explain why the issue matters and why advocacy is necessary.

Sample Assessment:

- What visible outcomes or harms are caused by this issue?
- Who is directly affected by these consequences?
- How does the issue manifest in real-world situations?

3. Immediate Causes:

Immediate causes are the factors that directly contribute to the problem. These causes are often operational or administrative failures such as weak enforcement, poor implementation, lack of oversight, or inadequate



institutional capacity. Identifying these causes helps organisations understand how the problem persists in practice.

Sample Assessment:

- What factors directly contribute to the problem?
- Are there administrative failures or gaps in implementation?
- Are institutions failing to enforce existing rules or policies?

4. Structural Causes:

Structural causes refer to deeper systemic factors that sustain the issue over time. These may include policy gaps, regulatory weaknesses, political incentives, economic structures, or entrenched institutional practices. Structural causes are often the most important targets for advocacy because addressing them can lead to long-term change.

Sample Assessment

- Are there weaknesses in laws, regulations, or policy frameworks?
- Do political or economic incentives allow the problem to continue?
- Are there systemic governance issues that enable the problem?

5. Actors and Institutions Involved:

This section identifies the key actors, institutions, or systems connected to the issue and its causes. Understanding who is involved helps organisations identify responsibility, accountability, and potential targets for advocacy engagement.

Sample Assessment:

- Which government institutions are responsible for this issue?
- Are there regulatory bodies or administrative agencies involved?
- Are private sector actors or other stakeholders connected to the problem?

6. Advocacy Leverage Points:

Advocacy leverage points are the points within the system where intervention may produce change. These could include policy reforms, regulatory adjustments, improved oversight mechanisms, or institutional accountability measures. Identifying leverage points helps organisations move from problem analysis to advocacy planning.

Sample Assessment

- Which causes appear most actionable through advocacy?
- Are there institutions or processes where influence is possible?
- Could policy reform, oversight, or public accountability address the problem?

7. Evidence and Information Gaps:

This section encourages organisations to identify areas where additional research or evidence may be required. Advocacy often requires credible data, case studies, or documentation to support policy engagement.

Sample Assessment

- Do we have sufficient evidence to support our understanding of the problem?
- Are there data gaps that need to be addressed?



- Would additional research strengthen the advocacy position?

Interpretation Guide

After completing the mapping exercise, organisations should review the relationship between the central issue, its effects, and the causes identified. In many cases, the most visible problem may be only the result of deeper structural factors. Effective advocacy strategies should focus on addressing the underlying causes that decision-makers have the authority to influence. Immediate causes may explain how the problem persists, but structural causes often reveal where policy change or institutional reform is necessary. Organisations should pay particular attention to the advocacy leverage points identified during the exercise. These leverage points indicate where advocacy interventions may produce the most meaningful impact.

Risk Lens

The root cause analysis process may reveal structural issues that involve powerful institutions, entrenched interests, or politically sensitive policy areas. Organisations should therefore reflect on how publicly addressing these causes may affect their operating environment. In some situations, highlighting structural failures may attract resistance from institutions or stakeholders connected to the problem. Organisations should consider how the framing of the issue and the choice of advocacy approach may influence their exposure to backlash. The objective of this reflection is not to discourage analysis but to ensure that organisations remain aware of the sensitivities surrounding the issue.

Sample Checklist to Assess Risk:

- Could identifying these root causes implicate powerful actors or institutions?
- Could public discussion of the issue trigger political or reputational backlash?
- Would publishing evidence on this issue expose staff, partners, or communities to risk?
- Would a quieter engagement strategy be safer in the early stages of advocacy?
- Does the organisation have sufficient protection mechanisms if the issue attracts attention?

Action Prompt :

After completing the root cause mapping exercise, organisations should translate their analysis into a clear understanding of where advocacy efforts should focus. This step ensures that the organisation does not simply document the causes of the issue but uses the analysis to guide strategic advocacy planning. Organisations should identify the structural causes that appear most relevant for intervention and note the institutions or actors responsible for addressing them. Documenting these insights will help ensure that subsequent advocacy strategies remain aligned with the deeper drivers of the problem rather than only its visible symptoms.

Sample Checklist:

- Which structural causes appear most responsible for sustaining the issue?
- Which institutions or actors are connected to these causes?
- Which of these causes could realistically be addressed through advocacy?
- What additional evidence or research may be required before engagement begins?

Note: This tool focuses on understanding the problem before designing advocacy strategies. The root cause mapping exercise helps organisations distinguish between symptoms and systemic drivers. The Risk Lens



encourages reflection on the sensitivity of the issue, while the Action Prompt helps translate analysis into a clear advocacy focus.

Consider the following flow: Problem Identification → Cause Mapping → Structural Analysis → Risk Reflection → Advocacy Focus

Sample Worksheet (Filled):

Central Issue	Observable Effects	Immediate Causes	Structural Causes	Actors / Institutions Involved	Advocacy Leverage Points	Evidence / Information Gaps
Frequent Internet Shutdowns	Disruption to businesses, restricted access to information and expression, digital rights violation	Administrative orders issued without oversight	Lack of legal safeguards regulation shutdown	Mnistry of Interior, telecom regulations, telecom companies	Policy refrom on shutdown procedures	Data on economic impact of shutdowns, personal narrative stories, etc

How to Read the Mapping:

After completing the mapping exercise, organisations should review the relationships between the central issue, its observable effects, and the causes identified. The objective is to understand how the visible problem is connected to the deeper factors that sustain it. In many cases, the most visible effects are only symptoms of deeper institutional or policy failures. Organisations should therefore focus on identifying the structural causes that appear to drive the problem. These causes often represent the most meaningful targets for advocacy engagement.

Organisations should also review the actors or institutions connected to these causes and examine the potential advocacy leverage points identified in the worksheet. These leverage points indicate where influence may realistically be applied. Finally, organisations should consider any evidence or information gaps identified during the exercise. Addressing these gaps through research or documentation may strengthen the organisation’s advocacy position before engagement begins.

Tool 3 — Policy Entry Point Identification

Purpose of the Tool

This tool helps organisations identify where advocacy efforts can realistically influence change. After identifying the issue and analysing its root causes, organisations must determine which institutions, processes, or decision-making spaces have the authority to address the problem. Effective advocacy requires directing effort toward actors who actually have the power to influence policy or institutional behaviour. This tool helps organisations locate those points within the system where engagement may produce meaningful change. When organisations clearly understand the policy landscape surrounding an issue, they are better positioned to design advocacy strategies that are targeted, strategic, and achievable.

When to Use This Tool



Use this tool after completing the Issue Prioritisation Matrix and the Problem and Root Cause Mapping exercise. At this stage, the organisation should already understand the issue and its underlying causes. The objective now is to identify where influence is possible within the policy or governance system. This tool is particularly useful when organisations are preparing to design an advocacy strategy and need to determine which institutions, policy processes, or regulatory mechanisms should be targeted.

Instructions for Use:

Keep the following pointers in mind when using the tool. The objective is to identify realistic entry points where advocacy engagement may influence decisions.

Begin by listing the policy area connected to the selected issue.

- Identify the institutions or authorities responsible for decisions related to the issue.
- Map the policy or regulatory processes through which decisions are made.
- Identify potential advocacy entry points where engagement may influence outcomes.
- Assess the accessibility and responsiveness of these entry points.
- Note any political or institutional constraints that may affect engagement.

Policy Entry Point Identification Worksheet:

This worksheet helps organisations map the policy and institutional landscape surrounding the selected advocacy issue. The objective is to identify decision-making spaces where advocacy engagement could realistically influence change.

Policy Area	Responsible Institutions	Decision-Making Process	Potential Advocacy Entry Points	Accessibility of Entry Points	Political or Institutional Constraints

Policy Entry Point Mapping: Use a structured mapping approach to identify the institutions, decision-making processes, and engagement opportunities connected to the selected advocacy issue. Begin by identifying the policy domain related to the issue, then map the responsible institutions and relevant policy processes. Next, identify potential advocacy entry points where influence may be possible and assess the accessibility of those entry points.

Elements of the Worksheet:

The following are the key elements of the worksheet described above. Each element helps organisations understand how decisions related to the issue are made and where advocacy engagement may be possible.

1. Policy Area:

This section identifies the policy domain connected to the advocacy issue. This may include areas such as telecommunications regulation, digital governance, public service delivery, environmental policy, or other sectors where institutional decisions shape outcomes.

Sample Assessment:

- Which policy domain does the issue fall under?
- Is the issue connected to an existing law, regulation, or policy framework?



- Does the issue intersect with multiple policy areas?

2. Responsible Institutions:

This section identifies the institutions or authorities responsible for decisions related to the issue. These may include ministries, regulatory agencies, parliamentary bodies, or administrative institutions.

Sample Assessment:

- Which government institution has primary authority over the issue?
- Are there regulatory agencies or oversight bodies involved?
- Do multiple institutions share responsibility for this policy area?

3. Decision-Making Process:

Decision-making processes refer to the mechanisms through which policy or regulatory decisions are made. These may include legislative processes, regulatory rule-making, administrative orders, or policy consultations.

Sample Assessment

- Is the issue addressed through legislation, regulation, or administrative policy?
- Are there formal consultation processes where stakeholders can engage?
- Are decisions made centrally or through multiple levels of governance?

4. Potential Advocacy Entry Points:

Advocacy entry points are the moments or spaces within the policy process where organisations may influence decisions. These could include public consultations, parliamentary hearings, policy reviews, regulatory submissions, or engagement with policymakers.

Sample Assessment:

- Are there upcoming policy consultations or review processes?
- Are there opportunities for dialogue with policymakers or regulators?
- Could research publications or policy briefs influence decision-makers?

5. Accessibility of Entry Points:

This section assesses how accessible the identified entry points are for civil society engagement. Some processes may be open and participatory, while others may be closed or politically sensitive.

Sample Assessment

- Are civil society organisations able to participate in the process?
- Is the decision-making process transparent or opaque?
- Would engagement require coalition support or indirect advocacy?

6. Political or Institutional Constraints:

This section identifies potential barriers that may limit advocacy engagement. These may include political sensitivities, institutional resistance, regulatory restrictions, or limited transparency.

Sample Assessment:

- Are there political sensitivities surrounding this issue?
- Could engagement trigger resistance from institutions or stakeholders?



- Are there legal or regulatory constraints affecting advocacy?

Interpretation Guide

After completing the mapping exercise, organisations should review the institutions, decision-making processes, and potential entry points identified in the worksheet. The objective is to determine which engagement opportunities appear most realistic and strategically viable. In many cases, multiple institutions may be connected to the issue, but not all of them will have direct decision-making authority. Organisations should prioritise engagement with actors who have the ability to influence policy outcomes. Organisations should also consider the accessibility of the entry points identified. Some opportunities may allow direct engagement with policymakers, while others may require indirect approaches such as coalition advocacy, public research, or strategic communication.

Risk Lens

Engaging with policy institutions may expose organisations to political sensitivity or institutional scrutiny. Organisations should therefore consider how the choice of entry point may affect their operating environment. Some engagement opportunities may involve highly visible advocacy efforts, while others may allow quieter engagement through dialogue or coalition participation. Organisations should carefully assess which approaches are appropriate given their capacity and risk exposure. The purpose of this reflection is to ensure that advocacy engagement remains strategic and aware of the broader political context.

Sample Checklist to Assess Risk:

- Could engagement with this institution attract political scrutiny or resistance?
- Are there actors who may oppose civil society involvement in this issue?
- Could public advocacy affect the organisation's relationship with policymakers?
- Would coalition-based engagement reduce exposure?
- Does the organisation have the capacity to sustain engagement with this institution?

Action Prompt:

After completing the policy entry point mapping exercise, organisations should identify the most realistic and strategic engagement opportunities. This step ensures that advocacy efforts are directed toward decision-making spaces where influence is possible. Organisations should prioritise entry points where engagement is both feasible and likely to produce impact. Documenting these priorities will help guide the design of advocacy strategies in later stages.

Sample Checklist:

- Which institutions should be prioritised for advocacy engagement?
- Which policy processes offer realistic opportunities for influence?
- Which entry points appear most accessible for the organisation?
- What advocacy approaches may be most effective for engaging these actors?

Note: This tool focuses on identifying where advocacy engagement may influence policy or institutional decisions. The mapping exercise helps organisations understand the decision-making landscape surrounding the issue. The Risk Lens encourages reflection on institutional sensitivities, while the Action Prompt helps translate the mapping into clear advocacy priorities.



Consider the following flow: Policy Landscape Mapping → Institutional Analysis → Entry Point Identification → Risk Reflection → Advocacy Target Selection.

Sample Worksheet (Filled):

Policy Area	Responsible Institutions	Decision-Making Process	Potential Advocacy Entry Points	Accessibility of Entry Points	Political or Institutional Constraints
Internet shutdown regulation	Ministry of Interior, Telecom Regulator	Administrative orders issued under national security framework	Policy consultations, legal reform proposals, parliamentary committee hearings	Limited public consultation, engagement possible through research and coalitions	High political sensitivity around national security
Data protection and privacy	Ministry of IT, Data Protection Authority (proposed)	Draft legislation and regulatory framework development	Public consultations, policy submissions, expert advisory groups	Moderate accessibility during legislative drafting	Potential resistance from security agencies

How to Read the Mapping

After completing the mapping exercise, organisations should review the institutions, decision-making processes, and advocacy entry points identified in the worksheet. The objective is to determine where influence is most likely to be effective. Institutions with clear authority over the issue and accessible engagement processes often represent the most practical targets for advocacy.

At the same time, organisations should consider the political and institutional sensitivities surrounding each entry point. Some opportunities may allow direct engagement with decision-makers, while others may require indirect approaches such as coalition engagement or research-based advocacy. By focusing on realistic entry points within the system, organisations can ensure that their advocacy efforts remain strategic, targeted, and achievable.

**Additional Tool (3A): This tool was specifically added to identify the exact level of governance where a solution sits, and the authority responsible for implementing it.*

Tool 3A — Governance Tier and Authority Mapping

Purpose of the Tool

This tool helps organisations identify the exact level of governance at which a solution to the advocacy issue exists, and the authority responsible for implementing that solution. While previous tools focus on understanding the issue, its causes, and the broader policy environment, this tool introduces precision by linking the problem to the correct decision-making tier and authority. In many cases, advocacy efforts become ineffective not because the issue is poorly understood, but because engagement is directed at the wrong level of governance or at actors who do not hold actual decision-making authority. An issue may appear local in its impact but may require regulatory reform at the provincial level, or even legislative change at the national level. Similarly, some problems may not require new policy at all, but rather improved enforcement of existing rules. The purpose of this tool is therefore to help organisations distinguish between different types of problems, identify where solutions



realistically sit within the governance structure, and determine which authority has the power to act. This ensures that advocacy efforts are directed toward the correct institutional level and are aligned with the type of change required.

When to Use This Tool

Use this tool after completing the Problem and Root Cause Mapping exercise. At this stage, the organisation should already understand the issue, its immediate and structural causes, and the actors connected to it. The objective now is to identify where within the governance system the solution exists and who holds the authority to implement that solution.

This tool is particularly useful before identifying policy entry points and designing advocacy strategies, as it ensures that advocacy efforts are targeted at the correct level of governance.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to match the issue with the correct governance tier and decision-making authority.

- Begin by restating the central issue identified in the previous tools.
- Determine the nature of the problem by identifying whether it is primarily an enforcement issue, a regulatory gap, or a policy or legal gap.
- Identify the level of governance at which the solution exists. This may be local or administrative, subnational or provincial, or national or federal.
- Identify the specific authority responsible for addressing the issue at that level.
- Determine the type of action required from that authority, such as enforcement of existing rules, amendment of regulations, or creation of new policy or legal frameworks.

Worksheet

The following sample worksheet can be used for governance and authority mapping. The elements of the worksheet are explained below.

Issue	Type of Problem	Level of Governance	Responsible Authority	Nature of Action Required	Clarity of Authority

Governance and Authority Mapping: Use a structured approach to identify where the solution to the advocacy issue exists within the governance system. Begin by defining the issue and identifying the nature of the problem. Then determine the appropriate level of governance and the authority responsible for addressing it. Finally, identify the type of action required from that authority.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations identify where authority lies and how advocacy efforts should be directed.

1. Issue:



This column identifies the specific advocacy issue being analysed. The issue should be clearly defined and aligned with the problem identified in earlier tools.

Sample Assessment

- What is the specific issue the organisation is addressing?
- Is the issue clearly defined and actionable?

2. Type of Problem:

This column classifies the nature of the issue. This helps determine what kind of intervention is required.

- Enforcement Issue — Existing rules or policies are not being implemented properly.
- Regulatory Gap — Rules exist but are inadequate, unclear, or restrictive.
- Policy or Legal Gap — There is no appropriate policy or legal framework addressing the issue.

Sample Assessment

- Is the problem caused by weak implementation of existing rules?
- Does the issue require changes to regulations?
- Is there a need for new policy or legislation?

3. Level of Governance:

This column identifies the tier of governance where the solution exists.

- Local or Administrative — Municipal bodies, district administration, or local regulatory offices.
- Subnational or Provincial — Provincial departments, regulatory authorities, or regional governance structures.
- National or Federal — Ministries, federal regulators, or national legislatures.

Sample Assessment

- At what level are decisions made regarding this issue?
- Is the issue controlled at a local, provincial, or national level?

4. Responsible Authority:

This column identifies the institution or authority that has the power to act on the issue at the identified level of governance.

Sample Assessment

- Which institution is responsible for addressing this issue?
- Does this authority have formal decision-making power?

5. Nature of Action Required:

This column defines what type of action is needed from the responsible authority.

- Enforce — Strengthen implementation of existing rules or policies.
- Amend — Modify existing regulations or frameworks.
- Create — Develop new policy or legal frameworks.

Sample Assessment

- Does the authority need to enforce existing rules?



- Is regulatory reform required?
- Is new legislation or policy needed?

6. Clarity of Authority:

This column assesses whether the authority responsible for the issue is clearly identified or whether responsibility is diffused across multiple institutions.

Sample Assessment

- Is there a single authority responsible for action?
- Are responsibilities shared or unclear across institutions?
- Does ambiguity in authority affect advocacy strategy?

Interpretation Guide

After completing the worksheet, organisations should review how the issue aligns with the identified governance level and authority. The objective is to ensure that advocacy efforts are directed toward actors who have the actual power to implement change. If the issue is incorrectly mapped to the wrong level of governance, advocacy efforts may fail to produce results despite strong engagement. Organisations should also examine the type of problem identified. Enforcement issues may require administrative engagement and oversight, while regulatory or policy gaps may require engagement with lawmakers or regulatory bodies. Understanding this distinction helps refine advocacy strategies and engagement approaches. Where authority is unclear or distributed across multiple institutions, organisations may need to adopt multi-level advocacy strategies or engage in coordination efforts across different governance tiers.

Risk Lens

Mapping governance and authority may reveal that the issue is connected to politically sensitive institutions or contested policy areas. Organisations should consider how engaging with authorities at different levels may affect their operating environment.

Engagement at higher levels of governance may carry greater visibility and political sensitivity, while local engagement may offer more accessible but limited influence. Organisations should assess how their advocacy approach aligns with their capacity and risk exposure.

Sample Checklist to Assess Risk

- Could engagement with this authority attract political or institutional scrutiny?
- Is the issue connected to sensitive policy areas or powerful institutions?
- Would engagement at this level increase visibility or backlash?
- Would a multi-level or coalition approach reduce exposure?

Action Prompt

After completing the governance and authority mapping exercise, organisations should confirm that their advocacy efforts are directed at the correct level of governance and toward the appropriate authority.

This step ensures that advocacy strategies are grounded in a clear understanding of where decision-making power lies and what type of action is required.

Sample Checklist



- Is the issue aligned with the correct level of governance?
- Has the responsible authority been clearly identified?
- Is the type of action required clearly defined?
- Does this mapping inform the next step in advocacy planning?

Note: This tool bridges the gap between understanding the problem and identifying policy entry points. While previous tools focus on analysing the issue and its causes, this tool ensures that advocacy efforts are directed toward the correct governance level and decision-making authority.

Consider the following flow:

Problem Analysis → Governance Mapping → Authority Identification → Risk Reflection → Policy Entry Point Mapping

Sample Sheet (Filled):

Issue	Type of Problem	Level of Governance	Responsible Authority	Nature of Action Required	Clarity of Authority
Local ISP licensing delays for community networks	Enforcement Issue	Local / Administrative	District Administration / Local Licensing Office	Enforce	Moderate (procedural ambiguity)
Restrictive provincial regulations on broadband providers	Regulatory Gap	Subnational / Provincial	Provincial IT Department / Provincial Regulator	Amend	High (clearly defined authority)
Lack of legal framework for data protection	Policy / Legal Gap	National / Federal	Ministry of IT / National Legislature	Create	Moderate (shared responsibility across institutions)

How to Read the Mapping

After completing the governance and authority mapping worksheet, organisations should review how each issue aligns with the identified level of governance and the authority responsible for action. The objective is to ensure that advocacy efforts are directed toward the correct decision-making tier. Issues classified as enforcement problems typically require engagement with administrative authorities responsible for implementation. These issues often benefit from oversight, procedural reform, or accountability mechanisms rather than new policy development.

Issues identified as regulatory gaps generally require engagement with regulatory bodies or provincial authorities responsible for amending or refining existing frameworks. These issues may involve technical consultations, policy submissions, or targeted advocacy within regulatory processes. Issues classified as policy or legal gaps typically require engagement at the national or legislative level, where new frameworks can be introduced or existing laws can be revised. These issues often involve longer-term advocacy strategies and may require coalition engagement, research-based advocacy, and sustained policy dialogue.

Organisations should also assess the clarity of authority. Where responsibility is clearly defined, advocacy efforts can be more direct and targeted. Where authority is diffused across multiple institutions, organisations may need to adopt multi-level advocacy strategies or coordinate engagement across different actors. By correctly aligning the issue with the appropriate governance tier and authority, organisations can avoid misdirected advocacy efforts and increase the likelihood of achieving meaningful policy or institutional change.



Module 2 — Stakeholder and Power Analysis

Advocacy does not take place in a vacuum. Even when an issue is clearly defined and policy entry points have been identified, the success of advocacy efforts often depends on the people and institutions that influence decision-making. Policies are shaped not only by formal authority but also by informal influence, institutional relationships, political incentives, and competing interests. Civil society organisations frequently focus their attention on institutions such as ministries or regulators. However, within those institutions there are individuals, advisors, committees, and networks that shape how decisions are made. In many cases, actors outside formal government structures, including private sector stakeholders, media actors, or civil society coalitions, may also influence outcomes.

Understanding these dynamics is essential for effective advocacy. Organisations must identify who holds decision-making authority, who influences those decision-makers, who may support the issue, and who may oppose it. Without this understanding, advocacy efforts may target the wrong actors or overlook important opportunities for engagement. This module helps organisations map the stakeholders connected to their advocacy issue and analyse the distribution of power among them. The tools in this module guide organisations in identifying key actors, assessing their influence, and determining how engagement strategies should be designed. In politically sensitive environments, stakeholder analysis is also closely linked to risk awareness. Some actors may be supportive allies, while others may be powerful opponents. Recognising these dynamics helps organisations engage strategically while avoiding unnecessary exposure.

When to Use This Module

Organisations should use this module after completing the issue identification and policy entry point analysis in Module 1. At this stage, the organisation should already understand the problem it wants to address and the policy or institutional spaces where change may occur. This module helps organisations analyse the actors connected to those spaces and determine how influence operates within them. It is particularly useful when designing an advocacy strategy or preparing to engage with policymakers, regulators, or other stakeholders. The module may also be revisited during advocacy campaigns when new actors emerge, alliances shift, or the political landscape surrounding the issue changes.

Decision Pathway

The tools in this module guide organisations through a sequence of stakeholder and power analysis steps.

- The first step is to identify and map the stakeholders connected to the issue and the policy system surrounding it. This allows organisations to understand who is involved and how different actors relate to the problem.
- The second step is to analyse the level of power and influence held by different stakeholders. Some actors may have direct decision-making authority, while others may influence outcomes indirectly.
- The third step is to determine how the organisation should engage with these stakeholders. Different actors may require different approaches, including direct dialogue, coalition-building, public advocacy, or indirect influence strategies.

By following these steps, organisations can ensure that their advocacy strategies target the actors who have the greatest ability to influence outcomes while navigating the broader political environment strategically.

Tool 4 — Actor and Influence Mapping



Purpose of the Tool

This tool helps organisations identify the individuals and groups who influence decisions related to the advocacy issue. While the previous tool mapped the policy system and institutional entry points where change can occur, this tool focuses on the people and actors who shape decisions within and around those systems. Policy outcomes are rarely determined by institutions alone. Decisions are often influenced by ministers, advisors, senior officials, political actors, industry representatives, civil society organisations, experts, and media voices who shape policy debates and influence decision-makers. Some actors may support the issue, others may oppose it, and some may remain neutral but still influence outcomes.

The purpose of this tool is therefore to map the network of actors surrounding the policy system, identify who influences decision-makers, and understand how different actors may affect advocacy efforts. By identifying these relationships, organisations can better anticipate support and opposition, build alliances, and engage stakeholders strategically.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify the actors who influence decisions related to the advocacy issue. Begin by identifying the key decision-makers connected to the issue identified in the previous tool. These may include ministers, regulators, senior officials, or other individuals with formal authority.

Next, identify actors who influence those decision-makers. These may include policy advisors, political actors, industry groups, experts, civil society organisations, or media actors who shape policy debates.

Assess each actor’s position on the issue. Some actors may support advocacy objectives, some may oppose them, and others may remain neutral but still hold influence.

Finally, assess how much influence each actor holds and how they relate to the decision-making system. This analysis helps organisations determine which actors should be prioritised for engagement and which actors may require careful monitoring.

Worksheet:

The following sample worksheet can be used for the mapping. The worksheet elements are explained below:

Actor Name	Actor Role	Connection to Decision-Makers	Position on the Issue	Level of Influence	Potential Role in Advocacy

Actor and Influence Mapping: Use a structured mapping approach to identify the individuals and groups who influence decisions related to the advocacy issue. Begin by listing key actors connected to the issue, then describe their role in the policy environment and their relationship to decision-makers. Assess each actor’s position on the issue and their level of influence. Finally, identify the potential role each actor may play in advocacy efforts, such as an ally, opponent, or engagement target.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations understand the actors who influence decisions related to the issue and how these actors may affect advocacy efforts.



1. Actor Name:

This section identifies the individual, organisation, or group connected to the advocacy issue. Actors may include policymakers, advisors, regulators, political actors, civil society organisations, industry representatives, researchers, or media actors who shape the policy environment.

Sample Assessment:

- Who are the individuals or groups influencing decisions related to this issue?
- Are there advisors, political figures, or external stakeholders connected to the issue?
- Are there actors shaping the public or policy debate around the issue?

2. Actor Role:

This section describes the role played by the actor within the policy or public environment. Some actors may be formal decision-makers, while others may act as advisors, influencers, advocates, or commentators who shape how the issue is understood.

Sample Assessment:

- Is the actor a policymaker, advisor, influencer, implementer, or observer?
- Does the actor operate within government, civil society, industry, academia, or media?
- What role does this actor play in shaping discussions about the issue?

3. Connection to Decision-Makers:

This section examines how the actor influences policy decisions. Some actors may hold direct authority, while others influence decisions through advisory roles, professional networks, political relationships, or public communication.

Sample Assessment:

- Does the actor have direct authority over decisions related to the issue?
- Does the actor influence policymakers through advisory roles or networks?
- Does the actor shape the public or political debate that influences policymakers?

4. Position on the Issue:

This section assesses whether the actor is likely to support, oppose, or remain neutral toward advocacy efforts related to the issue. Understanding these positions helps organisations anticipate potential allies and sources of resistance.

Sample Assessment:

- Is the actor likely to support the advocacy objective?
- Could the actor oppose the issue or advocate for alternative positions?
- Is the actor neutral but still influential in shaping outcomes?

5. Level of Influence:

This section evaluates how much influence the actor holds within the policy environment. Influence may come from formal authority, political relationships, expertise, financial power, or the ability to shape public debate.

Sample Assessment:

- Does the actor hold formal authority over decisions?



- Does the actor influence policymakers through networks, expertise, or political relationships?
- Can the actor shape media narratives or public opinion about the issue?

6. Potential Role in Advocacy:

This section identifies how the organisation may engage with the actor during advocacy efforts. Some actors may become allies or supporters, while others may require cautious engagement or monitoring.

Sample Assessment:

- Could this actor serve as an ally or supporter for the advocacy effort?
- Should the organisation engage directly with this actor?
- Would indirect engagement or coalition advocacy be more appropriate?

Interpretation Guide

After completing the actor mapping exercise, organisations should review the actors identified and examine how they influence the issue and the policy environment. The objective is to understand which actors hold the greatest ability to shape policy decisions or influence decision-makers. Some actors may hold direct authority within institutions, while others may influence outcomes through advisory roles, political networks, expertise, industry representation, or media influence. Organisations should also examine the positions of different actors toward the issue. Identifying supportive actors can help organisations build alliances and strengthen advocacy efforts, while recognising potential opponents helps organisations anticipate resistance and prepare appropriate strategies. Finally, organisations should review the potential roles identified in the worksheet and determine which actors should be prioritised for engagement, collaboration, or monitoring as advocacy efforts develop.

Risk Lens

Mapping influential actors can reveal relationships and interests that may involve political sensitivities or competing agendas. Organisations should therefore reflect on how engagement with certain actors may affect their operating environment.

Some actors may welcome collaboration with civil society organisations, while others may perceive advocacy efforts as a challenge to their authority, interests, or institutional position. Publicly engaging with certain actors may also create reputational or political risks if the issue is contested or politically sensitive.

This reflection step encourages organisations to consider the implications of engaging with different actors before initiating advocacy activities. The objective is not to avoid engagement, but to ensure that organisations approach stakeholder relationships strategically and with awareness of potential consequences.

Sample Checklist to Assess Risk:

- Could engagement with this actor attract political or institutional scrutiny toward the organisation?
- Is the actor connected to interests that may oppose the advocacy objective?
- Could public engagement with this actor create reputational or political risks?
- Would coalition-based engagement reduce potential exposure?
- Does the organisation have the capacity to manage potential backlash from engagement with this actor?

Action Prompt



After completing the actor and influence mapping exercise, organisations should translate their analysis into clear engagement priorities. The purpose of this step is to ensure that the mapping exercise informs the organisation’s advocacy strategy rather than remaining an analytical exercise. At this stage, organisations should review the actors identified in the worksheet and consider their level of influence, their position on the issue, and their connection to decision-making processes. This reflection helps organisations determine which actors should be prioritised for engagement, which actors may become allies, and which actors may require monitoring or cautious interaction. Documenting these decisions helps organisations focus their advocacy efforts on the actors who are most capable of influencing outcomes, while also helping them prepare for potential resistance or political sensitivities.

Sample Checklist:

- Which actors have the greatest influence over decisions related to the issue?
- Which actors are likely to support the advocacy objective and could become allies?
- Which actors may oppose the advocacy effort or influence opposition?
- Which actors should be prioritised for initial engagement or dialogue?

Consider the following flow: Actor Identification → Influence Mapping → Position Assessment → Risk Reflection → Engagement Prioritisation

Sample Worksheet (Filled):

Actor Name	Actor Role	Connection to Decision-Makers	Position on the Issue	Level of Influence	Potential Role in Advocacy
Minister for Information Technology	Government decision-maker	Direct authority over policy and regulatory direction	Mixed / cautious	High	Primary advocacy engagement target
Parliamentary Committee Member (ICT)	Legislator	Influences legislative debate and oversight	Potentially supportive	Medium	Policy briefings and legislative engagement
Telecom Regulatory Authority Officials	Regulatory implementers	Direct role in drafting and enforcing regulations	Neutral / procedural	High	Technical dialogue and regulatory submissions
Telecom Industry Association	Industry stakeholder	Lobbying influence on policymakers and regulators	Mixed interests	Medium	Consultation and negotiation
Digital Rights Civil Society Coalition	Civil society network	Advocacy influence and public campaigning	Supportive	Medium	Coalition partner
Technology Journalists and Media Commentators	Media influencers	Shape public discourse and political attention	Mixed / issue dependent	Medium	Strategic communication and awareness

How to Read the Mapping

After completing the actor and influence mapping worksheet, organisations should review the actors identified and examine how they influence decisions related to the advocacy issue. The objective is to identify which actors hold the greatest influence over decision-making and how their positions may affect advocacy efforts. Actors with high influence and direct connections to decision-makers often represent the most important engagement targets.



Organisations should also pay attention to the positions of different actors toward the issue. Supportive actors may become valuable allies or coalition partners, while actors who oppose the issue may require careful monitoring or indirect engagement strategies. Finally, organisations should review the potential roles identified for each actor and determine which actors should be prioritised for engagement. By focusing on influential actors and understanding their positions, organisations can design advocacy strategies that are more targeted, strategic, and effective.

Tool 5 — Power and Interest Analysis

Purpose of the Tool

This tool helps organisations analyse how power and interest are distributed among the actors identified in the previous tool. While the Actor and Influence Mapping exercise identified who the relevant actors are and how they relate to the issue, this tool focuses on assessing which actors matter most in shaping outcomes.

Not all actors influence policy decisions in the same way. Some actors hold significant power but may have limited interest in the issue, while others may be strongly invested in the issue but lack the authority to influence decisions directly. Understanding this distinction helps organisations determine which actors require direct engagement, which actors may serve as allies, and which actors may need to be persuaded or monitored.

The purpose of this tool is therefore to analyse the relative power and interest of actors and identify where advocacy engagement is most likely to produce meaningful influence.

When to Use This Tool

Use this tool after completing the Actor and Influence Mapping exercise. At this stage, organisations should already have a clear understanding of the actors connected to the issue and their roles in the policy environment. The objective now is to assess how much influence each actor holds and how strongly they are likely to engage with the issue. This analysis helps organisations prioritise engagement efforts and identify which actors represent the most important targets for advocacy.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to analyse the power dynamics surrounding the advocacy issue.

- Begin by listing the key actors identified in the Actor and Influence Mapping exercise.
- Assess the level of power or influence each actor holds within the policy environment.
- Assess the level of interest or stake each actor has in the issue.
- Place each actor within the Power–Interest Matrix according to these two dimensions.
- Use the results to determine which actors should be prioritised for advocacy engagement.

Worksheet:

The following worksheet can be used for the analysis.

Actor Name	Level of Power	Level of Interest	Matrix Category	Advocacy Implication



Power–Interest Matrix: Use a simple scoring approach to assess each actor across two dimensions: their level of power to influence decisions and their level of interest in the issue. Actors with high power and high interest represent the most important engagement targets. Actors with high power but low interest may require persuasion or awareness-building, while actors with high interest but lower power may become allies or coalition partners.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations analyse the relative importance of actors within the policy environment.

1. Actor Name:

This column identifies the actors previously mapped in the Actor and Influence Mapping exercise.

Sample Assessment

- Which actors were identified in the previous tool?
- Are there additional actors who should be considered in the analysis?

2. Level of Power:

This column assesses the actor’s ability to influence policy decisions or institutional behaviour. Power may arise from formal authority, political relationships, financial resources, expertise, or the ability to shape public discourse.

Sample Assessment

- Does the actor hold formal authority over policy decisions?
- Does the actor influence decision-makers through networks or expertise?
- Can the actor shape public debate or media narratives around the issue?

3. Level of Interest:

This column evaluates how strongly the actor is likely to engage with the issue. Actors with high interest are more likely to support or oppose advocacy efforts actively.

Sample Assessment

- Is the actor directly affected by the issue?
- Does the actor have political or institutional incentives related to the issue?
- Is the actor likely to participate actively in discussions about the issue?

4. Matrix Category:

This column records the category in which the actor falls within the Power–Interest Matrix.

- High Power / High Interest — Key decision actors
- High Power / Low Interest — Actors to persuade or activate
- Low Power / High Interest — Allies and coalition partners
- Low Power / Low Interest — Actors to monitor

Sample Assessment



- Does the actor combine both influence and strong interest in the issue?
- Is the actor influential but currently disengaged?
- Could the actor support advocacy but lack formal authority?

5. Advocacy Implication:

This column records how the organisation should approach engagement with the actor based on their position in the matrix.

Sample Assessment

- Should the organisation prioritise direct engagement with this actor?
- Would coalition engagement be more appropriate?
- Is monitoring sufficient rather than active engagement?

Interpretation Guide

After completing the matrix, organisations should review how actors are distributed across the four categories of the Power–Interest Matrix.

Actors with high power and high interest represent the most important engagement targets, as they hold both the authority and the motivation to shape policy outcomes.

Actors with high power but low interest may require strategic persuasion or awareness-building to encourage engagement with the issue.

Actors with high interest but lower power may become valuable allies who can support advocacy efforts through coalition work, public engagement, or knowledge contributions.

Actors with both low power and low interest generally require minimal engagement but should still be monitored for changes in position or influence.

Risk Lens

Power dynamics often involve political sensitivities and competing interests. Organisations should therefore reflect on how engaging with highly influential actors may affect their operating environment. Some actors may welcome engagement and dialogue with civil society organisations, while others may perceive advocacy efforts as a challenge to their authority or interests. This reflection step encourages organisations to assess how engagement strategies may influence relationships with powerful actors and whether certain approaches may carry greater exposure or risk.

Sample Checklist to Assess Risk:

- Could engagement with highly influential actors attract political scrutiny?
- Could advocacy efforts threaten the interests of powerful stakeholders?
- Would coalition engagement reduce potential exposure?
- Does the organisation have the capacity to sustain engagement with powerful actors?

Action Prompt:

After analysing the Power–Interest Matrix, organisations should identify which actors should be prioritised for engagement during advocacy efforts.



This step ensures that advocacy strategies focus on actors who combine influence with meaningful interest in the issue. Organisations should also consider how engagement strategies may differ depending on the actor’s position in the matrix.

Sample Checklist:

- Which actors fall within the high power and high interest category?
- Which influential actors may need to be persuaded or activated?
- Which actors may serve as allies or coalition partners?
- Which actors require monitoring rather than direct engagement?

Note: This tool focuses on analysing how power and interest are distributed among actors connected to the issue. While the previous tool identified who the relevant actors are, this tool helps organisations understand which actors hold the greatest influence and how advocacy engagement should be prioritised.

Consider the following flow: Actor Mapping → Power and Interest Analysis → Engagement Prioritisation → Risk Reflection → Advocacy Planning

Sample Worksheet (Filled):

Actor Name	Level of Power	Level of Interest	Matrix Category	Advocacy Implication
Minister for Information Technology	High	Medium	High Power / Moderate Interest	Direct engagement and policy dialogue
Parliamentary Committee Member	Medium	High	Moderate Power / High Interest	Policy briefings and legislative engagement
Telecom Industry Association	Medium	High	Moderate Power / High Interest	Negotiation and consultation
Digital Rights Coalition	Low	High	Low Power / High Interest	Coalition partner
Technology Media Commentators	Medium	Medium	Moderate Power / Moderate Interest	Strategic communication engagement

How to Read the Matrix:

After completing the matrix, organisations should review how actors are distributed across the Power–Interest categories. Actors with high power and high interest represent the most important engagement targets because they have both the authority and motivation to influence decisions. Actors with high power but lower interest may require awareness-building and persuasion. Actors with high interest but lower power may support advocacy efforts through coalition engagement or public communication. By understanding these dynamics, organisations can ensure that advocacy strategies focus on actors who have the greatest potential to shape policy outcomes.

Tool 6 — Stakeholder Engagement Strategy

Purpose of the Tool

This tool helps organisations translate their actor and power analysis into a clear engagement strategy. The previous tools helped identify relevant actors and assess how power and interest are distributed among them. This tool focuses on determining how those actors should be engaged during advocacy efforts. Different actors



require different forms of engagement. Some actors may be appropriate for direct dialogue and policy discussion, while others may be better approached through coalition advocacy, research dissemination, or strategic communication. Attempting to engage all actors in the same way may reduce the effectiveness of advocacy efforts. The purpose of this tool is therefore to help organisations design structured and appropriate engagement approaches for the actors identified in the previous tools.

When to Use This Tool

Use this tool after completing the Actor and Influence Mapping and the Power–Interest Analysis exercises. At this stage, organisations should already understand who the relevant actors are and how much influence they hold over decisions related to the issue. The objective now is to determine how those actors should be approached and engaged during advocacy efforts.

This tool is particularly useful when organisations are preparing advocacy strategies and need to determine the most appropriate engagement methods for different stakeholders.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to determine appropriate engagement strategies for different actors.

- Begin by listing the actors identified in the previous tools.
- Review the power and interest analysis associated with each actor.
- Assess the actor’s position toward the issue.
- Identify the most appropriate engagement approach for each actor.
- Consider whether engagement should be direct, coalition-based, research-driven, or communication-oriented.
- Use this analysis to prioritise engagement strategies for different actors.

Worksheet

The following sample worksheet can be used for stakeholder engagement planning. The elements of the worksheet are explained below.

Actor Name	Position on the Issue	Level of Influence	Engagement Approach	Engagement Priority

Stakeholder Engagement Planning: Use a structured approach to determine how different actors should be engaged during advocacy efforts. Begin by listing the actors identified in previous tools. Assess their position toward the issue and their level of influence. Then determine the most appropriate engagement approach and the priority level for engagement.

Elements of the Worksheet:

The following are the key elements of the worksheet described above. Each element helps organisations design appropriate engagement strategies for actors connected to the issue.

1. Actor Name:

This column identifies the actors previously mapped in the Actor and Influence Mapping exercise and analysed in the Power–Interest Matrix.



Sample Assessment

- Which actors were identified in the previous tools?
- Which actors influence decisions related to the issue?

2. Position on the Issue:

This column records whether the actor is supportive, opposed, or neutral toward the advocacy objective. Understanding this position helps organisations determine how the actor should be approached.

Sample Assessment

- Is the actor supportive of the advocacy objective?
- Is the actor likely to oppose policy change?
- Is the actor neutral but potentially persuadable?

3. Level of Influence:

This column records the actor's influence within the policy environment. Influence may arise from formal authority, political relationships, expertise, or the ability to shape public discourse.

Sample Assessment

- Does the actor hold formal authority over decisions?
- Does the actor influence policymakers through networks or expertise?
- Can the actor shape public debate around the issue?

4. Engagement Approach:

This column identifies the most appropriate strategy for engaging the actor. Engagement approaches may include direct dialogue, policy briefings, coalition advocacy, research dissemination, or public communication.

Sample Assessment

- Would direct dialogue be appropriate for this actor?
- Would coalition engagement strengthen advocacy efforts?
- Would research or evidence-based persuasion be more effective?

5. Engagement Priority:

This column records how important it is for the organisation to engage with the actor. Actors with high influence or strategic relevance typically require higher engagement priority.

Sample Assessment

- Should engagement with this actor be prioritised?
- Is occasional engagement sufficient?
- Should the organisation monitor this actor rather than actively engage?

Interpretation Guide

After completing the worksheet, organisations should review how engagement strategies differ across actors. Actors with high influence and supportive positions may become important allies and should be engaged through collaboration and policy dialogue. Influential actors who remain neutral may require persuasion through research, policy briefs, or strategic communication.



Actors who oppose the issue may require cautious engagement or indirect strategies such as coalition pressure, research-based advocacy, or public communication. By tailoring engagement strategies to different actors, organisations can ensure that advocacy efforts remain strategic and targeted.

Risk Lens

Stakeholder engagement may involve political sensitivities, particularly when dealing with powerful actors or contested policy issues. Organisations should therefore consider how engagement strategies may affect relationships with institutions or policymakers.

Some actors may respond positively to direct engagement, while others may require quieter or coalition-based approaches. Organisations should reflect on how their engagement strategy may affect their exposure to political or institutional risk.

Sample Checklist to Assess Risk

- Could engagement with this actor attract political or institutional scrutiny?
- Could engagement trigger resistance from powerful stakeholders?
- Would coalition engagement reduce potential exposure?
- Does the organisation have the capacity to manage potential backlash?

Action Prompt

After completing the stakeholder engagement worksheet, organisations should identify which actors should be prioritised for advocacy engagement. This step ensures that advocacy strategies focus on actors who have the greatest influence over decisions related to the issue and where engagement is most likely to produce meaningful results.

Sample Checklist

- Which actors should be prioritised for direct engagement?
- Which actors may serve as allies or coalition partners?
- Which actors may require persuasion or awareness-building?
- Which actors should primarily be monitored rather than engaged?

Note: This tool focuses on translating actor and power analysis into practical engagement strategies. While previous tools identified actors and analysed power dynamics, this tool helps organisations determine how those actors should be engaged during advocacy efforts.

Consider the following flow:

Actor Mapping → Power–Interest Analysis → Engagement Strategy Design → Risk Reflection → Advocacy Planning

Sample Worksheet (Filled):

Actor Name	Position on the Issue	Level of Influence	Engagement Approach	Engagement Priority
Minister for Information Technology	Mixed	High	Direct policy dialogue and policy briefs	High
Parliamentary Committee Member	Supportive	Medium	Legislative engagement and policy briefings	Medium



Telecom Industry Association	Mixed	Medium	Consultation and negotiation	Medium
Digital Rights Coalition	Supportive	Low	Coalition advocacy	Medium
Technology Media Commentators	Mixed	Medium	Strategic communication engagement	Medium

How to Read the Matrix

After completing the worksheet, organisations should review how engagement strategies align with the influence and position of each actor. Actors with high influence and supportive positions may become important allies for advancing advocacy objectives. Influential actors who remain neutral may require persuasion through evidence-based dialogue or research dissemination.

Actors with lower influence but strong interest may contribute through coalition work, research collaboration, or public communication efforts. By aligning engagement approaches with the characteristics of different actors, organisations can ensure that advocacy strategies remain focused, strategic, and effective.

Module 3 — Advocacy Strategy Design

Identifying the issue, understanding its causes, and mapping the actors connected to it are essential steps in advocacy planning. However, analysis alone does not produce change. Effective advocacy requires translating that analysis into a clear strategy that determines what the organisation wants to achieve, how it will pursue change, and which actions will move the issue forward.

Advocacy strategies help organisations move from understanding the problem to influencing decisions. They clarify objectives, define the type of change being pursued, and determine which advocacy approaches are most appropriate within the political and institutional environment.

Civil society organisations often work in complex and sensitive contexts where policy change may not occur quickly or directly. In such environments, advocacy strategies must be realistic, adaptive, and carefully sequenced. Some issues may require long-term policy reform efforts, while others may focus on incremental improvements, institutional accountability, or increased public awareness.

Advocacy strategies must therefore consider several factors, including the policy system, the actors involved, the organisation’s capacity, and the broader political context. A well-designed strategy helps organisations prioritise actions, allocate resources effectively, and maintain focus throughout the advocacy process.

This module helps organisations translate their issue analysis and stakeholder mapping into a structured advocacy strategy. The tools in this module guide organisations in defining advocacy objectives, selecting appropriate advocacy approaches, and planning coordinated actions that can influence decision-makers and policy processes.

In politically sensitive environments, advocacy strategies must also balance ambition with caution. Some actions may require public campaigning, while others may involve quiet policy dialogue, coalition engagement, or research-based advocacy. Strategic planning helps organisations choose approaches that maximise impact while managing potential risks.

When to Use This Module



Organisations should use this module after completing the issue identification, policy entry point analysis, and stakeholder mapping exercises in the previous modules. At this stage, the organisation should already understand the problem it wants to address, the institutional spaces where change may occur, and the actors who influence those decisions. This module helps organisations design a practical strategy for influencing those actors and institutions. It is particularly useful when organisations are preparing advocacy plans, launching advocacy campaigns, or coordinating coalition-based advocacy efforts. The module may also be revisited when advocacy efforts need to be adjusted due to changes in the political environment, stakeholder dynamics, or policy opportunities.

Decision Pathway

The tools in this module guide organisations through a sequence of advocacy strategy design steps. The first step is to define clear advocacy objectives and determine the type of change the organisation is seeking to achieve. This ensures that advocacy efforts remain focused and measurable. The second step is to identify appropriate advocacy approaches that align with the issue, the policy system, and the actors involved. Different contexts may require different methods, such as policy dialogue, research dissemination, coalition advocacy, or strategic communication. The third step is to translate the strategy into coordinated advocacy actions. These actions may include meetings with decision-makers, policy submissions, public awareness efforts, coalition initiatives, or research-based engagement.

By following these steps, organisations can move from analysis to action while ensuring that advocacy efforts remain strategic, coordinated, and responsive to the broader political environment.

Tool 7 — Advocacy Objective Definition

Purpose of the Tool

This tool helps organisations define a clear advocacy objective for the issue they have analysed in the previous modules. While earlier tools focused on understanding the problem, identifying root causes, mapping policy entry points, and analysing stakeholders, advocacy efforts require a clear statement of the change the organisation seeks to achieve.

Advocacy objectives translate analysis into a concrete goal. Without a clearly defined objective, advocacy efforts can become diffuse, focusing broadly on raising awareness or discussing problems without identifying the specific decision or change required.

The purpose of this tool is therefore to help organisations define a precise, realistic, and actionable advocacy objective that identifies the desired policy or institutional change and the authority responsible for making that change.

When to Use This Tool

Use this tool after completing the issue analysis and stakeholder mapping exercises in the previous modules. At this stage, the organisation should understand the issue, its underlying causes, the institutions responsible for addressing it, and the actors who influence decisions. The objective now is to translate this understanding into a clear advocacy goal. This tool is particularly useful when organisations are preparing advocacy plans, policy campaigns, or engagement strategies and need to clearly define what change they want to achieve.

Instructions for Use



Keep the following pointers in mind when using the tool. The objective is to clearly define the advocacy goal the organisation intends to pursue.

- Begin by restating the issue identified in the earlier analysis.
- Identify the specific policy, regulatory, or institutional change required to address the issue.
- Determine which institution or authority has the power to make that change.
- Define the desired outcome in clear and concrete terms.
- Consider whether the objective is realistic within the current political and institutional environment.

Worksheet

The following sample worksheet can be used to define the advocacy objectives. The worksheet elements are explained below.

Advocacy Issue	Desired Policy or Institutional Change	Responsible Decision-Maker	Expected Outcome	Time Horizon

Advocacy Objective Definition: Use a structured approach to define the advocacy objective connected to the selected issue. Begin by identifying the problem the organisation seeks to address, then define the specific change required. Identify the institution responsible for making the decision and describe the expected outcome if the change is achieved.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations clearly define the objective of their advocacy efforts.

1. Advocacy Issue:

This column identifies the issue that the organisation intends to address through advocacy. This issue should correspond to the problem identified in the earlier analysis.

Sample Assessment

- What specific issue is the organisation addressing?
- How does this issue affect communities or governance systems?

2. Desired Policy or Institutional Change:

This column describes the specific change required to address the issue. This may involve policy reform, regulatory change, improved implementation, institutional accountability, or the introduction of new policy mechanisms.

Sample Assessment

- What change is needed to address the issue?
- Does this require a policy reform, regulatory adjustment, or administrative action?

3. Responsible Decision-Maker:

This column identifies the institution or authority responsible for making the change described in the objective.



Sample Assessment

- Which institution has the authority to make this decision?
- Is the change determined by legislation, regulation, or administrative policy?

4. Expected Outcome:

This column describes the expected result if the advocacy objective is achieved. It helps organisations articulate why the proposed change is meaningful.

Sample Assessment

- What practical improvements would result from this change?
- How would communities, institutions, or governance systems benefit?

5. Time Horizon:

This column records the expected timeframe for achieving the objective. Some advocacy goals may be short-term and achievable within existing policy processes, while others may require longer-term engagement.

Sample Assessment

- Is the objective achievable within the short term?
- Does the change require long-term policy reform?

Interpretation Guide

After completing the worksheet, organisations should review whether the advocacy objective clearly identifies the change being pursued and the authority responsible for making that change.

A well-defined advocacy objective should describe a concrete change rather than a broad aspiration. Objectives that clearly identify the decision-maker and the expected outcome are easier to translate into practical advocacy strategies.

If the objective appears too broad or unclear, organisations may need to refine it to ensure that advocacy efforts remain focused and actionable.

Risk Lens

Advocacy objectives may involve policy reforms or institutional changes that affect powerful actors or sensitive policy areas. Organisations should therefore consider how the objective may be perceived by decision-makers and stakeholders.

Some objectives may require public advocacy efforts, while others may be better pursued through dialogue, coalition engagement, or research-based advocacy. Reflecting on these dynamics helps organisations pursue objectives that are both meaningful and strategically viable.

Sample Checklist to Assess Risk:

- Could pursuing this objective attract political or institutional resistance?
- Does the objective challenge the interests of powerful stakeholders?
- Would public advocacy increase exposure or backlash?
- Would quieter engagement approaches be more appropriate?

Action Prompt



After defining the advocacy objective, organisations should confirm whether the objective provides a clear foundation for advocacy strategy development. This step ensures that advocacy efforts are focused on achieving a specific and meaningful change rather than broadly addressing an issue without a clear target.

Sample Checklist:

- Does the objective clearly describe the change being sought?
- Is the responsible decision-maker clearly identified?
- Is the expected outcome meaningful and realistic?
- Is the objective achievable within the organisation’s capacity?

Note: This tool focuses on defining the specific change the organisation seeks to achieve through advocacy. While earlier tools analysed the issue, institutions, and stakeholders, this tool translates that analysis into a clear advocacy objective.

Consider the following flow: Issue Analysis → Policy System Understanding → Stakeholder Mapping → Advocacy Objective Definition → Strategy Development

Sample Worksheet (Filled):

Advocacy Issue	Desired Policy or Institutional Change	Responsible Decision-Maker	Expected Outcome	Time Horizon
Lack of transparency in telecom licensing decisions	Introduce mandatory public disclosure of licensing criteria and decisions	Telecommunication’s Regulatory Authority	Improved transparency and accountability in telecom regulation	Medium term
Weak enforcement of digital data protection guidelines	Establish enforcement mechanism and penalties for non-compliance	Ministry of Information Technology	Stronger compliance with data protection safeguards	Medium term

How to Read the Matrix:

After completing this worksheet, organisations should review whether the advocacy objectives clearly describe the change being pursued and the authority responsible for making that change.

Objectives that clearly identify the policy change required and the institution responsible for implementing it provide a strong foundation for advocacy strategy design. By defining clear and realistic objectives, organisations can ensure that their advocacy efforts remain focused, strategic, and outcome-oriented.

Tool 8 — Advocacy Approach Selection

Purpose of the Tool

This tool helps organisations determine the most appropriate advocacy approaches for achieving the advocacy objective defined in the previous tool. While the previous tool clarified the specific policy or institutional change the organisation seeks to achieve, this tool focuses on identifying the strategic methods through which that change can be pursued.

Advocacy can take many different forms. Some advocacy efforts rely on direct engagement with policymakers through dialogue, policy briefings, or consultations. Others may depend on research dissemination, coalition advocacy, media engagement, or public awareness efforts. In some situations, quiet engagement may be more



effective, while in others public mobilisation may help generate pressure for change. The purpose of this tool is therefore to help organisations assess different advocacy approaches and select those that best align with the issue, the policy environment, the actors involved, and the organisation’s capacity. Selecting appropriate advocacy approaches ensures that advocacy strategies remain realistic, targeted, and suited to the political context in which the organisation operates.

When to Use This Tool

Use this tool after defining the advocacy objective in the previous tool. At this stage, the organisation should clearly understand the policy change it seeks to achieve, the institutions responsible for making that change, and the actors who influence those decisions.

The objective now is to determine which advocacy approaches are most likely to influence those actors and institutions effectively. This tool is particularly useful when organisations are preparing advocacy strategies or planning advocacy campaigns and need to decide how to engage decision-makers and stakeholders.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify advocacy approaches that are most appropriate for achieving the defined objective:

- Begin by restating the advocacy objective identified in the previous tool.
- Identify the decision-makers and actors connected to the objective.
- Consider different advocacy approaches that may influence those actors.
- Assess how appropriate each approach is within the political and institutional environment.
- Consider the organisation’s capacity, networks, and available resources.
- Select the approaches that appear most realistic and strategically effective.

Advocacy Approach Selection Worksheet

The following sample worksheet can be used to identify the advocacy approaches most suitable for achieving the advocacy objective.

Advocacy Objective	Target Decision-Maker	Potential Advocacy Approach	Context Suitability	Organisational Capacity	Strategic Priority

Advocacy Approach Selection: Use a structured assessment to evaluate different advocacy approaches that could support the achievement of the advocacy objective. Begin by restating the objective and identifying the decision-makers connected to it. Then assess potential advocacy approaches such as policy dialogue, research dissemination, coalition advocacy, or public communication. Evaluate how suitable each approach is within the political environment and whether the organisation has the capacity to pursue it.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations determine which advocacy approaches are most appropriate for achieving the defined objective.

1. Advocacy Objective:



This column records the advocacy objective defined in the previous tool. Restating the objective helps ensure that advocacy approaches remain aligned with the desired policy or institutional change.

Sample Assessment

- What change is the organisation seeking to achieve?
- Which institution or authority must implement this change?

2. Target Decision-Maker:

This column identifies the institution or authority responsible for implementing the advocacy objective. Understanding the decision-maker helps organisations determine which advocacy approaches may influence the decision-making process most effectively.

Sample Assessment

- Which institution has the authority to implement the desired change?
- Are there specific officials, departments, or committees involved?

3. Potential Advocacy Approach:

This column lists the possible advocacy approaches that may influence the decision-maker or policy process. Examples may include policy dialogue, research dissemination, coalition advocacy, public communication, media engagement, or participation in policy consultations.

Sample Assessment

- Could direct dialogue with policymakers influence the decision?
- Would research or policy briefs help shape the debate?
- Would coalition advocacy strengthen influence?

4. Context Suitability:

This column evaluates how appropriate the advocacy approach is within the political and institutional environment. Some approaches may be highly effective in open policy environments but less suitable in politically sensitive contexts.

Sample Assessment

- Is this approach appropriate within the current political environment?
- Would the approach attract unwanted attention or backlash?
- Would quieter engagement be more effective?

5. Organisational Capacity:

This column assesses whether the organisation has the resources, expertise, networks, or partnerships required to implement the selected advocacy approach.

Sample Assessment

- Does the organisation have the expertise to implement this approach?
- Are there partners or networks that can support the effort?
- Does the organisation have sufficient time and resources?

6. Strategic Priority:



This column records whether the approach should be prioritised within the advocacy strategy. Some approaches may be essential, while others may be supportive or secondary.

Sample Assessment

- Should this approach be prioritised within the advocacy strategy?
- Would combining this approach with others strengthen advocacy efforts?

Interpretation Guide

After completing the worksheet, organisations should review the advocacy approaches identified and examine how well they align with the advocacy objective, the decision-makers involved, and the political environment. The objective is to determine which approaches are most likely to influence decision-makers and advance the advocacy objective. In many cases, effective advocacy strategies combine multiple approaches. For example, organisations may combine policy dialogue with research dissemination or coalition advocacy with public communication. Organisations should prioritise approaches that appear both feasible and strategically effective within the current context.

Risk Lens

Different advocacy approaches carry different levels of visibility and potential exposure. Organisations should therefore consider how selected approaches may affect their operating environment. Highly visible advocacy actions such as media campaigns or public mobilisation may attract attention from institutions or stakeholders connected to the issue. In some contexts, quieter engagement through policy dialogue, coalition work, or research dissemination may reduce exposure while still influencing decision-making. This reflection step encourages organisations to consider the potential risks associated with different advocacy approaches before implementing them.

Sample Checklist to Assess Risk:

- Could this advocacy approach attract political or institutional scrutiny?
- Would highly visible advocacy increase exposure to backlash?
- Would coalition-based engagement reduce potential risks?
- Does the organisation have systems in place to manage potential backlash?

Action Prompt

After assessing possible advocacy approaches, organisations should identify which approaches will form the core of their advocacy strategy. This step ensures that advocacy efforts focus on approaches that are realistic, aligned with the objective, and suited to the political context.

Sample Checklist:

- Which advocacy approaches should be prioritised?
- Which approaches best influence the identified decision-makers?
- Does the organisation have sufficient capacity to implement these approaches?
- Would combining multiple approaches strengthen the strategy?

Note: This tool focuses on selecting appropriate advocacy approaches for achieving the defined advocacy objective. While the previous tool clarified the specific policy or institutional change being pursued, this tool determines how organisations should attempt to influence that change.



The Risk Lens encourages organisations to consider how different advocacy approaches may affect their exposure to political or institutional sensitivities. The Action Prompt helps organisations confirm which approaches will form the foundation of their advocacy strategy.

Consider the following flow:

Advocacy Objective Definition → Advocacy Approach Selection → Risk Reflection → Strategy Confirmation

Sample Worksheet (Filled):

Advocacy Objective	Target Decision-Maker	Potential Advocacy Approach	Context Suitability	Organisational Capacity	Strategic Priority
Improve transparency in telecom licensing processes	Telecommunications Regulatory Authority	Policy dialogue with regulators	High	Moderate	High
Improve transparency in telecom licensing processes	Parliamentary oversight committee	Policy brief submission	High	High	High
Improve transparency in telecom licensing processes	Media and civil society networks	Public awareness campaign	Moderate	Moderate	Medium

How to Read the Matrix:

After completing the worksheet, organisations should review how different advocacy approaches align with the advocacy objective and the decision-makers involved. Approaches that demonstrate strong context suitability and organisational capacity are generally the most appropriate for prioritisation. These approaches are more likely to influence decision-makers while remaining feasible for the organisation to implement. In many cases, combining complementary approaches such as policy dialogue, research dissemination, and coalition engagement may strengthen advocacy efforts. By selecting advocacy approaches that align with both the objective and the operating environment, organisations can design strategies that are both effective and manageable.

Tool 9 — Advocacy Action Planning

Purpose of the Tool

This tool helps organisations translate their advocacy strategy into a concrete and coordinated set of actions. While the previous tools defined the advocacy objective and selected the most appropriate advocacy approaches, effective advocacy also requires careful planning of the specific activities that will advance those approaches. Advocacy efforts often involve multiple actions such as meetings with policymakers, submission of policy briefs, coalition coordination, research dissemination, or public communication efforts. Without a structured plan, these actions may occur in an ad hoc or fragmented manner, reducing their effectiveness. The purpose of this tool is therefore to help organisations identify the key actions required to implement their advocacy strategy, assign responsibilities, and establish a realistic sequence of activities. By translating strategy into clear actions, organisations can ensure that advocacy efforts remain coordinated, focused, and manageable within their operational capacity.

When to Use This Tool



Use this tool after defining the advocacy objective and selecting the appropriate advocacy approaches in the previous tools. At this stage, organisations should clearly understand the change they want to achieve and the strategic approaches they intend to use to influence decision-makers and stakeholders.

The objective now is to plan the specific actions that will implement those approaches in a structured and coordinated way. This tool is particularly useful when organisations are preparing advocacy plans, launching advocacy campaigns, or coordinating activities with coalition partners.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to translate advocacy strategy into practical actions:

- Begin by restating the advocacy objective identified in Tool 7.
- Review the advocacy approaches selected in Tool 8.
- Identify the specific actions required to implement each approach.
- Determine who within the organisation or coalition will be responsible for each action.
- Consider the timing and sequence of actions to ensure that advocacy efforts remain coordinated.
- Use this plan to guide the implementation of advocacy activities.

Advocacy Action Planning Worksheet

The following sample worksheet can be used to plan the actions required to implement the advocacy strategy.

Advocacy Objective	Advocacy Approach	Planned Advocacy Action	Responsible Person	Timeline	Expected Contribution
Improve transparency in telecom licensing processes	Policy dialogue	Meeting with telecommunications regulator	Advocacy Lead	Month 1	Present policy recommendations

Advocacy Action Planning: Use a structured planning approach to translate advocacy strategy into specific actions. Begin by identifying the advocacy objective and the approaches selected in the previous tool. Then identify the actions required to implement those approaches, assign responsibility for each action, and establish a timeline for implementation.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations organise and coordinate the activities required to implement their advocacy strategy.

1. Advocacy Objective:

This column records the advocacy objective defined in Tool 7. Restating the objective ensures that planned actions remain aligned with the desired policy or institutional change.

Sample Assessment

- What change is the organisation seeking to achieve?
- Which institution or authority is responsible for making this change?

2. Advocacy Approach:



This column identifies the advocacy approaches selected in Tool 8 that will guide the strategy. Examples may include policy dialogue, research dissemination, coalition advocacy, public communication, or participation in policy consultations.

Sample Assessment

- Which advocacy approaches were prioritised in the previous tool?
- How will these approaches help influence decision-makers?

3. Planned Advocacy Action:

This column lists the specific actions required to implement the selected advocacy approach. These actions represent the practical steps organisations will take during advocacy efforts.

Sample Assessment

- Should the organisation organise meetings with policymakers?
- Should policy briefs or research reports be produced?
- Should coalition meetings or public communication efforts be planned?

4. Responsible Person or Team:

This column identifies who within the organisation or coalition will be responsible for implementing each action. Assigning responsibility helps ensure accountability and coordination during advocacy efforts.

Sample Assessment

- Which staff member or team will lead this action?
- Are coalition partners involved in implementing this activity?

5. Timeline:

This column records when the action should take place. Advocacy actions may need to align with policy processes, consultations, or political developments.

Sample Assessment

- Should this action occur before a policy consultation or legislative debate?
- Is the action part of a short-term or long-term advocacy effort?

6. Expected Contribution to the Objective:

This column records how the action contributes to achieving the advocacy objective. Understanding this connection helps ensure that actions remain strategically aligned with the desired outcome.

Sample Assessment

- How will this action influence the decision-maker or policy process?
- Will this action strengthen evidence, build alliances, or increase visibility?

Interpretation Guide

After completing the worksheet, organisations should review the planned actions and examine whether they collectively support the advocacy objective and the selected approaches. The objective is to ensure that advocacy actions are clearly linked to the strategy and that responsibilities and timelines are well defined. A well-structured action plan should demonstrate how individual activities contribute to influencing decision-makers and



advancing the advocacy objective. Organisations should also review whether the planned actions are realistic given their available resources and organisational capacity.

Risk Lens

Advocacy actions may vary in their level of visibility and exposure. Organisations should therefore consider how different actions may affect their operating environment. Some actions, such as meetings with policymakers or research dissemination, may involve relatively low visibility. Others, such as public campaigns or media engagement, may attract greater attention and potentially provoke resistance from stakeholders connected to the issue. Reflecting on these dynamics helps organisations plan advocacy actions that balance impact with risk awareness.

Sample Checklist to Assess Risk:

- Could this action attract political or institutional scrutiny?
- Would highly visible advocacy actions increase exposure to backlash?
- Would coalition-based actions reduce potential risks?
- Does the organisation have the capacity to manage potential consequences?

Action Prompt

After completing the advocacy action planning worksheet, organisations should confirm that the planned actions form a coherent and coordinated strategy. This step ensures that advocacy activities are clearly aligned with the objective and that responsibilities and timelines are realistic.

Sample Checklist:

- Do the planned actions collectively support the advocacy objective?
- Are responsibilities clearly assigned for each action?
- Is the timeline realistic given the organisation’s capacity?
- Are the actions sequenced in a way that strengthens advocacy impact?

Note: This tool focuses on translating advocacy strategy into coordinated actions. While earlier tools defined the advocacy objective and selected appropriate advocacy approaches, this tool helps organisations organise the specific activities required to implement the strategy.

The Risk Lens encourages organisations to reflect on the visibility and potential exposure associated with different advocacy actions. The Action Prompt helps organisations confirm that their advocacy plan is realistic and strategically aligned.

Consider the following flow:

Advocacy Objective Definition → Advocacy Approach Selection → Advocacy Action Planning → Risk Reflection → Strategy Implementation

Sample Worksheet (Filled):

Advocacy Objective	Advocacy Approach	Planned Advocacy Action	Responsible Person	Timeline	Expected Contribution
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Improve transparency in telecom licensing processes	Policy dialogue	Meeting with telecommunications regulator	Advocacy Lead	Month 1	Present policy recommendations
Improve transparency in telecom licensing processes	Research dissemination	Publish policy brief on licensing transparency	Research Team	Month 2	Provide evidence for reform
Improve transparency in telecom licensing processes	Coalition advocacy	Convene civil society coalition meeting	Programme Manager	Month 2	Strengthen collective advocacy

How to Read the Matrix

After completing the worksheet, organisations should review how individual actions contribute to the advocacy objective. Actions that directly influence decision-makers or policy processes should generally be prioritised, while supporting actions such as research dissemination or coalition coordination may strengthen the overall advocacy strategy. By ensuring that actions are clearly linked to the advocacy objective and organised within a realistic timeline, organisations can implement advocacy strategies in a coordinated and effective manner.

Module 4 — Digital Advocacy and Strategic Use of Technology

Advocacy increasingly takes place in digital environments. Social media platforms, online communication tools, and digital campaigns can help civil society organisations reach wider audiences, mobilise supporters, and amplify policy messages. Digital tools also allow organisations to share research, coordinate coalitions, and engage with policymakers in ways that were previously difficult or resource-intensive. However, digital advocacy in politically sensitive environments requires careful consideration. Online engagement can increase the visibility of advocacy efforts, which may strengthen public awareness but can also attract attention from political actors, hostile stakeholders, or coordinated online harassment. Digital campaigns may expose organisations to misinformation attacks, trolling, surveillance, or reputational pressure.

For grassroots organisations working in sensitive contexts, digital advocacy should therefore be approached strategically rather than automatically. Not every issue benefits from highly visible online campaigns. In some situations, digital communication may support advocacy efforts by sharing research or strengthening coalitions. In other situations, quiet policy engagement may be more effective and less risky. This module helps organisations evaluate when digital advocacy can strengthen their efforts and how digital tools can be used responsibly within their advocacy strategies. The tools in this module guide organisations in assessing the suitability of digital engagement, selecting appropriate digital channels, and planning digital advocacy actions that align with their broader strategy.

Rather than encouraging organisations to rely heavily on digital campaigning, this module emphasises strategic use of technology. Digital tools should support advocacy objectives and complement other engagement approaches such as policy dialogue, coalition advocacy, or research dissemination. By approaching digital advocacy thoughtfully, organisations can increase the reach and effectiveness of their advocacy efforts while remaining aware of potential risks associated with online visibility. Digital advocacy should therefore not be treated as a separate activity but as a strategic extension of the advocacy objectives, stakeholder engagement strategies, and action plans developed in the earlier modules.

When to Use This Module



Organisations should use this module after designing their advocacy strategy and action plan in the previous module. At this stage, the organisation should already have a clear understanding of the advocacy objective, the actors involved, and the actions required to influence decision-makers. This module helps organisations determine whether digital tools can strengthen those advocacy efforts and how digital engagement should be integrated into the broader strategy. It is particularly useful when organisations are considering public communication, online campaigns, digital mobilisation, or the dissemination of advocacy research through digital platforms. The module may also be revisited when organisations experience increased online visibility, digital harassment, or other forms of online pressure during advocacy campaigns.

Decision Pathway

The tools in this module guide organisations through a sequence of steps that help them integrate digital advocacy into their strategy in a careful and deliberate manner.

The first step is to assess whether digital advocacy is appropriate for the issue and the political context. Not all advocacy efforts require online campaigning, and organisations should consider the potential benefits and risks of increased digital visibility.

The second step is to determine how digital tools can support advocacy objectives. Digital engagement may involve sharing research, communicating policy recommendations, strengthening coalitions, or raising public awareness.

The third step is to plan how digital communication will be implemented during advocacy efforts. This may involve selecting platforms, defining communication approaches, and determining how digital messaging aligns with the organisation's broader advocacy strategy.

By following these steps, organisations can ensure that digital advocacy supports their strategic objectives while remaining aligned with their organisational capacity and risk awareness.

Tool 10 — Digital Visibility Risk Assessment

Purpose of the Tool

This tool helps organisations assess the level of visibility that digital advocacy may create and whether that visibility is appropriate within their operating environment. While digital tools can expand the reach of advocacy efforts, increase public awareness, and strengthen mobilisation, they can also increase organisational visibility and exposure in politically sensitive environments.

Advocacy issues that are suitable for quiet policy dialogue or coalition engagement may not benefit from highly visible online campaigns. In some situations, digital advocacy may amplify policy messages effectively. In others, it may attract unwanted attention, harassment, or pressure from powerful actors connected to the issue.

The purpose of this tool is therefore to help organisations assess whether digital advocacy should be integrated into their strategy and, if so, how visible that engagement should be. By reflecting on the potential benefits and risks of digital engagement, organisations can ensure that digital advocacy supports their strategy rather than exposing them to unnecessary risk.

When to Use This Tool



Use this tool after completing the advocacy strategy and action planning exercises in the previous module. At this stage, organisations should already have a clear understanding of their advocacy objective, the actors involved, and the actions required to influence decision-makers. The objective now is to assess whether digital communication or online engagement should play a role in the advocacy effort. This tool is particularly useful when organisations are considering public communication through social media, digital campaigns, online publications, or digital mobilisation.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to determine the appropriate level of digital visibility for the issue and the political context.

- Begin by restating the advocacy objective defined in the previous module.
- Consider how visible digital advocacy might affect the issue and the organisation.
- Assess whether online engagement could strengthen advocacy efforts by raising awareness, sharing evidence, or mobilising support.
- Evaluate whether digital visibility could increase exposure to political pressure, harassment, or misinformation.
- Based on this assessment, determine whether digital advocacy should play a central role, a limited supporting role, or no role in the advocacy strategy.

Digital Advocacy Risk Assessment Worksheet

The following worksheet can be used to assess whether digital advocacy is appropriate for the advocacy effort.

Advocacy Objective	Potential Value of Digital Engagement	Visibility Sensitivity	Organisational Digital Capacity	Overall Suitability

Digital Advocacy Suitability Assessment: Use a structured assessment to determine whether digital advocacy should be integrated into the advocacy strategy. Begin by restating the advocacy objective, then evaluate the potential benefits and risks associated with online visibility. Assess whether digital engagement would strengthen advocacy efforts or increase exposure to risk.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations assess whether digital advocacy is strategically appropriate.

1. Advocacy Objective:

This column records the advocacy objective defined in the previous module. Restating the objective helps ensure that the suitability assessment remains connected to the advocacy strategy.

Sample Assessment

- What change is the organisation seeking to achieve?
- Which institution or authority must implement this change?

2. Potential Value of Digital Engagement:



This column evaluates how digital communication could support the advocacy effort. Digital engagement may strengthen advocacy by increasing awareness, sharing research findings, or mobilising public support.

Sample Assessment

- Would online communication help raise awareness of the issue?
- Could digital platforms help disseminate research or policy recommendations?
- Could digital engagement strengthen coalition visibility?

3. Visibility Sensitivity:

This column assesses how increased online visibility might affect the advocacy effort or the organisation's operating environment. Some issues may attract strong reactions from political actors or powerful stakeholders when discussed publicly online.

Sample Assessment

- Could digital visibility attract attention from powerful actors connected to the issue?
- Could online communication increase exposure to harassment or misinformation?
- Would quiet engagement be safer or more effective?

4. Organisational Digital Capacity:

This column evaluates whether the organisation has the capacity to manage digital advocacy activities effectively. Digital engagement requires staff time, communication skills, and the ability to monitor online responses.

Sample Assessment

- Does the organisation have staff who can manage digital communication?
- Does the organisation have the ability to monitor online responses or harassment?
- Does the organisation have experience using digital platforms for advocacy?

5. Overall Suitability of Digital Advocacy:

This column records the organisation's overall judgement about whether digital advocacy should be used within the strategy.

Possible outcomes may include:

- High digital visibility appropriate — Digital advocacy can play a central role.
- Moderate digital visibility appropriate — Digital engagement should support other advocacy approaches.
- Low digital visibility recommended — Digital visibility should remain limited.

Interpretation Guide

After completing the worksheet, organisations should review the relationship between the potential benefits of digital engagement and the risks associated with increased visibility. If digital engagement appears highly valuable and manageable within the organisation's capacity, it may play a central role in advocacy efforts. If digital engagement carries moderate benefits but some potential risks, it may serve as a supporting tool alongside other advocacy approaches. In situations where digital visibility may increase political sensitivity or organisational exposure, digital advocacy may need to be limited or avoided.

Risk Lens



Digital advocacy can significantly increase the visibility of advocacy efforts. Organisations should therefore carefully consider how online engagement may affect their operating environment. Online advocacy may expose organisations to harassment, misinformation, or political pressure. At the same time, digital platforms may strengthen advocacy by amplifying research findings and raising public awareness. This reflection step encourages organisations to weigh these factors carefully before integrating digital advocacy into their strategy.

Sample Checklist to Assess Risk:

- Could digital advocacy attract unwanted political attention?
- Could online communication expose the organisation to harassment or misinformation?
- Could digital engagement increase pressure on partners or beneficiaries?
- Does the organisation have the capacity to respond to online challenges?

Action Prompt

After completing the suitability assessment, organisations should decide how digital engagement will be integrated into the advocacy strategy. This step ensures that digital advocacy is used deliberately rather than automatically.

Sample Checklist:

- Should digital advocacy play a central role in the strategy?
- Should digital communication support other advocacy approaches?
- Should digital visibility be limited for this issue?
- Does the organisation have sufficient capacity to manage digital engagement?

Note: This tool focuses on determining whether digital advocacy should be integrated into the advocacy strategy. While previous tools defined the advocacy objective, selected advocacy approaches, and planned advocacy actions, this tool helps organisations assess whether digital visibility is appropriate for the issue and the operating environment. The Risk Lens encourages organisations to reflect on the potential exposure associated with online engagement. The Action Prompt helps organisations decide how digital advocacy will be used within the overall strategy.

Consider the following flow:

Advocacy Strategy → Digital Suitability Assessment → Risk Reflection → Digital Engagement Decision

Sample Worksheet (Filled):

Advocacy Objective	Potential Value of Digital Engagement	Visibility Sensitivity	Organisational Digital Capacity	Overall Suitability
Improve transparency in telecom licensing processes	Online communication could increase public awareness	Moderate sensitivity	Moderate capacity	Moderate suitability
Strengthen oversight of regulatory decisions	Digital engagement may amplify research findings	High sensitivity	Limited capacity	Low suitability

How to Read the Matrix

After completing the worksheet, organisations should review whether the potential benefits of digital advocacy outweigh the risks associated with increased visibility. Issues that demonstrate strong value for digital



communication and manageable visibility risks may benefit from online engagement. Issues that carry high sensitivity or exposure may require more cautious approaches such as research dissemination or coalition advocacy without highly visible online campaigns. By assessing digital suitability carefully, organisations can ensure that digital advocacy strengthens their efforts without creating unnecessary risk.

Tool 11 — Digital Audience and Platform Mapping

Purpose of the Tool

This tool helps organisations identify the audiences they want to reach through digital communication and determine which digital platforms are most appropriate for engaging those audiences. While the previous tool assessed whether digital visibility is appropriate for the advocacy issue, organisations must also decide who digital communication should reach and where those audiences are most likely to engage. Different audiences use different digital spaces, and effective digital advocacy depends on understanding these communication patterns.

For example, policymakers, journalists, civil society organisations, and the general public may interact with different digital platforms. Messages designed for one audience may not be effective for another. Selecting appropriate platforms and audiences therefore helps organisations ensure that digital communication supports their advocacy objectives rather than dispersing effort across platforms that do not influence the policy environment. The purpose of this tool is therefore to help organisations identify priority digital audiences and match those audiences with the platforms most suitable for communication. By clarifying who digital communication should target and where those audiences are active, organisations can ensure that digital advocacy remains strategic, focused, and aligned with their broader advocacy efforts.

When to Use This Tool

Use this tool after completing the Digital Visibility Risk Assessment in the previous tool. At this stage, organisations should already have determined the appropriate level of digital visibility for their advocacy effort. The objective now is to identify which audiences should be reached through digital communication and which platforms are most appropriate for engaging those audiences. This tool is particularly useful when organisations are planning online communication, public awareness activities, digital dissemination of research, or coalition messaging.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify the most relevant digital audiences and platforms for advocacy communication.

- Begin by identifying the audiences that the organisation wishes to influence or inform through digital communication.
- Consider which audiences are most relevant for advancing the advocacy objective. These may include policymakers, journalists, civil society actors, researchers, or the broader public.
- Assess which digital platforms are most commonly used by those audiences.
- Consider how messages may need to be adapted for different audiences and platforms.
- Use this analysis to prioritise the platforms and audiences that should be targeted through digital communication.

Digital Audience and Platform Mapping Worksheet



The following worksheet can be used to identify the audiences and platforms most relevant for digital advocacy communication.

Target Audience	Audience Relevance	Preferred Digital Platforms	Communication Purpose	Priority Level

Digital Audience and Platform Mapping: Use a structured mapping exercise to identify the audiences that digital communication should reach and the platforms through which those audiences can be engaged. Begin by identifying priority audiences connected to the advocacy issue, then assess which digital platforms those audiences are most likely to use. Finally, determine how digital communication may support engagement with those audiences.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations determine how digital communication should be directed within the advocacy strategy.

1. Target Audience:

This column identifies the audience that the organisation wishes to reach through digital communication. Different audiences may play different roles in advocacy efforts. Target audiences may include policymakers, journalists, civil society organisations, coalition partners, researchers, or the general public.

Sample Assessment

- Which audiences are most relevant for advancing the advocacy objective?
- Which audiences influence the policy debate surrounding the issue?

2. Audience Relevance to Advocacy:

This column explains why the audience is important for the advocacy effort. Some audiences may influence policymakers directly, while others may help shape public debate, media attention, or coalition support.

Sample Assessment

- Does this audience influence decision-makers?
- Could this audience strengthen awareness of the issue?
- Could this audience support coalition advocacy?

3. Preferred Digital Platforms:

This column identifies the digital platforms where the audience is most active. Different audiences may engage through different digital spaces, such as social media platforms, professional networks, messaging platforms, or digital media outlets.

Sample Assessment

- Which platforms are commonly used by this audience?
- Are policymakers or journalists active on particular platforms?
- Are coalition partners using messaging platforms for coordination?

4. Communication Purpose:



This column describes the purpose of engaging the audience through digital communication. Digital communication may be used to share research findings, raise awareness, mobilise support, strengthen coalition coordination, or amplify policy messages.

Sample Assessment

- Is the objective to inform, persuade, mobilise, or coordinate?
- Will digital communication help influence policy discussion or public debate?

5. Priority Level:

This column records how important the audience and platform are within the digital communication strategy. Some audiences may be central targets for communication, while others may be secondary or supportive audiences.

Sample Assessment

- Is this audience a primary communication target?
- Should communication efforts focus strongly on this platform?
- Is occasional engagement sufficient?

Interpretation Guide

After completing the worksheet, organisations should review how audiences and platforms are distributed across the mapping exercise. The objective is to identify which audiences are most relevant for the advocacy objective and which platforms provide the most effective channels for communication. Organisations should prioritise audiences that influence the policy environment and select platforms where those audiences are most likely to engage with advocacy messages. This helps ensure that digital communication remains focused on audiences that can contribute meaningfully to advocacy outcomes.

Risk Lens

Digital communication directed toward certain audiences may increase the visibility of advocacy efforts or expose organisations to online reactions. Organisations should therefore reflect on how communication with different audiences may affect their operating environment.

Some audiences may engage constructively with advocacy messages, while others may trigger polarised debate or coordinated online responses. Reflecting on these dynamics helps organisations determine how openly digital communication should be directed toward different audiences.

Sample Checklist to Assess Risk

- Could communication with this audience increase online visibility beyond the intended scope?
- Could certain audiences react negatively or mobilise opposition online?
- Would coalition-based messaging reduce exposure?
- Does the organisation have the capacity to manage online engagement with this audience?

Action Prompt

After completing the audience and platform mapping exercise, organisations should identify which audiences and platforms will be prioritised within the digital communication strategy. This step ensures that digital advocacy efforts remain focused on audiences that can strengthen the advocacy objective.



Sample Checklist

- Which audiences should be prioritised for digital communication?
- Which platforms are most appropriate for reaching those audiences?
- How should communication differ across different audiences?
- Which platforms should be used only occasionally or avoided?

Note: This tool focuses on identifying the audiences and platforms most relevant for digital communication within advocacy efforts. While the previous tool assessed the appropriate level of digital visibility, this tool helps organisations determine who digital communication should reach and where those audiences can be engaged.

The Risk Lens encourages organisations to reflect on how digital communication with different audiences may affect their operating environment. The Action Prompt helps organisations prioritise digital communication channels within their advocacy strategy.

Consider the following flow:

Digital Visibility Risk Assessment → Audience and Platform Mapping → Risk Reflection → Digital Communication Prioritisation

Sample Worksheet (Filled):

Target Audience	Audience Relevance	Preferred Digital Platforms	Communication Purpose	Priority Level
Policy journalists	Shape public debate and policy discussion	X (Twitter), LinkedIn	Share research findings	High
Civil society coalition partners	Strengthen coordination	WhatsApp, Signal groups	Coalition coordination	High
General public	Increase awareness of the issue	Facebook, Instagram	Public awareness	Medium

How to Read the Matrix

After completing the worksheet, organisations should review which audiences and platforms appear most relevant for supporting the advocacy objective. Audiences that influence policy debates or public discussion often represent the most important communication targets. Platforms where these audiences are active should generally be prioritised within the digital communication strategy.

By focusing digital communication on the audiences and platforms most connected to the advocacy objective, organisations can ensure that digital advocacy remains strategic and effective.

Tool 12 — Digital Messaging and Content Strategy

Purpose of the Tool

This tool helps organisations define the key messages and digital content that will support their advocacy efforts. While the previous tools assessed the appropriate level of digital visibility and identified the audiences and platforms for communication, effective digital advocacy also requires clear and strategic messaging. Digital communication is most effective when messages are simple, consistent, and aligned with the advocacy objective.



Without a clear messaging strategy, organisations may share information online without clearly influencing public debate or policy discussions.

Different audiences may also respond to different forms of communication. Policymakers may respond to concise policy recommendations, journalists may respond to clear evidence and data, and the general public may respond more strongly to accessible explanations of how an issue affects communities. The purpose of this tool is therefore to help organisations define the key advocacy messages they wish to communicate and determine the types of digital content that can support those messages. By clarifying messaging and content, organisations can ensure that digital communication strengthens their advocacy strategy and contributes to influencing policy debates.

When to Use This Tool

Use this tool after completing the Digital Visibility Risk Assessment and the Digital Audience and Platform Mapping exercises. At this stage, organisations should already understand the appropriate level of digital visibility for their advocacy effort and the audiences and platforms through which digital communication may occur. The objective now is to define the messages that will be communicated through those platforms and determine the types of digital content that will carry those messages. This tool is particularly useful when organisations are preparing digital communication materials, public awareness efforts, or online dissemination of research and advocacy findings.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to define clear and consistent advocacy messages for digital communication.

- Begin by restating the advocacy objective identified earlier in the toolkit.
- Identify the key messages that communicate the importance of the issue and the change being sought.
- Consider how these messages should be framed for different audiences.
- Identify the types of digital content that can effectively communicate these messages.
- Ensure that messages remain consistent across platforms and aligned with the broader advocacy strategy.

Digital Messaging and Content Strategy Worksheet

The following worksheet can be used to define key advocacy messages and the digital content that will communicate those messages.

Advocacy Objective	Core Message	Supporting Evidence	Target Audience	Content Format	Priority

Digital Messaging and Content Strategy: Use a structured approach to define the key messages that digital communication should convey and the types of content that will communicate those messages effectively. Begin by identifying the advocacy objective, then define the core messages that explain the issue and the desired policy change. Finally, determine the digital content that can communicate these messages to the identified audiences.

Elements of the Worksheet



The following are the key elements of the worksheet described above. Each element helps organisations ensure that digital communication supports the advocacy objective.

1. Advocacy Objective:

This column records the advocacy objective defined earlier in the toolkit. Restating the objective ensures that digital messaging remains aligned with the desired policy or institutional change.

Sample Assessment

- What change is the organisation seeking to achieve?
- Which institution or authority must implement this change?

2. Core Advocacy Message:

This column records the central message the organisation wishes to communicate through digital communication. Effective advocacy messages are typically concise, clear, and directly connected to the issue and the desired policy change.

Sample Assessment

- What is the main message the organisation wants audiences to understand?
- How can the issue be explained clearly and simply?

3. Supporting Evidence or Argument:

This column records the evidence, research findings, or arguments that support the advocacy message. Evidence strengthens credibility and helps audiences understand why the proposed change is necessary.

Sample Assessment

- What data, research, or examples support the message?
- Can evidence be presented in a clear and accessible way?

4. Target Audience:

This column identifies the audience that the message is intended to reach. Messages may need to be framed differently depending on whether the audience includes policymakers, journalists, coalition partners, or the broader public.

Sample Assessment

- Who should receive this message?
- How might the message need to be adapted for different audiences?

5. Digital Content Format:

This column records the type of digital content that will communicate the message. Different messages may be communicated through different formats such as short posts, infographics, short videos, research summaries, or digital reports.

Sample Assessment

- Would an infographic explain the issue clearly?
- Would a short video help communicate the message?
- Would a research summary support policy discussions?



6. Communication Priority:

This column records the priority level of the message within the digital communication strategy. Some messages may form the core narrative of the advocacy effort, while others may provide supporting information.

Sample Assessment

- Is this a central message for the advocacy campaign?
- Should this message be communicated frequently or occasionally?

Interpretation Guide

After completing the worksheet, organisations should review whether the digital messages clearly communicate the advocacy objective and whether the selected content formats effectively support those messages. Messages that clearly explain the issue and the desired policy change are more likely to influence public discussion and policy debates. Organisations should prioritise messages that are clear, credible, and directly connected to the advocacy objective.

Risk Lens

Digital messages can attract public attention and may generate responses from supporters as well as critics. Organisations should therefore consider how advocacy messages may be interpreted within the broader political and social environment. Messages that challenge powerful actors or sensitive policy issues may provoke reactions from stakeholders connected to the issue. Reflecting on these dynamics helps organisations communicate strategically while remaining aware of potential risks.

Sample Checklist to Assess Risk:

- Could this message attract hostile responses or misinformation online?
- Could certain messages increase political sensitivity around the issue?
- Should certain messages be communicated more cautiously?
- Does the organisation have the capacity to respond to online reactions?

Action Prompt

After defining digital messages and content formats, organisations should confirm which messages will form the core narrative of their digital advocacy efforts. This step ensures that digital communication remains consistent and aligned with the broader advocacy strategy.

Sample Checklist

- Which messages should be prioritised in digital communication?
- Which messages should be tailored for different audiences?
- Which content formats are most effective for communicating the message?
- Are messages clearly aligned with the advocacy objective?

Note: This tool focuses on defining the messages and digital content that will support advocacy communication. While the previous tools determined the appropriate level of digital visibility and identified the audiences and platforms for communication, this tool helps organisations define what messages will be communicated and how those messages will be presented.



The Risk Lens encourages organisations to reflect on how advocacy messages may be interpreted in the digital environment. The Action Prompt helps organisations ensure that digital communication remains aligned with the broader advocacy strategy.

Consider the following flow:

Digital Visibility Risk Assessment → Audience and Platform Mapping → Digital Messaging Strategy → Digital Communication

Sample Worksheet (Filled):

Advocacy Objective	Core Message	Supporting Evidence	Target Audience	Content Format	Priority
Improve transparency in telecom licensing	Licensing decisions should be publicly transparent	Regulatory transparency research	Policy journalists	Infographic + policy summary	High
Improve transparency in telecom licensing	Public oversight strengthens regulatory accountability	Case studies from regional regulators	Civil society organisations	Short explainer post	Medium

How to Read the Matrix

After completing the worksheet, organisations should review whether digital messages clearly communicate the advocacy objective and whether the selected content formats are appropriate for the intended audiences. Messages that are clear, evidence-based, and aligned with the advocacy objective should form the foundation of digital communication efforts. By developing clear messages and selecting appropriate content formats, organisations can ensure that digital advocacy strengthens policy discussions and public understanding of the issue.

Module 5 — Coalition and Network Building

Advocacy rarely succeeds through the efforts of a single organisation acting alone. Many policy issues involve complex institutional systems, competing interests, and multiple actors who influence decision-making. In such environments, collaboration among civil society organisations, research institutions, professional networks, and community groups can significantly strengthen advocacy efforts.

Coalitions allow organisations to combine their expertise, credibility, and networks in order to amplify their influence. Collective advocacy can increase the legitimacy of policy demands, strengthen evidence-based arguments, and demonstrate that an issue is supported by a broader community of stakeholders rather than a single organisation.

At the same time, coalition engagement must be approached strategically. Not all organisations share the same priorities, advocacy approaches, or risk tolerance. Differences in organisational mandates, political relationships, or communication strategies can sometimes create coordination challenges within coalitions. For this reason, organisations should carefully assess potential partners and collaboration structures before entering joint advocacy efforts.

This module helps organisations think systematically about coalition engagement. The tools in this module guide organisations in identifying potential partners, assessing alignment among coalition actors, and planning how collaborative advocacy efforts will be coordinated.



In politically sensitive environments, coalition engagement can also play an important role in managing risk. Collective advocacy may distribute visibility across multiple actors, reduce the exposure of individual organisations, and strengthen resilience when addressing sensitive policy issues.

When to Use This Module

Organisations should use this module after developing their advocacy strategy and identifying the actions required to influence decision-makers. At this stage, the organisation should already have a clear advocacy objective, an understanding of the policy landscape, and a plan for engagement with key stakeholders.

The purpose of this module is to help organisations determine whether coalition engagement could strengthen their advocacy efforts and, if so, how such collaboration should be structured. This module may also be useful when organisations are entering existing networks or coalitions, or when multiple organisations are already working on the same issue and coordination could improve advocacy outcomes.

Decision Pathway

The tools in this module guide organisations through a sequence of steps designed to support effective coalition engagement. The first step is to identify potential organisations or networks that may contribute to collective advocacy efforts. The second step is to assess the level of alignment between potential partners and the advocacy objective. The third step is to determine how coalition collaboration should be organised so that roles, responsibilities, and coordination mechanisms are clear. By following these steps, organisations can ensure that coalition engagement strengthens their advocacy strategy while maintaining clarity, coordination, and strategic focus.

Tool 13 — Coalition Partner Mapping

Purpose of the Tool

This tool helps organisations identify potential partners who could participate in coalition-based advocacy efforts. Many advocacy objectives are difficult for a single organisation to achieve alone. Coalitions allow civil society actors to combine expertise, credibility, networks, and influence in order to strengthen advocacy efforts.

However, not all partnerships are automatically beneficial. Different organisations may have different priorities, levels of capacity, political relationships, or risk tolerance. Entering a coalition without understanding these dynamics can create coordination challenges or expose organisations to unintended risks.

The purpose of this tool is therefore to help organisations identify potential coalition partners and assess how those partners may contribute to collective advocacy efforts. By mapping potential partners, organisations can better understand the strengths, interests, and roles that different actors may bring to a coalition.

When to Use This Tool

Use this tool when organisations are considering working with other actors to advance their advocacy objective. Coalition engagement is particularly useful when:

- Advocacy objectives require broad support to influence decision-makers
- Multiple organisations are already working on the same issue
- Collective advocacy can increase legitimacy or visibility
- Partners can contribute complementary expertise or networks



This tool can also be used when organisations want to strengthen existing networks or explore new collaborative advocacy opportunities.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify organisations that could contribute to coalition advocacy.

- Begin by listing organisations, networks, or institutions that are working on similar issues.
- Consider whether these actors share similar advocacy goals or policy concerns.
- Assess what each potential partner could contribute to a coalition effort.
- Consider the credibility, expertise, networks, and influence of each organisation.
- Use this mapping exercise to identify organisations that may be suitable partners for coalition-based advocacy.

Coalition Partner Mapping Worksheet

The following worksheet can be used to identify potential partners who could participate in coalition advocacy efforts.

Organisation / Network	Area of Expertise or Interest	Potential Contribution to Advocacy	Level of Alignment with Advocacy Objective	Collaboration Potential	Notes

Coalition Partner Mapping: Use a structured mapping approach to identify organisations that may participate in coalition advocacy. Begin by listing potential partners, then assess their expertise, alignment with the advocacy objective, and the potential role they could play in a coalition effort.

Elements of the Worksheet

1. Organisation or Network:

This column identifies the organisation, coalition, or network that may participate in advocacy collaboration.

Potential partners may include:

- Civil society organisations
- Research institutions
- Professional associations
- Advocacy networks
- Community groups

Sample Assessment

- Which organisations are already working on this issue?
- Are there networks or coalitions addressing related topics?

2. Area of Expertise or Interest:

This column describes the issue area in which the organisation is active. Understanding each organisation’s expertise helps determine whether the partner’s work aligns with the advocacy objective.



Sample Assessment

- Does the organisation work directly on the issue?
- Does the organisation have expertise relevant to the policy debate?

3. Potential Contribution to the Coalition:

This column identifies what the organisation could contribute to a coalition effort. Different organisations may contribute in different ways.

Possible contributions may include:

- Research or evidence generation
- Policy expertise
- Community mobilisation
- Media engagement
- Policy relationships

Sample Assessment

- Could the organisation contribute research or evidence?
- Does the organisation have networks with policymakers?
- Could the organisation mobilise community voices?

4. Level of Alignment with Advocacy Objective:

This column evaluates how closely the organisation's goals align with the advocacy objective. Strong alignment increases the likelihood that partners will collaborate effectively within a coalition.

Sample Assessment

- Does the organisation share the same policy goals?
- Would the organisation support the proposed advocacy objective?

5. Collaboration Potential:

This column records the organisation's overall suitability as a coalition partner. Some organisations may be strong partners for close collaboration, while others may participate only occasionally or support advocacy informally.

Sample Assessment

- Would this organisation be a core coalition partner?
- Would occasional collaboration be more appropriate?

Interpretation Guide

After completing the worksheet, organisations should review the potential partners identified and consider how different actors could contribute to coalition advocacy. Coalitions often benefit from diversity. Different partners may contribute research, policy expertise, grassroots mobilisation, or communication capacity. Organisations should prioritise partners whose expertise and advocacy goals align with the advocacy objective.

Risk Lens

Coalition participation may also introduce risks that organisations should consider carefully. Different organisations may have different political relationships, reputations, or levels of exposure. In sensitive



environments, coalition partners may face varying levels of risk tolerance. Before forming a coalition, organisations should consider how partnerships may affect their operating environment.

Sample Checklist to Assess Risk

- Could collaboration with this organisation attract political scrutiny?
- Does the partner have relationships with actors who may oppose the issue?
- Could coalition participation increase the organisation’s visibility or exposure?

Action Prompt

After identifying potential coalition partners, organisations should determine which actors should be approached for collaboration. This step ensures that coalition-building efforts remain strategic and aligned with the advocacy objective.

Sample Checklist

- Which organisations should be approached as core coalition partners?
- Which organisations may provide occasional support?
- Which organisations should be monitored for potential collaboration?

Note: This tool focuses on identifying potential coalition partners who may contribute to a collective advocacy effort. While previous modules focused on issue analysis, stakeholder mapping, and strategy design, this tool introduces collaboration as a means of strengthening advocacy impact. Coalitions can increase credibility, broaden expertise, and amplify advocacy messages, but they should be formed deliberately and strategically.

Consider the following flow:

Advocacy Strategy → Coalition Partner Mapping → Coalition Alignment → Coalition Coordination

Sample Worksheet (Filled):

Organisation / Network	Area of Expertise or Interest	Potential Contribution to Advocacy	Level of Alignment with Advocacy Objective	Collaboration Potential	Notes
Digital Rights NGO	Internet governance, data protection, digital rights policy	Policy research, advocacy credibility, participation in policy consultations	High	Core coalition partner	Strong reputation in policy advocacy and existing engagement with regulators
Media Freedom Network	Media policy, press freedom, journalism safety	Public communication, media outreach, amplification of advocacy messaging	Moderate to High	Supporting partner	Strong media networks and ability to amplify coalition messaging
Academic Research Institute	Policy research, data analysis, regulatory studies	Evidence generation, research reports, policy briefs	Moderate	Occasional collaboration	Can strengthen evidence base for advocacy positions
Technology Industry Association	Digital economy, technology regulation, industry policy	Private sector perspective, engagement with regulators, policy dialogue	Moderate	Strategic engagement partner	May support reform proposals aligned with industry interests



Civil Society Policy Network	Governance, accountability, public policy advocacy	Coalition coordination, mobilisation of partner organisations	High	Core coalition partner	Experience managing multi-organisation advocacy campaigns
Community Rights Organisation	Community mobilisation, public interest advocacy	Grassroots mobilisation, documentation of community impact	Moderate	Supporting partner	Useful for demonstrating social impact of the issue
Legal Advocacy Group	Constitutional law, public interest litigation	Legal analysis, regulatory interpretation, litigation options	Moderate to High	Strategic partner	Can support policy arguments with legal expertise

How to Read the Matrix

After completing the worksheet, organisations should review the potential partners identified and assess how their expertise, alignment, and collaboration potential fit the advocacy objective. Partners with high alignment and strong collaboration potential are generally the most suitable candidates for core coalition roles. These organisations are more likely to share the advocacy objective, contribute consistently, and strengthen the legitimacy of collective action.

Organisations with moderate alignment may still be valuable, particularly if they bring specialised expertise, public communication capacity, grassroots networks, or access to decision-makers. Such actors may be better suited for supporting or occasional collaboration rather than core coalition roles. The worksheet should also be used to identify possible limitations or considerations before collaboration begins. These may include differing priorities, political sensitivities, or coordination challenges. By reviewing the matrix in this way, organisations can make informed decisions about which partners to approach, how closely to collaborate, and what kind of coalition structure may be most effective.

Module 6 — Monitoring, Learning, and Adaptive Advocacy

Advocacy rarely unfolds in a predictable or linear manner. Policy processes often evolve over time, political priorities shift, and the behaviour of decision-makers and stakeholders may change in response to new events or pressures. As a result, advocacy strategies that appear effective at the outset may require adjustment as the external environment develops. For civil society organisations, this means that advocacy planning should not end once a strategy has been designed or actions have been initiated. Continuous monitoring and reflection are essential to understand whether advocacy efforts are producing the intended effects and whether the strategy remains appropriate within the evolving policy landscape.

Monitoring advocacy efforts helps organisations track progress toward their objectives and observe how policymakers, institutions, and other stakeholders are responding to advocacy engagement. At the same time, reflection and learning allow organisations to identify which approaches are working effectively and where adjustments may be needed. This module helps organisations integrate monitoring and learning into their advocacy work. The tools in this module guide organisations in tracking advocacy activities, reflecting on outcomes, and adapting strategies when necessary. In politically sensitive environments, monitoring and adaptive learning are particularly important. Advocacy efforts may need to shift between public engagement, coalition collaboration, research dissemination, or quiet policy dialogue depending on how the context evolves. Regular reflection helps organisations make these adjustments in a deliberate and informed manner.

When to Use This Module



Organisations should use this module during the implementation of their advocacy strategy. Once advocacy actions have begun, organisations should periodically review their progress and assess how the policy environment and stakeholder responses are evolving. This module is also useful after major advocacy milestones, such as policy consultations, meetings with decision-makers, public campaigns, or the release of research reports. Reflecting on these moments can help organisations capture lessons and refine their strategy moving forward.

Decision Pathway

The tools in this module guide organisations through a sequence of monitoring and learning steps. The first step is to track the implementation of advocacy actions and observe whether planned activities are taking place as intended. The second step is to reflect on how policymakers, institutions, and other stakeholders are responding to advocacy engagement. The third step is to determine whether adjustments to the advocacy strategy may be necessary. By following these steps, organisations can ensure that advocacy remains responsive to changing circumstances while maintaining a clear focus on the overall objective.

Tool 14 — Advocacy Progress Monitoring

Purpose of the Tool

This tool helps organisations systematically track the implementation of their advocacy actions and observe how decision-makers and stakeholders are responding to those efforts. While previous tools helped organisations design their advocacy strategy and plan specific actions, this tool focuses on monitoring whether those actions are being carried out and what developments are occurring as a result.

Advocacy outcomes often take time to materialise, and progress may appear through small signals rather than immediate policy change. Meetings with policymakers, increased public discussion of an issue, requests for additional information from institutions, or invitations to consultations may all indicate that advocacy efforts are gaining traction.

The purpose of this tool is therefore to help organisations document advocacy activities and observe early indicators of progress. By recording these developments, organisations can better understand whether their advocacy strategy is moving in the intended direction.

When to Use This Tool

Use this tool after advocacy actions have begun. Once organisations start implementing the advocacy activities defined in their action plan, they should begin monitoring those actions and documenting relevant developments. This tool is particularly useful when advocacy efforts involve multiple activities over time, such as policy meetings, coalition engagement, research dissemination, or public communication. Organisations may use this monitoring process periodically throughout an advocacy campaign to track developments and maintain a clear understanding of how the advocacy effort is evolving.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to track advocacy activities and observe responses from policymakers, institutions, and other stakeholders.

- Begin by recording the advocacy action that was planned or implemented.
- Note the date or time period when the action took place.



- Record the actors or institutions involved in the activity.
- Document any response, feedback, or observable development that followed the advocacy action.
- Note whether the development suggests progress, resistance, or no clear change.
- Use this information to track how advocacy engagement is evolving over time.

Advocacy Progress Monitoring Worksheet:

The following worksheet can be used to track advocacy activities and observe developments connected to the advocacy strategy.

Advocacy Action	Date / Time Period	Actors or Institutions Involved	Observed Response or Development	Early Signals of Progress

Advocacy Progress Monitoring: Use a structured monitoring approach to document advocacy actions and observe how policymakers, institutions, and other stakeholders respond. Begin by recording the advocacy action implemented, then document the actors involved and any responses or developments that occur as a result of the action.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations track the implementation of advocacy actions and observe signals of progress.

1. Advocacy Action:

This column records the advocacy activity that was implemented. These actions should correspond to the activities defined in the advocacy action plan developed in the previous module.

Sample Assessment

- What advocacy action was carried out?
- Was this action planned within the advocacy strategy?

2. Date or Time Period:

This column records when the advocacy activity took place. Tracking the timing of actions helps organisations understand how advocacy efforts unfold over time.

Sample Assessment

- When did the activity take place?
- Was the action linked to a policy process or decision-making moment?

3. Actors or Institutions Involved:

This column identifies the actors or institutions that participated in or were engaged through the advocacy activity.

Sample Assessment

- Which policymakers or institutions were engaged?
- Were coalition partners involved in the activity?

4. Observed Response or Development:



This column documents any observable response following the advocacy action. Responses may include formal feedback, requests for information, changes in tone from decision-makers, invitations to consultations, or public discussion of the issue.

Sample Assessment

- Did policymakers respond to the advocacy effort?
- Did the issue receive attention from institutions or stakeholders?

5. Early Signals of Progress:

This column records whether the development suggests progress, resistance, or neutral outcomes.

Sample Assessment

- Does the response indicate openness from decision-makers?
- Is there resistance from institutions or stakeholders?

Interpretation Guide

After completing the worksheet over time, organisations should review the developments recorded and examine patterns in stakeholder responses. Some advocacy actions may produce immediate feedback, while others may take longer to generate visible outcomes. By reviewing the monitoring records periodically, organisations can identify whether decision-makers are becoming more receptive, whether new opportunities for engagement are emerging, or whether resistance is increasing. Monitoring these signals helps organisations maintain situational awareness and understand how the advocacy effort is evolving within the policy environment.

Risk Lens

Advocacy monitoring may reveal shifts in how institutions or stakeholders respond to the issue. In some cases, increased attention to the issue may also lead to increased scrutiny of the organisation's work. Organisations should therefore reflect on how their advocacy efforts are being perceived and whether monitoring data suggests changes in the level of sensitivity surrounding the issue.

Sample Checklist to Assess Risk

- Have advocacy activities attracted unexpected political attention?
- Have institutions or stakeholders expressed resistance or concern?
- Could continued advocacy on the issue increase organisational exposure?
- Are adjustments to the advocacy approach necessary?

Action Prompt

After reviewing the monitoring records, organisations should consider whether their advocacy strategy is producing meaningful signals of progress. This step encourages organisations to reflect on whether advocacy actions should continue as planned or whether adjustments may be necessary.

Sample Checklist

- Which advocacy actions appear to generate positive engagement from decision-makers?
- Which activities produce little response or progress?
- Are there new opportunities for engagement that should be explored?
- Should certain actions be modified or strengthened?



Note: This tool focuses on tracking the implementation of advocacy actions and documenting responses from policymakers and stakeholders. While previous modules helped organisations design advocacy strategies and plan actions, this tool helps organisations observe how those actions are unfolding in practice.

The Risk Lens encourages organisations to remain aware of how advocacy activities may affect their operating environment. The Action Prompt helps organisations reflect on whether advocacy efforts are producing meaningful signals of progress.

Consider the following flow:

Advocacy Action Implementation → Progress Monitoring → Stakeholder Response Observation → Risk Reflection → Strategic Adjustment

Sample Worksheet (Filled):

Advocacy Action	Date / Time Period	Actors or Institutions Involved	Observed Response or Development	Early Signals of Progress
Policy meeting with telecommunications regulator	March 2026	Regulatory authority officials, coalition partner organisation	Regulator requested additional research evidence on the issue	Moderate progress
Publication of policy brief	April 2026	Civil society organisations, policy researchers, media actors	Issue discussed in policy forums and referenced in media reporting	Positive progress
Coalition consultation meeting	May 2026	Civil society coalition partners	Partners agreed to coordinate joint advocacy engagement	Positive progress
Submission of policy recommendations	June 2026	Ministry officials	Ministry acknowledged submission but provided no immediate response	Neutral outcome
Public discussion at policy conference	July 2026	Policy experts, civil society representatives	Policymakers invited organisation to participate in upcoming consultation	Positive progress

How to Read the Matrix

After completing the worksheet over time, organisations should review how advocacy actions correspond with the responses recorded in the monitoring matrix. Actions that generate positive engagement from policymakers or institutions may indicate that the advocacy strategy is gaining traction. Activities that produce limited response may require additional follow-up or adjustment. By examining these patterns, organisations can better understand how their advocacy efforts are evolving and determine whether adjustments to the strategy may be necessary.

Tool 15 — Advocacy Outcome and Impact Reflection

Purpose of the Tool

This tool helps organisations reflect on the outcomes and broader effects of their advocacy efforts. While advocacy progress monitoring focuses on tracking activities and responses as they occur, this tool encourages organisations to step back and examine whether those efforts are producing meaningful change.



Advocacy outcomes do not always appear as immediate policy reforms. In many cases, progress may take the form of increased recognition of the issue, shifts in the position of decision-makers, the inclusion of new voices in policy discussions, or improvements in institutional behaviour. These developments may represent important steps toward longer-term policy change.

The purpose of this tool is therefore to help organisations assess how their advocacy work has influenced the policy environment and whether it is contributing to the intended objective. By reflecting on these outcomes, organisations can better understand what aspects of their advocacy approach are effective and where improvements may be needed.

When to Use This Tool

Use this tool after a significant period of advocacy implementation or following important advocacy milestones. These milestones may include the completion of a policy consultation process, the publication of research reports, the conclusion of a public campaign, or engagement with key decision-makers. This tool is particularly useful when organisations want to reflect on how the policy environment has evolved since the advocacy effort began and whether advocacy activities have contributed to that change. Organisations may also use this tool at the end of an advocacy cycle to capture lessons and inform future advocacy strategies.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to reflect on the outcomes and broader effects of advocacy efforts.

- Begin by restating the advocacy objective defined in earlier modules.
- Review the advocacy actions that were implemented and the responses observed during the monitoring process.
- Identify any observable outcomes connected to the advocacy effort.
- Consider whether the advocacy effort influenced decision-makers, policy discussions, or institutional behaviour.
- Reflect on the broader effects of advocacy efforts, including increased awareness, coalition strengthening, or improved access to policy processes.
- Use this reflection to identify lessons that can inform future advocacy work.

Advocacy Outcome Reflection Worksheet

The following worksheet can be used to reflect on the outcomes and broader effects of advocacy efforts.

Advocacy Objective	Key Advocacy Actions Implemented	Observable Outcomes	Changes in Stakeholder Behaviour	Broader Effects of Advocacy

Advocacy Outcome Reflection: Use a structured reflection exercise to assess how advocacy efforts have influenced the policy environment. Begin by restating the advocacy objective and reviewing the advocacy actions that were implemented. Then identify observable outcomes, shifts in stakeholder behaviour, and broader changes in the policy discussion surrounding the issue.



Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations examine how advocacy efforts may have influenced the policy environment.

1. Advocacy Objective:

This column records the advocacy objective that guided the advocacy effort. Restating the objective helps ensure that outcome reflection remains connected to the intended change.

Sample Assessment

- What change was the organisation seeking to achieve?
- Which institution or authority was expected to implement this change?

2. Key Advocacy Actions Implemented:

This column records the main advocacy actions that were carried out. These actions should correspond to the activities defined in the advocacy action plan.

Sample Assessment

- Which major advocacy activities were implemented?
- Which actors or institutions were engaged?

3. Observable Outcomes:

This column records outcomes that can be linked to advocacy efforts. These may include changes in policy discussions, requests for input from policymakers, invitations to consultations, or improvements in institutional responsiveness.

Sample Assessment

- Did decision-makers acknowledge the issue?
- Did policymakers request evidence or recommendations?

4. Changes in Stakeholder Behaviour:

This column identifies any observable shifts in how stakeholders or institutions responded to the issue.

Sample Assessment

- Did policymakers show increased openness to dialogue?
- Did institutions demonstrate greater willingness to engage?

5. Broader Effects of Advocacy:

This column captures wider effects of advocacy efforts that may not directly represent policy change but still strengthen the advocacy environment.

Sample Assessment

- Did public awareness of the issue increase?
- Did coalition partners strengthen collaboration?
- Did media attention or expert discussion increase?

Interpretation Guide



After completing the worksheet, organisations should review how the outcomes identified relate to the original advocacy objective. Some advocacy efforts may produce visible policy changes, while others may generate incremental progress such as improved access to policymakers, increased public discussion, or stronger coalition coordination. These developments may represent important steps toward long-term policy change. By examining these outcomes carefully, organisations can better understand the pathways through which advocacy influence occurs and identify which advocacy approaches appear most effective.

Risk Lens

Advocacy outcomes may also change how organisations are perceived within the policy environment. Increased influence or visibility may attract both opportunities and challenges. Organisations should therefore reflect on whether the outcomes of advocacy have altered their relationships with policymakers, stakeholders, or other actors connected to the issue.

Sample Checklist to Assess Risk

- Has advocacy success increased organisational visibility or expectations?
- Have any stakeholders expressed concern about the organisation's advocacy work?
- Could further advocacy engagement on this issue attract political sensitivity?
- Are there risks associated with maintaining momentum on the issue?

Action Prompt

After reflecting on advocacy outcomes, organisations should identify lessons that can strengthen future advocacy efforts. This step helps ensure that reflection leads to learning and improved strategic planning.

Sample Checklist

- Which advocacy approaches appear most effective?
- Which actions produced limited results and may require adjustment?
- Are there new opportunities for engagement that emerged from the advocacy effort?
- How can these lessons inform future advocacy strategies?

Note: This tool focuses on reflecting on the outcomes and broader effects of advocacy efforts. While the previous tool tracked advocacy activities and responses as they occurred, this tool encourages organisations to examine how those efforts influenced the policy environment over time. The Risk Lens encourages organisations to remain aware of how advocacy outcomes may affect their operating environment. The Action Prompt helps organisations translate reflection into lessons for future advocacy work.

Consider the following flow:

Advocacy Implementation → Outcome Reflection → Learning Identification → Risk Awareness → Strategy Improvement

Sample Worksheet (Filled):

Advocacy Objective	Key Advocacy Actions Implemented	Observable Outcomes	Changes in Stakeholder Behaviour	Broader Effects of Advocacy
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Encourage regulatory transparency in telecommunications policy	Policy meetings with regulators, publication of policy brief, coalition consultations	Regulator invited organisation to participate in policy consultation	Policymakers demonstrated greater openness to dialogue	Increased discussion of regulatory transparency in policy forums
Strengthen data protection safeguards	Research publication, stakeholder workshops, policy submissions	Policymakers requested additional evidence on regulatory gaps	Institutions acknowledged the importance of stronger safeguards	Increased collaboration among civil society partners

How to Read the Matrix

After completing the worksheet, organisations should review how the outcomes recorded relate to the original advocacy objective and the actions that were implemented. Outcomes that demonstrate increased engagement from decision-makers, improved institutional openness, or greater visibility of the issue may indicate that advocacy efforts are influencing the policy environment.

Activities that produce limited outcomes may require reconsideration or adjustment in future advocacy efforts. By reviewing these patterns, organisations can identify lessons that strengthen future advocacy strategies and improve the effectiveness of their engagement with policymakers and stakeholders.

Tool 16 — Advocacy Strategy Adaptation

Purpose of the Tool

This tool helps organisations adjust their advocacy strategy based on the lessons and observations generated through monitoring and reflection. Advocacy environments are dynamic, and the behaviour of policymakers, institutions, and stakeholders may change over time. As a result, strategies that were effective at one stage may need to evolve as the policy landscape develops. While the previous tools helped organisations monitor advocacy activities and reflect on the outcomes of those efforts, this tool focuses on translating those insights into strategic adjustments. The objective is to ensure that advocacy strategies remain responsive to new opportunities, emerging challenges, and shifts in stakeholder behaviour. By deliberately reviewing and adapting their strategy, organisations can maintain momentum, refine their engagement approaches, and strengthen the effectiveness of their advocacy work.

When to Use This Tool

Use this tool after completing the advocacy progress monitoring and outcome reflection exercises. Once organisations have gathered sufficient information about how advocacy activities are unfolding and what outcomes have emerged, they should consider whether their strategy requires adjustment.

This tool is particularly useful when there are significant changes in the policy environment, shifts in stakeholder positions, new advocacy opportunities, or signs that current advocacy approaches are producing limited results. Organisations may also use this tool periodically during long advocacy campaigns to ensure that their strategy remains aligned with evolving circumstances.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify whether and how the advocacy strategy should be adjusted.



- Begin by reviewing the monitoring records and outcome reflections from the previous tools.
- Identify which advocacy actions and engagement approaches appear to be producing positive results.
- Identify actions or approaches that have produced limited progress or unexpected resistance.
- Consider whether new opportunities for engagement have emerged within the policy environment.
- Based on these observations, determine whether adjustments to the advocacy strategy are necessary.

Advocacy Strategy Adaptation Worksheet

The following worksheet can be used to identify possible adjustments to the advocacy strategy.

Observed Development or Lesson	Implication for Advocacy Strategy	Recommended Strategic Adjustment	Responsible Team or Actor	Timeline for Adjustment

Advocacy Strategy Adaptation: Use a structured reflection process to identify how the advocacy strategy may need to evolve. Begin by reviewing the lessons identified through monitoring and outcome reflection. Then assess whether advocacy approaches, engagement strategies, or communication efforts should be adjusted.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations translate monitoring insights into strategic adjustments.

1. Observed Development or Lesson:

This column records the key lesson or observation identified during the monitoring and reflection process. These observations may include stakeholder responses, policy developments, or emerging opportunities.

Sample Assessment

- What developments were observed during advocacy monitoring?
- What lessons emerged from the outcome reflection exercise?

2. Implication for Advocacy Strategy:

This column records how the observed development affects the current advocacy strategy.

Sample Assessment

- Does this development strengthen the current strategy?
- Does it suggest that certain advocacy approaches may be less effective?

3. Recommended Strategic Adjustment:

This column identifies potential changes that may improve advocacy effectiveness. Adjustments may involve modifying engagement approaches, prioritising different actors, adjusting communication strategies, or strengthening coalition coordination.

Sample Assessment

- Should advocacy engagement shift toward different actors?
- Should communication strategies be adjusted?
- Should coalition coordination be strengthened?



4. Responsible Team or Actor:

This column identifies who within the organisation or coalition should implement the strategic adjustment.

Sample Assessment

- Which team or staff member should implement the adjustment?
- Are coalition partners involved in implementing the change?

5. Timeline for Adjustment:

This column records when the strategic adjustment should be implemented.

Sample Assessment

- Should the adjustment be implemented immediately?
- Should it be aligned with upcoming policy events or advocacy milestones?

Interpretation Guide:

After completing the worksheet, organisations should review the proposed strategic adjustments and consider how they affect the overall advocacy strategy. Some adjustments may involve minor changes to communication or engagement tactics, while others may require more significant shifts in advocacy priorities or coalition coordination. The purpose of this exercise is to ensure that advocacy strategies remain responsive to the evolving policy environment and that organisations are able to adapt their approach when new opportunities or challenges emerge.

Risk Lens

Adjusting advocacy strategies may involve changes in engagement approaches, visibility levels, or stakeholder relationships. Organisations should therefore consider how these adjustments may affect their operating environment. In some cases, strategic adjustments may increase the visibility of advocacy efforts, while in other cases they may involve shifting toward quieter engagement approaches.

Sample Checklist to Assess Risk

- Could strategic adjustments increase political sensitivity around the issue?
- Could changes in advocacy approach affect relationships with policymakers or partners?
- Could increased advocacy visibility create new risks for the organisation?
- Does the organisation have the capacity to implement the proposed adjustments?

Action Prompt

After identifying potential strategic adjustments, organisations should decide which changes should be implemented and how they will be integrated into the ongoing advocacy effort. This step ensures that lessons from monitoring and reflection lead to practical improvements in advocacy practice.

Sample Checklist

- Which strategic adjustments should be prioritised?
- Who is responsible for implementing these changes?
- When should the adjustments be implemented?
- How will the organisation monitor the effects of these changes?



Note: This tool focuses on translating monitoring insights and outcome reflections into practical adjustments to the advocacy strategy. While previous tools helped organisations track progress and reflect on outcomes, this tool helps ensure that advocacy strategies remain flexible and responsive to changing circumstances. The Risk Lens encourages organisations to remain aware of how strategic adjustments may affect their operating environment. The Action Prompt helps organisations implement changes in a deliberate and structured manner.

Consider the following flow:

Advocacy Monitoring → Outcome Reflection → Strategic Adjustment → Updated Advocacy Strategy

Sample Worksheet (Filled)

Observed Development or Lesson	Implication for Advocacy Strategy	Recommended Strategic Adjustment	Responsible Team or Actor	Timeline for Adjustment
Policymakers showed increased interest in research evidence	Evidence-based advocacy appears effective	Increase production and dissemination of policy briefs	Research and policy team	Within the next two months
Limited response from regulatory authority	Direct engagement may need strengthening	Schedule follow-up meetings and involve coalition partners	Advocacy team	Within the next policy consultation cycle
Increased public discussion of the issue	Communication strategies are generating awareness	Expand media engagement and public communication	Communica tions team	Ongoing
Coalition partners expressed interest in stronger coordination	Coalition engagement may strengthen advocacy impact	Establish regular coalition coordination meetings	Coalition coordination team	Beginning next quarter

How to Read the Matrix

After completing the worksheet, organisations should review how the lessons identified during monitoring and reflection translate into strategic adjustments. Developments that reveal new opportunities may indicate that certain advocacy approaches should be strengthened. Observations of limited progress may suggest that engagement strategies need to be modified or expanded. By examining these insights systematically, organisations can refine their advocacy strategy and ensure that their efforts remain aligned with the evolving policy environment.

Module 7 — Documentation, Learning, and Institutional Memory

Advocacy efforts often generate valuable knowledge about how policy processes work, how institutions respond to engagement, and how strategies evolve over time. However, much of this knowledge can remain informal or dispersed among individuals involved in the advocacy process. When lessons are not systematically documented, organisations risk losing insights that could strengthen future advocacy efforts.

Documentation is therefore an important part of effective advocacy practice. Recording experiences, outcomes, and lessons helps organisations understand what approaches were successful, what challenges emerged, and how strategies adapted to changing circumstances. This process contributes to institutional memory, ensuring that knowledge gained from one advocacy effort can inform future initiatives.



For civil society organisations operating in complex or politically sensitive environments, documentation also plays an important role in maintaining continuity. Staff turnover, shifting coalitions, and evolving policy contexts can make it difficult to retain organisational knowledge unless it is captured in a structured way.

This module helps organisations consolidate the learning generated through advocacy work. The tools in this module guide organisations in documenting advocacy processes, recording lessons learned, and capturing insights that can strengthen future strategy development. Rather than focusing on immediate advocacy actions, this module encourages organisations to reflect on the broader experience of advocacy engagement and preserve that knowledge for future use.

When to Use This Module

Organisations should use this module after completing a significant advocacy cycle or after reaching important advocacy milestones. These milestones may include the completion of an advocacy campaign, the conclusion of a policy consultation process, or the implementation of major strategic adjustments. This module may also be used periodically to record insights that emerge during long-term advocacy efforts. By documenting advocacy experiences and lessons, organisations can build a stronger foundation for future advocacy work and ensure that valuable knowledge is retained within the organisation.

Decision Pathway

The tools in this module guide organisations through a sequence of documentation and learning steps. The first step is to document the advocacy process and record the major activities, milestones, and developments that occurred during the advocacy effort. The second step is to capture lessons learned from the experience, including insights about effective strategies, stakeholder engagement, and coalition dynamics. The third step is to consolidate this knowledge in a way that strengthens organisational memory and informs future advocacy planning.

By following these steps, organisations can ensure that the experience gained through advocacy efforts contributes to continuous learning and stronger advocacy practice over time.

Tool 17 — Advocacy Process Documentation

Purpose of the Tool

This tool helps organisations systematically document the overall advocacy effort so that key experiences, developments, and insights are preserved. While previous modules focused on monitoring progress, reflecting on outcomes, and adjusting strategies, those exercises often generate valuable knowledge that may remain informal or dispersed across teams. The purpose of this tool is to create a clear and structured record of the advocacy process. Documenting the issue addressed, the advocacy objective, the key actions undertaken, and the developments observed helps organisations preserve institutional memory and ensure that knowledge gained during advocacy efforts is not lost over time. Advocacy environments are often complex and evolve gradually. By documenting the advocacy process, organisations can better understand how strategies unfolded, what milestones were reached, and how the policy environment responded to advocacy engagement.

When to Use This Tool

Use this tool after a significant advocacy cycle, major advocacy milestones, or when an organisation wishes to consolidate documentation of its advocacy efforts. This tool is particularly useful after the completion of a



campaign, a policy reform process, or a sustained advocacy initiative where multiple actions, actors, and developments were involved. Organisations may also use this tool periodically to ensure that advocacy processes are documented before institutional knowledge is lost due to staff transitions or changes in organisational priorities.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to document the overall advocacy effort in a clear and structured manner.

- Begin by recording the advocacy issue and the objective that guided the advocacy effort.
- Document the key advocacy actions that were implemented during the process.
- Record major milestones or developments that occurred within the policy environment.
- Identify the actors and institutions that were engaged during the advocacy effort.
- Note the outcomes or policy developments associated with the advocacy process.
- Use this documentation to preserve a clear institutional record of the advocacy effort.

Advocacy Process Documentation Worksheet

The following worksheet can be used to document the overall advocacy process and capture the key elements of the advocacy effort.

Advocacy Issue	Advocacy Objective	Key Advocacy Actions	Major Milestones or Developments	Actors and Institutions Engaged	Outcomes or Policy Developments

Advocacy Process Documentation: Use a structured documentation exercise to record the major components of the advocacy effort. Begin by documenting the advocacy issue and objective, then record the key actions undertaken, major milestones, actors involved, and observable outcomes.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations document the overall advocacy effort.

1. Advocacy Issue:

This column records the policy issue or problem that the advocacy effort sought to address. Documenting the issue ensures that future teams understand the context in which the advocacy effort took place.

Sample Assessment

- What issue was the organisation advocating on?
- What problem or policy gap was being addressed?

2. Advocacy Objective:

This column records the advocacy objective defined earlier in the strategy design process. Restating the objective ensures that the documentation remains connected to the intended policy change.



Sample Assessment

- What change was the organisation seeking to achieve?
- Which institution or authority was expected to implement this change?

3. Key Advocacy Actions:

This column records the major advocacy activities implemented during the advocacy process.

Sample Assessment

- What advocacy activities were carried out?
- Which actions represented the most important components of the strategy?

4. Major Milestones or Developments:

This column documents important events or developments that occurred during the advocacy effort. These may include policy consultations, regulatory announcements, public discussions, or coalition initiatives.

Sample Assessment

- Were there major policy discussions or consultations related to the issue?
- Did significant developments occur within the policy environment?

5. Actors and Institutions Engaged:

This column identifies the actors, institutions, or stakeholders that were engaged during the advocacy process.

Sample Assessment

- Which policymakers or institutions were engaged?
- Were coalition partners or other stakeholders involved?

6. Outcomes or Policy Developments:

This column records any outcomes or developments that occurred during or after the advocacy effort. Outcomes may include policy changes, invitations to consultations, institutional commitments, or increased attention to the issue.

Sample Assessment

- Did the advocacy effort influence policy discussions?
- Were there observable changes in institutional behaviour?

Interpretation Guide

After completing the worksheet, organisations should review the documentation to understand how the advocacy effort unfolded over time. This documentation can help organisations identify the sequence of actions, milestones, and developments that shaped the advocacy process. By examining these records, organisations can better understand how different advocacy approaches interacted with the policy environment. Documenting the advocacy process also ensures that future staff and partners can learn from past advocacy efforts and build upon existing knowledge.

Risk Lens



Documenting advocacy processes may involve recording sensitive interactions with policymakers, institutions, or coalition partners. Organisations should therefore consider how advocacy documentation is stored and shared.

In some contexts, internal documentation may contain information that should not be publicly disclosed.

Sample Checklist to Assess Risk

- Does the documentation include sensitive information about stakeholders or institutions?
- Should some elements of the documentation remain internal to the organisation?
- Could public disclosure of the documentation create risks for the organisation or its partners?
- Are there appropriate safeguards for storing advocacy documentation?

Action Prompt

After completing the documentation worksheet, organisations should ensure that the information recorded is preserved and accessible to relevant staff members.

This step ensures that the insights generated through advocacy work contribute to institutional memory and future advocacy planning.

Sample Checklist

- Where will this documentation be stored within the organisation?
- Who should have access to the documentation?
- How can the information be organised so that future teams can easily use it?
- Should the documentation inform future advocacy planning processes?

Note: This tool focuses on documenting the overall advocacy process so that key experiences, milestones, and outcomes are preserved within the organisation. While previous modules focused on monitoring progress and adapting advocacy strategies, this tool captures the broader narrative of the advocacy effort for future reference.

The Risk Lens encourages organisations to consider how advocacy documentation should be managed responsibly. The Action Prompt helps organisations ensure that documentation contributes to institutional learning.

Consider the following flow:

Advocacy Process Documentation → Institutional Record Creation → Knowledge Preservation → Future Advocacy Reference

Sample Worksheet (Filled):

Advocacy Issue	Advocacy Objective	Key Advocacy Actions	Major Milestones or Developments	Actors and Institutions Engaged	Outcomes or Policy Developments
Improve transparency in telecommunications regulation	Encourage the regulatory authority to publish consultation drafts for new telecom regulations	Policy meetings with regulators, research publication, coalition consultations	Regulatory authority opened consultation on proposed regulatory reform	Telecommunications regulator, civil society coalition partners	Organisation invited to provide policy recommendations during consultation



Strengthen safeguards in data protection policy	Advocate for stronger provisions within national data protection legislation	Research report, policy workshops, stakeholder consultations	Parliamentary committee initiated review of draft legislation	Members of parliament, policy experts, civil society partners	Issue incorporated into policy discussions during legislative review
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How to Read the Matrix

After completing the worksheet, organisations should review how the issue, objective, actions, and developments are connected within the advocacy process. This documentation helps create a clear institutional record of the advocacy effort, allowing organisations to understand how strategies were implemented and what outcomes emerged. By preserving this information, organisations can ensure that future advocacy efforts benefit from the experience and knowledge gained during previous initiatives.

Tool 18 — Lessons Learned and Knowledge Capture

Purpose of the Tool

This tool helps organisations extract and organise key lessons from their advocacy experience. While the previous tool focused on documenting what happened during the advocacy process, this tool focuses on analysing that experience to identify what worked, what did not, and why. Advocacy efforts often generate insights about stakeholder behaviour, effective strategies, coalition dynamics, and engagement approaches. However, these insights are not always systematically captured or articulated. Without structured reflection, valuable lessons may remain implicit and may not inform future advocacy work. The purpose of this tool is therefore to help organisations identify and record actionable lessons that can strengthen future advocacy strategies. By moving from documentation to analysis, organisations can better understand how their advocacy efforts influenced the policy environment and how their approach can be improved.

When to Use This Tool

Use this tool after completing the advocacy process documentation. Once organisations have a clear record of the advocacy effort, they should reflect on that experience to extract key lessons. This tool is particularly useful at the end of an advocacy cycle, after major milestones, or when organisations want to review their advocacy approach and improve future strategy design. Organisations may also use this tool periodically during long-term advocacy efforts to capture lessons as they emerge.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify lessons that can inform future advocacy work.

- Review the documented advocacy process, including actions, milestones, and outcomes.
- Identify which advocacy approaches or actions appeared effective.
- Identify challenges, limitations, or unexpected outcomes that emerged.
- Consider how stakeholders responded to advocacy efforts and what influenced those responses.
- Reflect on coalition dynamics, communication strategies, and engagement approaches.
- Translate these observations into clear and actionable lessons.

Lessons Learned and Knowledge Capture Worksheet



The following worksheet can be used to identify and record lessons from the advocacy experience.

Key Observation	What Worked Well	What Did Not Work or Challenges Faced	Lesson Learned	Recommendation for Future Advocacy
Policymakers responded positively to evidence-based policy briefs	Research-driven advocacy strengthened credibility	Limited follow-up engagement reduced momentum	Evidence-based advocacy is effective but requires sustained engagement	Increase follow-up meetings after sharing policy briefs
Coalition partners contributed diverse expertise	Coalition strengthened advocacy legitimacy	Coordination challenges slowed decision-making	Coalition effectiveness depends on clear coordination mechanisms	Establish structured coordination processes within coalitions
Public communication increased awareness of the issue	Media engagement expanded visibility	Increased visibility attracted critical scrutiny	Public advocacy can strengthen influence but may increase exposure	Balance public communication with targeted policy engagement

Lessons Learned and Knowledge Capture: Use a structured reflection process to extract key lessons from the documented advocacy effort. Begin by identifying key observations from the advocacy process, then analyse what these observations reveal about effective or ineffective advocacy approaches.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations convert experience into actionable learning.

1. Key Observation:

This column records a specific observation from the advocacy process. Observations may relate to stakeholder behaviour, policy developments, advocacy actions, or coalition dynamics.

Sample Assessment

- What happened during the advocacy effort?
- What patterns or developments were observed?

2. What Worked Well:

This column identifies aspects of the advocacy approach that contributed positively to the advocacy effort.

Sample Assessment

- Which strategies or actions were effective?
- What contributed to positive engagement from stakeholders?

3. What Did Not Work or Challenges Faced:

This column records challenges, limitations, or aspects of the advocacy approach that were less effective.

Sample Assessment

- Which approaches produced limited results?
- Were there barriers that affected advocacy effectiveness?



4. Lesson Learned:

This column translates the observation into a clear lesson that can inform future advocacy work.

Sample Assessment

- What can be learned from this experience?
- How should future advocacy approaches be adjusted?

5. Recommendation for Future Advocacy:

This column records a practical recommendation based on the lesson learned.

Sample Assessment

- How should this lesson influence future advocacy strategies?
- What should be done differently next time?

Interpretation Guide

After completing the worksheet, organisations should review the lessons identified and consider how they relate to their overall advocacy approach. Some lessons may confirm that certain strategies are effective and should be continued or strengthened. Others may reveal gaps or limitations that require adjustments in future advocacy efforts. By systematically capturing these lessons, organisations can ensure that their advocacy practice becomes more informed and effective over time.

Risk Lens

Reflecting on lessons learned may involve identifying internal weaknesses, challenges, or sensitive aspects of advocacy engagement. Organisations should consider how these insights are documented and shared. In some cases, lessons related to stakeholder relationships or political sensitivities may require careful handling.

Sample Checklist to Assess Risk

- Do the lessons identified involve sensitive information about stakeholders or institutions?
- Should certain lessons remain internal to the organisation?
- Could sharing these insights externally affect relationships with partners or policymakers?
- Are there appropriate safeguards for documenting and storing lessons learned?

Action Prompt

After identifying key lessons, organisations should ensure that these insights inform future advocacy planning and strategy development. This step ensures that learning is not isolated but contributes to continuous improvement.

Sample Checklist

- Which lessons should directly inform future advocacy strategies?
- Are there recurring challenges that require structural changes in approach?
- Should these lessons be shared with partners or coalition members?
- How will these insights be incorporated into future planning processes?

Note: This tool focuses on extracting lessons from the documented advocacy process and translating those insights into actionable recommendations. While the previous tool recorded what happened during the advocacy



effort, this tool focuses on understanding why those outcomes occurred and how future advocacy can be improved. The Risk Lens encourages organisations to consider how lessons learned are documented and shared. The Action Prompt helps organisations ensure that these insights are integrated into future advocacy work.

Consider the following flow

Advocacy Documentation → Observation Analysis → Lesson Identification → Recommendation Development → Knowledge Capture

Sample Worksheet (Filled):

Key Observation	What Worked Well	What Did Not Work or Challenges Faced	Lesson Learned	Recommendation for Future Advocacy
Policymakers responded positively to evidence-based policy briefs	Research-driven advocacy strengthened credibility	Limited follow-up engagement reduced momentum	Evidence-based advocacy is effective but requires sustained engagement	Increase follow-up meetings after sharing policy briefs
Coalition partners contributed diverse expertise	Coalition strengthened advocacy legitimacy	Coordination challenges slowed decision-making	Coalition effectiveness depends on clear coordination mechanisms	Establish structured coordination processes within coalitions
Public communication increased awareness of the issue	Media engagement expanded visibility	Increased visibility attracted critical scrutiny	Public advocacy can strengthen influence but may increase exposure	Balance public communication with targeted policy engagement

How to Read the Matrix

After completing the worksheet, organisations should review how observations from the advocacy process translate into lessons and recommendations. Lessons that highlight effective strategies can inform future advocacy planning and should be strengthened. Lessons that reveal challenges or limitations should guide adjustments in approach. By analysing these patterns, organisations can build a stronger and more informed advocacy practice that benefits from past experience.

Tool 19 — Organisational Learning Integration

Purpose of the Tool

This tool helps organisations ensure that lessons from advocacy efforts are not only captured but actively integrated into future practice. While the previous tool focused on identifying lessons learned, this tool focuses on embedding those lessons into organisational processes, systems, and decision-making. Advocacy organisations often generate valuable insights, but these insights may not consistently influence future strategies unless they are deliberately incorporated into planning, workflows, and internal systems. Without this step, lessons risk remaining isolated rather than strengthening long-term advocacy effectiveness. The purpose of this tool is therefore to help organisations translate lessons learned into concrete changes in how advocacy work is designed and implemented. By integrating learning into organisational practice, organisations can improve consistency, strengthen strategic thinking, and build long-term institutional capacity.

When to Use This Tool



Use this tool after completing the lessons learned and knowledge capture exercise. Once organisations have identified key lessons, they should determine how those insights will be incorporated into future advocacy work. This tool is particularly useful when organisations are preparing for new advocacy initiatives, updating internal processes, or strengthening organisational systems for strategy development and implementation. Organisations may also use this tool periodically to ensure that learning from past advocacy efforts is reflected in ongoing work.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to ensure that lessons learned are translated into practical organisational improvements.

- Review the lessons and recommendations identified in the previous tool.
- Identify which lessons require changes in advocacy strategy, processes, or internal practices.
- Determine how these changes can be incorporated into organisational systems or workflows.
- Assign responsibility for implementing these changes.
- Define a timeline for integrating these lessons into future advocacy work.
- Use this process to ensure that learning informs future planning and decision-making.

Organisational Learning Integration Worksheet

The following worksheet can be used to integrate lessons learned into organisational practice.

Key Lesson Identified	Recommended Change	Area of Integration	Responsible Team or Individual	Timeline for Integration

Organisational Learning Integration: Use a structured process to translate lessons learned into organisational improvements. Begin by identifying key lessons and recommendations, then determine how these insights will be incorporated into advocacy strategies, internal processes, or organisational systems.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations embed learning into practice.

1. Key Lesson Identified:

This column records the lesson identified during the knowledge capture process.

Sample Assessment

- What lesson was identified from the advocacy experience?
- What insight should inform future work?

2. Recommended Change:

This column records the specific change that should be made based on the lesson.

Sample Assessment

- What should be done differently in future advocacy efforts?
- Does this require changes in strategy, processes, or coordination?

3. Area of Integration:



This column identifies where the change should be integrated within the organisation. This may include advocacy planning processes, stakeholder engagement approaches, communication strategies, or internal coordination systems.

Sample Assessment

- Should this change be reflected in strategy design?
- Does it affect how the organisation engages with stakeholders or partners?

4. Responsible Team or Individual:

This column identifies who is responsible for implementing the change within the organisation.

Sample Assessment

- Which team or staff member should implement this change?
- Are multiple teams involved?

5. Timeline for Integration:

This column records when the change should be implemented.

Sample Assessment

- Should this change be implemented immediately?
- Should it be incorporated into the next advocacy planning cycle?

Interpretation Guide

After completing the worksheet, organisations should review how lessons learned are translated into practical changes across different areas of advocacy work. Some lessons may require adjustments to strategy design, while others may involve improvements in coordination, communication, or stakeholder engagement. By mapping these changes clearly, organisations can ensure that learning leads to concrete improvements rather than remaining abstract. Integrating learning into organisational practice helps build long-term capacity and ensures that future advocacy efforts benefit from past experience.

Risk Lens

Integrating organisational learning may involve changes to established processes, roles, or approaches. Organisations should consider how these changes may affect internal dynamics and external relationships. In some cases, changes in advocacy approach may also affect how organisations engage with policymakers or partners.

Sample Checklist to Assess Risk

- Could these changes affect existing relationships with stakeholders or partners?
- Do proposed changes require additional organisational capacity or resources?
- Could changes in advocacy approach create new sensitivities or risks?
- Are internal teams aligned on the proposed changes?

Action Prompt



After identifying how lessons will be integrated, organisations should ensure that these changes are implemented and reflected in future advocacy work. This step ensures that learning contributes to continuous improvement rather than remaining theoretical.

Sample Checklist

- Which changes should be prioritised for immediate implementation?
- How will these changes be incorporated into future advocacy planning?
- Who is responsible for ensuring these changes are implemented?
- How will the organisation track whether these changes improve advocacy effectiveness?

Note: This tool focuses on embedding lessons learned into organisational practice. While previous tools identified lessons from advocacy experience, this tool ensures that those lessons influence how future advocacy strategies are designed and implemented.

The Risk Lens encourages organisations to consider how changes may affect internal and external dynamics. The Action Prompt helps organisations implement learning in a structured and practical way.

Consider the following flow:

Lesson Identification → Recommendation Development → Organisational Integration → Improved Advocacy Practice

Sample Worksheet (Filled):

Key Lesson Identified	Recommended Change	Area of Integration	Responsible Team or Individual	Timeline for Integration
Evidence-based advocacy increases credibility	Strengthen research component in advocacy strategies	Advocacy planning process	Research and policy team	Next advocacy cycle
Coalition coordination needs improvement	Establish regular coordination meetings and clear roles	Coalition management	Advocacy and partnerships team	Within the next quarter
Public communication increases visibility but also risk	Develop balanced communication strategies combining public and targeted engagement	Communication strategy	Communications team	Immediate and ongoing

How to Read the Matrix

After completing the worksheet, organisations should review how lessons learned are being translated into concrete organisational changes. Lessons that are clearly linked to changes in strategy, processes, or coordination are more likely to improve future advocacy effectiveness. By ensuring that each lesson leads to a defined action, responsibility, and timeline, organisations can strengthen their ability to learn from experience and continuously improve their advocacy practice.



Module 8 — Sustainability and Advocacy Continuity

Advocacy does not end with a single campaign, policy change, or engagement cycle. In many cases, policy reforms require sustained engagement over time, continued monitoring, and repeated efforts to ensure implementation. Without continuity, even successful advocacy efforts may lose momentum or fail to produce lasting change. Civil society organisations often operate in environments where resources, political space, and institutional relationships shift over time. In such contexts, sustaining advocacy efforts requires deliberate planning. Organisations must consider how advocacy priorities will be maintained, how relationships with stakeholders will be preserved, and how knowledge and capacity will be carried forward.

This module focuses on ensuring that advocacy efforts remain sustainable beyond individual initiatives. It encourages organisations to think about long-term positioning, resource continuity, and maintaining influence within policy processes. Rather than designing new advocacy strategies, this module helps organisations consolidate their position within the advocacy ecosystem and ensure that progress made is not lost over time.

When to Use This Module

Organisations should use this module after completing an advocacy cycle or when planning the next phase of engagement.

It is particularly useful when:

- A policy change has been achieved but requires follow-up
- Advocacy efforts need to be sustained over time
- Organisational priorities are shifting
- New funding cycles or partnerships are being considered

Decision Pathway

The tools in this module guide organisations through the final stage of advocacy work. The first step is to assess how advocacy gains can be sustained and protected over time. The second step is to identify how relationships with stakeholders and partners can be maintained. The third step is to plan how organisational capacity, knowledge, and resources will support continued advocacy engagement. By following these steps, organisations can ensure that advocacy efforts lead to lasting impact rather than temporary change.

Tool 20 — Advocacy Sustainability Planning

Purpose of the Tool

This tool helps organisations plan how advocacy efforts will be sustained over time, beyond a single campaign or policy engagement cycle. Advocacy outcomes often require continued follow-up, reinforcement, and monitoring to ensure that progress is not reversed or weakened. While previous modules focused on designing, implementing, and learning from advocacy efforts, this tool focuses on maintaining momentum. It helps organisations think about how advocacy gains can be protected, how engagement with decision-makers can be sustained, and how the issue can remain visible within policy discussions where necessary. The purpose of this tool is therefore to ensure that advocacy efforts lead to lasting impact rather than temporary change. By planning for sustainability, organisations can continue influencing policy processes and support the long-term implementation of reforms.

When to Use This Tool



Use this tool after completing an advocacy cycle or when an organisation is preparing the next phase of engagement on an issue.

This tool is particularly useful when:

- A policy change has been achieved but requires follow-up
- Advocacy efforts need to be sustained over time
- Organisations want to maintain relationships with policymakers or stakeholders
- The issue remains relevant within evolving policy discussions

Organisations may also use this tool when transitioning from one advocacy phase to another to ensure continuity.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify how advocacy efforts can be sustained over time.

- Begin by reviewing the current status of the advocacy issue and any outcomes achieved.
- Identify which aspects of the advocacy effort require continued engagement.
- Consider how relationships with policymakers, stakeholders, and coalition partners will be maintained.
- Assess what level of visibility or engagement is needed to keep the issue relevant.
- Determine what organisational capacity or resources are required to sustain advocacy efforts.
- Use this analysis to define a sustainability approach for ongoing advocacy.

Advocacy Sustainability Planning Worksheet

The following worksheet can be used to plan how advocacy efforts will be sustained over time.

Current Status of the Issue	Areas Requiring Continued Engagement	Key Actors to Maintain Engagement With	Sustainability Actions	Required Capacity or Resources

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations plan for sustained advocacy engagement.

1. Current Status of the Issue:

This column records the current position of the advocacy issue within the policy environment. This may include policy changes achieved, ongoing policy discussions, or areas where progress is incomplete.

Sample Assessment

- Has any policy change been achieved?
- Is the issue still under discussion within policy processes?

2. Areas Requiring Continued Engagement:

This column identifies aspects of the issue that still require advocacy attention.



Sample Assessment

- Are there gaps in policy implementation?
- Are there unresolved issues that require further engagement?

3. Key Actors to Maintain Engagement With:

This column identifies the actors or institutions with whom relationships should be maintained.

Sample Assessment

- Which policymakers or institutions remain relevant?
- Are coalition partners still engaged?

4. Sustainability Actions:

This column records specific actions required to sustain advocacy efforts. These may include follow-up meetings, ongoing research dissemination, coalition coordination, or periodic engagement with policymakers.

Sample Assessment

- Should follow-up meetings be scheduled?
- Should periodic policy updates or briefs be shared?

5. Required Capacity or Resources:

This column identifies the organisational capacity or resources required to sustain advocacy efforts.

Sample Assessment

- Does the organisation have sufficient staff or resources to continue engagement?
- Are additional partnerships or funding required?

Interpretation Guide

After completing the worksheet, organisations should review how advocacy efforts can be maintained in a realistic and sustainable manner. Not all advocacy efforts require continuous high-intensity engagement. In some cases, periodic follow-up may be sufficient to maintain influence, while in others, sustained engagement may be necessary to ensure policy implementation. By identifying priority areas for continued engagement, organisations can allocate resources effectively and maintain strategic focus.

Risk Lens

Sustaining advocacy efforts may involve continued engagement in politically sensitive environments. Organisations should consider how prolonged advocacy engagement may affect their operating environment.

In some cases, maintaining visibility on an issue may increase exposure, while in others, reduced visibility may weaken advocacy impact.

Sample Checklist to Assess Risk

- Could continued advocacy engagement increase political sensitivity?
- Is there a risk of advocacy fatigue among stakeholders or partners?
- Could sustained visibility attract unwanted attention or resistance?
- Is a lower-profile engagement approach more appropriate over time?



Action Prompt

After identifying sustainability priorities, organisations should define how advocacy efforts will continue in practice. This step ensures that sustainability planning leads to actionable next steps rather than remaining conceptual.

Sample Checklist

- Which advocacy actions should continue beyond the current cycle?
- Which relationships should be maintained or strengthened?
- How frequently should engagement occur?
- What resources are required to sustain advocacy efforts?

Note: This tool focuses on ensuring that advocacy efforts are sustained over time. While previous modules addressed strategy design, implementation, and learning, this tool helps organisations maintain momentum and protect advocacy gains.

The Risk Lens encourages organisations to consider how sustained engagement may affect their operating environment. The Action Prompt helps organisations define practical steps for continuing advocacy efforts.

Consider the following flow

Advocacy Outcomes → Sustainability Assessment → Continued Engagement Planning → Resource Alignment → Long-Term Advocacy Continuity

Tool 21 — Relationship and Network Continuity

Purpose of the Tool

This tool helps organisations maintain and manage relationships with key stakeholders, partners, and networks beyond a single advocacy cycle. Advocacy effectiveness often depends not only on specific actions but on sustained relationships with policymakers, institutions, coalition partners, and other influential actors.

While previous tools helped organisations identify stakeholders and build coalitions, those relationships can weaken over time if they are not actively maintained. Changes in personnel, shifting priorities, or reduced engagement can lead to loss of access, influence, or coordination. The purpose of this tool is therefore to help organisations identify which relationships should be sustained, how those relationships should be maintained, and what level of engagement is appropriate over time. By planning for relationship continuity, organisations can preserve access to decision-makers, maintain trust with partners, and strengthen their long-term position within the advocacy ecosystem.

When to Use This Tool

Use this tool after completing an advocacy cycle or when transitioning into a new phase of advocacy.

This tool is particularly useful when:

- Key relationships were developed during advocacy efforts
- Coalition partnerships need to be sustained
- Ongoing engagement with policymakers is required
- Networks or alliances need to be maintained over time



Organisations may also use this tool periodically to review the status of key relationships and ensure that engagement remains consistent.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to identify and maintain relationships that support long-term advocacy.

- Begin by identifying key stakeholders, partners, and networks engaged during the advocacy effort.
- Assess the importance of each relationship for future advocacy.
- Determine the appropriate level and frequency of engagement for each actor.
- Identify actions that can help maintain or strengthen these relationships.
- Use this analysis to develop a plan for relationship continuity.

Relationship and Network Continuity Worksheet

The following worksheet can be used to plan how relationships and networks will be maintained over time.

Stakeholder or Partner	Role in Advocacy Ecosystem	Importance of Relationship	Desired Level of Engagement	Engagement Actions

Relationship and Network Continuity: Use a structured planning process to identify key relationships and determine how they will be sustained. Begin by listing stakeholders, partners, and networks, then assess their importance and define appropriate engagement approaches.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations maintain and strengthen key relationships.

1. Stakeholder or Partner:

This column identifies the stakeholder, institution, or partner organisation whose relationship should be maintained.

Sample Assessment

- Which policymakers, institutions, or partners were engaged?
- Which relationships remain important for future advocacy?

2. Role in Advocacy Ecosystem:

This column describes the role that the stakeholder or partner plays within the advocacy environment.

Sample Assessment

- Is the actor a decision-maker, influencer, or coalition partner?
- What role does this actor play in shaping policy outcomes?

3. Importance of Relationship:

This column assesses the importance of maintaining the relationship for future advocacy efforts.



Sample Assessment

- Is this relationship critical for continued advocacy engagement?
- Does this actor influence policy decisions or processes?

4. Desired Level of Engagement:

This column defines how frequently or intensively the organisation should engage with the actor.

Sample Assessment

- Should engagement be regular, periodic, or occasional?
- Does this relationship require active or low-profile engagement?

5. Engagement Actions:

This column records specific actions that can help maintain or strengthen the relationship.

Sample Assessment

- Should follow-up meetings be scheduled?
- Should updates, research, or policy briefs be shared?

Interpretation Guide

After completing the worksheet, organisations should review how relationships are distributed across different levels of importance and engagement. Some relationships may require regular engagement to maintain influence and access, while others may only require occasional contact. By identifying appropriate engagement levels, organisations can manage relationships strategically without overextending resources. Maintaining relationships over time helps organisations remain connected to policy processes and strengthens their ability to engage effectively in future advocacy efforts.

Risk Lens

Maintaining relationships with stakeholders and partners may involve navigating political sensitivities or managing expectations. Organisations should consider how ongoing engagement may affect their relationships and whether certain interactions require careful handling.

Sample Checklist to Assess Risk

- Could continued engagement with this actor create political sensitivity?
- Are there risks associated with maintaining close relationships with certain stakeholders?
- Could relationship dynamics change over time?
- Does the organisation have the capacity to sustain engagement appropriately?

Action Prompt

After identifying key relationships and engagement approaches, organisations should implement a structured approach to maintaining these connections. This step ensures that relationship continuity is actively managed rather than left to informal or ad hoc interactions.

Sample Checklist

- Which relationships require immediate follow-up?
- How frequently should engagement occur?



- Who is responsible for maintaining each relationship?
- How will relationship management be tracked over time?

Note: This tool focuses on maintaining relationships and networks that support long-term advocacy engagement. While previous tools identified stakeholders and coalition partners, this tool ensures that those relationships are sustained over time.

The Risk Lens encourages organisations to consider how ongoing engagement may affect their operating environment. The Action Prompt helps organisations implement a structured approach to relationship continuity.

Consider the following flow:

Advocacy Engagement → Relationship Identification → Engagement Planning → Relationship Maintenance → Long-Term Network Strengthening

Sample Worksheet (Filled):

Stakeholder or Partner	Role in Advocacy Ecosystem	Importance of Relationship	Desired Level of Engagement	Engagement Actions
Telecommunications regulator	Decision-maker	High	Regular engagement	Schedule periodic meetings, share policy updates
Parliamentary committee members	Policy influencers	High	Periodic engagement	Provide policy briefs, engage during legislative processes
Civil society coalition partners	Advocacy partners	High	Regular engagement	Maintain coordination meetings, share updates
Media organisations	Public communication actors	Moderate	Occasional engagement	Share research findings, provide updates on advocacy issues

How to Read the Matrix

After completing the worksheet, organisations should review how relationships are prioritised and how engagement levels are defined. High-importance relationships with decision-makers or key partners typically require regular engagement, while relationships with moderate importance may require periodic or occasional contact. By examining these patterns, organisations can ensure that relationship management remains strategic, focused, and aligned with long-term advocacy goals.

Tool 22 — Resource and Capacity Planning for Advocacy Continuity

Purpose of the Tool

This tool helps organisations assess and plan the resources and internal capacity required to sustain advocacy efforts over time. While previous tools focused on maintaining momentum and relationships, advocacy continuity ultimately depends on whether organisations have the people, skills, time, and financial resources to continue engagement effectively.

Advocacy work often evolves beyond initial plans. Sustained engagement may require ongoing research, repeated policy interaction, coalition coordination, and communication efforts. Without adequate capacity, even well-designed advocacy strategies may lose momentum.



The purpose of this tool is therefore to help organisations identify what resources are required, assess current capacity, and plan how gaps can be addressed. By doing so, organisations can ensure that advocacy efforts remain realistic, sustained, and effective over the long term.

When to Use This Tool

Use this tool after identifying sustainability priorities and relationship continuity needs.

This tool is particularly useful when:

- Advocacy efforts need to continue beyond an initial phase
- Organisations are planning the next phase of engagement
- Additional resources or capacity may be required
- Organisations want to align internal capacity with advocacy priorities

Organisations may also use this tool during planning cycles to ensure that advocacy ambitions are matched by available resources.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to align advocacy goals with organisational capacity.

- Begin by identifying the key advocacy activities that need to be sustained.
- Assess the current organisational capacity available to support these activities.
- Identify any gaps in staff, expertise, time, or financial resources.
- Consider how these gaps can be addressed through internal adjustments, partnerships, or external support.
- Use this analysis to plan how advocacy efforts will be resourced over time.

Resource and Capacity Planning Worksheet

The following worksheet can be used to assess organisational capacity and identify resource needs for sustained advocacy.

Key Advocacy Activity	Required Capacity	Current Organisational Capacity	Capacity or Resource Gap	Plan to Address Gap

Resource and Capacity Planning: Use a structured planning process to assess the resources required for ongoing advocacy efforts. Begin by identifying key activities that need to be sustained, then evaluate current capacity and identify any gaps.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element helps organisations align resources with advocacy needs. The following are the key elements of the worksheet described above. Each element helps organisations align resources with advocacy needs.

1. Key Advocacy Activity:



This column identifies the advocacy activities that need to be sustained over time. These activities should correspond to sustainability actions and relationship management efforts identified in previous tools.

Sample Assessment

- Which advocacy activities need to continue?
- Are these activities linked to policy processes or stakeholder engagement?

2. Required Capacity:

This column identifies the type of capacity required to sustain the activity. This may include staff time, technical expertise, communication capacity, or coordination ability.

Sample Assessment

- What skills or expertise are required for this activity?
- Does this activity require ongoing research or engagement capacity?

3. Current Organisational Capacity:

This column assesses the organisation's existing capacity to support the activity.

Sample Assessment

- Does the organisation currently have the required staff or expertise?
- Is there sufficient time allocated to this activity?

4. Capacity or Resource Gap:

This column identifies gaps between required capacity and current capacity.

Sample Assessment

- Is additional staff time or expertise needed?
- Are there financial or operational constraints?

5. Plan to Address Gap:

This column records how identified gaps will be addressed. This may include reallocating internal resources, strengthening partnerships, seeking funding, or adjusting advocacy priorities.

Sample Assessment

- Can existing resources be reallocated?
- Should partnerships be leveraged to fill capacity gaps?
- Is additional funding required?

Interpretation Guide

After completing the worksheet, organisations should review how their current capacity aligns with the requirements of sustained advocacy efforts. Activities that are well-supported by existing capacity can continue as planned, while activities with significant gaps may require adjustments or additional support. This analysis helps organisations prioritise advocacy efforts realistically and avoid overextension.

Risk Lens



Capacity limitations may affect the organisation’s ability to sustain advocacy efforts effectively. Organisations should consider how resource constraints may influence the quality or consistency of advocacy engagement.

In some cases, attempting to sustain too many activities without sufficient capacity may weaken overall impact.

Sample Checklist to Assess Risk

- Are advocacy priorities aligned with available capacity?
- Could capacity constraints reduce the effectiveness of advocacy efforts?
- Is there a risk of staff burnout or overextension?
- Should certain activities be prioritised or scaled back?

Action Prompt

After identifying capacity gaps, organisations should decide how to align resources with advocacy priorities. This step ensures that advocacy continuity planning is realistic and supported by available resources.

Sample Checklist

- Which activities should be prioritised based on available capacity?
- How will identified gaps be addressed?
- Should partnerships be leveraged to strengthen capacity?
- Are additional resources or funding required?

Note: This tool focuses on ensuring that advocacy efforts are supported by adequate organisational capacity and resources. While previous tools identified sustainability priorities and relationship management needs, this tool helps organisations align their internal capacity with those requirements.

The Risk Lens encourages organisations to consider how capacity constraints may affect advocacy effectiveness. The Action Prompt helps organisations develop realistic plans for sustaining advocacy efforts.

Consider the following flow:

Advocacy Continuity Needs → Capacity Assessment → Gap Identification → Resource Planning → Sustainable Advocacy Implementation

Sample Worksheet (Filled):

Key Advocacy Activity	Required Capacity	Current Organisational Capacity	Capacity or Resource Gap	Plan to Address Gap
Ongoing engagement with telecommunications regulator	Policy expertise, regular engagement time	Existing policy team with limited time availability	Limited staff time for sustained engagement	Reallocate staff time and prioritise engagement activities
Research and policy brief development	Research expertise, data analysis capacity	Strong research team	No major gap	Continue current approach
Coalition coordination	Coordination skills, communication capacity	Moderate coordination capacity	Need for more structured coordination	Assign dedicated coordination role



Public communication and media engagement	Communication expertise, media relations	Limited communications capacity	Need for stronger media engagement	Partner with media organisations or hire communications support
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How to Read the Matrix

After completing the worksheet, organisations should review how advocacy activities align with available capacity and resources. Activities that are well-supported can be sustained effectively, while those with significant capacity gaps may require adjustment or additional support. By examining these relationships, organisations can ensure that advocacy efforts remain realistic, focused, and sustainable over time.

Tool 23 — Integrated Advocacy Planning Framework

Purpose of the Tool

This tool helps organisations bring together the outputs of all previous tools into a single, coherent advocacy blueprint. While earlier tools guided organisations through issue identification, stakeholder analysis, strategy design, implementation, learning, and sustainability, those insights are often distributed across multiple worksheets and stages. The purpose of this tool is to consolidate those insights into one structured overview that clearly presents the advocacy issue, strategic approach, key actors, actions, and sustainability considerations. This allows organisations to align internally, communicate clearly with partners, and maintain a shared understanding of the advocacy effort. This tool does not introduce new analysis. Instead, it integrates and organises existing insights into a format that supports clarity, coordination, and decision-making.

When to Use This Tool

Use this tool after completing all modules of the toolkit or when preparing to present, review, or implement an advocacy strategy.

This tool is particularly useful when:

- Aligning internal teams around a single advocacy strategy
- Presenting advocacy plans to partners, donors, or leadership
- Preparing for coordinated implementation
- Reviewing the overall coherence of the advocacy approach

Organisations may also use this tool at different stages to maintain a consolidated view of their advocacy work.

Instructions for Use

Keep the following pointers in mind when using the tool. The objective is to integrate insights from previous tools into a single framework.

- Begin by summarising the advocacy issue and objective.
- Identify the key root causes and policy entry points connected to the issue.
- List the most important stakeholders and advocacy targets.
- Summarise the advocacy strategy, including approaches and key actions.
- Identify the role of digital advocacy and coalition engagement.
- Record key monitoring indicators, lessons learned, and planned adjustments.
- Include sustainability considerations, including relationship continuity and resource needs.



- Use this framework to create a clear and concise advocacy snapshot.

Integrated Advocacy Planning Worksheet

The following worksheet can be used to consolidate insights from all modules into a single advocacy framework.

Component	Summary

Integrated Advocacy Planning Framework: Use a structured consolidation process to bring together key elements of the advocacy strategy. Begin by summarising the issue and objective, then integrate insights on stakeholders, strategy, actions, and sustainability into one coherent overview.

Elements of the Worksheet

The following are the key elements of the worksheet described above. Each element represents a key component of the overall advocacy framework.

1. Advocacy Issue and Objective:

This section summarises the core issue and the intended policy change.

Sample Assessment

- What is the issue being addressed?
- What change is the organisation seeking to achieve?

2. Key Root Causes and Policy Entry Points:

This section summarises the structural causes of the issue and the policy or regulatory spaces where advocacy can influence change.

Sample Assessment

- What are the main drivers of the issue?
- Where can advocacy influence decision-making?

3. Key Stakeholders and Advocacy Targets:

This section identifies the most important actors involved in the issue, including decision-makers, influencers, and coalition partners.

Sample Assessment

- Who are the key decision-makers?
- Which actors influence policy outcomes?

4. Advocacy Strategy and Approach:

This section summarises the overall advocacy approach, including engagement methods and strategic positioning.

Sample Assessment

- What approach is being used to influence policy?
- Is the strategy focused on direct engagement, coalition advocacy, or public communication?



5. Key Advocacy Actions:

This section lists the most important actions that will be implemented.

Sample Assessment

- What are the main advocacy activities planned?
- How will engagement with stakeholders occur?

6. Digital Advocacy and Visibility Approach:

This section summarises the role of digital engagement within the advocacy strategy.

Sample Assessment

- Will digital advocacy play a central or supporting role?
- What level of visibility is appropriate?

7. Coalition and Partnership Approach:

This section summarises how coalition partners will be engaged and how collaboration will be structured.

Sample Assessment

- Which partners are involved?
- What roles will they play?

8. Monitoring and Adaptation Approach:

This section summarises how advocacy progress will be tracked and how strategies will be adjusted.

Sample Assessment

- How will progress be monitored?
- How will lessons inform adjustments?

9. Sustainability and Continuity Considerations:

This section summarises how advocacy efforts will be sustained over time.

Sample Assessment

- How will relationships be maintained?
- What resources are required for continued engagement?

Interpretation Guide

After completing the framework, organisations should review the coherence and alignment of the different components. The objective is to ensure that the advocacy issue, strategy, actions, and sustainability considerations are clearly connected and mutually reinforcing. Any gaps or inconsistencies identified at this stage can be addressed before implementation or external communication. This framework also provides a clear overview that can support coordination among teams and communication with partners.

Risk Lens

Bringing together all elements of the advocacy strategy may highlight areas of sensitivity or potential exposure. Organisations should consider how the integrated strategy may be perceived by stakeholders and whether any elements require careful handling.



Sample Checklist to Assess Risk

- Does the overall strategy involve politically sensitive issues?
- Are there elements of the strategy that require low visibility?
- Could coordination with partners introduce additional risks?
- Are there safeguards in place for managing sensitive engagement?

Action Prompt

After completing the integrated framework, organisations should use it as a guiding reference for implementation and coordination.

This step ensures that the advocacy strategy remains clear, aligned, and actionable.

Sample Checklist

- Is the advocacy strategy clearly understood across the organisation?
- Can this framework be shared with partners or stakeholders?
- Are all components of the strategy aligned and feasible?
- Should any elements be adjusted before implementation?

Note: This tool integrates insights from across the entire toolkit into a single advocacy framework. It does not introduce new analysis but ensures that all elements of the advocacy strategy are aligned and clearly articulated.

The Risk Lens encourages organisations to reflect on how the integrated strategy may affect their operating environment. The Action Prompt helps organisations use the framework as a practical tool for coordination and implementation.

Consider the following flow:

Issue Identification → Stakeholder Analysis → Strategy Design → Implementation → Learning → Sustainability → Integrated Advocacy Framework

Sample Worksheet (Filled)

Component	Summary
Advocacy Issue and Objective	Improve transparency in telecommunications regulation by ensuring publication of consultation drafts
Key Root Causes and Policy Entry Points	Lack of regulatory transparency, weak consultation mechanisms; entry point through regulatory authority consultations
Key Stakeholders and Advocacy Targets	Telecommunications regulator, policy advisors, civil society coalition partners
Advocacy Strategy and Approach	Combination of direct policy engagement and coalition-based advocacy
Key Advocacy Actions	Policy meetings, research publication, coalition consultations
Digital Advocacy and Visibility Approach	Moderate visibility through research dissemination and controlled public communication



Coalition and Partnership Approach	Collaboration with civil society partners and research institutions
Monitoring and Adaptation Approach	Track stakeholder responses and adjust engagement strategies accordingly
Sustainability and Continuity Considerations	Maintain engagement with regulator and coalition partners; allocate resources for continued advocacy

How to Read the Matrix

After completing the framework, organisations should review how each component of the advocacy strategy connects to the others. A well-aligned framework will show clear links between the issue, strategy, actions, and sustainability considerations. If components appear disconnected or inconsistent, adjustments may be required. By using this integrated view, organisations can ensure that their advocacy efforts remain coherent, strategic, and actionable.

Tool 24 — Strategic Readiness and Go/No-Go Decision Tool

Purpose of the Tool:

This is the final and most critical tool in the toolkit. Its purpose is not to analyse, map, or plan, but to force a disciplined decision. By this stage, organisations have already identified the issue, mapped stakeholders, designed a strategy, planned actions, assessed risks, and considered sustainability. What is often missing in advocacy practice is a moment of pause where all of this is weighed together before moving forward.

This tool creates that moment. It helps organisations test whether the strategy is not just well-designed, but actually ready, realistic, and appropriate for implementation in the current context. It prevents premature action, overconfidence, and misalignment between ambition and capacity. The outcome is simple but powerful: proceed, refine, or hold.

When to Use This Tool:

Use this tool immediately after completing the Integrated Advocacy Planning Framework.

This tool is particularly important when:

- Entering a politically sensitive advocacy space
- Committing organisational resources to a campaign
- Aligning leadership and teams around a final strategy
- Deciding whether timing is appropriate

This is the final gate before action.

Instructions for Use:

Keep the following in mind when using the tool. The objective is not to justify the strategy, but to stress-test it.

- Review the full advocacy framework as a single system.
- Assess whether all parts of the strategy align logically.
- Evaluate whether the organisation is genuinely ready to execute.
- Consider whether the timing and context support action.



- Make a clear, honest decision.
- Avoid neutral or ambiguous conclusions.

Strategic Readiness Worksheet

Strategic Readiness Assessment: Use a structured judgement framework to determine whether the advocacy strategy is ready to move forward. This is not a scoring exercise but a disciplined reflection across key dimensions.

Elements of the Worksheet

1. Strategic Fit:

This assesses whether the issue aligns with the organisation's mandate, priorities, and positioning.

Sample Assessment

- Does this issue fit our organisational mission?
- Does it strengthen or dilute our strategic focus?

2. Outcome Clarity:

This assesses whether the intended change is specific, realistic, and actionable.

Sample Assessment

- Is the objective clearly defined?
- Is the expected outcome achievable within the current system?

3. Pathway to Influence:

This assesses whether there is a credible pathway to influence decision-making.

Sample Assessment

- Do we know who needs to be influenced?
- Are there realistic entry points to reach them?

4. Execution Readiness:

This assesses whether the organisation is practically ready to implement the strategy.

Sample Assessment

- Do we have the team, time, and resources?
- Are roles and actions clearly defined?

5. Risk–Return Balance:

This assesses whether the potential impact justifies the risks involved.

Sample Assessment

- Is the potential gain worth the exposure?
- Are risks understood and acceptable?

6. Timing and Context:

This assesses whether the current moment is suitable for action.



Sample Assessment

- Is this the right time to act on this issue?
- Are there external conditions that support or hinder engagement?

7. Final Decision:

This records a clear organisational decision.

- *Proceed*
The strategy is ready and aligned with capacity and context.
- *Refine*
The direction is correct but requires adjustments before action.
- *Hold*
The strategy is not suitable at this time and should be paused.

Interpretation Guide

This tool is not about averaging judgements. It is about identifying whether any critical weakness exists. If most areas are strong and no major gaps are identified, the organisation can proceed with confidence. If one or two areas show uncertainty, refinement is required before moving forward. If multiple areas are weak or unclear, holding the strategy is the more strategic choice.

Risk Lens

This is the final point to confront uncomfortable questions.

Sample Checklist to Assess Risk

- Are we underestimating political or institutional resistance?
- Could this strategy expose the organisation in ways we are not prepared for?
- Are we relying on assumptions rather than evidence?
- What would failure look like in this context?

Action Prompt

Make the decision explicit and operational.

Sample Checklist

- What is our decision: proceed, refine, or hold?
- If refine, what exactly needs to change?
- If hold, what conditions would need to shift?
- If proceed, what is the immediate next step?

Note: This tool closes the loop of the entire toolkit. It ensures that all prior analysis leads to a deliberate and defensible decision. It is not a formality. It is the moment where strategy becomes commitment.

Consider the following flow:

Full Advocacy Framework → Strategic Stress Test → Risk Confrontation → Go/Refine/Hold Decision

Sample Worksheet (Filled)



Dimension	Judgement	Notes
Strategic Fit	Strong	Fully aligned with organisational mandate
Outcome Clarity	Strong	Clear and actionable objective
Pathway to Influence	Moderate	Entry points identified but require validation
Execution Readiness	Moderate	Capacity exists but stretched
Risk–Return Balance	Moderate	Manageable but politically sensitive
Timing and Context	Strong	Policy window currently open
Final Decision	Refine	Strengthen entry points and capacity before proceeding

How to Read the Matrix

Do not look for perfection. Look for weakness. If no critical gaps exist, proceed. If specific gaps can be fixed, refine. If the foundation is uncertain, hold. This tool ensures that advocacy begins with intention, not momentum.