Pushing for Change

Lessons for supporting and conducting highly sensitive advocacy

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Abstract

Advocacy is about change, and change is inevitably contested. But how should advocates and funders approach advocacy when the change being proposed is particularly sensitive? While any advocacy is a complicated endeavor, there are additional conditions that advocates need to consider in cases where there is elevated sensitivity to the proposed changes. This paper is written for advocates and funders of advocacy to share learning from evaluation and research about "sensitive advocacy." The paper starts with a discussion about advocacy implications when the proposed changes are highly contested. It follows with six lessons about conducting and supporting advocacy under these conditions. Finally, we conclude with a summary table of lessons for advocates and funders of advocacy.

Introduction

Advocacy is a strategy to harness a set of influences with the intention of securing or resisting social or political change.[1] It is, essentially, about organizing information and relationships in a way that convinces people to think or act differently. As such, by its very nature, advocacy always involves some degree of resistance or opposition (if it didn't, advocacy wouldn't be needed). Sometimes, this resistance or opposition is so inflamed that it creates sensitivity that mandates consideration when planning, conducting, evaluating, and supporting advocacy.

In this paper, we are discussing advocacy situations involving change propositions that are particularly contested or "sensitive." It examines the implications that exist when the advocacy is sensitive and provides a series of lessons learned on how to undertake advocacy that pushes for social or political changes that are controversial.[2]

What is advocacy, and what makes a topic particularly sensitive?

While certain topics, like abortion, can be sensitive in different cultures and contexts, a topic alone is not a predictor of sensitivity. Rather, sensitivity rests with the changes proposed and the implications for the

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[1] Coe, Jim and Rhonda Schlangen. "Looking Through the Right End of the Telescope." Report. 2011; Van Rujil, Peter and Lisa Jordan. "Political Responsibility in Transnational NGO Advocacy." World Development 28.12 (1999): 2051-2065. 15 August 2020.

[2] This paper is written for the purpose of providing practical advice and guidance for funders and advocates who work on sensitive advocacy issues. It has been informed by a wide range of sources including, in particular, two evaluations conducted in 2019 and 2020 of civil society organizations that had received grant funding from the Bill and Melinda Gates Foundation. The authors also drew on evidence from several academic studies and conducted a series of complementary interviews with advocates and philanthropic foundations that fund advocacy programs.

shifts in power that making those changes would entail. In *Looking through the Right End of the Telescope*, Coe and Schlangen explain these two characteristics:

> Advocacy inherently takes place in a crucible of contested space. It revolves around disputes as to whether and to what extent the change sought is legitimate; whether the means undertaken to achieve it are appropriate; what the results are, whether they are beneficial, and if so, to whom.

> Advocacy inevitably pivots on questions of power. Questions around the distribution and enactment of power underpin the basic dynamics in any advocacy situation: who sets the agenda; what the parameters of possibility are; and who has the authority and ability to make, implement, and assess decisions.[3]

The extent to which these characteristics are amplified and contested has implications for the scale and type of opposition and thus the level of "sensitivity" to the anticipated change. The extent of sensitivity may also be affected by the scope of change: whether it is systemic (requiring change in demand, supply chain, agricultural culture, public trust), social (change in norms, public understanding and attitudes) or political or legal (codified in changes in laws and policy).

Table 1   *Examples of "sensitive" advocacy*

ISSUE	CONTEXT RELATED TO SENSITIVITY
Biotechnology	Lack of buy-in from end-user (farmers, consumers, other stakeholders) about the value proposition of genetically modified seeds as a poverty solution (related to lack of understanding/evidence)
Contraception	Religious and cultural disagreement about the primacy of women's rights to bodily integrity and/or family size preferences ("children are a gift from God")
Vaccine research	Distrust of public health interventions involving vaccines coupled with history of exploitative medical research
Land rights	Deconcentrating political and economic power by honoring traditional land rights and limiting access of private companies is a threat to government and private holders of wealth

The same topic may be sensitive in one place and not in another, with the degree of sensitivity influenced by contextual factors such as social acceptance of the proposed changes, the ability of civil society to operate, or the extent to which the topic implies significant shifts in power distribution. Sensitivity may also change as social or legal norms shift over time. For instance, advocating for access to HIV/AIDS prevention and mitigation strategies has gradually become less contested since it first emerged in the 1980s. At the same time, vaccine and immunization campaigns have become more contested in parallel with the rise of the modern anti-vaccination movement in the last decades.[4]

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[3] Coe and Schlangen. 2011. 1-2

[4] Kennedy, Jonathan. "Populist politics and vaccine hesitancy in Western Europe: an analysis of national-level data." *European Journal of Public Health,* 29.3 (2019): 512–516. 17 August 2020.

What are the implications when advocating for changes that are controversial?

While any advocacy is a complex endeavor that requires careful planning and execution, the sensitivity of the proposed changes creates additional challenges that advocates need to take into consideration:

1) **The fact that a change being sought is highly contested means challenges are likely to continue and there will be a need for ongoing advocacy.** Progress is more likely to be achieved through incremental and looping patterns than through a single linear change process (in other words, the idea of achieving success through "moving the needle" is a misnomer).

2) **Legal and policy changes alone are unlikely to be sufficient to create durable change.** While changes may be settled by policy or law, cultural norms may take time to shift. There is some evidence that institutionalizing a change by enshrining it in law or policy can shift social norms and lead to normalization.[5] However, if these areas are not aligned (i.e., if the policy is wildly out of step with public opinion), norms will continue to work in ways that threaten to undermine any policy, procedural/regulatory, or legal gains achieved.[6]

3) **Significant capacities are required to sustain attention to the issue.** When advocacy is particularly contested, the resulting gains in terms of social or policy change also tend to be contested. As a result, there's a need for continued advocacy, which in turn necessitates deep issue commitment and attention. In places without a well-resourced civil society sector to feed and support movements, there's a risk of fading attention and/or inability to sustain momentum. Also, while support for advocacy led by social or political elites may deliver 'quick win' changes in policy, the contested nature of the issue means that any changes resulting from advocacy may be more likely to be overturned with a change in political leadership.

4) **Issue polarization may dissipate any middle ground or room for compromise.** When the change being sought through advocacy is highly contested, with an elevated sense of potential winners and losers created through that change, it may be more challenging to find middle ground for compromise. Advocates on either side of the issue may resort to using information in ways intended to dig in supporters rather than convince or engage a middle ground.

In operational terms, these challenges necessitate adjustments to advocacy efforts, which may include a particular emphasis on processes that are typical of any advocacy effort (such as power mapping) but which become even more important when the focus of the advocacy is particularly contested. In the following section, this paper presents seven lessons for advocates who are working on sensitive topics and their funders. These lessons have emerged from the experiences (wins and challenges) of real advocacy efforts across different domains and draw on evidence from relevant academic research.

Lessons Learned

Lesson learned #1: Set the advocacy agenda and identify level of contestation

External and internal power dynamics related to an advocacy campaign or other effort should be the first, fundamental issues to explore when considering plans. These dynamics have implications for the depth and durability of internal support (among advocates and funders) and for the potential for external

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[5] See for instance Salazar, L.F. et al. "Moving Beyond the Individual: Examining the Effects of Domestic Violence Policies on Social Norms." *American Journal of Community Psychology*, 32, 253-264.

[6] For example, with advocacy related to access to contraceptives and reproductive health services in the United States.

contention. In this brief, we emphasize how internal power dynamics affect ownership of the advocacy agenda, since these have a particular implication for advocacy on contested issues/changes.

Internal power dynamics

There are several reasons to be frank and open about internal power dynamics, particularly between funders and advocates, and who is driving the advocacy agenda. While funders may have their own ideas and vision about the objectives of an advocacy campaign, ideally the strategy should be first informed by the organizations and affected communities on the ground who are working on an issue day-to-day. When there is misalignment between the agendas of donors and the organizations they're funding, it raises the risk that grantees will have to weigh the extent to which they're willing to spend organizational capital advancing a strategy they haven't fully bought into, which can inadvertently undermine sustainability by limiting advocates' interest and commitment that are necessary to achieve lasting change.

The issue of agenda ownership can heavily influence the legitimacy of an advocacy campaign in the eyes of its target audience (i.e., the extent to which a campaign is perceived to speak on behalf of/act in the interest of the target beneficiaries). In *A Review of NGO Approaches to the Evaluation of Advocacy Work*, Rick Davies argues that the legitimacy of an advocacy organization or coalition is a key indicator of its ability to achieve long-term success (Davies, 2001).[7] The role of funders in shaping advocacy and other development agendas has been a matter of attention for the last decade,[8] and in the context of this paper there's an argument among some funders supporting advocacy in particularly sensitive contexts or on contentious issues that all agendas and plans must align with community need and support. For highly sensitive advocacy, the value a local/community-driven agenda is particularly important. A US-based philanthropic organization that funds community-based organizations worldwide argued that an agenda driven by the community (rather than the funder) helps amplify and sustain the legitimacy of and support for advocacy:

> We believe having a grassroots movement makes potential for change stronger, because people buy into and support that change. If you don't have widespread support for something, how do you make sure the policy isn't just a piece of paper but that it's supported culturally? If it's donor-driven, and that support is contingent on funding, where is that cultural support coming from? Might that not even further empower or embolden opposition if they see that as an external agenda that's just being taken up for the purpose of keeping the business going?[9]

As part of the process of examining internal power dynamics, funders should also consider if and how their support in itself contributes to the sensitivity of a topic by generating demand for advocacy top-down[10] rather than meeting a real need from advocates and communities. Funders need to consult with advocates about the extent to which they can and should play a supporting role in the advocacy. In some

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[7] Davies, Rick. *Evaluating the Effectiveness of DFID's Influence with Multilaterals Part A: A Review of NGO Approaches to the Evaluation of Advocacy Work*. Cambridge, UK, 2001.

[8] For instance, there is a changing norm amongst international development actors on the value of ensuring a 'local' response to crises. In "From the Ground up: it's about time for local humanitarian action," Larissa Fast and Christina Bennett argues that a community-driven intervention "enhances flexibility, efficiency and sustainability, is more responsive to context and needs and involves local aid actors and communities more meaningfully in decisions affecting humanitarian programming." Fast, Larissa and Christina Bennett. "From the ground up: It's about time for local humanitarian action." Report. 2020. 6.

[9] Interview with article authors

[10] i.e. situations where the agenda/priorities for advocacy are disproportionally set or driven by actors benefitting from a power imbalance in the relationship between involved stakeholders (such as funders, international organizations based in the Global North, etc.)

cases, the engagement of a well-placed funder can open doors and help advocates engage with key decision-makers as a way to move policy advocacy forward, but this should be done in collaboration with and under the direction of grantees. It is important to acknowledge that funders themselves may give rise to controversy and/or ethical concerns when they take a directive approach to investing in advocacy initiatives by, indirectly or directly, determining the strategic priorities for civil society organizations and other practitioners in the field.

External power dynamics

Developing an understanding of the external power dynamics is also crucial as it will help funders and advocates understand how, to what extent, and why the advocacy topic or the change being sought is contested among external stakeholders. Such an analysis is a horizontal conversation between stakeholders (funders, advocates, and affected communities) that takes a broad look at who will (or perceives that they will) benefit and lose from the proposed changes. For one, a contested change means challenges are likely to continue and there will be a need for ongoing advocacy efforts, particularly due to the likelihood of backsliding in the face of opposition or even unsteady support. As a result, funders should be prepared that results will take time to materialize and will be diffuse and indirect rather than clear-cut wins. A US-based philanthropic organization that funds community-based organizations worldwide highlighted this need to recognize that pursuing change is a long process:

> It's anticipated that everything we do is going to be two steps forward, three steps back. This is a long-term, intergenerational change… [we] approach it all with humility and recognize that the change is long-term and we're a small actor.[11]

Lastly, funders also need to coordinate and understand the landscape of philanthropic and donor support for and opposed to the position they are supporting. Particularly in the international development landscape, otherwise allied funders have a responsibility to coordinate and reconcile differences, rather than funding civil society groups to engage in opposing advocacy – which can manipulate and distort the role of civil society actors so that they are perceived as mercenary advocates carrying out the agendas of foreign funders. For sensitive topics it is not uncommon to have two groups of otherwise aligned funders at odds by investing in opposite agendas. This has been the case in advocacy for agricultural GMOs, where funders that traditionally collaborate and even co-fund development initiatives (such at the Gates Foundation, the Norwegian Foreign Ministry and the Danish development agency DANIDA) have found themselves funding organizations that are conducting opposing advocacy campaigns.[12]

Lesson learned #2: Understand opposition

The early stages of planning any advocacy initiative include analyzing the issue it targets and the ecosystem in which it operates. This requires understanding the actors (individuals or organizations) and constituencies (i.e., specific social, political, religious or economic groups) that are affected by the issue, and understanding the factors that influence their respective beliefs and motivations. For change propositions that are particularly contested, the ecosystem is influenced by two factors that advocates need to take into consideration early on: the presence of (or likelihood of developing) an active, organized, resourced, and vocal opposition, and the risk to the advocacy efforts that the opposition poses—including to the safety and security of advocates (see Lesson # 5 for how to manage risks).

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[11] Interview conducted by the authors.

[12] See Cornish, Lisa. "Who are the donors taking on GMOs?" 13 February 2018. Devex. 21 August 2020; and Paarlberg, Robert. "A dubious success: the NGO campaign against GMOs." GM crops & food vol. 5,3 (2014): 223-8.

While all advocacy efforts are likely to face some form of opposition, advocacy on sensitive topics is more likely to see coordinated and organized opposition from individuals, organizations, corporations, or government authorities who actively work to undermine the campaign (see case study example 1 below).

Case study example 1: Understanding opposition to advocacy campaigns

- **Genetically modified organisms (GMOs):** Civil society organizations and coalitions advocating for the development and introduction of agricultural GMOs (i.e., genetically modified crops) in sub-Saharan Africa face significant and various forms of opposition across different countries. Opposition is driven by a variety of motivations ranging from intractable ideological opposition, to private commercial interests, such as stakes in the fertilizer and non-GMOs seed industry that are perceived to lose from the widespread use of GM seeds, to concerns (whether informed or misguided) about the actual agronomic and economic benefits of specific GM crops for smallholder farmers. Such opposition takes the form of both organized and coordinated efforts (driven by national and international actors) to counter the 'pro-GMO' advocacy efforts to actors (individuals and organizations) expressing various concerns or skepticism about the benefits of agricultural GMOs. For instance, Oxfam International has affirmed that GM crops *could* benefit poor farmers (if the safety of its use is confirmed) but is concerned with the potential for large, multinational companies further monopolizing local seed supply chain to the detriment of smallholder farmers.[13] Greenpeace, on the other hand, unequivocally maintains that GMOs should be banned on the basis of unacceptable risks to the environment and human health.[14]

- **Family planning:** Civil society organizations working to expand family planning access across several countries in sub-Saharan Africa encountered opposition from other health care providers, in particular nurses in Nigeria, for a proposed policy that community health extension workers should be allowed to provide injectable contraceptives to expand access to long-acting contraceptives. The opposition was partially driven by interprofessional rivalry as the nurses, particularly in urban centers, feared losing jobs, clinical responsibilities and resources to community health extension workers because of the proposal. In more rural areas with fewer teaching hospitals (and thus less health care resources available), the nurses were much more open to the proposal.

Advocacy is rarely done successfully through "defeating" opponents to the change the advocacy is trying to achieve, but more frequently through successfully eroding opposition by gradually shifting support away from the opponents and towards their own side. Understanding opposition thus allows advocates to anticipate who will oppose their campaign – and plan accordingly for ways to counter them – but also enables them to identify where there are opportunities to engage and shift support.[15]

This opposition should not be seen as a monolithic bloc of actors but rather as a continuum of actors with different degrees of opposition that are motivated by a multitude of reasons. The "Spectrum of Allies" tool developed by George Lakey[16] is a useful approach for analyzing and understanding opposition to

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[13] Oxfam. "Genetically Modified Crops, World Trade and Food Security." Position Paper. 1999.

[14] Cornish, Lisa. "Understanding the Opposition to GMOs." 22 January 2018. Devex. 25 August 2020.

[15] Lakey, George. "Know your allies, your opponents and everyone in between." 27 July 2012. *Waging nonviolence*. 5 September 2020.

[16] Lakey, George. "Spectrum of Allies." n.d. *Training for Change.* PDF. 25 August 2020.

advocacy campaigns.[17] It is used to identify and locate the actors and constituencies affected by an issue along a spectrum that ranges from active opposition to active allies (Figure 1).

Figure 1   Spectrum of Allies[18]
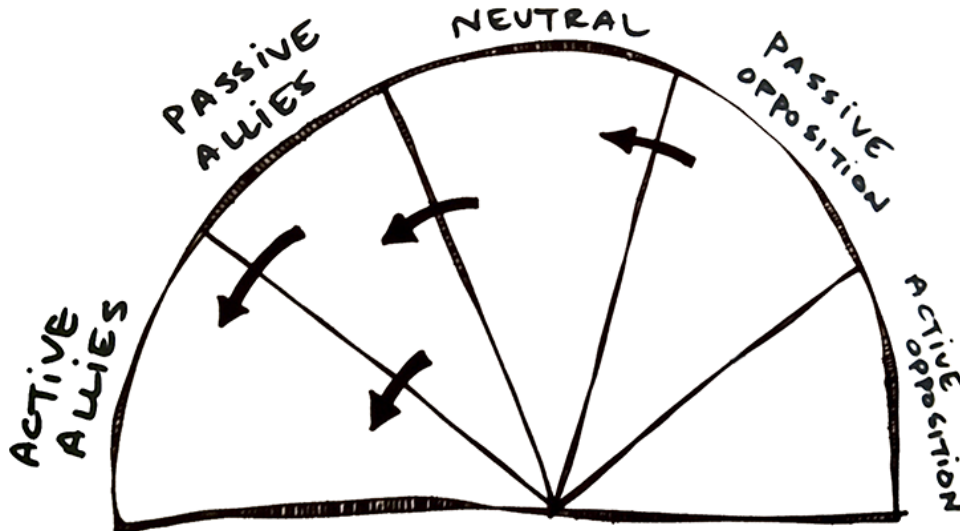
For the purpose of this analysis, it is useful to consider the society as an ecosystem that consists of a collection of specific actors and constituencies with different degrees of cohesion and visibility. The tool allows identifying and categorizing these groups by the extent to which they are likely to oppose a specific cause, which can consequently help target those that are most likely to be convinced to move closer to the desired position.

The purpose of a spectrum-of-allies analysis is to identify the actors and constituencies that can be moved one step along the spectrum towards a specific position, such as by shifting from a passive opponent to neutral. A key benefit of this approach is that it enables determining the relative costs and benefits involved in engaging different stakeholders and constituency groups, which can help advocates avoid common mistakes and maximize the impact of their campaigns. Engaging only with active allies (those already on the side of the advocates) does little to shift the overall support for the proposed change in the ecosystem, while trying to win over active opponents requires significant time and resources and is unlikely to be successful. Many advocacy organizations are faced with resource constraints due to a relatively small number of donors and choosing the most cost-effective tactic helps maximize the potential impact of the campaign.

Before trying to engage, it is important to understand where there is room to influence opposition and where any progress is unlikely (for instance due to intractable ideological opposition). Advocates should consider the sources of the individual and organized opposition (motivations and incentives) in order to

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[17] A spectrum-of-allies analysis can also be complemented by other analytical tools such as Political Economy Analysis (PEA) which aims to generate a rich understanding of each country's ecosystem by identifying decision-making processes, actors and factors in the policy space relevant to the advocacy campaign. Harris, David. "Applied political economy analysis: A problem-driven framework." Report. 2013

[18] "Spectrum of Allies" (https://commonslibrary.org/spectrum-of-allies/)

adopt an engagement strategy that is most likely to change someone's opinion (see case study example 2 below).

Case study example 2: The importance of engaging opposition

- **Opposition to GMOs**: A Nigerian coalition of civil society organizations that advocate for the development and introduction of agricultural GMOs successfully engaged different actors that had expressed concerns about the introduction of such crops. The coalition focused on understanding and targeting the specific sources of the stated skepticism (concerns about safety, ethical considerations, unclear benefits to smallholder farmers, etc.) and thus managed to diminish opposition among actors from influential stakeholder groups, such as faith-based organizations and leaders, associations of media professionals, and senior government bureaucrats and politicians.

- **Opposition to family planning:** In India, opposition to hormonal contraceptives has declined as improved versions of the contraceptives are becoming available in the private sector, and data on the safety of these contraceptives and user perceptions are increasingly available. The determination of decision-makers to add new contraceptive methods to the public program converged with many years of advocacy by civil society organizations on the issue to address the change needed in social norms and perceptions in order to drive this policy. The expanded basket of contraceptive choices has provided choice to girls and women (especially younger and lower parity girls and women) who wish to delay first pregnancy and space early births with contraceptive options. This is a pathway to shifting from a sterilization-heavy family planning program to a more choice-based program.

Lesson learned #3: Engage allies

Working collectively with allies and supporters in the ecosystem is good advocacy practice in general and in particular when advocating on sensitive topics due to a more challenging pathway to achieve sustained success. Creating a 'big tent' of allies serves to broaden the base, stability and legitimacy of an advocacy effort by leveraging different access points to communities, decision makers or people who influence decision makers, and thus help create synergies between available resources. This is particularly important in contested situations because it has implications for the ability to sustain advocacy and cultivate support for a change when there's an active opposition pushing for that not to happen (e.g., implications for the resources and support advocates need, the leverage influential allies can offer, etc.).

It is fundamental to establish clear coordination processes when working with allies (informally/ad hoc and through formal coalitions) in order to avoid competing efforts or missed opportunities. Collaboration by diverse actors is facilitated by taking time to establish consensus on shared advocacy priorities. It is important to consider that different allies will have different assets, vulnerabilities and limitations, as well as different levels of ability to commit to the advocacy efforts (i.e., in terms of how far/much they are willing to engage, what political/organizational capital they are willing to contribute). Clarifying and understanding these helps inform strategies, tactics, and division of labor between allies.

Ultimately, the advocacy community can achieve far greater success when working with a strong collective voice from a range of coalition partners. Donors can potentially play a key role in facilitating the ability of advocates to work collectively, and there are two models often used in these situations (see case study example 3 below):

- For efforts with a short-term window of change, a spread-betting approach to grantmaking focus on investing in multiple organizations that use different tactics and approaches to target different aspects of the issue. It is impossible to predict whether it is the conventional campaign or the innovative approach that will eventually lead to success, and funding multiple (complementary) approaches is an effective way of hedging against failure.

- Some funders take a long-game approach by supporting the development of an ecosystem of advocates over time, who cultivate their own collaboration.

In either model, coordination is important. The funder should play an active (though not necessarily a managerial) role in ensuring that the approach promotes coordination and coalition building between organizations with a shared goal, since inter-organizational competition for credit can easily arise in environments with fierce rivalry for donor funding. There are many different ways through which funders can mitigate such negative dynamics, such as by being transparent and ensuring clarity around strategies, tactics and goals, and by providing resources that can be used to support collaboration.

Case study example 3: BMGF has adopted different approaches to support a community of allies

Spread-betting: In sub-Saharan Africa, the Bill and Melinda Gates Foundation supports a diverse portfolio of complementary grantees advocating for agricultural GMOs, which collectively tackle most of the key roadblocks to GM crop approval: it generates and packages *evidence* and trains and connects *advocates* to engage *influencers* in policy processes and the media, and provides *expertise* to remove regulatory and judicial roadblocks. It shows that it pays off to map challenges and recruit grantees with a diverse set of capabilities to tackle challenges at different levels of the ecosystem.

Long game: In the US, BMGF's funding level and consistency of grant-making is a significant contribution to the ability of grantees to function effectively as a group of advocates. A recent evaluation found that the Gates Foundation has supported a core community of family planning advocates for over a decade. This has enabled grantees to actively foster collaboration and maintain a cohesive advocacy community. This community acts in largely coordinated, supportive ways, even when there are disagreements about policy positions. In turn, it has reinvigorated the advocacy community for US funding for family planning as part of its international development assistance program.

Lesson learned #4: Use credible messages and messengers

In recent years, the deliberate spreading of misinformation (misleading or false content) particularly through social media has emerged as a key challenge for advocates to get their message across and influence policymaking processes. Disinformation and misinformation[19] are thriving at a time with low credibility and trust in media (in part due to a financial crisis in traditional journalism), a growing imbalance between opinions and fact-based reporting, and even to some extent a 'war on science' by certain actors. Such misinformation efforts have been very effective in targeting individuals and organizations to contest prevailing narratives or create confusion and have arguably contributed to eroding trust in public institutions and increasing political polarization on issues such as climate change, vaccination, COVID-

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[19] Disinformation refers to the intentional spreading by individuals or entities of false financial, political information, while misinformation refers to the unintentional spreading of inaccurate information by people without taking the time/effort to probe its accuracy. Both disinformation and misinformation should be understood as a spectrum rather than as a true/false dichotomy.

response, etc. An international advocacy organization working in the field of HIV/AIDS interventions highlighted that it increasingly needs to dedicate resources to countering misinformation:

> Countering misinformation has become a full-time job. Our starting point to do so is to research literature… we have to be really science-based, to stay ahead of the misinformation. This is part of the evolving context with misinformation on social media… We have a very strong communication team that counters misinformation on a day-to-day basis. In particular, [we focus on] building journalists' capacities to understand the science. They need to understand how to read research articles/journals, ask the right questions.

A 2020 study by the Shorenstein Center at Harvard University to better understand the spread and impact of misinformation found (unsurprisingly) that it circulates widely on messaging apps; participants in the study were significantly more exposed to false claims than to true (mainstream, fact-checked) claims on social messaging apps, but not in traditional media (newspapers and TV news).[20] Effective communication is a crucial tactic in contexts with significant mis/disinformation as it serves to bridge the gap between the information emerging from research and how it is understood (or misunderstood) by the general public and intended audience of the advocacy effort. Two key variables in communication are the messages and narratives (what is said) and the messengers (who is saying it).

As a general rule, advocacy messages should be evidence-based, include verifiable information from trusted sources, and be transparent about uncertainties (admitting what we don't know or can't be sure about). In *The Power of Persuasion*, Amy Risley argues that advocacy campaigns should further focus on good storytelling that deliberately uses a narrative to capture the attention of the audience and 'cuts through the noise' (of multiple messages competing for attention) and helps bridge the gap between the data (evidence emerging from research) and a compelling narrative that resonates with the audience.[21] One important implication for advocates is that the credibility of the messenger is of utmost importance when countering misinformation in terms of using "people who are likely to be credible to recipients of the message (like-minded messengers) and making them the source" of the counter-information.[22] However, the value of a credible messenger is never stronger than the quality of the deployed message.

Getting the audience to listen to a specific narrative is easier said than done. Advocates in contested situations must both shape and frame what they want to convey while at the same time contesting the messages and narratives intended to counter their position. However, it is important to avoid the pitfall of reusing the same narrative framework established by the opposition, but instead focus on 'controlling/owning' the narrative.[23] A study by the Center for Nonprofit Strategies on the results of six successful US-based advocacy campaigns highlighted the benefits of reframing issues as a way for advocates to "create a perceptual shift in the audience's mind" by enabling "the public, the media and policymakers to see the issue in a different way, through a different lens."[24] It also argued that positive

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[20] Pasquetto, Irene et al. "Understanding Misinformation on Mobile Instant Messengers (MIMs) in Developing Countries." Harvard Kennedy School of Government, 2020.

[21] Risley, Amy. "The Power of Persuasion: Issue Framing and Advocacy in Argentina." *Journal of Latin American Studies* 43.4 (211): 663-691.

[22] Ibid, 3.

[23] For instance, using risk-mitigation messaging around GM crops (i.e., that they are safe to grow and consume) plays into the counter-argument that GM crops should be banned due to safety issues, while developing messaging around potential benefits (i.e., more drought tolerance, greater yields, more food security for poor farmers) allows advocates to reframe and control the narrative (see example 4 below).

[24] Center for Nonprofit Strategies. "Advocacy for Impact: Lessons from Six Successful Campaigns." Report Commissioned by: Global Interdependence Initiative, A Program of the Aspen Institute. 2005.

framing – focusing on potential gains as opposed to potential loss – can be particularly valuable in contested situations as it provides an opportunity to reframe an issue away from the messages communicated by opposing actors (see case study example 4 for how advocacy campaigns have successfully used reframing in their communication strategies).[25]

Case study example 4: Reframing and owning advocacy messages[26]

- **Family planning:** In Kenya, while there continues to be vocal opposition to youth access to family planning services, between 2016 and 2019 there has been a growing debate on the issue of teenage pregnancies which has opened up opportunities for policy developments. Several advocates believe that using teenage pregnancy and the impact it has on young girls' opportunities including education has been a better entry point for discussing family planning than the need to improve access to contraceptives, as the latter argument is often countered by opponents as promoting promiscuity among young people.

- **Agricultural GM crops**: A pro-GMO advocacy group in sub-Saharan Africa has consistently used a benefit case (focusing on potential gains) rather than arguments drawing on risk mitigation (countering claims that GMOs are harmful to human health or the environment). It has also focused on conveying its own messages, rather than engaging with or responding to the messaging of opponents (unless absolutely necessary).

- **HIV/AIDS interventions:** International advocates for HIV/AIDS prevention and mitigation helped reframe the narrative of HIV/AIDS as a global emergency that threatens entire communities and nations rather than a few "morally weak" people.

There are several possible avenues for countering misinformation. The most effective (but also frequently the most resource-intensive) method is to limit the harmful effects of disinformation on policymakers, influencers and the general audience by funding authoritative media to create and distribute relevant content and by systematic fact-checking information through services such as Africa Check[27] which monitors social media for dis/misinformation and share posts that debunk stories that are widely circulating in many African countries.

Communication tactics that can more realistically be adopted by advocates and civil society actors include the following:

- **Use language that the public understands** to explain issues. Frame the argument to match the audience and transparently include and acknowledge any risks involved in the proposed change

- **Build alliances with trusted, credible messengers** to reach audiences and convincingly convey messages (see Table 2). Advocates should identify, support and leverage credible champions who are adapted to the specific context. For instance, scientists can play an important role in informing policymaking,[28] and in many communities religious or traditional leaders are influential and listened

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[25] Research in persuasive communication shows some inconclusive and even conflicting evidence on the value of stressing either positive or negative outcomes but suggests the possibility of an effect of positive framing under certain conditions. See Spence, Alexa and Nick Pidgeon. "Framing and communicating climate change: The effects of distance and outcome frame manipulations." *Global Environmental Change* 20.4 (2010): 656-667.

[26] These examples are selected from evaluations which are not publicly available, conducted by the article authors for international development assistance initiatives.

[27] See https://africacheck.org/

[28] Scott, J. Michael and Janet L. Rachlow. "Refocusing the debate about advocacy." *Conservation Biology* (2011).

to by the general audience. When disseminating messages, advocates should keep the geographic coverage in line with the scale of the change being sought (i.e., national champions for national level changes, regional champions for regional-level changes, etc.).

- **Provide the level of support local champions require** to communicate their messages and counter opposition, as opposed to (only) relying on international studies or 'experts.' Advocates can train champions in how to effectively communicate and provide continued, ongoing support to facilitate their engagement with the target audience.

Table 2   Messages and messengers to support advocacy

OPPOSITION ARGUMENTS	MESSAGE	MESSENGERS
Agricultural GMOs are not safe to use (for environment /health) and/or do not lead to the promised benefits for farmers	In several sub-Saharan African countries, civil society organizations advocating for GM crops have actively targeted agricultural scientists and research agencies to speak out about the benefits of GMOs and have upgraded their communication capabilities through targeted training and support. These actors are strong early allies, as they bring the credibility to speak about the benefits of the technology, as well as an interest in seeing it develop further, and thus provide an entry point particularly on controversial topics.	**Agricultural researchers** – to help counter opposition to GM crops among other scientific peers; provide accurate information directly to journalists covering the topic, and function as spokespersons for the value of introducing GM crops in public meetings and in direct engagement with decision-makers.
Family planning goes against religious values	In counties in Kenya where religious and cultural leaders have influence, civil society organizations have used the scriptures of Islam and Catholicism to engage with religious opposition, for instance by using the Quran's reference to child spacing as a way to engage imams, or referencing scriptures calling for parents to support their children and take responsibility for planning their families to engage with Christian religious leaders opposing family planning.	**Community and religious leaders who are trusted to provide moral and ethical guidance –** to help counter opposition to family planning among religious peers, and to engage with county officials to advocate for family planning.

Lesson learned #5: Manage risk(s)

Advocacy on contested issues can involve risks to the reputations and physical security of practitioners, their allies, and of donors funding their campaigns. Different risks may emerge based on the type of change sought or by the (country-specific) context:

▪ In some countries, governments have put in place legislative and extra-legal barriers that restrict the rights to freedom of association, peaceful assembly and expression.[29] In those situations, advocacy by citizens is not broadly supported by policy makers, in particular on issues that directly or indirectly challenge government policies, and advocates may face different measures intended to restrict their ability to operate.

▪ Advocacy on issues that are particularly contested may elicit opposition and even violent reactions from both state and non-state actors.

> **Case study example 5: Threats to physical safety**
>
> The Ugandan teacher and outspoken LGBTQI+ rights activist David Kato was murdered at his home in Kampala in 2011, just weeks after he had won a lawsuit against a tabloid newspaper that had printed his name, photographs and address, alongside those of dozens of others it claimed were gay or lesbian and calling for them to be hanged. The killing took place in the context of an increasingly hostile climate for LGBTQI+ people in Uganda, where same-sex relations are illegal and widely opposed in public opinion, in the midst a high-profile political debate to expand criminal legislation to make same-sex relations punishable by death.[30]

– Some are perceived to challenge deep-held social norms and traditions, such as the human rights of LGBTQI+ people. Many advocates working to strengthen the rights of LGBTQI+ people are faced with threats, harassment and violence in many parts of the world (see case study example 5), at times aggregated by the unwillingness of government authorities to offer legal protection.

– Some might challenge the actions of private or even governmental actors to accrue resources, such as through land grabs. There can be significant risks involved in challenging legal or illicit business interests. For instance, the NGO Global Witness estimated that more than 160 activists working to preserve land and water rights were killed in 2019 alone.[31]

▪ Finally, advocates and their funders risk having their reputations undermined by false or misleading accusations from those opposing them (for instance, the inclusion of the Bill and Melinda Gates Foundation in conspiracy theories about Covid-19 and vaccines).

The concept of "Do No Harm", one the foremost principles guiding international development assistance, asserts that the ultimate priority of any development program is to ensure that any potentially harmful

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[29] The CIVICUS Monitor is a research tool that provides close to real-time data on the state of civil society and civic freedoms in 196 countries. The data is generated through collaboration with more than 20 civil society research partners, and input from a number of independent human rights evaluations. https://www.civicus.org/index.php/what-we-do/innovate/civicus-monitor

[30] Rice, Xan. "Ugandan gay rights activist David Kato found murdered." 27 January 2011. *The Guardian.* 20 August 2020.

[31] E360 Digest. "164 activists were killed defending land and water last year." 30 July 2019. *Yale Environment 360*

side effects on beneficiaries, field staff or other stakeholders are identified, addressed and prevented.[32] This principle is acutely relevant for advocacy focusing on contentious topics due to the very real possibility of harm occurring to the advocates, their allies and/or funders, and there is thus a clear need to integrate principles of harm mitigation into the planning and execution of any campaign. Both funders and advocates can do so by ensuring that potential risks are mapped and analyzed at the planning stage and by mainstreaming risk management into their organizational culture to develop the necessary approach, knowledge and skills to address and manage risks and protect campaigners.

It is important to recognize that the "Do No Harm" principle should ultimately influence the decision about whether, how and when to launch an advocacy effort in the first place – if the potential risks are too great and/or unlikely to be successfully addressed, the advocacy initiative should be revised, tailored or (in some cases) even cancelled at the planning stage. For a movement- or community-driven advocacy approach, tactics should be reviewed to consider vulnerability that may be created and plan for contingencies. Many advocates and funders have integrated risk awareness and risk management in their advocacy and philanthropic approach, as illustrated by a human rights organization based in Southeast Asia:

> We work with local human rights defenders that are living in their communities. Security protocols and other common tools create a false sense of security, we instead focus on identifying and addressing risks throughout [the different phases] our work in order to be able to adapt to changing situations. We analyze situations upfront and discuss any potential repercussions - what are potential problems, what can go wrong, etc. Getting sued and harassed is part of the work for human rights defenders. We focus on preparing our team for these risks – even the risk of going to jail for the work that we are doing. But some issues are too risky to engage on… and we make calculated decisions to stay away.[33]

Lesson learned #6: Prioritize adaptability

Adaptability – the ability to pivot advocacy efforts to changing contexts and opportunities – is important under ordinary circumstances and even more so for particularly sensitive topics that are often highly fluid. When the desired change is particularly contested, the bedrock for successful advocacy is sufficient and adaptive organizational capacities in terms of amount and flexibility of resources, knowledge and skills. These affect the ability to implement a project but also reflect the organization's level of credibility, legitimacy and influence among external stakeholders in the ecosystem. Most critically, these capacities enable advocates to adapt to changes in context and emerging opportunities that may not have been foreseen when planning grant agreements.

Even well-conceived and well-implemented advocacy campaigns will have a difficult time achieving concrete "wins" in the absence of a favorable environment in terms of political establishments, media coverage, or public opinion. This points to the importance of giving attention to the complexity of more systemic change and adjusting expectations for timeframes of change. A focus on organizational capacities can lay the foundation for the durability of short-term results and longer-term sustainability of advocacy efforts to continue to support. Advocacy strategists have argued for the prioritization of

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[32] PE 07. "Incorporating the principle of "Do No Harm": How to take action without causing harm. Reflections on a review of Humanity & Inclusion's practices." 2018.

[33] Interview with article authors.

adaptability as a capacity priority.[34] For instance, Teles and Schmitt (2011) make the case that rather than using the short-term results of specific interventions as the key measure of success, funders should instead support advocates to develop and strengthen capacities that serve as enabling factors for the "long-term adaptability, strategic capacity, and ultimately influence of organizations themselves."[35]

Although funders might be tempted to sunset funding in the absence of any visible progress in the short and medium term, endurance can pay off in the long term as continued activities can help sustain pressure on the issue, ensure that any hard-won gains are not reversed, and, ultimately, maintain the ability to react to and leverage changing circumstances (for instance, when an election leads to a new government that is more favorable to the cause of the advocates).

For issues that are new and in which communities/advocates may be grappling with how to respond, funders may need to consider investing in related capacity. While for some topics a plethora of civil society organizations are active, many established organizations might be hesitant to advocate on controversial issues, leaving funders with few credible options. Rather than searching for the perfect fit among a limited pool of candidates, donors can instead provide access to resources that fund staff and general operating support to nascent but promising organizations in order to strengthen required advocacy capacities.

Lesson learned #7: Measure and learn about progress

Advocacy on an issue that is particularly contested is a complex, iterative, and long-term undertaking. Conducting a traditional evaluation that tries to determine causality or the effectiveness of individual organizations or tactics with a degree of rigor is challenging due to several reasons.

For one, campaigns and other forms of advocacy often adopt a multi-pronged strategy with different tactics involving groups of allies, since achieving success is usually dependent on influencing a range of actors and factors.[36] Consequently, few if any successful campaigns are the result of the efforts of a single organization but rather of a mix of collective actions from a variety of actors and external factors that have directly or indirectly influenced the desired change (such as when shifting political considerations lead a key decision-maker to change his/her position on a topic). In particularly sensitive advocacy, these tactics may not be visible, and the reactions of the audiences that advocates are trying to influence may also be off-the-record or intentionally discreet. Surfacing these cause-effect connections through evaluation may not only be difficult to do with a level of credibility or rigor, but also may inadvertently undermine the (likely ongoing) advocacy by calling attention to it.

To illustrate, a campaign seeking to change public policy can use grassroots mobilization activities to gradually build broad-based support for their cause, while at the same time targeting influential policymakers through direct engagement efforts. These tactics can all be effective in achieving their respective objectives and collectively contributing to the desired change, but often have different levels of visibility and perceived influence among external stakeholders, making it challenging to distinguish and learn about their relative effectiveness.

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[34] Rick Davies, *Evaluating the Effectiveness of DFID's Influence with Multilaterals Part A: A Review of NGO Approaches to the Evaluation of Advocacy Work*. Cambridge, UK, 2001; Singh, Sehjo, Clare Moberly and Jan Knight. *Empowered to Influence: Capacity Building for Advocacy*. London: INTRAC, 2011.

[35] Teles, Steven and Mark Schmitt. "'The Elusive Craft of Evaluating Advocacy." *Stanford Social Innovation Review* (2011): 38–43.

[36] Coe, Jim and Rhonda Schlangen. "No Royal Road: Finding and Following the Natural Pathways of Advocacy Evaluation. *Center for Evaluation Innovation.* (2019)

As a result, evaluations risk conflating visibility with effectiveness. Multiple organizations may claim credit as the decisive force behind any accomplishment – and they have all usually played *some* part – which makes it difficult for evaluators to untangle this complex web of actors and factors and assess the effectiveness of a particular campaign (in fact, if the collaborative advocacy is effective, these would be impossible to distinguish).

Secondly, advocating on contentious topics is often particularly complex and long-lasting, as the presence of an active opposition represents a constant risk of backsliding whenever progress has been achieved. A lack of tangible results does not mean failure since a lack of success can be due to a number of forces, not necessarily due to a poorly conceived or conducted campaign, which makes it more onerous for the evaluator to assess effectiveness or results. This highlights the importance of supporting learning as a mechanism to review and revise approaches or tactics, and also to inform the design of campaigns in other geographic and thematic areas.

Despite these challenges in evaluating results, advocacy campaigns provide rich opportunities for learning that can inform internal decision-making processes and provide lessons that other advocates can draw on (see case study example 6). This requires a proactive focus on documenting actions, processes and progress throughout the campaign cycle. Drawing on the lessons from a series of civil society campaigns in Tanzania, Tumbo, Awinda and Schlangen[39] (2017) argue that campaigns should integrate a robust approach to document, critically reflect on and review progress as an element in the decision-making process during project implementation (although the primary purpose of documentation should be on information that is useful for advocates, and they should only do so to the extent that such documentation does not elevate the risk to the advocates or community members by creating "evidence" that can be used to harm them). Most critical is time and space for reflection. This enables them to be highly adaptive to a changing environment and to revise ineffective or unsuccessful tactics throughout the campaign, rather than only as a consequence of external (and often donor-initiated) evaluations. Critical reflection should also include the perspectives of donors and other allies as a way to share learning not just internally but also between organizations. For instance, Teles and Smith (2011) believe that the effect of a campaign is also measured by the learning it generates for the larger ecosystem and "evaluating advocacy organizations means paying close attention to the value they generate for others, rather than only focusing on their direct impacts."[40]

Case study example 6: Learning from success and failures

A case study of three civil society campaigns in Tanzania showed that campaign results should not be measured only in terms of formal changes in policy or practice, but also in the strengthened capacity of civil society to engage with decision makers. While there were mixed perspectives on the extent to which the three campaigns achieved their policy change objectives, the case study documented other less visible but important effects. For instance, a spontaneous, grassroots campaign to end a doctors' strike[37] ended with a compromise that did not secure the desired short-term objectives, but the advocates felt that an important side-effect was to elevate an agenda for health systems strengthening. Further, the campaign "demonstrated the capacity of civil society to intuitively self-organize and act across sectors that few apparently realized existed. It also exemplifies the capability of civil society to quickly organize an effective response when advocates are intimidated during the course of their campaigning."[38]

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[37] A broad coalition of CSOs and citizens got together in a high-risk effort to end a labor dispute between doctors and the government that had significant consequences for people who could not access critical healthcare.

[38]Ibid. 9.

[39] Tumbo, Julie et al. "Tanzanian civil society campaigning for change." 2017.

[40] Teles, Steven and Mark Schmitt. (2011)

Conclusion

Advocacy by civil society organizations is a critical tool for social progress, but funders and advocates working in contexts where the change being sought is highly contested often face significant risks. Contested advocacy is prone to setbacks and typically requires long-term and sustained attention. Integrating seven lessons can help support progress: Carefully consider the power dynamics around the change being sought to better positions advocacy efforts for success (lesson 1). Identify power structures, opposition and where there is room to shift views to channel resources and attention in the most productive directions (lesson 2). Collaborate with allies to build movements for longer-term advocacy and, in the short-term, broadens the base of efforts (lesson 3). Work with trusted messengers and share credible and evidence-based information to help frame issues around effective narratives (lesson 4). Mainstream risk management into organizational culture and map potential risks early to protect advocates, allies, and local communities (Lesson 5). Prioritize advocates' capability to pivot and adapt in response to emergent opportunities and developments helps ensure that efforts remain relevant (lesson 6). Focus evaluation resources on supporting advocates' learning about progress, rather than in ways that reinforce competition, to ultimately support better advocacy (lesson 7).

We hope advocates and funders can apply these lessons to reinforce their advocacy efforts.

Summary of lessons for funders and advocates

FOCUS	LESSONS FOR ADVOCATES	LESSONS FOR FUNDERS
Setting the agenda	• Be honest and transparent about risks and benefits of participating in advocacy • Understand the external power dynamics (including decision makers and gate keepers) affecting the change being sought	• Ensure that the agenda and advocacy is community-driven • Consider if and how the support is meeting local demands • Be prepared that results will take time
Understand opposition	• Analyze and understand opposition to the change being sought • Identify and locate the actors and constituencies affected by an issue along a spectrum that ranges from active opposition to active allies, understand what factors influence their respective beliefs and motivations	• Understand where there is room to influence opposition and where progress is unlikely • Coordinate and understand the landscape of donor support for and opposed to the proposed change
Engage allies	• Create a 'big tent' of allies to broaden the base, stability and legitimacy of the movement by leveraging different access points and create synergies between available resources	• Support a strong collective voice and synergies between coalition partners by investing in multiple complementary organizations (spread-betting) and/or by supporting the development of an ecosystem of advocates cultivate their own collaboration (long-game)
Messages and messengers	• Use language that the public understands to explain issues	• Provide funding that allows for investing dedicated resources for countering

	• Use messages that are evidence-based, include verifiable information from trusted sources, and are transparent about uncertainties • Build alliances with trusted, credible messengers as a way to reach audiences and convincingly convey messages • Provide the level of support that local champions require to communicate their messages and counter opposition	misinformation and the development of high-quality messages • Support capacity-strengthening of local champions to act as credible messengers
Manage risks	• Ensure that potential risks are mapped and analyzed at the planning stage • Mainstream risk management into organizational culture to develop the necessary approach, knowledge and skills to address and manage risks and protect advocates, allies and local communities	• Incorporate considerations for the "Do No Harm" principle into decisions about whether, how and when to launch an advocacy campaign • Incorporate a risk-management approach into programmatic objectives by offering security support to advocates
Adaptability	• Focus on building adaptive organizational capacities to support and maintain ability to implement advocacy, but also credibility, legitimacy and influence among external stakeholders in the ecosystem	• Invest in sufficient and adaptive organizational capacities in terms of amount and flexibility of resources, knowledge and skills • Consider providing support for staff and general operating support to nascent but promising organizations in thematic areas with few established organizations • Maintain funding in the face of short-term setbacks/lack of progress
Measure success	• Integrate a robust approach to document, critically reflect on and review progress as an element in the decision-making process during project implementation	• Supporting learning as a mechanism to review and revise approaches or tactics, and also to inform the design of campaigns in other geographic and thematic areas

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