How to design a policy influence plan?

Toolkit Nº8

How to communicate. Define the strategy and key messages

This toolkit is part of a series addressing the various components of a public policy influence plan.

1	Diagnostic
2	Objectives
3	Actors and alliances
4	Proposal
5	Strategies and actions
6	Communication plan
7	Resources and timeline
8	Monitoring
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In **Toolkit N° 7: How to carry out the proposal. Define strategies and actions** different strategies were presented which an organization may adopt for its influence plan in accordance with its outlined objective. A majority has a communication component which must be planned: from the identification of priority audiences to the detection of key messages they may wish to share, or of the media/channel which will be used to broadcast the proposal. In this toolkit, we will cover these and other relevant aspects when designing a communication plan.

Communicating does not consist only in bringing the organization´s proposal closer to decision-makers, once it has been defined; it also implies reflection on the ways in which it can influence those who decide, as well as those who influence them. It is about "shifting" from a unilateral vision of communication (associated mainly with the dissemination of a proposal expressed in the organization´s own way) towards a bilateral, multi-directional and interactive communication which involves decision-makers and other key actors in the dialogue and exchange process, thus increasing the probabilities of influence.

Often, the efficacy of the proposal is sustained by its communication value: it is not about a mere transmission of an idea, or of a policy recommendation, but about ensuring that the political and social actors understand what the public policy is about, make the proposal become a benchmark for decision-making, and that it be adopted and applied

in practice (IDRC, 2007). Therefore, it is not enough to communicate only at critical moments in the process: communication actions must be planned.

Principles and bases of communication:

- It is necessary to plan the communication actions and consults, to avoid transmitting incorrect information or messages.
- Promote dialogue. Communication is a complex process: at least two actors play a role, each with its own manner of cultural understanding, contexts, etc. Insofar as the needs, interests and beliefs of the audience are known, conditions will be most favorable for involving it with the developed messages.
- Good communicators question themselves and reflect upon their audience, so as to better know its needs, what "language" they understand and what they pay attention to.
- Take advantage of available and opportune paths and channels of communication.
- Develop messages which respect the context (cultural, ideological, resources).
- Understand and respect your own communication abilities and limitations (and identify who can help you, in case you are unable to do it yourselves).
- When necessary, clearly formulate how to move from theory to action.

CIPPEC, based on IDRC (2008).

Communication plan

A communication plan is useful for:
- Ensuring a certain level of commitment among the members of the organization, particularly in terms of human and financial resources to be allocated to the influence process.
- Building consensus about objectives, priorities, responsibilities and expected results.
- Promoting coordination, consistency and internal coherence through the development of internal and external communication actions.

And it works as a basis for:
- Decision-making: it guides teamwork towards aligning and boosting its decisions; and it is a useful tool to evaluate the costs of a detour (if a new opportunity or a negative unexpected change arises, it allows for better informed decision-making as to what is possible and desirable in order to reallocate resources).
- Arranging and prioritizing actions to optimize the investment in time and resources.
- An internal and external evaluation of the effectiveness, opportunity and quality of developed relationships with key actors.

Ideally, the production of a communication plan should be led by the most knowledgeable and experienced specialists or members of the organization regarding access to, and working with, policy-makers. This group should design the plan which may later be debated with the rest of the working team, so that they may add suggestions and provide resources (contacts, experience, communication tools, etc.). It is important to highlight that the communication plan will be a dynamic platform which must be continually revised, owing to the changing nature of relationships and public affairs.

Who decides?

Understanding intervals and instances for decision-making is a pre-requisite when reaching policy-makers with an adequate message, within the appropriate format, at the right time. For this, it is necessary to carry out an intensive research regarding the characteristics of these processes.

In addition to knowing formal as well as informal processes, the challenge consists in detecting those governmental agencies and, within them, those individuals in charge of decision-making. Part of this work is carried out within the **Stakeholder Analysis**[1] framework.

Another useful tool is the so-called **Influence Mapping**[2] which allows for identification of individuals and groups with power to effect key decisions and deepen research on the roles and motivations of each actor together with the best paths to communicate with them. Designing the map of who influences whom is fundamental to detect the flow of communications (the more obvious public ones may not be the most strategic) and to decide how to present the proposal to increase its acceptance in a gradual manner or reduce the possibilities of direct rejection.

Communication strategies

It is important to discuss and decide which are the best strategies for attaining established communication objectives are. The strategies must be in line with the communications objective (mobilize for action, persuade or inform, among others), thus facilitating the selection of actions and tools. For example, using 2.0 tools to broadcast events such as seminars, workshops, congresses, press meetings or conferences, or organizing meetings with journalists to help them understand the importance of an issue or, simply providing them with the evidence on which to base their notes with precision.

Typical tensions when defining communication strategies:

- Should communication be organized on a local, jurisdictional or national level?
- What style of communication should prevail: formal or informal?
- Should a communication be a decentralized function (depends on each member) or centralized (assigned to the area of communication or to another coordination instance)?
- Should communication be implemented in a participative manner or should certain members of the working team be clearly in charge of it?
- Should public or private communications be favored?
- Should frequency (that is, communicating often with strategic actors) be a priority or, should it be the reach (that is, communicating with wide or mass audiences less frequently?)
- What is the appropriate balance between communicating technical aspects derived from policy research, and developing an emotive style through stories, for example?

Source: Weaving Global Networks (2006).

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1   For more information, see: **Toolkit N° 5: Who should we work with. Define actors and alliances.** Available at: www.vippal.cippec.org
2   For more information, see Weaving Global Networks Handbook (CIPPEC, 2006), pages 83 and 84. Available at: http://www.vippal.cippec.org/media/produccionconocimiento/tejiendo_redes_globales_manual_para_la_incidencia_politica.pdf

Defining the message

One of the most common challenges when communicating is the definition of the message: the language must be simple, unclear and complex slang should be avoided, and data should be presented in a comprehensible manner. For example, if it is about communicating policy recommendations, clarity of objectives and practical implications, viable designs in political terms, statistical analyses and adequate, applicable conclusions to other cases should be sought.

The manner in which messages are formulated and arguments are constructed is very important, since it is linked, for the most part, to the political space which may be considered as an arena for battle, and which is, first and foremost, inscribed in the field of discourse. The various actors involved in a policy issue will attempt to impose their messages, and often, the validity or acceptance of the latter will depend on the manner in which they "reach" decision-makers. The introduction of the proposal at an inadequate time of the process of policy formulation, or the choice of a presentation style inadequate for the audience, compromises the value of the proposal (Bardach, 1998).

Clear, consistent and effective messages

For a definition of truly effective messages we may bear the following elements and questions in mind:

- **Content.** What is the main message? Which are the priority aspects of the problem and why is it relevant to the proposal?
- **Audiences.** Who is to be addressed?

- **Language, format and resources** (metaphors, experiences, stories, comparisons) How can arguments be expressed more convincingly?
- **Source.** Through whom is it convenient to disseminate the messages?
- **Timeframe and interval.** When and where is it more convenient to communicate?

Source: CIPPEC, based on Save the Children (2007), and Mendizabal and Weyrauch (2011)[3]

Clear and simple messages!

Often, a complex argument or statement may be expressed in few words without modifying or reducing the value of its content, and this gives it greater clarity.

Education has been seen in many cases to help young men and women integrate into global markets and global value chains. This can help reduce the burden of governments to provide social protection in rural areas because some of the most vulnerable can earn greater incomes, thus alleviating poverty.

And if we make it more simple? *Education can reduce rural poverty.*

Source: CIPPEC, based on Mendizabal and Weyrauch (2011).

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3   Mendizabal, E. and Weyrauch, V. (2011): Strategies and Tools for Effective Communication in Policy Making. Washington. www.onthinktanks.org

How to make policy recommendations? Policy briefs as a tool to influence decision-making

Policy briefs or public policy documents are a practical way to present analysis and/or recommendations, and of exercising the capacity for communication in a succinct, concrete politically able manner. It is about short documents, written according to the essential interests of the audiences (press, academia, politicians, etc.) in which: a) the importance or urgency of approaching a situation or problem is described; b) it informs on possible solutions currently being discussed in the political context and highlights the pros and cons of each; c) when there is sufficient evidence, the author may take a position and recommend one of all the alternatives being debated, through a properly based argument, and d) it provides evidence which supports the current reasoning behind the recommendations.

To better know policy brief, see **Tools for policy influence. Policy briefs** (CIPPEC, 2012).

In addition to thinking which type of communication objectives are most linked with the various types of influence objectives, the team should establish objectives according to the following levels of communication:

- **Institutional communication** (communication about the organization *per se*).
- **Internal communication** (to ensure coordination, commitment and participation of its various members).
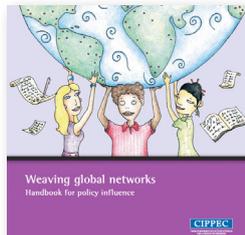
To continue searching!

Reading recommendations by CIPPEC´s Civil Society Directorate to design an influence plan

- *Policy briefs, in Tools for policy influence,* Vanesa Weyrauch y Julia D' Agostino, CIPPEC, 2012.
  Available at www.vippal.cippec.org.

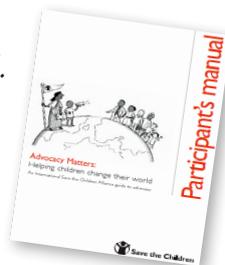- *Weaving global networks. Handbook for policy influence;* CIPPEC, 2006, pages 80 to 91.
  Available at:
  www.vippal.cippec.org.

- *Impact 2.0 iGuide: New mechanisms for linking research and policy,* Association for Progressive Communications (APC), 2011. iGuía Impacto 2.0.
  Available at: http://www.apc.org.

- *Advocacy Matters: Helping children change their world. An International Save the Children Alliance guide to advocacy,* Save the Children, 2007, pages 92-115.
  Available at:
  www.savethechildren.org.uk.

- *Now hear this: The 9 Laws of Successful Advocacy Communication,* FENTON Communications, 2009.
  Available at: www.fentom.com.

- *An opportunity looking for a home,* International Development Research Center (IDRC), 2007. Available at: www.idrc.ca.

In Spanish:

- *The eight-step path for policy analysis,* Eugene Bardach, 1998

- "Evidence based policies. Public policy as an informed action and research object", Teresa Bracho in *Problems, decisions y solutions. Approaches to public policy,* 2010.

Next Toolkit:
Who, how much and when. Define resources and timeline

If you wish to quote this document:
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How to design a policy influence plan?

Toolkit Nº 1.
What is an influence plan. Why should we plan.

Toolkit Nº 2.
The policy making process. Analyze the context for effective influence planning.

Toolkit Nº 3.
Where are we and how far can we go. Identify strengths, weaknesses, opportunities and challenges.

Toolkit Nº 4.
What we desire. Define influence objectives.

Toolkit Nº 5.
Who should we work with. Define actors and alliances.

Toolkit Nº 6.
How to generate the desired impact. Define the proposal.

Toolkit Nº 7.
How to carry out the proposal. Define strategies and actions.

Toolkit Nº 8.
How to communicate. Define the strategy and key messages.

Toolkit Nº 9.
Who, how much and when. Define resources and timeline.

Toolkit Nº 10.
What have we learned? An approximation to monitoring and evaluation of policy influence.

Other series:

How can we monitor and evaluate policy influence?

Tools for policy influence

Available at www.vippal.cippec.org

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