INFLUENCING FOR IMPACT GUIDE
How to deliver effective influencing strategies

OXFAM

CONTENTS

INTRODUCTION
WELCOME TO THE INFLUENCING FOR IMPACT GUIDE

This guide is designed to support civil society organisations, Oxfam teams and partners to develop and deliver 'influencing strategies' for social justice that tackle the structural causes of poverty, inequality and environmental crisis - influencing strategies that will shift unequal and unjust power relations, and change policies, practices, attitudes, behaviours and social norms.

It describes how to design effective influencing strategies and put them into practice and explains the tactics that you can use to make change happen. The guide is informed by the learning, experiences and courageous influencing and campaigning undertaken by social movements, civil society networks, Oxfam partners, allies and staff over many years, as well as from evaluations and academic research.

For Oxfam teams and partners it sits alongside the Oxfam Guide to Feminist Influencing, the National Influencing Guidelines, the Oxfam Program Framework and the Rights in Crisis Guide to Influencing.

For those in Oxfam running workshops on influencing, we recommend using this guide in conjunction with the Influencing Training Facilitation Pack.

This guide is not intended to be read from beginning to end, but we encourage you to find the practical guidance, resources and ideas you need. Links are provided to additional resources and guidance.

If you have any feedback or questions about this guide, you can contact renglish@oxfam.org.uk; sagolding@oxfam.org.uk or tdunmore@oxfam.org.uk

The guide is split into three parts:

INFLUENCING: This part explains some of the context and principles that underpin Oxfam's approach to influencing.

STRATEGY: This part explains how to develop an influencing strategy to maximize impact. It takes you through the main steps, provides analysis and planning tools and examples of the strategies and tactics you can use.

TACTICS AND TOOLS: This part provides more in-depth guidance and information on the strategies, tactics and skills you can develop to be effective in your influencing and campaigning. Throughout this guide we refer to strategy; strategies, tactics, actions, activities and tools.

By a campaign or influencing strategy we mean an overall plan through which you will contribute to achieving an overall goal for change.

By strategies: we mean broad approaches you use to achieve your objectives and overall goal.

By tactics: we mean specific types of actions/activities you undertake within your strategies to achieve your objectives.

By tools: we mean mechanism or channels of communications (e.g. online social networking services such as Twitter) which support the delivery of your actions and activities or frameworks and processes (e.g. a power analysis tool) for designing, implementing, reviewing and evaluating your influencing and campaigns.

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PART 1

WHAT IS INFLUENCING AND WHY DOES IT MATTER TO OXFAM? INCLUDES A FEMINIST APPROACH TO INFLUENCING

PART 1
WHAT IS INFLUENCING, AND WHY DOES IT MATTER TO OXFAM?

Oxfam works with partners and allies to save and protect lives in humanitarian crises, to support long term improvements in the lives of marginalized and excluded groups and to tackle the root causes of poverty and injustice. Oxfam links local action and influencing with campaigning, advocacy and influencing at national and global levels in support of policy, practice, attitude, norms and behaviour change that will deliver justice, hold power holders to account and transform unequal gender and power relations.

1.1 WHAT IS INFLUENCING?

For Oxfam, 'influencing' refers to a range of systematic efforts to bring about changes in the structural causes of poverty and injustice which includes changes in unequal gender and power relationships, policy, practice, attitudes, behaviours and social norms.

Examples of **influencing strategies** include:

• Strengthening and supporting the capacity of marginalized individuals and groups to have their voice heard, participate in decision making and secure their rights

• Building the capacity of state institutions to engage and create spaces for marginalized and vulnerable people to participate in decision making.

• Shifting the terms of debate on important issues of public concern, or raising a neglected issue up the policy agenda.

• Changing the policies and practices of governments and businesses in favour of marginalized people and groups.

• Changing the attitudes, social norms and behaviours of the public or officials that perpetuate poverty and injustice or prevents the implementation of policy.

• Supporting, testing and scaling up development solutions – often from the grassroots.

• Convening stakeholders to enable dialogue and solve common problems.

• Supporting social movements and civil society, women's rights and youth organisations.

Examples of **influencing tactics** include:

• **Research and policy development.** For example: developing and stating an organizational position on an issue and what should be done to address it; publishing research and policy papers.

• **Lobbying and direct advocacy.** For example, building relations, organizing and attending meetings, writing lobby letters or other direct communication with decision makers and influential people in government, business and other institutions and organizations

• **Convening and facilitating** engagement and dialogue with key stakeholders and decision makers in a change process.

• **Supporting community engagement on issues.** For example, through critical awareness raising activities, participatory and shared learning events.

• **Supporting women and men to become change-makers and influencers themselves.** For example, through leadership development programmes

• **Communications and media.** For example, developing powerful messaging and narratives, engaging with and using local, national and international media and communication outlets, social and digital media and other communication channels.

• **Alliances and network building.** For example, supporting, funding, convening and participating in civil society and women's networks and social movements to achieve common goals.

• **Supporting civil society organisations.** For example, through core funding and technical advice and capacity building.

• **Mobilization and public campaigning.** Organizing public rallies and events, email petitions and mass social media actions, mobilizing celebrities or other external influential people.

• **Supporting community engagement on issues.** For example, through awareness raising, transformative education, community organising and leadership development.

We deal with these strategies in much more depth in **Part 3**

1.2   EXAMPLES OF INFLUENCING

Oxfam and its partners are involved in a varied range of influencing programmes, including:

• Multi-level campaigns operating at across local, national and global levels – for example, the **Even it Up** and **FAIR** campaigns, which are focused on economic inequality, tax and fiscal justice; and the **Enough Campaign** to end violence against women and girls.

• National influencing programmes – for example, **Oxfam in Ghana** has advocacy and campaigns on investment in agriculture, health and education, and fair taxation.

• Sub-national campaigns or advocacy projects within a country development or humanitarian programme – for example, the campaign on the **unjust land systems that are driving inequality in Uganda** and the in-country advocacy is being used to secure access to **aid and protection for civilians in Yemen**.

With different types of target audiences or influencing strategies including:

• Strengthening women's participation - for example, **Raising Her Voice** programmes focused on women's participation in governance systems that have led to new laws on gender-based violence and women's rights across a number of countries.

• Government accountability and active citizenship programmes to increase the accountability and responsiveness of local and national government – for example, the **Chukua Hatua** programme in Tanzania.

• An activism and communications platform that connects, monitors and amplifies citizen's voices and action against inequality – for example, **Actúa.pe!** in Peru

• Campaigns to influence private sector practices e.g. **Behind the Brands** which targeted the "Big 10" global food companies to increase their transparency and accountability throughout their food supply chain.

1.3 OXFAM'S INFLUENCING GUIDELINES[1]

Oxfam is part of the worldwide civil society constituency and seeks to apply the following approaches and principles to its influencing work globally and nationally:

- **Supports partners and allies in their efforts to strengthen civil society and influence for change** because they have primary legitimacy in their own countries. Oxfam will always strive to support and amplify the voices of citizens and will subsume its brand unless there is a reason for not doing so.

- Can also **act directly** (e.g. by directly engaging power holders) where this is thought to increase the impact on poverty. Oxfam's role is determined in consultation with staff and partners and based on an assessment of the country-specific context and a power analysis. Oxfam seeks to use its brand in countries of the Global South as a strategic influencing tool only when valued by partners and allies and when it is politically appropriate (unless Oxfam in that country is an affiliate of the Oxfam confederation with an explicit aim to build its local profile).

- **Engages with partners and people living in poverty** to ensure people's rights are met through the implementation of a rights-based approach to inform its humanitarian, programme and influencing work.

- **Speaks from direct experience** but does not claim to speak for or on behalf of people living in poverty - but will strive to support and amplify their voices.

- Leverages its **considerable body of knowledge and evidence** to tackle the root causes of poverty, injustice and environmental crisis.

- Mobilizes **global solidarity through its millions of supporters** – donors, partners and volunteers – who express their concerns and demands on poverty and injustice through Oxfam.

- Oxfam has **global reach at different levels** (within countries and between them, among state and non-state actors), which allows it to convene different actors to work on common problems.

Oxfam is committed to embedding a feminist approach to influencing which:

- Uses a **rights-based, transformative approach to eliminating poverty** that recognizes how gender, power and wealth inequalities exacerbate each other, resulting in women and girls making up the majority of people living in poverty;

- Means all research and strategy should **reflect the reality that poverty affects men and women, and other marginalised groups, differently;**

- Ensures that **a gender analysis** is at the core of influencing objectives and tactics;

- **Is not 'instrumentalist'**, i.e. framing women's issues in service of another goal (economic growth, etc.); instead, the issues women face should be framed in terms of the importance of women's rights;

- **Bases advocacy in the legal standard**s defined by Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW);

- Prioritizes strong **partnerships with women's rights advocates, organizations and networks;**

- Requires teams have the **time, capacity, knowledge, budget and resources** to integrate gender from start to finish, with staff held accountable for their commitments to integrate gender;

- Is **not just about including women and girls**, but ensures that the specific needs and experiences of women and men are understood and accounted for;

- Requires an **examination of the way people's intersecting identities** (class, gender, race, sexuality, ability, etc.) impact the ways that they have power and privilege, and the ways they face marginalization and discrimination;

- Ensures that **no one is left behind**, and the poorest and most marginalized men, women, boys and girls are given an equal voice and opportunity to shape the future.

PART 2
DEVELOPING AN EFFECTIVE INFLUENCING STRATEGY INCLUDES

PART 2
DESIGNING AN EFFECTIVE INFLUENCING STRATEGY

This part of the guide will take you through the process of developing and implementing an effective influencing strategy for a programme or campaign. It covers planning, design, implementation and management. Influencing strategy development is an iterative process: effective programmes and strategies respond to progress and changes in the real world. Being flexible and responsive requires on-going monitoring, review and evaluation; during implementation you will find things out about the people and institutions you are engaging with, and you may need to adapt your strategies.

You should decide whether your influencing strategy will be articulated as a standalone document or integrated into other organizational plans, such as country thematic programme strategies. We have developed a sample **Influencing Strategy** Template to help you during your strategy development process if your approach needs to be captured in a standalone document.

For the design of influencing strategies in development programmes and campaigns, Oxfam uses the programme cycle (see Figure 1).

OXFAM AND INFLUENCING

Oxfam also recommends the use of Systems Thinking to frame your context analysis process, as it encourages people to step back and see the wider picture, and identify trends and relationships. It is particularly helpful in campaign and programme design and implementation, encouraging adaptation as conditions change on the ground or new opportunities arise. It gives you a framework to try things out to see what will work best to achieve the changes you want to see.
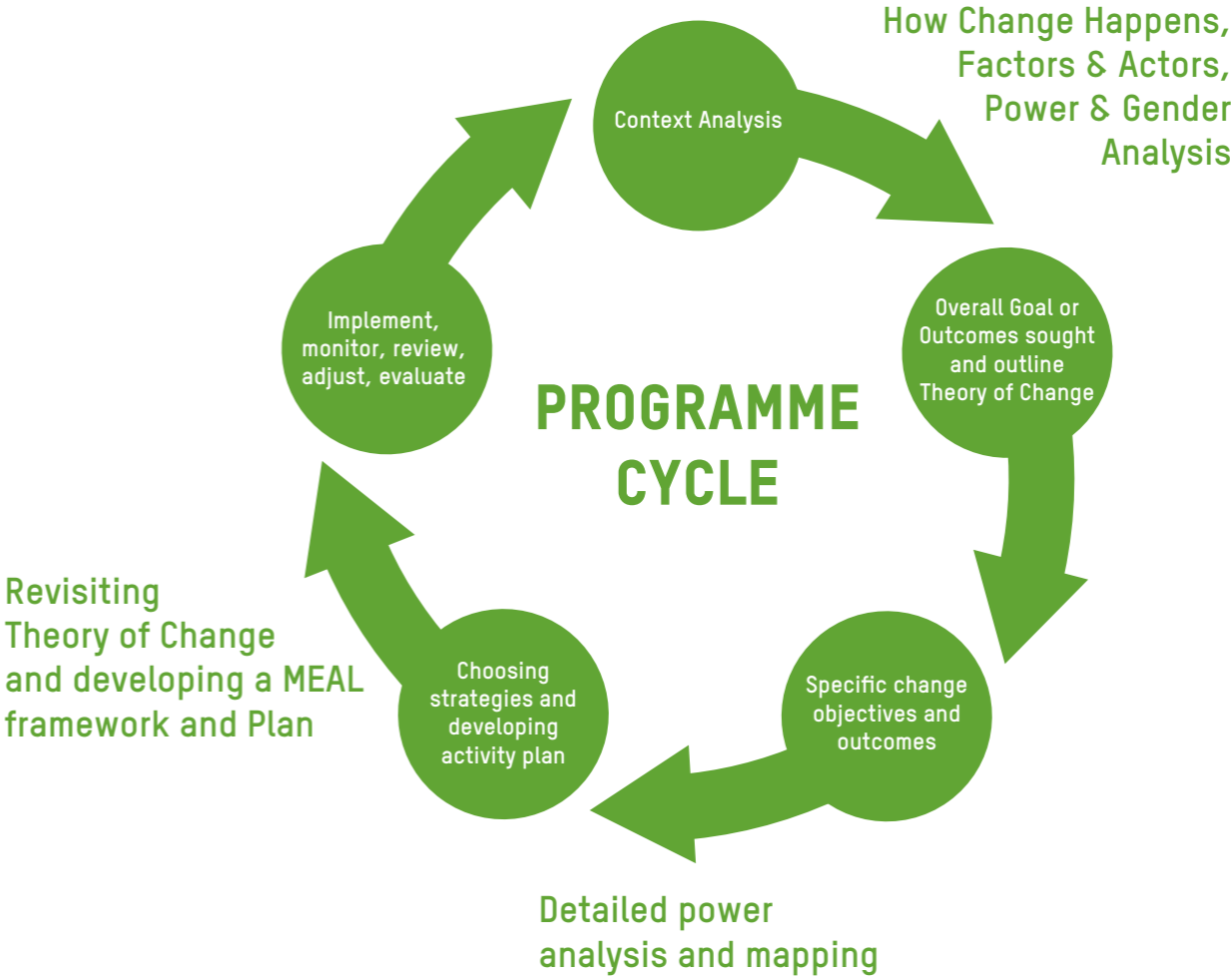
An Influencing or Advocacy Cycle follows the Programme Management Cycle framework and is also exemplified in Oxfam's Feminist Guide to Influencing approach

FIGURE 1 | Source: Oxfam GB

The key questions covered in the rest of this part of the guide are:

• How can you lay a solid foundation for your strategy for change by engaging with others from the outset?

• What are the problems you want to address and the changes you seek?

• What is the context in which you will be seeking to make change happen through influencing?

• How will the different dimensions of power impact on the issues you will focus on?

• What are the obstacles and opportunities for change?

• How can you set clear and motivating influencing goals and objectives?

• What is your theory of change (also called a theory of action)?

• Which individuals, institutions and organizations will you engage with, and how can you rebalance power through your influencing?

• How can you develop a strong and engaging narrative and set of key messages?

• How can you apply feminist principles and practices to your influencing, and transform unequal gender and power relations?

• What mix and sequencing of tactics and tools will help you deliver your change goals?

• How will you know you are on track and learn how to be more effective in your influencing and campaigning?

• How can you put together an effective and detailed plan of action?

• How will you learn to take risks and manage them effectively?

2.1 ENGAGING PEOPLE FROM THE OUTSET

People are the most important resource in designing and implementing an influencing strategy. You will need the right mix of skills and knowledge at the different stages of the cycle. Engaging and involving people will help you to:

• **Understand the context you're working in.** You will need to know about relevant laws, political trends, cultural and social norms, community structures and history etc. You should reach out to others who can challenge any perceptions you might have on what you think you know about the issues and be proactive about bringing in outside expertise at the relevant stages of the influencing cycle.

• Ensure the representation and relevance of your influencing strategy to people affected by the issue,

• Strengthen the agency and action of people affected by the issue to achieve change themselves.

• **Address gender and power.** You must consider power from a feminist perspective, bearing in mind whose voices are heard on the issues you are working on. If women and other marginalized groups are not able to participate and lead in a meaningful way, you should consider what could make this happen. Consider bringing in gender specialists to play an advisory role throughout the process. The **Oxfam Guide to Feminist Influencing** provides helpful advice on embedding feminism in an organization's internal culture.

• **Engage and build relationships from the outset.** It takes time and effort to build new relationships, so reach out early to partners, allies and your other stakeholders and audiences to discuss how you can work together to develop a strategy.

• **Think about how to involve those people most affected by the issue.** Put their views and needs at the centre of your strategy; the influencing you do together will increase their voice and power. Engage with those most directly marginalized, e.g. local communities, women's organizations, organizations for people with disabilities, LGBTQ+ groups and young people.

2.2 PROBLEM ANALYSIS

To produce a rigorous campaign or influencing strategy, you will need to prioritise which issue/problem you will work on and then analyse its causes and possible solutions. The starting point will vary depending on your organisation's structure, mission and goals.

For example, Oxfam is a world-wide organisation of affiliates and country programmes with a purpose of fighting inequality to help create lasting solutions to beat poverty and injustice.

It has identified key thematic priorities in its fight to ensure just economies, gender justice, climate justice, and accountable governance.

Oxfam country teams with partners analyse the underlying causes of poverty and vulnerability in their country and assesses how Oxfam and partners can address them informed by Oxfam's global thematic areas of work. They develop an Oxfam Country Strategy within which an influencing and campaign contribution to change at local, national and global levels will have been broadly defined.

Once you have prioritised the problem you can then start analysing causes and consequences. A simple way to start is to use a problem tree analysis. This part of your analysis must involve representatives of all key stakeholders and those most affected by the issues, as they will bring their understanding and knowledge of the issue and its context.

For examples of an approach to problem analysis using a 'problem tree', see The Multi Stakeholder Partnership Guide: Problem Tree Tool and Civicus Tax Justice Advocacy Toolkit for Civil Society - Chapter 3 page 5

You can then examine the causes in more depth through a thorough context analysis outlined in the next section. After that we will look at what the solutions are which will enable you to set your overall goal for change and some clear objectives.

FIGURE 2 | Source: Oxfam International
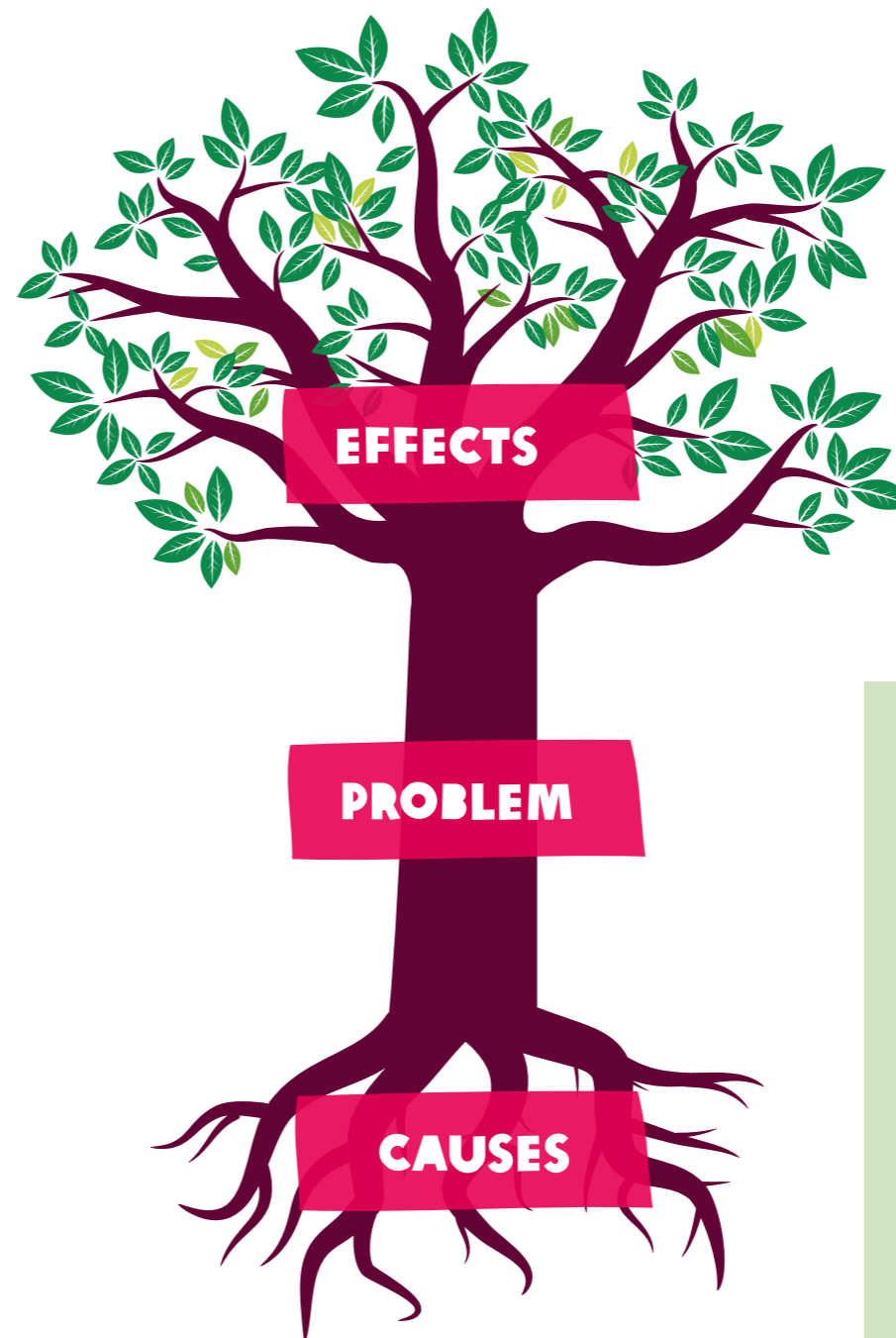
PROBLEM TREE ANALYSIS

This visual tool can help you define the overall problem and identify the specific causes and consequences/effects.

You can then examine the causes, and in conjunction with a thorough context analysis outlined in the section below, identify what the specific solutions are needed to address them which will then help you define your overall goal and objectives for change.

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2.3 UNDERSTANDING THE CONTEXT

For Oxfam, effective influencing tackles the structural causes of poverty and injustice. People live in poverty or are marginalized because of the way society is organized, and the structures, social norms and rules within it. These factors are shaped by history, culture and power, but they are constantly changing in response to trends and developments in the world around us. Understanding how these factors and trends interact through your context analysis can help you identify what needs to change on the problem and issues you want to address and what programme, campaign and influencing strategies could help achieve these changes.

The section that immediately follows highlights some cross-cutting issues that should be considered when looking at the causes of the problem and the factors that might enable or constrain change.

2.3.1 INTERSECTIONALITY

Understanding intersectionality is critically important in understanding the causes of poverty and injustice and developing and implementing an influencing strategy. We have introduced this concept at this early stage, so it can inform your analysis and thinking as we progress through the subsequent sections of this guide.

Intersectionality (first used by scholar and civil rights advocate Kimberlé Crenshaw in 1989) is a theoretical framework for understanding how aspects of an individual's social and political identities (gender, race, class, sexuality, ability, age, education, religion, etc.) might combine to create unique forms of discrimination. It holds that different types of oppression – such as racism, sexism and homophobia – do not act independently of one another, but interrelate, to create the 'intersection' of multiple forms of discrimination.

A person can experience privilege and subordination simultaneously. For example, anywhere in the world, a medical doctor or NGO leader who is respected in her profession may suffer domestic abuse at home. The challenge of identity and intersectionality lies in recognizing and addressing differences and inequalities, but not allowing them to become unbridgeable chasms that prevent people from identifying common ground and building relationships of solidarity. Potentially powerful alliances for social justice – from North-South coalitions to linkages between grassroots constituencies and global policy advocates – confront important questions connected to privilege and control.[2]
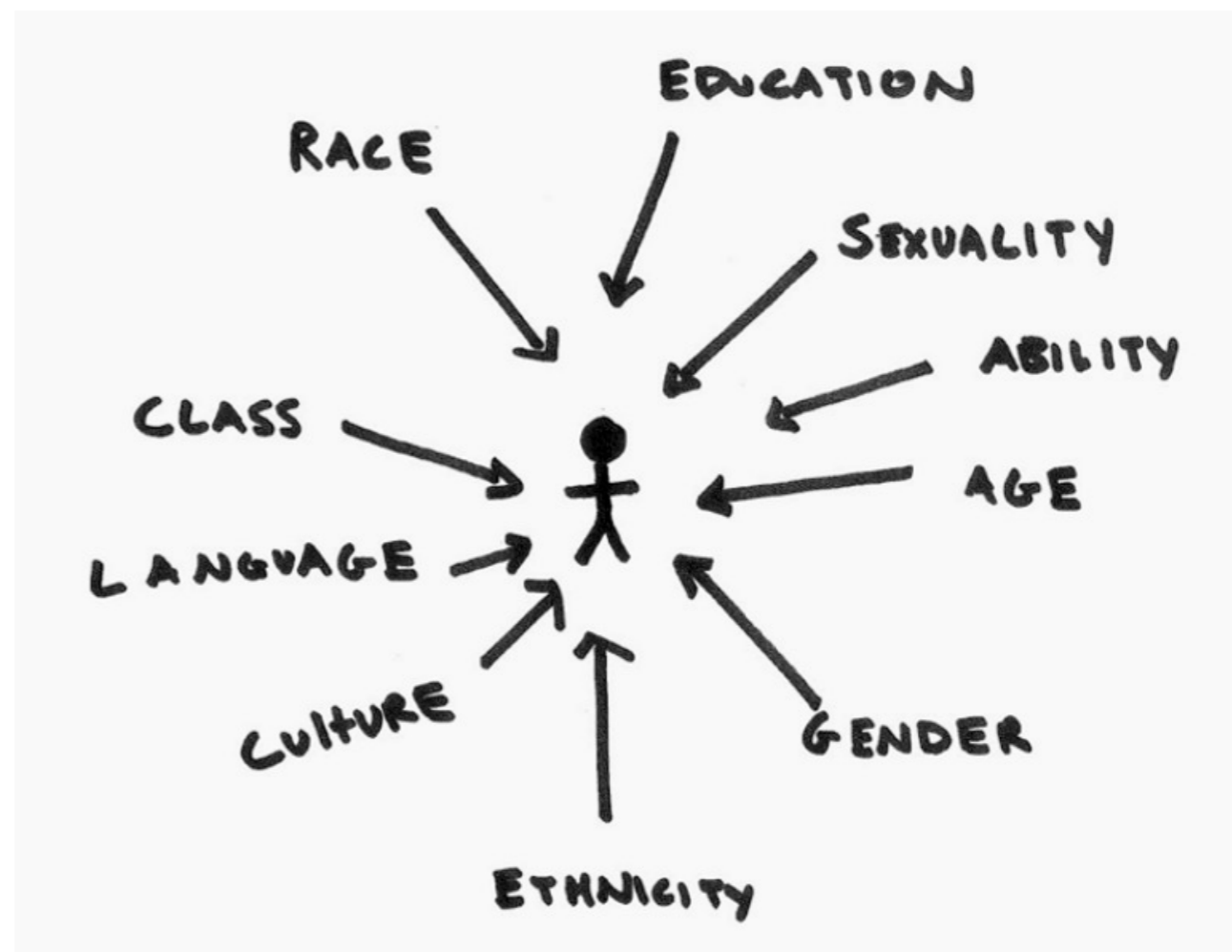
FIGURE 3: Intersectionality | Image Credit: Ashley J. Velazquez; Source: WHAT DOES INTERSECTIONAL FEMINISM ACTUALLY MEAN? International Women's Development AGENCY May 11, 2018

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2.3.2 GENDER ANALYSIS

Gender relations, as part of a wider intersectional analysis, are also important in understanding the causes of poverty and injustice. **Women form the majority of those living in poverty**.[3] They have fewer resources, less power and less influence compared with men, and can experience further inequality due to the different aspects of their identity such as gender, race, class, sexuality, ability, age, education, religion, etc.

When you conduct your context, factor and power analysis you should ensure you integrate a strong gender analysis.

First, **gather data on gender relevant to the problem and issue:**

• Identify existing data on the situation of women, men and gender non-conforming people from other organizations and institutions.

• Collect qualitative information by speaking with people from the communities you are hoping to work with and connecting directly with women's organizations.

Then, to **prepare a gender analysis:**

• Bring together your team, members of the community, women's rights organizations, activists and any other key stakeholders affected by the issues you seek to address.

• Identify the different factors that could have an impact on the issues as they affect women and men differently, such as culture, resources, laws, policies, structures, work, health or time.

• Organize and integrate the collected data on gender with your wider power and context analysis processes.

Important questions to consider while working on your gender analysis as you move through the context analysis phase are:

• What gaps exist in the available data on gender and women's rights and how can these gaps be filled?

• How do people experience the problems or issues you seek to address differently as a result of their gender? How might they experience the solutions to that problem differently?

• How do women's and gender justice organizations understand the problems or issues? How are they already working on addressing these?

• How do relevant policies, structures and institutions treat women, men and gender-nonconforming people differently? Do women have a seat in formal structures that determine these policies, structures and institutions?

• How do relevant cultural norms and practices treat people differently based on gender? Which women are most marginalized and vulnerable due to class, caste, race, age or ability? How do these groups experience the problem differently, and how might they experience the solution differently?

A more detailed description of the key steps to take in organizing your gender analysis can be found in **Oxfam's Guide to Feminist Influencing** Pages 11 - 13

2.4 IDENTIFYING THE EXTERNAL FACTORS THAT ENABLE OR CONSTRAIN CHANGE

As well as the direct causes of the problem and the possible solutions there can be a range of wider factors that help or hinder change on the problems you wish to influence. As with the other stages of analysis, it is important to engage with your key stakeholders, including those people and groups differently affected by the issue and their various identities.

The **key questions when identifying wider external factors** are:

• What underlying or long-term political, economic, social, cultural, technological and environmental factors are enabling or constraining change relative to the problem you are addressing? How do these factors affect different social groups?

• What are the long-term trends (i.e. changes over time) for these factors? How do these affect different groups?

• Are there any immediate events or opportunities that are rapidly emerging? Examples include new governments forming, changes of leadership, crises and scandals, elections, the introduction of new technologies, shifting public attitudes and social norms, and external pressures from climate change.

• What might be preventing change? Is the problem exacerbated by government policies, or are there suitable policies that are not being implemented?

• Are public attitudes, norms and behaviours of different people constraining change?

• What is happening at different levels – individual, household and family, community, sub-national, national and international?

• Have you integrated the questions about intersectionality and gender relations as outlined in **section 2.3**?

Answers to these questions can be divided into opportunities for change and obstacles to change. This will help you think what the potential strategies and tactics you could use in response which we will return to later in the guide. The influencing will, of course, vary according to the issue you are working to change.

> **Tables 1** and **2** can help guide this thought process: the first covers **policy and practice change**, the second covers **behaviour change**. Note that the ideas for potential tactics do not have to be comprehensive at this stage; influencing tactics are considered in detail in **Part 3** of this guide.

Image courtesy of **Tiara Audina**/OXFAM

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TABLE 1: CONSTRAINING AND ENABLING FACTORS FOR POLICY AND PRACTICE CHANGE

Actors and factors influencing the issue	Opportunities for change	Obstacles or constraints to be addressed	Draft ideas for potential tactics in response
Politics and power dynamics e.g. elections; reform processes; leadership changes; crises; splits between power holders and elites; decision-making timetables; political space; new social movements and campaigns; capacity of civic groups to engage in dialogue with institutions			
Economics e.g. market trends; corporate interests			
Society and culture e.g. public opinion for or against; social norms and behaviours of public officials or the public			
Technology e.g. changing communications and social media channels			
Wider longer-term pressures e.g. climate crises; resource degradation; demographic changes			

TABLE 1 | Source: Oxfam Internal

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TABLE 2: CONSTRAINING AND ENABLING FACTORS FOR BEHAVIOUR CHANGE[4]

Actors and factors influencing the issue	Opportunities for change	Obstacles or constraints to be addressed	Draft ideas for potential tactics in response
Internal individual influences e.g. conscious attitudes, beliefs, expectations, intentions; unconscious mental shortcuts and habits, motivations, values, emotions and self-concepts; personal agency, skills, intentions and access to resources; the environment in which choices are made			
Interpersonal and relational group influences e.g. social norms, peers and role models; social reference groups, group standards and sanctions; collective skills, resources and capabilities			
Institutional influences e.g. institutional cultures, standards and incentives; institutional resources and capacity			
Technology e.g. changing communications and social media channels			
Social or structural influences e.g. government policy; availability, quality and cost of technologies, infrastructures, goods and services; cultural beliefs; socioeconomic structures; political structures and power relations ; aspects of identity and intersectional discrimination			

TABLE 2 | Source: Oxfam Internal

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2.5 UNDERSTANDING POWER

This section is designed to deepen your understanding of power and what the implications are for the development of your influencing strategy. Later in the guide (**section 2.10**) you can use this analysis to help you identify the key organisations, individuals and publics who have the power to make the change and who and what influences them, before you decide on the most appropriate strategies and tactics to use.

Power lies at the heart of change. Oxfam's work is based on the understanding that unequal power relations are one of the main underlying drivers of inequality, poverty and suffering. Oxfam aims to transform power relations, so that all marginalized people and those living in poverty or facing crisis have greater influence over the policies, structures and social norms that affect their lives. When designing your influencing strategy, the people, groups or their representatives most affected by the issue should be fully involved and power relations addressed.

Power can be economic, political, social, cultural or symbolic. People's experiences of power depend often on their identities, related to age, gender (see **Section 2.5.1**), race, class, ethnicity, religion, sexual orientation or disability status.

A good power analysis is essential when seeking changes to attitudes and beliefs on issues, such as violence against women. It is equally important to changing policies, such as public spending priorities or the legal rights of women and men living in poverty. It is central to constructing a robust influencing and campaign strategy.

Unequal power relations manifest in different ways: unfair trade regulations that disproportionately benefit rich countries; restrictions on civic space and the repression of activists and human rights defenders; and the social norms that uphold child marriage, female genital mutilation or other forms of violence against women and girls are all forms of power.

Power can be used **negatively** e.g. when it is used to control others or maintain an unequal or harmful status quo, or **positively**, e.g. when it is used to increase people's capacity and agency to drive social change.

TYPES OF POWER

A common conception of power is control over others or the ability to carry out one's will. However, power is subtler. For example, there are **different expressions of power:**

- **Power with** is the strength and capacity gained from joining others in working towards a common goal, often called collective power.

- **Power within** is personal self-confidence, often linked to cultural, religious or societal beliefs about what appears to be legitimate or acceptable to oneself and others.

- **Power over** is having authority and control over individuals, groups or institutions which can be backed up by force.

- **Power to** is the capability to decide actions and carry them out.

Power takes different **forms:**

- **Visible power** is when decision making is observable and leads to formal and recognizable rules, laws, structures and procedures. In this scenario, power is in the public realm.

- **Invisible power** is made up of the norms, values, attitudes, beliefs and ideology that shape a person's way of thinking. For example, despite being illegal in some African countries, the practice of female genital mutilation is still widespread. Laws arising from the formal arena of power that prohibit such practice have not been successful in eliminating it. Such laws are not enforced because powerful groups do not see it as an important issue. Strong cultural and social norms push women to accept this practice.

- **Hidden power** refers to the informal shaping or influencing of the political agenda from behind the scenes. It is often without legitimacy, as it usually happens outside of the legal governance processes in a country.

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Power is used in different **spaces:**

• **Closed spaces** are where decisions are made only by groups.

• **Invited spaces** are where only invited people can participate, usually within certain boundaries.

• **Claimed spaces** are where people with less power create their own space and set their own agenda.

Power is held and used at different **levels: household, community, national, regional** and **global.**

The **Power Cube** is a useful resource for understanding how forms, spaces and levels of power can help bring about social change.

GUIDING QUESTIONS

The following questions are helpful for assessing how an understanding of power, using the type descriptions above, can inform your influencing strategy on your chosen issue:

• Who holds power and how does their gender or social group reinforce this?

• Where are decisions taken? Are spaces open, closed or need to be claimed? Which people are excluded or marginalized from these spaces based on their gender or identity?

• Who is gaining from the current distribution and use of power? Is gender, social or other groups benefiting more than others?

• What are the individual, collective or institutional sources of your power and that of your stakeholders and how can they be strengthened?

• Do you and your stakeholders have the confidence and belief that you can effect change?

• How will working with others create more power to effect change?

• How can you support the '**power within**', '**power with**' and '**power to**' of other individuals and groups pursuing change?

• How will you engage with **visible power**?

• Can you identify where **hidden power** operates, and how might you address this?

• Have you identified what forms of **invisible power** are important for you to address if you want to achieve sustainable change over time?

For some more examples of these forms and expression of power and potential strategic responses, see pages 15–118 of **Oxfam's Feminist Guide to Influencing** – What is a gender power analysis of a context and situation?

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2.5.1 GENDER AND POWER

A gender power analysis makes explicit the gendered elements of power and whether those with power are going to champion or block the change you wish to see. It will also identify who needs to be influenced, who is an ally, and how to most effectively engage these different groups.

As a part of considering the gendered aspects of power a useful first step is to consider power in different two spheres:

• **Private spheres:** the ways that gender and power intersect is often learned at the household level, and in the private spaces of our lives. Think about the roles of women and men at home: who takes care of children and who controls the money?

• **Public spheres:** gender and power dynamics are reinforced in public spaces. People are rarely powerful or powerless in all ways. For instance, even when a woman reaches political office, often she is not as powerful in her own home.

Advocacy that aims to promote women's equality through, for example, equal pay or representation in parliament, will ultimately fail if it does not also address women's lack of power in private and intimate spheres that prevents them seizing opportunities. Having women representatives would not necessarily in itself push the women's rights agenda.

EXAMPLE OF CONSTRAINTS TO WOMEN'S ACCESS TO THEIR RIGHTS

Take the example of rape **[power over]**: while the laws of the land **[power over]** may have been reformed to give women access to justice **[power to]**, there are many cultural barriers **[invisible power]** that they must cross to reach it.

Firstly, the survivor's own belief systems **[invisible power]** must be transformed to recognize that this is a crime of violence, and not something to be hidden for fear of being shamed or shunned by her family or community. Then, her family must support **[power with]**, rather than hinder her, in filing a complaint with the police and making the matter more public.

The attitudes of the police **[invisible power]** must be changed to avoid further harassment or shaming of the survivor or to prevent them aligning with the rapist, if he is from a more powerful group. The survivor and her family need the support of the larger community **[power with]**, whose traditional taboos **[invisible power]** against making such matters public need to be altered.

Then, she must have the resources **[power to]** – in terms of time, money, etc. – to seek legal assistance. And finally, legal services or courts must not only be available, but also provide appropriate services to the survivor – such as closed hearings and sensitive judges.

For Oxfam staff and partners, Oxfam's Gender and Power E-learning Course includes more discussion on power and can be found in Learning at Oxfam.

2.5.2 POLITICAL ECONOMY ANALYSIS

The context analysis frameworks, tools and resource links in this guide should be sufficient for the development and implementation of a robust influencing strategy for most country programmes, global campaigns or advocacy issues. However, for an effective analysis of the situation, you might need a deeper understanding of the interactions of political and economic processes and the distribution of power and wealth in a society.

If this is the case, you can consider doing a more rigorous **Political Economy Analysis (PEA)**. Oxfam, building on experience in Myanmar and Vietnam, have produced a **straightforward PEA guide** for those who need to go deeper.

Image courtesy of **Tineke D'haese**/OXFAM SOLIDARITÉ

2.6 FOCUS AREAS FOR YOUR INFLUENCING

The Gender at Work Framework was developed by feminists to analyse the kinds of changes needed to achieve gender equality. Oxfam uses an adapted version (see Figure 4 opposite). This framework should be used alongside your problem and factor analysis (as well as the other tools in subsequent sections of the guide) and especially alongside the gender analysis we outlined in the previous section above.

The framework can help you to check if you have identified the possible causes of poverty and injustice and the possible factors constraining and enabling change at individual, household, community, national and global levels. For example, it enables you to consider both the visible issues – such as limited access to resources, or discriminatory policies and practices – and less visible issues, such as cultural norms, practices and attitudes that might impede change.

It's not only for use in specific women's rights or gender-equality campaigns or programmes. It can be used to identify the changes needed on wider rights-based, social and environmental justice issues and helps ensure that gender equality is embedded in influencing strategies.

We have adapted the framework so that it can be used to decide which type of change you will need to focus on before you develop tactics and activities (see Section 2.10) to achieve the impact you seek in one or more of the quadrants, while at the same time maintaining a gender and feminist lens on change.

The types of change in each of the quadrants are interconnected, and all four are important for change to be significant and sustained. An assumption in this model is that if action is taken within multiple quadrants, change will potentially come about more quickly and last longer.

Individual and collective change

Informal	Change in individual women and men's knowledge, skills, confidence and commitment	Women and men accessing resources (voice, services, support, money etc.) and organizing together to make change happen	Formal
	Changes in ideas, beliefs, social norms, behaviours and exclusionary practices in society at large	Changes at institutional level, e.g. laws; policies and practices of governments, businesses and other institutions	

Systemic change

FIGURE 4: Individual and collective change | Source: Oxfam Internal

You can use your context analysis with others to identify where it is best to focus efforts across or within the quadrants to contribute to the positive changes that you want to see.

For example, will you be more effective if you focus on changing government policy while also helping strengthen the capacity of local civil society to advocate in their own voice? Or would it be more effective to influence the social norms and behaviours of key government officials or the wider public to ensure compliance? Or would it be effective to work with government to widen political space for marginalized groups to participate?

It may be that certain quadrants and issues are being adequately addressed by other groups in society, allowing you to focus on where you can make the most difference. Different civil society and campaigning organizations will have different strengths in influencing in each of the quadrants.

Below we briefly describe some areas of influencing that are often important for Oxfam and other civil society and social justice organizations: government policy and practices; private sector policies and practices; attitudes, behaviours and social norms; active citizenship and civil society space. Where you focus your influencing strategy in these areas can be informed by using the framework above and your context analysis. The specific tactics you will use and the skills you will need to influence in these areas is explored in more detail in **Part 3**.

2.6.1 GOVERNMENTS AND INSTITUTIONS

Governments at all levels are the primary duty bearers, with responsibility to respect, protect and promote people's rights. A key role for rights-based civil society organizations is to hold governments to account for the progressive realization of people's rights. Governments can be an ally or partner in your influencing work focused on improving the capacity of the state to discharge its responsibilities.. Alternatively, you can engage them as a **target** for advocacy and campaigning. Choosing the most effective influencing route will depend on the context, your power analysis and theory of change, safeguarding and risk issues, and adherence to your core values and principles.

Much of this guide will help you to think through how to effectively influence governments and other institutions who are responsible for upholding people's rights. In later sections we look in detail at a range of what we call insider and outsider strategies to effect change with governments and institutions that operate at the local, national and global levels.

Image courtesy of **GMB Akash**/**Panos**/OXFAM AUSTRALIA

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2.6.2 THE PRIVATE SECTOR

The private sector can play an important role in contributing to sustainable human development. However, it can also undermine the fundamental rights of vulnerable people living in poverty and destroy the environment. Given its diversity, it is important to be very clear about what part of the private sector you are seeking to influence: from local markets and people working in the informal sector, to large multinational corporations.

Oxfam's approach to influencing the private sector uses both:

• Insider strategies, e.g. collaborating with and assisting businesses to work in ways that enable people to realize their rights; and

• Outsider strategies, e.g. strongly campaigning against private sector practices that threaten the rights and well-being of marginalized people and communities.

We have included some examples of some of different types of private sector influencing to inform your thinking should you decide on this sector to achieve change.

EXAMPLE 1

Influencing standards, rules and regulation for trade and investment; putting pertinent issues like land grabs, living wages, tax regimes on the public and political various agendas. This includes national and international guidelines and agreements that governments commit to implement highlighting bad business practices.

CASE STUDY: INDIA RESPONSIBLE BUSINESS INDEX

The India Responsible Business Index (IRBI) was originally conceived through a collaborative partnership between Corporate Responsibility Watch (CRW), Oxfam India, Change Alliance, Praxis Institute for Participatory Practices (Praxis) and Partners in Change (PiC).

The IRBI analyses the disclosures by top listed companies on five parameters of social inclusion: non-discrimination in the workplace, respecting employee dignity and human rights, community development, inclusiveness supply chain and community as business stakeholders. It serves to shift the focus from the 2% mandatory spending on corporate social responsibility to the commitment to 'people' mantra cited by the National Voluntary Guidelines on Social Environmental and Economic Responsibilities of Business.

EXAMPLE 2

Influencing the broader debate on the role of the private sector on development, poverty and social justice and human rights issues through research, policy papers and convening spaces for this debate.

CASE STUDY: LARGEST EVER GROUP OF GLOBAL INVESTORS CALL FOR MORE ACTION TO MEET PARIS TARGETS.

Companies can be persuaded to push and convince the government due to their economic value to the country. These companies might be interested to even the level playing field in which they operate, which requires government regulation.

https://www.theguardian.com/environment/2018/dec/10/largest-ever-group-of-global-investors-call-for-more-action-to-meet-paris-targets

EXAMPLE 3

A partnership to influence a company's overall business approach through a long-term relationship, underpinned by a shared vision and level of trust in working together with worker and producer groups within the company's supply chain.

CASE STUDY – I-AFFORD - ACCESS TO FINANCIAL SERVICES - PHILIPPINES.

To address financial exclusion in the Philippines, Oxfam has partnered with the government and private companies - Visa, a global payment company, PayMaya Philippines, the financial technology leader and SMART, the biggest mobile telecommunications company in the Philippines to promote access to micro-financial services and expand the use of electronic payments by supporting small village merchants to accept electronic prepaid Visa cards.

EXAMPLE 4

Critical outsider advocacy: Using public pressure and the exposure of bad practices to build the case for policy change.

CASE STUDY: BEHIND THE BRANDS.

Exposing bad practices to help build public pressure and the case for policy change.

https://views-voices.oxfam.org.uk/2015/11/how-the-behind-the-brands-campaign-has-driven-change-in-corporate-policy/

https://politicsofpoverty.oxfamamerica.org/2015/09/critical-friends-the-dos-donts-of-corporate-campaigning-oxfam-style/

EXAMPLE 5

Insider advocacy through dialogue and relationship building. Through dialogue, Oxfam and its partners can share their views and evidence with the companies and discuss critical issues that builds trust and mutual understanding.

CASE STUDY – THE MALAWI TEA 2020 PROGRAMME

The Malawi Tea 2020 Programme is a coalition of Malawian tea producers, trade unions, some of the largest international tea buyers, relevant certification standards organizations, NGOs and donors. This aim of this cross-sector collaboration is to achieve a competitive, profitable tea industry that can provide living wages and living incomes, and improved nutrition for its workers by 2020. Notably, in 2016, the first-ever collective bargaining agreement was concluded between the Tea Association of Malawi and the Plantation and Agricultural Workers Union.

Link here for further information on Oxfam's Private Sector Influencing and Advocacy

Image courtesy of **Keith Parsons**/OXFAM AUSTRALIA

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2.6.3 ATTITUDES, BEHAVIOURS AND SOCIAL NORMS

Influencing attitudes, behaviours and social norms of public officials and the wider public a key area in combating poverty, injustice and environmental degradation.

Extensive research has shown that social norms exert a strong influence on people's behaviours – especially those related to violence against women and girls, unpaid care work and other gendered inequalities of power. They are powerful in contexts in which there is a lot of group interdependence, conformity and coordination. But they are not always a key influence – for example, our use of energy behaviours may be influenced as much by available infrastructure, such as the availability of clean energy sources, as social norms.

It is not possible to do justice in this guide to the in-depth analysis and understanding of behaviour and social norm change that is required should you need to embark on this form of influencing.

As such, we recommend you use the following two Oxfam resources to guide you in this work:

> R. Mayne, M. Kesmaecker-Wissing, L. Knight, J. Miziniak. (2018). *Influencing Behaviours and Practices to Tackle Poverty and Injustice*. Oxfam discussion paper. https://policy-practice.oxfam.org.uk/publications/influencing-behaviours-and-practices-to-tackle-poverty-and-injustice-620407

This first discussion paper sets out the range of influences that can shape people's behaviours at individual, group, societal and systemic levels, including social norms; the associated change interventions that can be used to address them; **and in section 10 of the paper is an outline of the key steps necessary for planning and designing behaviour change interventions.**

It describes how the steps in developing your influencing strategy need to be adapted. For example, in the power mapping stage, rather than thinking about stakeholders with decision-making power, it is vital to think about actors who have influence over the social group among which a specific social norm operates, for example friendship groups, teachers, family members, religious leaders, celebrities or other role models.

> A. Parvez Butt, I. Davies and S. Sekaram. (2019). *Social Norms Diagnostic Tool: Sexual and gender-based violence on public transport*. Oxfam. https://policy-practice.oxfam.org.uk/publications/social-norms-diagnostic-tool-sexual-and-gender-based-violence-on-public-transpo-620991

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FIGURE 5: Interconnectedness in influencing behaviours | Source: Oxfam Internal
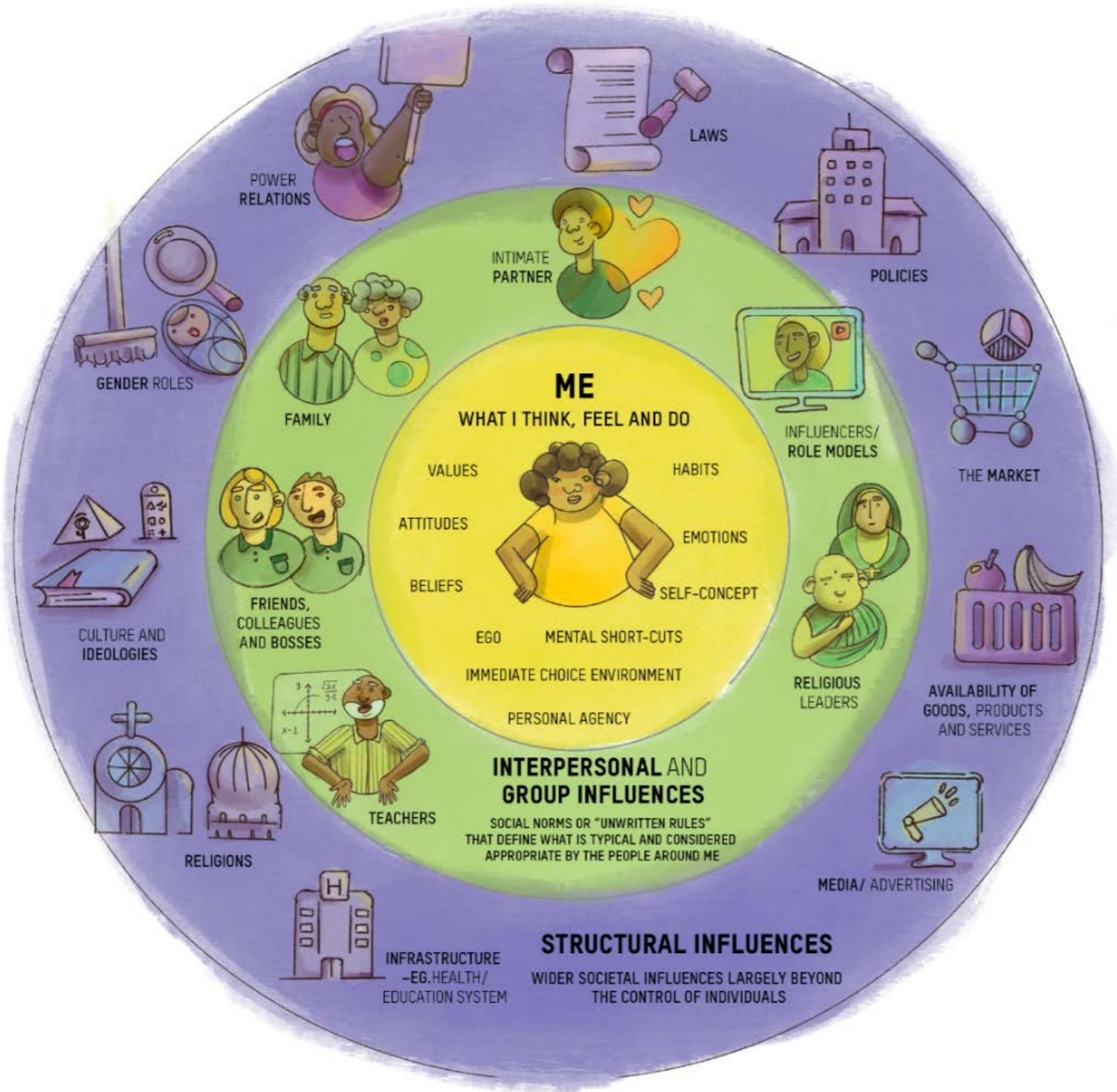
This infographic shows the interconnected levels and influences which need to be considered when developing strategies and activities that seek to influence behaviours and social norms. The diagram is explained in more detail in this **blog**

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The second resource is a Social Norms Diagnostic Tool guidance document that sets out participatory exercises for a 1.5-day workshop that will help programme teams identify and discuss the social norms, perceptions and expectations that shape, constrain or promote sexual harassment against women, girls, transgender and gender non-conforming people on public transport; and to develop initial ideas for change strategies with community members.

> Some tips for strategies to influence social norms include:
>
> • Promote existing positive norms;
>
> • Seek to influence less entrenched norms that are easier to mobilize a community around;
>
> • Challenge both **injunctive and descriptive norms**[5]; for instance, campaigns that highlight only the prevalence of violence against women and girls can reinforce its normalization;
>
> • In restrictive contexts, adapt a wider human rights or wellbeing framing and approach;
>
> • Centre interventions on people's lived experiences;
>
> • Conceive and adapt locally tailored messages and use influential local messengers; and
>
> • Use creative channels of communication to reinforce messages.

One of the most powerful ways of influencing social norms and behaviours is via participatory social learning groups. We explain this in more detail in **section 3.8**.

2.6.4 ACTIVE CITIZENSHIP AND CIVIC SPACE

Oxfam believes that without a strong civil society, both state and corporate power is more likely to go unchallenged. With an empowered civil society including strong women's rights movements, citizens are more able to demand and collectively claim their rights.

Citizen organizing can take many forms. Social movements, women's rights organizations and local grassroots associations have been found to be key drivers of social change[6]. Some groups emerge and dissipate quickly, while others are long standing (e.g. women's and farmers' movements). However, the rise of politically manipulated populism by ruling elites is challenging the gains of recent decades[7]. The challenges and risks faced by citizen groups and social movements in different countries can be considerable and integrating a civic space focus into your influencing and advocacy has become a key issue for Oxfam and many local, national and global civil society groups. This is very relevant to the opposition and attempts to silence women human rights defenders and women's organizations campaigning on gender equality. **Civicus** is a good source of analysis and support on the state of civil society in different countries and has a range of toolkits. Working with and supporting social movements and local grassroots groups can be an important way of reducing poverty and injustice.

Dealing with this requires flexibility, creativity and innovation, as well as a strategy to challenge the restrictions and calling for more open civic space while recognizing the risks made by doing this. Oxfam's **Civic Space Monitoring Tool** is useful in understanding what is happening in civic space at a local and national level.

For Oxfam teams, a microsite on this topic is available on Compass: **Getting Started on Civic Space**.

Getting the right mix of strategies and tactics is important in this area of influencing. In relation to policy influencing and civic space, for example, the findings of the recent meta-review of Oxfam's and partners' national and regional citizens' voice and policy influencing initiatives (Shephard et al, 2018) found that:

• To change policy, it helps to have first expanded civic space. Among the 13 reviewed initiatives that sought to simultaneously strengthen domestic civil society voice and expand the political space for them to exert influence and change policy, only one successfully changed policy without also having widened civic space for domestic organizations.

• Influencing tactics that strengthen networks and alliances, and create spaces for dialogue, between domestic civil society and establishment allies were highlighted as particularly effective (Shephard et al, 2018). For instance, the Coalitions Support Program in Vietnam supported civil society, media, academic, and in some case state and business champions, to work together on key policy issues of public concern. The programme's theory of change aimed to 'unsettle' normal decision-making processes and create new ways of designing and delivering policies (Sidel, 2015).

• However, the successful expansion of civic space on its own does not guarantee policy change. Only half of the ten cases that were successful at expanding civic space were also successful at changing policy. In other words, access to decision makers does not necessarily equate with influence: other strategies are needed.

2.6.5 SCALING UP SOLUTIONS

One of the key ways change happens is by people and organisations copying and adapting solutions or alternatives routes to change from others. (Bandura, 1977;[8] Braithwaite and Drahos, 2000)[9]. This can be an important civil society strategy for change: to identify, test and nurture and then scale up solutions to the problem to be addressed. One route to scaling up theses solutions is to influence governments to support them with, for instance, legislation or money. You can encourage replication by sharing and actively disseminating these solutions to other organisations or service providers, either in a planned way or when opportunities arise.

Image courtesy of **Dustin Barter**/OXFAM

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2.7 SETTING GOALS AND OBJECTIVES

In <u>section 2.2</u> of the guide we looked at the problem tree as a way of identifying the causes and effects of the problem(s) your influencing/campaign will set out to address.

Informed by your context analysis and thinking, return to the causes of the problem you identified and choose the solutions you think might be most appropriate in your context.

It is likely that there will be more than one solution so we recommend that you identify some **core criteria** by which you will choose the most suitable solutions to the identified problem and its causes. This will help you to then draft your overall change goal, from which specific influencing and campaign objectives can be set.

Some examples of possible criteria you can use to identify solutions on which to focus are shown in <u>Figure 6</u>. You can either tick the ones which are met or use a points system e.g. 1 to 5 to grade how well they meet the criteria.

Possible criteria	Solution 1	Solution 2	Solution 3
You and your stakeholders care passionately about the issue			
Your solution is very relevant to the problem			
You can secure significant benefits if successful			
There will be great harm if no change happens			
Likelihood of success – there are clear opportunities for change			
There is good potential for your group to make a difference			
There is good potential to find allies to work with			
Those directly affected can engage directly on the issue			
You can set a realistic timeframe to tackle the issue			
It will contribute to women's and men's empowerment for gender justice			
Likely to deliver transformational shift in power relations			
Issue is culturally- and conflict-sensitive			
Has potential to resonate and engage with supporters			
Insert more criteria here as necessary/agreed by the group			

TABLE 3: Possible criteria chart | Source: Oxfam Internal

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SETTING GOAL AND OBJECTIVES

The solutions you have identified should be used to develop an overall goal under which some specific objectives will sit.

The goals and objectives will depend on the kind of change that is necessary, whether it is policy (formulation, approval, implementation and/or monitoring), institutional or business practices, or individual attitudes and behaviour. You also need to determine at what level(s) the change needs to take place. See **Figure 11**.

A **goal** (or aim) defines the final impact or change you want to see on people's lives or the environment. It should be an ambitious and transformational vision of change which will motivate and engage people

- *Women, children and men living in vulnerable and fragile contexts have claimed power and achieved justice in the ways that they, their countries and the world manages land, water and climate change, so that they can lead sustainable and fulfilled lives – now and in the future.*

Objectives are specific changes or outcomes that you want to see to the structural causes of poverty or injustice, which contribute to achieving the overall goal.

- *By 2025, government funding will increase by 10% for small-scale food production and a greater proportion of private investment in agriculture is focused on helping, not harming, small-scale food producers.*

- *By 2025, communities that are vulnerable to climate change have greater access to adaption finance and other forms of support, and global emissions from key sources will continue to be reduced by 7.6% per annum*

As far as possible, you should select objectives against which your progress can be tracked. There are many variables over which you will have no control, but as far as possible, objectives should be:

- **Clear** – well defined; not vague; an aid to focusing your influencing;

- **Trackable** – possible to identify whether they have been achieved or not;

- **Plausible** – based on well-founded theory of change (we deal with this in the **section 2.9** below) and will help achieve the desired outcomes and impact given limited resources and time;

- **Timebound**[10] – working to a specific timeframe which can be adjusted as the strategy is implemented;

For more information on formulating objectives with a gender lens, see pages 25 - 27 of Oxfam's Feminist Guide to Influencing.

WHAT CHANGE IS NECESSARY?
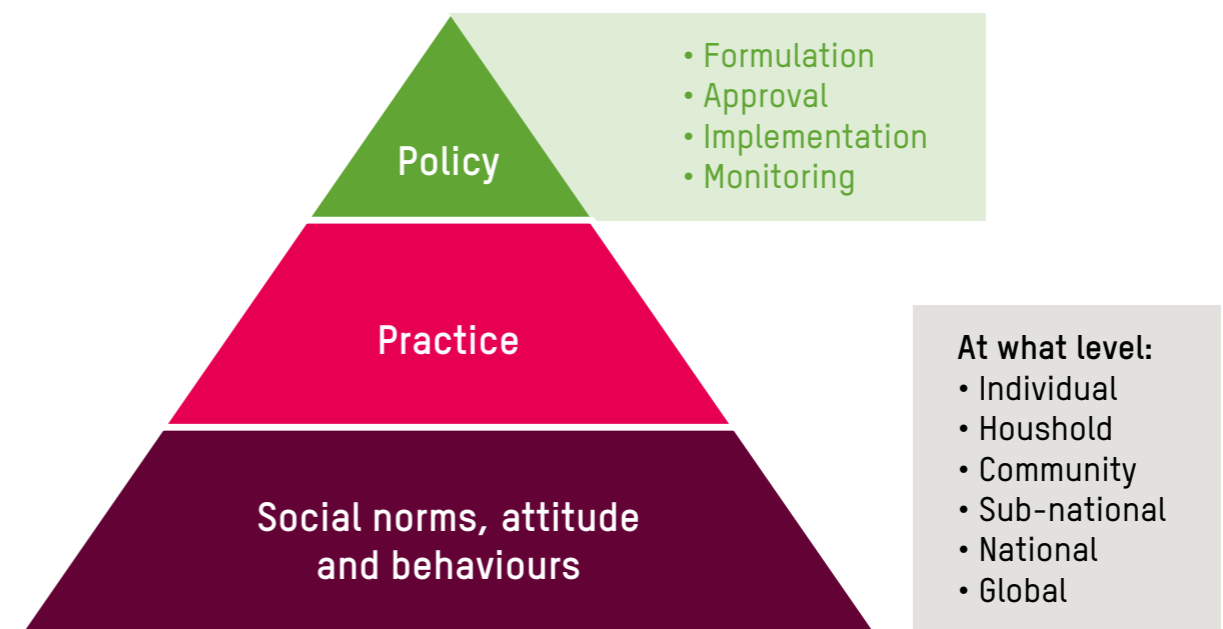
FIGURE 6: **What change is needed?** | Source: Oxfam Internal

2.8 POWER MAPPING

All members of your team, along with partners, people affected by the issue and other trusted experts should be involved in a **power mapping analysis**. This involves identifying potential targets for influencing activities, i.e. the people and institutions you will need to engage with on your selected areas of influencing (see **section 2.6**) and your goals and objectives (see **section 2.7**). These may include:

• Political leaders and parties;

• Private sector companies;

• Civil society organizations and unions;

• Local and city officials and politicians;

• Local community groups, alliances, women's rights groups and activists;

• Specific individuals in homes, communities and workplaces;

• Government departments and bureaucrats;

• Faith leaders and religious institutions;

• Corporate lobby groups or businesses;

• Public commentators and bloggers, media personalities and opinion formers;

• Social media Influencers;

• International institutions and their senior leaders;

• Intergovernmental and regional organizations and their senior leaders;

• Large NGOs and coalitions; and

• Donors, financial institutions and wealthy individuals.

Be specific: identify exactly which person or group exerts influence in a given institution, on your issue, or on any social norms or groups. Wherever possible, include names/positions of key people who will become a target of your advocacy work. For example, rather than targeting 'the UN' or 'the US government', you might list the current UN Secretary.

2.8.1 PRIORITIZATION OF TARGETS

Once you have identified all potential individuals, groups, organizations and institutions, you should prioritize those with power and influence, and those with the biggest potential to help bring about change.

We recommend using a power **mapping tool** (see **Figure 7**) to map your influencing stakeholders and actors.
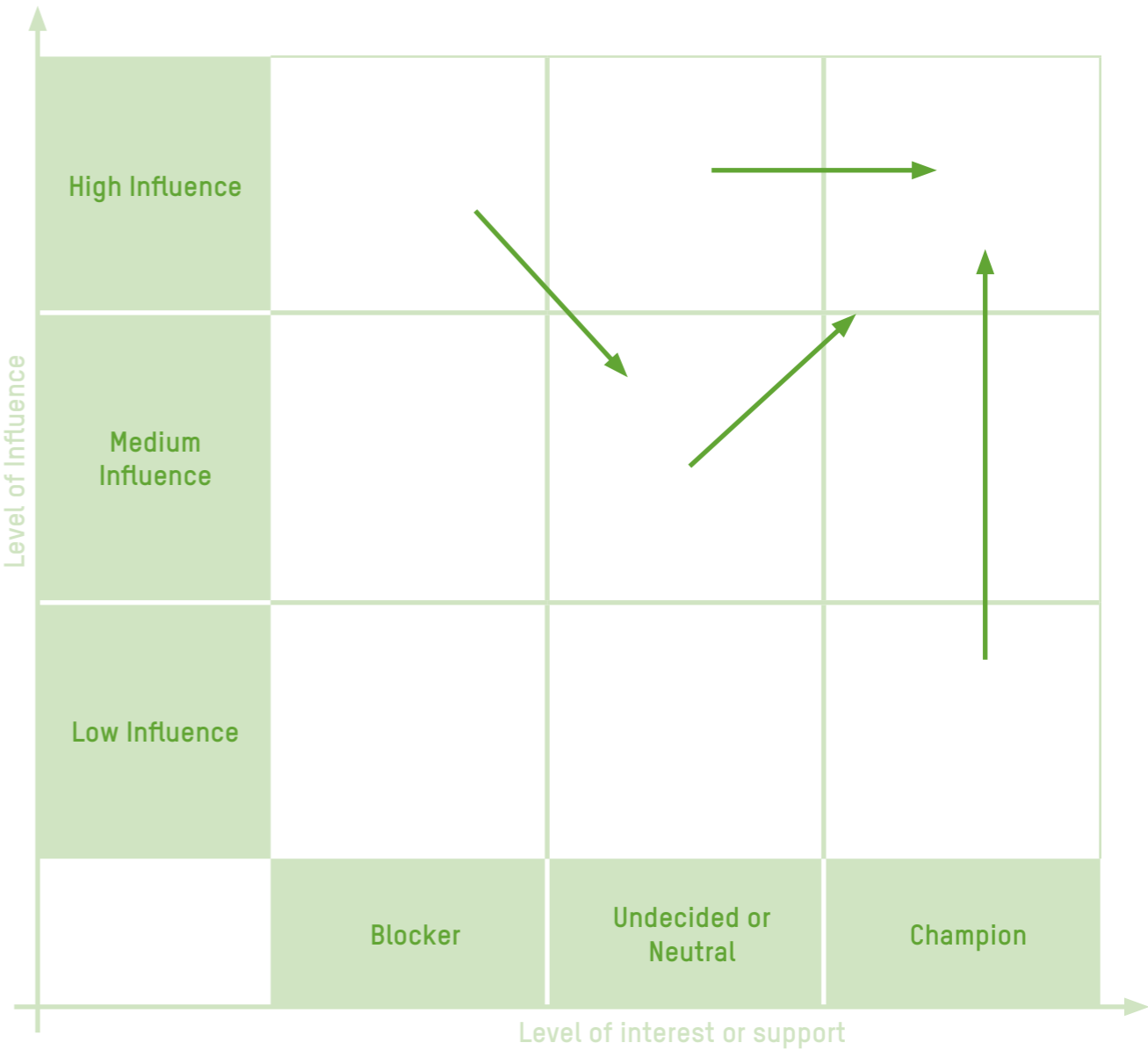
FIGURE 7: Power Mapping Tool | Source: Oxfam Internal

Some will be supporters – how can you harness this support?

Some will be undecided or neutral - consider what might change their minds?

Some will blockers - how you might mute or neutralize their influencing on the issue?

Once you have mapped all your key stakeholders and influencing targets on this tool think through what strategies you might want to use to move them around the grid as per the dotted arrows.

Some **potential responses** as result of your power mapping are:

• **With high influence and high support actors**, use a convening approach to bring people together for maximum impact and get people to use their influence to bring in other supporters.

• **With low influence but highly supportive actors,** build power with and within to increase confidence and enable a coalition of interests to increase their influence and voice.

• **With high influence and neutral or undecided actors,** decide who would be the best messenger to deliver your proposals for change. Develop messaging that will appeal to their interests or concerns, highlighting the positive aspects of the changes (see Section 3.2 on Communication).

• **With high influence but oppositional actors,** consider how to isolate their arguments for opposing your aims through your messaging (see Section 3.2). Think about who might they listen to who could persuade them it is not in their interests to actively oppose your desired change, while looking out for opportunities to isolate them.

2.8.2 BRINGING YOUR POWER ANALYSIS AND MAPPING TOGETHER

Pull together your analysis of stakeholders, decision makers and influencers using the grid (**Table 4**). We recommend that you use it in conjunction with the Gender & Change Framework (**Figure 4**).

OBJECTIVES	DECISION- MAKERS	INFLUENCERS	POTENTIAL STRATEGIES/ TACTICS	FORMS OF POWER	ALLIES	SPACES	IMPLICATIONS?
Your policy, practice, attitude, behaviour or social norm change objectives And at the level at which decision-making is made e.g. individual, household, local, district, national, regional, global[11]	Key decision-makers? What is their current position on issue: Champion (potential driver of change) Floaters (undecided and persuadable) Blocker (opposed)	Who can influence them? And their current position on issue: Champion/Supporter, Floater or Blocker Level of influence: High or Low	What will influence decision-makers? Ideas; evidence and research; peer pressure; popular pressure; shocks; etc.	What are the main sources and forms of power? Is it visible? Is it hidden? Is it invisible?	Who are the key allies or partners on this issue? What is their influence and position? What role can they play?	Where are particular decisions made? – the spaces • Closed • Invited • Claimed	What advocacy strategies, tactics and activities should you be adopting and are there any implications for what you are currently doing?
1.							
2.							
3.							

TABLE 4: Power Analysis Grid | Source: Oxfam Internal

The final column is critical. Spend time considering the implications for your influencing, advocacy and campaigning strategies, tactics and activities. Try to answer the question: **what will help make real change happen among the specific people and institutions you are influencing?**

Some helpful guiding questions for this process are:

• Do you want to encourage or persuade by engaging directly with decision makers and their influencers in their spaces through insider strategies? Or do you need to put pressure on them through public mobilization and other outsider strategies? What mix and sequencing between these two approaches might work best?

• How can you create real or perceived pressure to change the attitudes, decisions and actions of your influencing targets?

• Do you need to focus on social norms or attitudes and behaviour change programmes to ensure the change is transformative and sustainable at both individual and systemic levels?

• Do you need to have a role as a convener of spaces that will bring different stakeholders and decision makers together to address the issue?

• Do you need to support social movements that are also dealing with the issue, or help build a coalition or movement for change with others?

• How will you engage with civil society organizations, activists and citizens on the issue to raise awareness and build a collective voice?

• At what levels do the changes need to occur? What changes need to happen at the individual or community level? Does a national policy or law need to change? Should a regional or international treaty be negotiated and agreed?

• Do the voice and ability of marginalized groups to claim their rights need to be strengthened? How does intersectionality influence your choice of strategy and engagement with these groups?

• Does civic space need to be protected or expanded for change to happen?

• Will your change process build over a long duration? If so, what quick successes can be planned, and how can you be agile and responsive to opportunities that arise?

This analysis and thinking will inform your theory of change, and the choices you will make on the mix of influencing and campaigning strategies and tactic you will pursue.

2.9 THEORY OF CHANGE/ACTION

Theories of change are the ideas and hypotheses ('theories') people and organisations have about how change happens. At the broadest level they are the ideas and beliefs people have about how social change happens influenced by personal histories and socio-cultural factors or based on and influenced by social and political theories and research.

At the programme or campaign level they refer to the changes that you expect or assume will happen due to a set of specific campaign or influencing interventions.

Creating a theory of change as part of developing an influencing or campaign strategy helps **make explicit the assumptions about how your strategies and actions connect to help create the change you want to see**. For example, you might plan to mobilize people around an issue because of your assumption that many people demanding change would make it happen.

Some examples of common assumptions are:

• People are not aware of their rights and because of this they don't act.

• If women participate in politics, they will advance women's rights.

• If we achieve a pro-poor policy change, positive change for women and marginalized groups will follow.

• If we strengthen civil society organizations, they will influence governments.

However, these may not be valid in the context in which you work. For example, governments may marginalise, repress or not listen to civil society organisations. Your assumptions, therefore, need to be based on a good understanding of your context and how change happens.

AN EXAMPLE OF AN INFLUENCING THEORY OF CHANGE/ACTION IN A HUMANITARIAN CRISIS

Women, girls, and men affected by a disaster will receive the assistance they need in accordance with their human rights:

• if the national government effectively leads the response;

• the UN and other humanitarian agencies effectively coordinate their activities; and

• all wealthy countries contribute their fair share towards humanitarian appeals.

This will happen if:

• the national government, UN and humanitarian agencies are held accountable for their performance by empowered communities, coordinated national civil society and donors;

• if the public and citizens in wealthy countries are aware of and concerned about the crisis, and demand their governments provide their fair share of funding for appeals; and

• Civil society works in alliance with relevant stakeholders, uses an effective mix of insider and outsider strategies to widen political space and influence government, and uses communications and media to raise awareness among the public.

Interrogating and documenting your theory of action or change will help you to challenge, discuss, and improve your analysis and understanding of the opportunities and potential for influencing, and the potential barriers that may need to be overcome (see **Section 2.4**).

A theory of action or change should be a live document that you revisit as you gather data on how things are changing as you implement your activities.

Theories of action or change are often informed by prior experience of what works for different issues in different context. But they can sometimes also usefully be informed by social and political science theories of change

EXAMPLES OF SOCIAL AND POLITICAL SCIENCE THEORIES OF CHANGE

'System change occurs when macro pressures, such as a climate crisis or environmental degradation, exerts pressure on dominant policies, practices and behaviours and open the door for niche innovations (and solutions) to spread' (Geels & Schot, 2007).[12] This theory suggests the need for *'influencers'* to identify, nurture and promote solutions and exert pressure on dominant policies, practices and behaviours.

'Legislative change, a key element of wider system change, is most likely to come about when there is a confluence of: political recognition of a problem, the presentation of mature policy solutions that conform to policy makers' values, and a conducive political environment including changes to public opinion and advocacy campaigns' (Kingdon, 2003).[13] This theory suggests the need for 'influencers' to build relations with power holders, develop and package up solutions and take strategic advantage of windows of opportunity as they arise.

Successful government to government influencing entails an escalating mix of rewards and sanctions. The sequence starts with *'persuasion'* (dialogue, reciprocity and modelling solutions), as this is more efficient and less disruptive to relationships than coercive strategies. It then shifts to the threat of *'pressure'*, and the use of pressure as a last resort (Braithwaite and Drahos 2000).[14] This academic research suggests that civil society 'influencers' might use a similar mix and sequencing of influencing strategies and tactics to achieve their goals.

2.9.1 DEVELOPING YOUR THEORY OF CHANGE

Use the Theory of Change Pathway (**Figure 8**) to identify:

- The **overall impact or change** that your influencing or campaign strategy will achieve on the lives of people (link this back to your solution and overall goal);

- The **long-, medium- and short-term outcomes** that will sequentially lead to achieving this impact (be informed by your objectives);

- The **key strategies and tactics** (also called activities) you can use to achieve these outcomes;

- Finally, **the key assumptions you are making** about how change will happen. As you deliver your strategy you then need to check in periodically that these assumptions still hold true. If not, you may need to adjust your strategy.

THEORY OF CHANGE PATHWAY
(also known as an outcome map or impact chain)
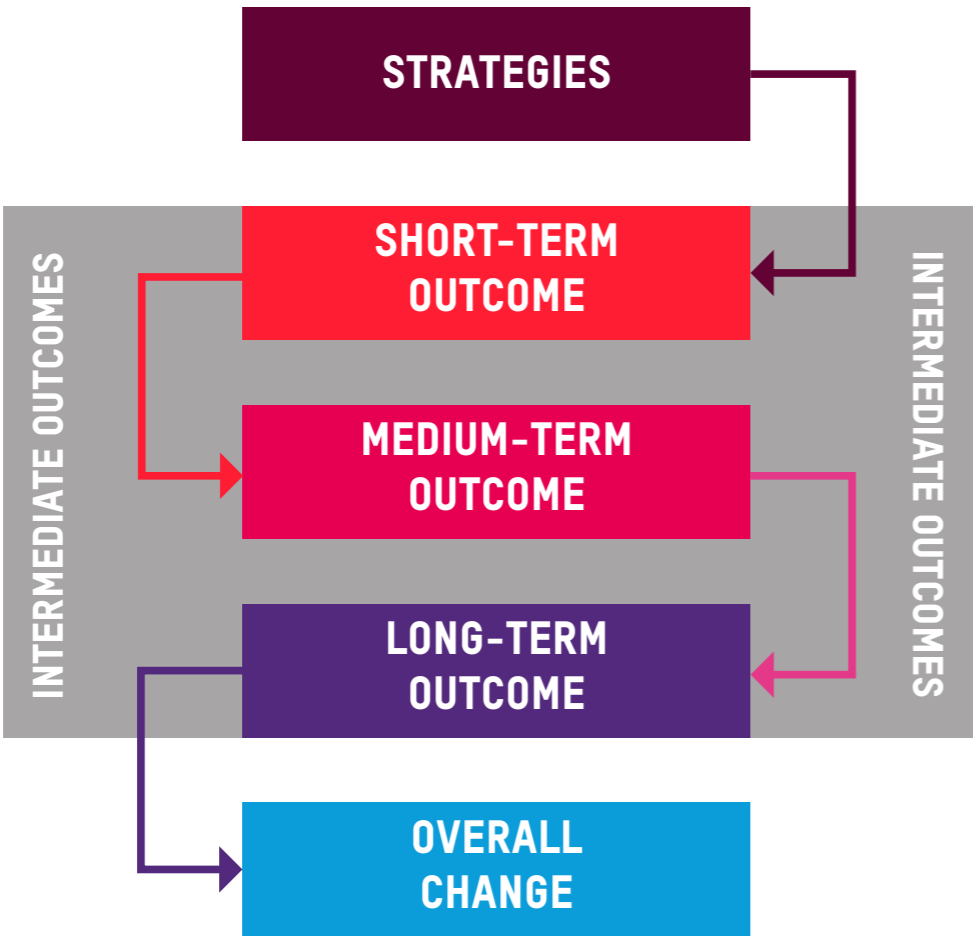
TESTING YOUR ASSUMPTIONS:

For each of the links that you have made, ask yourself these types of questions:

- Why did you think that x would lead to y?

- What might hinder this? (e.g. opposition, lack of trust, attitudes, the capacity of people to engage)

- Are there any missing links?

- Who else might need to be involved and how?

- Are there things you are not sure or confident about?

- Are you choosing the same old strategies you know or have used before assuming they will work? What are the alternatives?

FIGURE 8: The Theory of Change Pathway | Source: Oxfam Internal

A good theory of change helps ground your monitoring, evaluation and learning processes (see **Section 2.12**). You can use your theory of change to monitor your progress, check and test your assumptions as you deliver the strategy and help you review and update your context analysis.

Below are visual representations of two different theories of change. The first is from the first phase of the **Control Arms campaign** when it was focused on achieving a legally binding international arms trade treaty.

The second is an Oxfam Theory of Change for a proposed alliance influencing programme developed by Oxfam Novib focused on **protecting and improving the livelihoods of small-scale farmers and agricultural workers**. This second examples identifies the assumptions that are being made at different stages of the intended change process.

STRATEGIES

Define Problem:
• Research
• Case study development
• Policy Briefs

Develop & Disseminate message on problem and solution to target audiences
• Production and Distribution of Shooting Poverty films
• 'Voices from the front line'
• Case studies

Communicate/ coordinate with key decision makers and/ or influentials on policy issue at key int'l events

Capacity Building:
• Training import/ export officials on arms transfer & sustainable development Guide
• Training Politicians

Slrengthened Base of Support:
• Broad Diverse Coalition
• New champions among key countries
• Increased public will

Media coverage

Increased agreement on problem & solutions among key actors:
• Awareness of issues of corruption, & lack of accountability/ transparency in arms transfers
• Salience of development criteria
• Awareness of human suffering caused by arms

Increased capacity to engage on policy asks

OUTCOMES

Increased Political Will to deliver Increased political will to deliver an Arms Trade Treaty

Increased alignment on treaty asks

Legally Binding Arms Trade Treaty which:
• Aims to reduced human suffering caused by arms transfers
• Includes strong provisions to combat corruption, and enhance accountability/ transparency
• Prohibits transfer of arms/ ammunition likely to fuel conflict and/ or undermine peace building efforts

IMPACT

Reduction in armed violence, and the death, injury, and displacement caused by armed violence

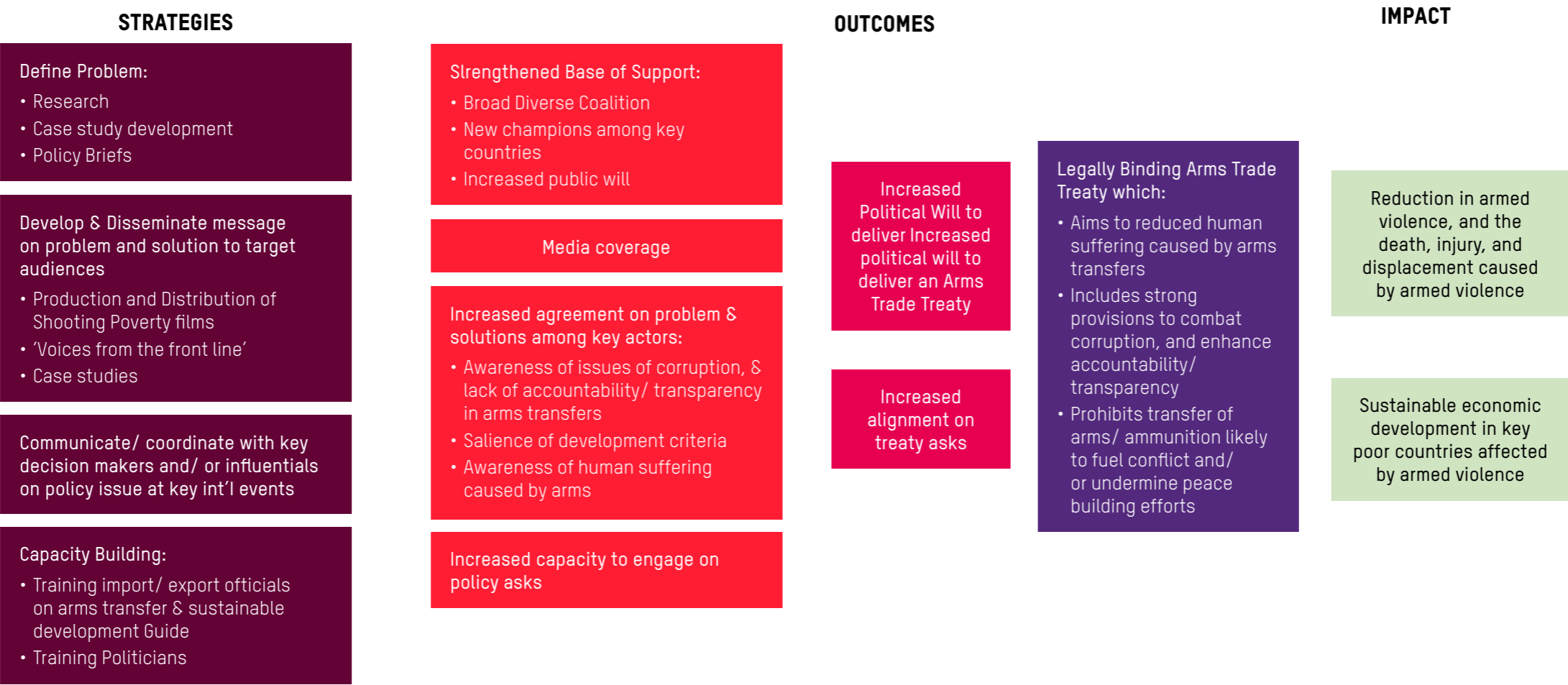Sustainable economic development in key poor countries affected by armed violence

FIGURE 9: Example of a theory of change for the global Arms Trade Treaty coalition campaign: Control Arms | Source: Oxfam Internal

CONTENT MENU

PART

This example of an Oxfam Novib land rights programme ToC is not focused on a stand-alone campaign but includes both direct work and advocacy as strategies to achieve the desired change. This shows how influencing can and should be integrated into a broader project and includes elements of citizen mobilization.

A1   Joining CSO forces at different geographical levels around a common goal increases influence over decision makers.

A2   The support of influential actors is important to in-fluence final decision makers, as they hold both formal and informal power.

A3   Awareness doesn't automatically lead to behavioural change. Citizens need to be provided with tools and platforms for interaction with influential actors and decision makers.

A4   As citizens become active advocates, public pressure creates windows for change and strengthens political will for improved policies.

A5   CSOs working in partnership will add value to their collective efforts as different CSOs represent different constituencies and contribute different areas of expertise.

A6   When influential public and private sector champions demonstrate the feasibility of more sustainable ways to produce and consume food, this will strengthen support among key stakeholders.

A7   Favourable terms of debate open up space for increased political will for change.

IMPACT
Women, men and children living in poverty realise their right to food

LONG-TERM OUTCOME
Small-scale food producers and agricultural workers, particularly women, and their communities, benefit from local to global public and private sector policies that protect and promote their prosperity and resilience

TARGETED OUTCOMES

National, regional and global CSOs have increased capacity to influence (sub) national governments, the private sector and international institutions on the right to food and participate in more inclusive governance systems

Governments, the private sector and international institutions have implemented policies and practices that advance the opportunities of small scale producers and agricultural workers

EARLY AND INTERMEDIATE OUTCOMES

Stronger and wider alliances

CSOs and communities are capable of influencing decision makers

Increased political will in the public and private sector to change policies and practice

Favourable terms of debate

Public and private sector champions have demonstrated the feasibility of more sustainable, pro-poor business models, policies and practices

Oxfam Novib, SOMO and CSO platforms have succeeded in mobilizing citizens and media in order to put pressure on public and private sector stakeholders

INTERVENTIONS

- Build knowledge on policy issues
- Build influencing and research skills of CSOs
- Engage with governments, companies and multilateral institutions
- Support policy propositions
- Convene stakeholders
- Review accountability mechanisms
- Support CSOs to access engagement models and complaint

- Develop propositions with public and private sector champions
- Co-strategise in multi-stakeholder platforms (MSIs)
- Public communication on improved policies and practice
- Develop tools and products that encourage companies to adopt policies
- Work in partnership with public and private sector champions

- Public awareness and campaigns
- Create tools and platforms for citizens interaction
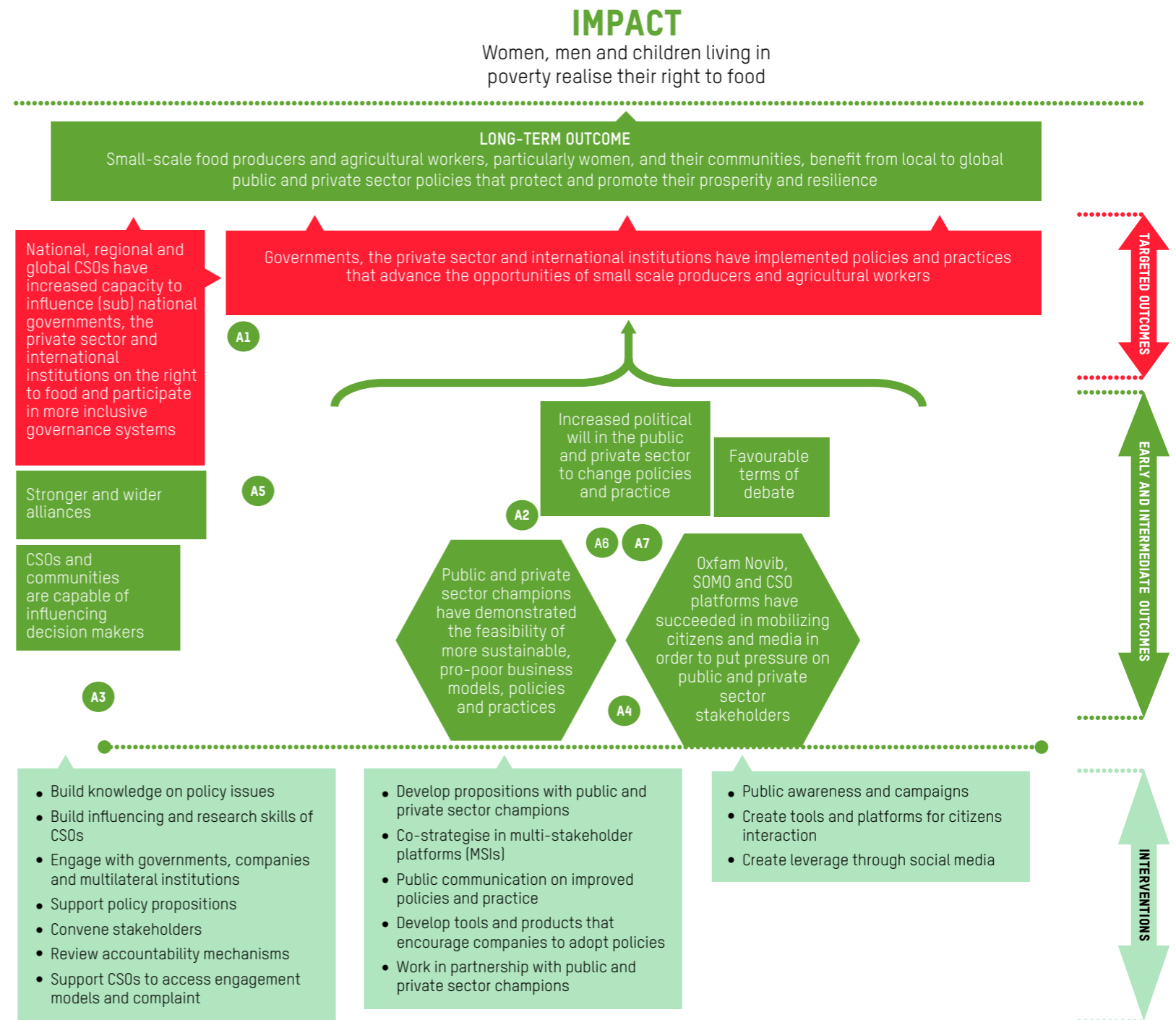- Create leverage through social media

FIGURE 10: Example of a theory of change for a right-to-food campaign | Source: Oxfam Internal

2.10 SELECTING INFLUENCING TACTICS

Your problem, context, power analysis and theory of change has helped you identify your influencing focus and strategies. You can now drill down into your influencing tactics. Your influencing strategy describes the destination and how you will get there. **Tactics are the specific actions you intend to pursue to help you achieve your objectives.** A range of tactics and tools are explored in more detail in **Section 3**. At this stage in the development of your influencing strategy it is important to identify the key tactics that you will use before you move on the develop your action plan.

A list of tactics that Oxfam considers important for campaigning and influencing, which we introduced in an earlier section, is repeated below to help you identify the tactics which you think are important for your strategies and objectives. There are also some guiding questions that follow.

- **Research and policy development.** For example: developing and stating an organizational position on an issue and what should be done to address it; publishing research and policy papers.

- **Lobbying and direct advocacy.** For example, building relations, organizing and attending meetings, writing lobby letters or other direct communication with decision makers and influential people in government, business and other institutions and organizations

- **Convening and facilitating** engagement and dialogue with key stakeholders and decision makers in a change process.

- **Supporting community engagement on issues.** For example, through critical awareness raising activities, participatory and shared learning events.

- **Supporting women and men to become change-makers and influencers themselves.** For example, through leadership development programmes

- **Communications and media.** For example, engaging with and using local, national and international media and communication outlets, social and digital media and other communication channels.

- **Alliances and network building.** For example, supporting, funding, convening and participating in civil society and women's networks and social movements to achieve common goals.

- **For social norms and behaviour change:** supporting social learning or the use of influential messengers

- **Support to civil society organisations.** For example, through providing core funding and technical advice and training.

- **Mobilization and public campaigning.** Organizing public rallies and events, email petitions and mass social media actions, mobilizing celebrities or other external influential people.

Refer to your analysis, your theory of change and strategies and use these guiding questions to select the most suitable tactics.

- What type and mix of influencing strategies and tactics are most likely to influence the key actors identified in your power analysis?

- How can you create real engagement with or pressure on your target audiences?

- What resources (time and money) are needed for this type of activity and do you have access to these resources?

- Which partners and allies in your partnership, coalition or movement are best placed to deliver or contribute to the activities?

- Are you prepared switch quickly to different tactics when new opportunities for influencing arise or when your tactics or strategies are not working?

- How will you manage risk? See **section 2.11.2** below

- How will you manage any tension that might arise if you are using both insider and outsider strategies and tactics?

2.11 DEVELOPING YOUR PLAN OF ACTION

A plan of action sets out the specific actions that will be taken, includes plans for managing risks, and decisions on how to resource your influencing work.

2.11.1 ACTIVITY PLAN

Using the activity plan table (**Table 5**), detail all the influencing tactic and activities to be undertaken against each objective. This includes deciding on timetables, responsibility and resource management.

Objectives	Strategies	For each strategy/ approach decide on your tactics/activities	Timing: main phases in the delivery of the activities	Who will lead on the activity e.g. Oxfam, partners; coalition members?	Budget and other resources needed to deliver your activities
1.					
2.					
3.					

TABLE 5: Activity plan | Source: Oxfam Internal

BUDGET AND RESOURCE MOBILIZATION

The effectiveness of any influencing strategy is dependent on being able to match ambition with resources. Alongside the resources of the partnerships, networks, alliances and coalitions of which you may be a part, you will need to:

• Set a **realistic budget** for both financial and human resources; and potentially

• Develop and implement a **fundraising plan**.

Your budget should include funds and resources to cover:

• Specific activities (such as research, publications, events etc.);

• Human resources, such as staffing costs (including a proportion of support staff time) and costs associated with hiring and supervising volunteers;

• Travel costs to enable planning and implementation of activities;

• Partners' participation and leadership (e.g. accessing grants and other financial contributions to enable their active participation and leadership);

• Monitoring, evaluation and learning activities (see **Section 2.12**) – Oxfam recommends a budget of 5% of total costs for this[15]);

• Overheads related to running your operations, office, printers, computers etc. (depending on your circumstances, this could be up to 10% of the budget);

• Contributions to coalition, alliance or network activities and coordination.

Consider **phasing your budget** by month or by quarter over the life of your influencing strategy. This will ensure that you to know how much you will need at different stages of the plan to meet your objectives. This is important for fundraising purposes.

2.11.2 RISK MANAGEMENT

Campaigning for justice and social change, advocating for major shifts in policies and practices of those who hold power, or campaigning in difficult and restricted contexts is inherently risky. The risks of taking action must be weighed against the risks to your organization, programmes, partners and to citizens of doing nothing and allowing an injustice to occur or continue. There are differing restrictions on citizens to mobilize and different levels of political repression in countries globally for both mass mobilization and digital activism.

Good risk management requires making informed judgments quickly, effectively and continuously to manage and mitigate risks.

TYPES OF RISK

The most common types of risk associated with influencing include the following.

- **Direct security risks.** This includes surveillance (communications, physical); damage to assets and property; threats and intimidation; arbitrary detention or prosecution; violent attacks, kidnapping or killing.

- **Political risks.** This includes government backlashes against your organization and/ or partners; restrictions on the ability to operate; threats against continued license to operate.

- **Reputational risks.** This includes hostile media or public reactions; loss of community or institutional income; damage to relationships with other civil society, national, and international NGOs.

- **Legal risks.** This includes libel (anything that harms or could be seen to harm someone's reputation); legal action against your organization or partners; compensation claims.

- **Credibility risks.** If your influencing has little or no impact on the changes you want to see, there is a risk of criticism and reputational harm among your staff, constituencies, donors, partners and other stakeholders.

Oxfam uses this **risk assessment framework** (**Tabe 6**) for developing risk analyses. A good risk assessment should answer the following questions:

• What could happen?

• What is the probability of it happening?

• What is the potential impact?

• Who are the key stakeholders affected (e.g. staff, individual citizens, activists, supporters, partners, affected groups)?

• Do the benefits outweigh the likely risks? Oxfam uses a 'traffic light' system to assess this:

  - **Green:** opportunities outweigh risks, which are not seen as significant. Proceed to run the risk but monitor.

  - **Amber:** situation is more balanced, proceed with caution. More rigorous mitigation and monitoring required.

  - **Red:** risks far outweigh opportunities. Avoid the risk by not proceeding with the activity.

• What actions will be taken to mitigate risks?

USE THIS TABLE TO ASSESS THE RISKS FOR YOUR INFLUENCING AND CAMPAIGN OBJECTIVES AND ACTIVITIES.

Objective/ Opportunity	Key stakeholders affected	Key stakeholders who can influence decisions	Risk scenario – what could it happen - type of risk	Probability - high, medium or low	Impact - high, medium or low	Weighting – are benefits perceived to outweigh likely risk - yes or no	Status - Green; Amber; Red	Actions

TABLE 6: Risk assessment matrix | Oxfam Internal: National Influencing Guidelines – Annex 7

2.12 MONITORING, EVALUATING, ACCOUNTABILITY AND LEARNING

Setting up a systematic approach to collect and analyse data on your influencing activities and the impact they are having will help you:

- **Increase your effectiveness and impact** and that of your partners and allies by sharing learning on what influencing strategies contribute to the change you seek.

- **Provide useful intelligence** to inform strategy on any changing positions or attitudes of your target audiences

- **Demonstrate the impact** you are having to motivate your allies and supporters

- **Provide data and evidence** that you can use to scale your approach and increase your impact

A sound monitoring, evaluation, accountability and learning (MEAL[16]) plan should be part of your influencing strategy from the design and planning stage to the end of the cycle. When developing your MEAL plan there are some distinctive challenges to address. For instance:

- Change as a result of influencing work takes time, **so you'll need to monitor and track progress on a regular and long-term basis.**

- You will be influencing in unpredictable contexts, **so how can you respond to a frequently changing context in your planning and MEAL processes?**

- Your influencing works indirectly to achieve change, **so how do to measure your contribution?**

- Change happens through the interactions between the many actors and drivers of change, so **how can you prove that your influencing and campaigning is responsible for the change?**

- You will be engaging with a range of different stakeholders during the MEAL process. **Are you clear who to involve at each stage?**

2.12.1 CONTRIBUTION TO CHANGE

Contributions to influencing outcomes are complicated because the people you influence can also be impacted by factors outside your control, e.g. political landscape, the economy or personal relations. Effective influencing also requires organizations to work in coalition. This may make it harder to determine your contribution to a particular outcome.

However, it can be helpful, as part of your MEAL processes to characterize your contribution as either:

- **Instrumental.** You were the only or the driving actor; the change would not have happened without you;

- **Substantial.** You significantly shaped outcomes, but the process was predominantly driven by other actors or a coalition;

- **Visible.** You played an important but not decisive role; or

- **Nominal.** You contributed, but not in a substantial way.

2.12.2 MEAL AND LEARNING QUESTIONS

Your MEAL Learning questions should be set after you have drafted your Theory of Change and identified your assumptions (see **Section 2.9**).

These learning questions can then be taken into account as you identify what you are going to monitor and in the progress reviews you undertake as you deliver your activities in the plan.

Learning questions encourage you to:

- **Focus on whether you are achieving your objectives**

- **Explore the assumptions you made in your theory of change.** For instance, what worked, what didn't and why?

- **Test and revise your theory of change.** For example, what do you need to do differently with your target audiences and allies and with the mix and sequencing of your strategies, tactics and activities? Are you focusing on and shifting power relations?

- **Stimulate creativity and innovation.** Learning questions can encourage you to consider, test and adopt new approaches.

- **To address gaps** in your understanding and knowledge of the context. For example, what more do you need to know about the context in which you are operating, the problem and its causes and solutions, your targets audiences, and other external factors that might be impacting on the issue.

2.12.3 SETTING INDICATORS

An indicator is a **quantitative measure** or **qualitative observation** used to describe change. They depict the extent to which influencing work is accomplishing its planned outcomes and goals. They communicate in specific, measurable terms the performance.

Some examples of indicators that can measure reach, access, and influence, respectively are:

- **Reach.** How many people and groups are you reaching through your influencing activities? For instance, the number of people recruited to the campaign and the actions they are taking through events or social media; the number of allies and groups engaging with you in the campaign and the type and number of activities taken;

- **Access.** How many decision makers or influencers (individuals or institutions) are you and your allies accessing and how are they responding? For instance, through written records of meetings with officials; media coverage gained; private or public statements of support from decision makers;

- **Influence.** What progress have you made in achieving your objectives on policy, practice, attitudes, behaviour or social norm change? For instance, policy demand supported through public or private statements and actions; policy or practice enacted or voted on.

If you are assessing campaign or influencing outcomes and/or impact, you will be able to derive many of your indicators from you change pathway. It is also important to include more open-ended questions in your MEAL to address your additional learning questions, help you interpret different outcomes, and capture unintended outcomes as well.

Given the limitations of resource and time only collect data you will actually use.

2.12.4 DATA COLLECTION

Once you have developed your indicators and learning questions, you will need to decide how you will collect data to measure and assess progress. Some questions to consider are:

- **Are you or someone else already collecting this data?**

- **What kind of data collection tools will you use** - desk review, interviews, surveys?

- **Do you need quantitative or qualitative data?** Ideally, you will use a mix of both.

  - **Gather qualitative data** if you need in-depth understanding of social changes.
  - **Gather quantitative data** if you need to collect a lot of data that you can compare against baselines to test hypotheses.

- **Will your data collection tools** provide you with the information you need to inform progress and indicate what impact you might be having on the change you want to see?

- **Is it safe to collect and analyse this data?** Will the data be sensitive or personal? Are you putting yourselves or participants in danger by asking for this data?

- **How can you spot and reduce bias?** Every data collection tool will have some sort of bias. Identify these biases and think of ways you can mitigate them, e.g. by triangulating data with different data collection methods.

- **What resources do you have to collect data?** How much time and skill are you and your team able to allocate developing and using data collection tools? How much time will people taking part in your data collection spend on this.

2.12.5 USING YOUR DATA AND INFORMATION

The data collected can be analysed using different review methodologies, including your team and other relevant stakeholders. The main ones are **After Action Reviews, debriefs, strategic reviews and evaluative studies** as appropriate.

PERIODIC STRATEGY REVIEWS:

- Meet with the team periodically and use your Theory of Change to ask questions such as:

  - Where have we built new power and influence?
  - Where are we getting blocked?
  - Are there new threats or opportunities?
  - Which strategies and tactics are working/not working and why

- Unpack:

  - What are the drivers behind any progress that has been made or any blockage faced and are there any new opportunities or threats?

- Agree:

  - What strategic or tactical adjustments do we need to make?
  - What action steps do we need to take?

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EXAMPLE OF 'AFTER ACTION REFLECTION' QUESTIONS:

• Did we do what we said we would do?

• Did we reach our advocacy targets?

• Was our advocacy messaging relevant and accessible to our advocacy targets?

• Did we achieve our expected immediate or intermediate outcomes from our activities? If not, why not?

• Did we experience backlash or negative changes?

• Did we work well with others? Are we building the strength of coalitions or social movements?

• What have we learned? What would we do differently?

• Do we need to change our activities or strategy as a result of this activity? If so, how?

Adapted from J. Ross. (2013). *Advocacy: A Guide for Small and Diaspora NGOs*. PLP, p.14, available at: https://www.intrac.org/resources/advocacy-guide-small-diaspora-ngos/

You can find further guidance, tools and resources in Oxfam's MEL of Influencing Toolkit.

Also see Section 8 of Oxfam's Guide to Feminist Influencing.

Image courtesy of **Edson Gomez**/OXFAM BOLIVIA

CONTENT MENU

PART

PART 3

DIGGING DEEPER INTO INFLUENCING STRATEGIES, TACTICS AND TOOLS

PART 3

DIGGING DEEPER INTO INFLUENCING STRATEGIES, TACTICS AND TOOLS

The effectiveness of your advocacy, campaigning and influencing will depend on the mix of insider and outsider tactics you use (see Section 3.3), informed by your context and power analysis and research.

3.1 RESEARCH FOR INFLUENCING

Good research and credible evidence are a vital part of effective influencing. You should consider what, if any, additional evidence you need to inform your context and power analysis and influencing strategy design whether in relation to:

• What needs to change - the problem, its root causes, solutions

• Who needs to change – targets, influencer and allies

• The route to effective change and the mix and sequencing of influencing strategies and tactics.

Credible research and evidence, for example about problems and solutions, is a vital influencing tactic which can help you make the case for change with targets and allies. For example, evidence shows that insider strategies – which usually involve some form of evidence – are a necessary although not sufficient tactic to achieve policy change. As such evidence should reinforce and complement other influencing strategies and tactics such as public campaigning, awareness-raising, digital and media work, and alliances.

Many effective campaigns start with an overall campaign report that outlines the problem and solutions. The overarching report can provide evidence needed to make the case for change to target audiences and unite allies around a cause and provide the basis for other communications products that can be framed and targeted to specific audiences. As events unfold shorter updates, such as policy briefings, can be produced targeted to different audiences but that reference the overarching report.

Oxfam's **Planning Research for Influencing** diagram provides a guide to the key steps for planning research for influencing (see **Figure 11**).

It will help you to think through how to focus your research on:

• what, if any, additional evidence is needed?

• which types of research will target audiences best respond to?

• How will you engage audiences and frame your evidence to maximise your influence through using human stories, infographics, killer statistics, and diagrams?

You also need to think carefully about whose knowledge and what kind of knowledge you are prioritising. As Oxfam's research guidelines shows different audiences may respond best to different types of evidence. But make sure you do not exclude people's know-how just because it does not fit a certain format. For example, conventionally there is a presumption for written evidence but personal face to face testimonies with policy makers can be extremely powerful in influencing.

PLANNING RESEARCH FOR INFLUENCING

USE THIS DIAGRAM AS A GUIDE TO YOUR OPTIONS AND REVISIT IT AT DIFFERENT STAGES OF PLANNING AND ACTION

Informed by influencing aims and objectives (problem, context) and gender analysis

1 WHAT ARE WE TRYING TO INFLUENCE WITH EVIDENCE?
[indicative lists]

INFLUENCING OBJECTIVE AND POSSIBLE ROLES FOR RESEARCH

Change people's attitudes and beliefs, norms and behaviours:
- Identify and understand existing attitudes and beliefs, social/gender norms and behaviours; whether and how they are changing.
- Identify influences that support or limit behaviour change and/or policy implementation.
- Identify positive outliers that might lead to wider adoption/scale-up.

Change, implement government and private sector policies and practices:
- Demonstrate the human/gender/environmental impacts of policies and practices from local people's experiences.
- Show why policy and practice alternatives are feasible and likely to work.
- Change behaviours that hinder policy implementation.

Set the policy agenda, change the terms of debate:
- Document the problem and human/environmental impacts.
- Propose general principles; present a new angle on a familiar issue; make hidden and neglected issues visible.
- Present moral, legal, political, practical case for change.
- Demonstrate viable policy and practice alternatives.

Inform and strengthen civil society voice and strategies:
- Analyse context and trends.
- Assess what works/doesn't work for influencing.
- Provide learning from evidence and practice.

Informed by an initial power analysis and stakeholder mapping (including gender analysis)

2 WHO ARE WE TRYING TO INFLUENCE WITH EVIDENCE AND HOW?
[indicative lists]

AUDIENCES AND EVIDENCE THEY RESPOND TO BEST

Policymakers/politicians:
- Short;
- Timely solutions that resonate with public mood and policymakers' values and priorities;
- Compelling stories;
- Big ideas;
- Positive visions.

Civil servants:
- Objective, rigorous, credible methodology;
- Data;
- Technical details.

Corporate executives:
- Company-specific findings;
- Comparative rankings vs other companies;
- Credible methodology.

Communities (geographic, identity, interest):
- Community-focused;
- Generated with their participation and participatory/action research.

Activists, supporters, general public:
- Human face to the story;
- Heroes and villains;
- Killer facts – easy to remember;
- Clear impacts of policy.

Media:
- Controversial, new;
- Human face to the story;
- Killer facts with numbers.

3 FOCUS YOUR RESEARCH!

1ST: WHAT'S ALREADY KNOWN?
Conduct a rapid literature review of what's out there.

2ND: WHAT NEW OR ADDITIONAL RESEARCH IS NEEDED, IF ANY?
What are the knowledge gaps and what do we need to add e.g in relation to what needs to change, who has the power to achieve it and/or how – at different scales?

3RD: WHAT QUESTION(S) ARE WE TRYING TO ANSWER?
Refine and specify the question further
- Who, what, when, where?
- Is it a single case study, or comparative across time or place?
What sub-questions need to be answered to respond to the main question?

DECIDE HOW TO DO IT

4 WHAT TYPE OR MIX OF RESEARCH APPROACHES AND METHODS WILL BEST ANSWER THE RESEARCH QUESTION(S) AND ENGAGE TARGET AUDIENCES?

OPTIONS INCLUDE:

Macro policy research methods:
- Investigative/journalistic approach
- Document/data analysis
- Key informant interviews
- Modelling/projections/estimates

Community-based research methods:

To collect qualitative data - semi-structured interviews, focus groups, participatory mapping, video, learning workshops

To collect quantitative data - household and other surveys, participatory ranking, numbers

Consider gender and intersectionality fully

Record quotes, take photos!

Macro-micro linkages: human interest case studies and/or stories illustrating the broader issues/injustices, killer facts and graphics

5 HOW CAN WE ENGAGE AUDIENCES WITH THE RESEARCH PROCESS AND FINDINGS TO MAXIMIZE RESEARCH INFLUENCE?

Refer again to your power analysis, research design and overall influencing strategy and think of ways to involve key audiences and influencers in the different stages of the research and influencing process:
- Develop relations with key audiences.
- Plan the research together.
- Invite them to be a member of a steering or advisory group.
- Involve in data collection team.
- Share and discuss draft findings in a safe space.
- Ask them to comment on 1st draft report.
- Preview final report and speak at launch.
- Co-host a seminar on the topic.
- Discuss findings in a one-to-one meeting.

Are there important influencers whose cooperation is needed?
- Government ministries?
- Other national or local institutions?
- Key individuals at national or community level?

Communications:
- **Decide how to frame the research,** e.g. how to appeal to the target audience
- **Decide what research products will be most effective and user-friendly,** e.g.
  - Written report with short executive summary or overview (with detail in annexes, separate documents or on web)
  - 1-page policy/media brief(s) or well-placed blogs
  - Video clips, photographs, cartoons?

Timing and messengers:
Regularly assess context and make the most of windows of opportunity; use influential people as messengers

Ensure evidence is combined with complementary influencing strategies:
- Coalition-building;
- Using public campaigning;
- Engaging with the media.

OXFAM Research Network

FIGURE 11: Planning research for influencing | Oxfam Policy and Practice

3.2 COMMUNICATIONS

Developing powerful messaging and narratives that will engage, motivate and resonate with your audiences and key stakeholders to make a change is a critical element of effective influencing and campaigning. For effective influencing, you will need to distil the complexity of your issue and your change proposition into clear value-based messages bound together by a strong narrative and framing. Your messages must, ultimately, move people to action.

However, evidence, information and communication are often not enough to achieve significant change, particularly when there are large vested interests resisting change. Additionally, personal beliefs and values affect how people absorb and accept or reject evidence, facts and figures. People will also be influenced by their peers, key influencers, social norms, dominant ideologies and cultural beliefs within communities. People who work in institutions or in government will be influenced by the dominant culture of the organization and the power dynamics within it. We are all influenced by economic, cultural, social and economic structures in our society. So complementary influencing strategies are generally also needed achieve change.[17]

3.2.1 VALUES

Social and environmental concern and action is based on more than simply access to the facts – they are motivated by a set of underlying values. Values represent people's guiding principles: our broadest motivations which influence the attitudes we hold and how we act.

Cultural and social norms, the money and resources we have at our disposal and the power we perceive we have, are also important motivators. But our values represent a strong guiding force that shapes our attitudes and behaviour over the course of our lives. They can be divided into two main types: intrinsic and extrinsic.[18]

Intrinsic values are those that are inherently rewarding to pursue, for example:

• Affiliation to friends and family;

• Connection with nature;

• Concern for others;

• Self-acceptance;

• Social justice; and

• Creativity.

Extrinsic values are those that are centred on external approval or rewards, for example:

• Wealth;

• Material success;

• Concern about image;

• Social status;

• Prestige;

• Authority.

Aligning your strategy and communications with the values that are likely to motivate people to action is not a quick and easy process; it needs thought and testing. Some suggestions on how to do it include:

• **Nurture intrinsic values.** Aim to not only promote intrinsic values in communications but also embed them across all areas of your activities;

• **Challenge extrinsic values.** Elements of our cultures foster a desire for wealth, recognition and power that diminishes care for people and the environment. Activating extrinsic values may, however, crowd out intrinsic values and therefore, weaken progress towards achieving your goals. For example, a penalty for parents who were late picking up their children from nursery increased the frequency of late arrivals (as being on time was no longer seen as a moral issue.[19] However, it may be possible to motivate enlightened self-interest without activating negative extrinsic values by emphasizing the ways in which the change benefits everyone;

• **See the big picture.** Maintaining a vision of long-term systemic change, with a clear understanding of the values it can tap into, can sustain a strategy;

• **Work together.** No one group, or organization is likely to shift values on its own. Cooperate and collaborate within and across different sectors to be effective – diverse issues can be linked by the values that underpin them.

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3.2.2 BUILDING NARRATIVES

Most enduring and popular stories have characters, a plot, a challenge to address, a choice, a resolution and a lesson or moral.

In your communications, **do not lead with the problem** you are trying to fix. This can divide people or play into the hands of your opponents. Instead, always try to **lead with a shared value that is shared by your audience and a vision of the future that they can relate to** before raising the problem and introducing the key actors. Then you can raise solutions.

When communicating about solutions, you can use appeals to social norms by emphasizing how many people or organizations are already acting in the desired way.

When communicating policy objectives, campaigners should avoid using the language of 'fixing', 'reforming', 'improving' and 'mitigating'. Instead, motivate people by communicating the good thing your advocacy or campaign exists to create. In short: be for something desirable, rather than just against something deplorable.

3.2.3 FRAMING

Decades of research demonstrate that **attempts to refute false information can actually strengthen people's belief in the false claims.** Testing shows that people remember the assertion and forget that it is a lie. For example, when anti-vaccine activist **Andrew Wakefield** published a paper in prestigious journal *The Lancet* linking vaccines to autism, it caused the rise of the 'anti-vaxxer' movement. That the paper was subsequently discredited and withdrawn by *The Lancet* has still not made a dent on the resistance to vaccination in some quarters, leading to unnecessary morbidities and deaths in children.

Similarly, people will often accept arguments that reinforce what they already believe and reject those that do not. This is known as **'confirmation bias'.**

Therefore, you should use messages that not only engage your own supportive constituency base, but also have the potential to persuade the undecided and do not reinforce the attitudes of those who have an opposing view. Some ways to do this include:

• **Lead with values and a vision for change.** Hook people with an image of the world we want to create.

For example: When marriage equality campaigners stopped talking about 'rights' and started leading with 'love' and 'family', opinions started to shift.[20]

• **Name the problem and villain:** Do not talk about the problem in the abstract. Highlight what and who is standing in the way.

Rather than say	>	Say
'climate change is happening, and we have to act now',		*'corporations are making huge profits polluting our air and water. Climate damage, fuelled by dirty coal pollution, could drive a staggering 122 million more people into extreme poverty by 2030. There is no space for new coal. Most people want the government to act. Call on your government to act now.'*

• **Give a solution:** Make it clear, practical, timely and outcome focused by describing what will happen in real life for real people if you succeed. Involve your audience in the solution – clearly tell them why they are an important part of the solution and exactly what they can do.

Rather than talk about 'improving local services', demand that 'the road should be fixed so everyone in your village can get to school, work, and the hospital'.

SOME EXAMPLES OF FRAMING

TAX RELIEF

'So, taxes are an affliction, a reliever is a hero, and anyone who wants to stop him from the relief is a villain. You have just two words, yet all of that is embedded. If you oppose reducing taxes and you use the phrase "tax relief", you've already lost.' Lakoff 2010[21]

PEOPLE AS CONSUMERS, AND PEOPLE AS CITIZENS

Research has shown that, when framed as consumers, people become more competitive, are less likely to work together to solve a common problem and feel less personal responsibility for social and environmental problems. When people are framed as citizens, they become more positive and collaborative, and want to work together to fix common problems.

3.2.4 MESSENGERS

Individuals are social beings, and therefore highly influenced by their social interactions with other people and groups of people. Evidence indicates that people are particularly influenced by authority figures and experts or people they like or with whom they share commitments (Kahan, 2010). They are also influenced by social norms. So, the messenger can be as important as the message. You should try to enrol and use 'attractive' messengers, champions and influencers in your campaign and appeal to positive social norms.

3.2.5 GENDER AND COMMUNICATIONS

A gender-just approach to communications for influencing requires taking your audience on a journey that pushes them to think about things in a new way. If you are not aware of the gender dimensions of your communications, you may unintentionally reinforce the status quo instead of challenging it.

As Oxfam's **Feminist Guide to Influencing**[22] explains: 'Some organizations use an "instrumentalist" frame – arguing that gender equality is desirable because it will promote economic growth, or that investing in women and girls is important as it will benefit the whole community. This strategy has certainly worked in terms of increasing the political constituency for gender equality, but it can be dangerous because it excludes the aspects of gender equality that don't contribute to economic growth or community development. Justice and rights arguments may seem harder to make, but without them campaigns can fail to win real converts to the cause. It is important that decision makers support women's equality as a matter of fundamental human rights, above and beyond what a woman might do for her community'.

Therefore, take gender into account in your communications:

- **Consider the language you use.** Pay attention to the different ways and terms used to describe men and women, and the ways in which words to describe women can be infantilizing or patronizing. Using the term 'survivor' for someone who has experienced sexual violence, rather than the term 'victim', may be more respectful of their agency. Distinguish between male and female (which refers to sex) and woman and man (which refers to gender). Include non-binary or non-gender conforming voices where possible, and respect the pronouns that those individuals wish to use.

- **Consider whose voices you amplify.** Amplify the voices of both women and men and pay attention to the ways that those voices are presented or treated.

- **Images, photos and videos.** Ensure your materials refrain from promoting harmful gender stereotypes.

3.2.6 WRITING FOR IMPACT

You will often need to present your research, evidence and arguments in writing to those you are wanting to influence. You will need to produce well-written policy briefs, letters, reports, etc. that both fit your organization's style and persuade your target audiences to respond.

To write powerfully:

- Keep it as brief as you can;

- Use plain language;

- Include stories;

- Use the active voice (i.e. 'Oxfam stated that…' rather than 'it was stated by Oxfam that'); and

- Structure your report for impact – with a short executive summary for long reports.

If you are writing a report, use a clear **Terms of Reference** to define the purpose and proposition, outcomes and expectations of your report. This will include listing the associated media work, blogs, videos and tweets that will form part of your influencing strategy.

The **kinds of reports** that provide the public-facing intellectual backbone for your influencing agenda and strategy can include:

- **Campaign reports** that link the evidence and arguments for change that the overall campaign is proposing with the human or environmental impacts of the problem;

- **Policy papers** that focus on a specific policy area, and provide new information, evidence, analysis and recommendations for policy makers;

- **Briefing notes** are short, punchy, and less substantive than full policy papers. They can be more topical and more suited to a media audience, often serving as an update on an issue that has already been highlighted by your campaign;

- **Research reports** are evidence-based analytical or investigative pieces. They may contain research findings or case studies of programmes or policy experience. Research papers are more formal and scholarly in style than policy papers and are often longer. Their purpose may be to make useful and relevant research available internally and externally; to encourage staff to learn from each other's work; to influence the development agenda; to build credibility; or to feed into subsequent policy papers.

For more information and support materials, see Oxfam's research pages on its **Policy and Practice** website.

3.3 LOBBYING AND DIRECT ADVOCACY

Each context will have its own set of power holders and decision makers to influence. **Your power analysis and mapping** are critical to your decisions on how to engage with your influencing targets through direct advocacy.

The list of potential lobby and campaigning targets can be extensive, including:

• government ministries and departments, state agencies, public bodies, advisory commissions, NGOs at local and national levels;

• regional intergovernmental organizations, such as the European Union, the African Union, the Association of Southeast Asian Nations or the League of Arab States;

• other global institutions such as UN agencies, the G7, the G20, the World Health Organization, the World Bank and the International Monetary Fund;

• businesses operating at local, national and global levels;

• women's groups, youth groups, LGBTQ+ groups, faith groups, cultural associations and other groups of organized citizens who have, or aspire to have, more decision-making or influencing power on the issue.

• People who are influential with decision-makers or in decision-making spaces e.g. political figures, academics, civil servants, bloggers and opinion-formers; celebrities, faith leaders, partners and friends.

Direct advocacy involves building relationships with your target audiences and using evidence and dialogue to persuade and influence them. Some key points to remember are: regular and cordial contact builds trust; using a reliable source of information means people will listen to you more readily; hearing powerful stories of the problem faced by people will appeal to values and build a stronger connection (see **Section 3.2.1**). Finishing a meeting by suggesting a next step means the door can remain open. Different tactics are appropriate for **closed, invited and claimed spaces** (see **Section 2.5**).

Many advocacy and campaigning strategies and tactics can be divided into **insider** and **outsider** strategies, as with the private sector (see **Section 2.6.2**):

• **Insider strategies and tactics:** Often involve the use of persuasion through engaging directly with decision-makers and their influencers through meetings, phone calls and other face-to-face activities. Insider strategies often include a strong focus on cultivating relationships and gaining access to decision making spaces. It can be a powerful way to influence but there is also the risk of being, or being seen to be, co-opted into the decision-making processes of the powerful and giving them undeserved legitimacy on the issue. Evidence often plays a key role in insider strategies.

• **Outsider strategies and tactics:** Can include: putting pressure on the decision makers through, for instance, public and grassroots mobilization; taking to the streets; using media and social media to expose, challenge and demand a change from those who hold power. It can also involve civil disobedience or direct action.

3.3.1 TACTICS FOR DIFFERENT CONVENING SPACES

LOBBY MEETINGS (RELEVANT FOR INVITED SPACES)

Meeting directly with decision makers gives you the opportunity to ask questions, provide background information on your issue, share details of the positive impacts your desired change will bring, or the negative impacts if the issue is not tackled. **Personal stories delivered directly to power holders have the power to change minds.**

If you are part of a wider movement, advocacy or campaigning alliance/coalition then plan together to ensure your messaging, lobby points and tactics are aligned. Play to the strengths of the different members of the group for maximum impact. You may have differences in approach or on specific issues but put those aside and focus on points of agreement.

PUBLIC FORUMS OR EVENTS (RELEVANT FOR INVITED AND CLAIMED SPACES)

Local, national or global events and policy forums organized by governments, research and policy institutes, public interest groups or companies provide opportunities. **Getting invited or attending relevant events for relationship building and lobbying** is an important route to effective lobbying.

Depending on your issue, consider claiming the policy space for your constituency by organizing your own event or policy forum, ideally with the support of other organizations and influencers. Invite key decision makers, the media and others who can influence on the issue. At the same time, your invited representatives can advocate for change from the inside.

The **C20 civil society parallel forum** to the G20 is an example of **an invited space** that Oxfam has been involved in. It serves as a space for dialogue and discussion of the main G20 themes for civil society organizations, but also as a space to channel civil society positions to G20 leaders. On several occasions, senior G20 leaders have also attended C20 meetings, and it is regularly recognized in official G20 communiqués. However, there is ongoing discussion among civil society around the legitimacy of this space. Some civil society organizations and social movements prefer to organise parallel 'People's Forum' events, with no official endorsement: this is an example of using **a claimed space** to maintain independence and a critical 'outsider' position on the issues.

LOBBY LETTERS (RELEVANT FOR CLOSED, INVITED OR CLAIMED SPACES)

Formal lobby letters are appropriate for decision makers such as local or national government ministers and officials, or business leaders. If you are writing one, make sure you understand the correct protocol. For instance, a letter to the UN Secretary-General will require a different style and form of address to one addressed to a Bangladeshi minister or the chair of a local government committee.

Your letter may also include documents such as briefing notes or group statements. **The key points from any attachment should be summarized in the letter,** and your 'asks' or recommendations included right up front. Emails are more commonly used with officials and can be more informal when a target is known.

Collective lobby letters from civil society organizations and other interested organizations and individuals can amplify and reinforce other public campaigning and influencing tactics such as petitions, individual letters of concern from the public, social media actions, coverage in the traditional media, rallies and protest events.

CLOSED SPACES

Using relationships to influence decision making in **closed spaces** directly is challenging but not impossible. Your tactics can include finding people who have access and are engaging with them to influence on your behalf. However, if you can build relationships with and get direct access to people involved in decision-making processes you then have a range of lobbying tactics and activities open to you depending on your context.

3.4 MEDIA FOR INFLUENCING

Working with local, national and international traditional media (e.g. newspapers, TV and radio) can be an effective way to get your main campaign messages across to a wider public. Good media coverage can expose abuses of power, damaging policies or poor practices.

It can also help raise public awareness and demonstrate public concern for your issue, which can put pressure on power holders to respond with a policy or practice change. Media or broadcast coverage, when aligned with other influencing strategies and tactics, and presented in the right way, can also play a contributing role in influencing public attitudes and behaviours. The most recent and salient examples come from the climate change and #metoo movements.

In 2006 *An Inconvenient Truth* opened in cinemas in the United States. Starring former US vice president Al Gore, the documentary about the threat of climate change set out to raise public awareness and change people's behaviour to reduce greenhouse gas emissions.

In the 10 years following An Inconvenient Truth, a number of surveys and research pieces were done. This body of research underscores the difficulties confronting any public awareness campaign. An Inconvenient Truth was successful in raising public awareness of climate change, increasing willingness to change behaviour and, in some cases, actually changing behaviour. However, the effect didn't last long. This indicates that persistent communication efforts and complementary influencing strategies are required to promote sustained behaviour change.

The #metoo movement, which uses the collective power of social media to effect change, is referenced in other sections of this guide. In the coverage of #metoo, there has been widespread discussion about the best ways to stop sexual harassment and abuse – for those who are currently being victimized at work, as well as those who are seeking justice for past abuse and trying to find ways to end what they see as a culture of abuse. Traditional media and broadcast outlets have given significant coverage as a result, see:

#metoo in India   What #metoo has meant around the world

3.4.1 WAYS IN WHICH THE MEDIA COVERAGE COULD CONTRIBUTE TO YOUR INFLUENCING EFFORTS

• Amplify and create space for the voices of your constituency and those affected by the issue;

• Build support from a range of different audiences and citizen groups, and share information about activities that people can do that can contribute to change;

• Put pressure on decision makers and power holders to act;

• Be a part of delivering your narrative-based communication strategy and messages (see **Section 3.2**);

• Challenge arguments or counter-narratives that are against the changes you are proposing;

• Help shift public attitudes or the term of the debate on an issue opening the door for a policy change.

• Expose any hypocrisy, misinformation or lies put out by the opponents of change; and

• Build trust and demonstrate accountability to your supporters, your stakeholders and the wider publics.

There are challenges in influencing through the media, which can be both an ally and an enemy. Many media organizations are highly influenced or controlled by powerful people and institutions that oppose the changes you are advocating. In some countries, the media is manipulated or controlled by the state; in such contexts, activists can face significant risks for speaking out. Understanding these challenges and risks is an important part of developing an effective media strategy and set of activities for your influencing work.

You can use the media in a variety of ways to get your messages across. Articles written by journalists, opinion pieces, media stunts and working with celebrities are a few examples. To do this you'll need to be creative, well organized, focused on building relationships with key people in the media, and able to identify with your audiences.

3.4.2 PLANNING YOUR MEDIA APPROACH

BUILD EFFECTIVE RELATIONSHIPS WITH KEY JOURNALISTS

Research and seek out journalists with an interest in your subject matter. Contact them, keep them informed and build a trusting relationship.

ASSIGN AND TRAIN SPOKESPEOPLE

An effective media strategy is reliant on articulate and credible spokespeople with the skills to convey your media messages. Being a media spokesperson is not for everyone – some people will require support, practice and formal media training to feel comfortable in this role.

KEY MESSAGES AND TALKING POINTS

A set of talking points (or a 'song sheet') to help spokespeople and others working with the media to 'sing the same song' when talking to journalists is useful. Song sheets contain concise, vivid messages that capture your main arguments and messaging on the need for change.

'QUESTION AND ANSWER' GUIDES

A set of 'Q&A' guides can be used to set all out all the questions that a journalist or interviewer might ask your spokesperson and provide an approved or agreed answer. This guidance is vital for sensitive subjects, and such guides are essential preparation for spokespeople likely to receive tough questions relating to the issues you are seeking to influence.

REACTIVE LINES

A 'reactive line' is a brief statement of your policy or position on an issue in anticipation that you may be asked challenging questions while not actively seeking publicity. Those asking the questions are most likely to be journalists, but can be politicians, government representatives, company staff or other NGOs. A reactive line is a defensive tool developed to ensure you are ready to answer counter-arguments at any time.

PRESS RELEASES

Press releases are normally circulated to journalists electronically, or at a press conference. Press conferences work best when most of the media you are targeting are going to be in one location, and you have strong spokespeople available to present the release and answer questions.

Journalists like press releases to be concise. Make them interesting and avoid using jargon:

• set out the problem that affects people;

• highlight the cause;

• put forward the solution; and

• state what needs to happen.

Try to always include a solution, as audiences need to know that the situation can change.

OPINION PIECES AND BLOGS

Writing your own opinion piece or blog for online or print publications is an effective way to communicate a complex issue and argue what needs to be done about it.

MEDIA STUNTS AND PHOTOS OPPORTUNITIES

Newspapers and TV are always looking for good visual content. So, get creative! Visual stunts and photo opportunities are a compelling way to get a message across and achieve media placement.

WORKING WITH CELEBRITIES AND INFLUENCERS

Working with celebrities and influencers can be a great way to raise the profile of an issue. Engaging a celebrity ambassador who can effectively represent your campaign can help you reach new audiences who may be more likely to take an action endorsed by someone they trust and can relate to.

However, it is important to think through the opportunities and risks of celebrity association. Here are some tips:

• Ensure that the celebrity has the right popularity profile for the audiences you want to engage.

• Think about how realistic your request is for the celebrity.

• Seek to build a relationship, so you can build their knowledge of the issue over time, enabling them to be a positive and informed ambassador.

• If you take any pictures or videos of the celebrity or write any quotes for them, you should get written approval from them or their agent before it is used externally.

3.5 DIGITAL AND SOCIAL MEDIA

Digital media includes email, mobile messaging, apps, the web, blogs and social media.

Social media are online communications channels dedicated to community-based interaction, content-sharing and collaboration. The best-known examples are: Facebook, YouTube, Twitter, Instagram, WeChat, Tumblr, TikTok, Weibo, Reddit, QQ, Signal, Viber and WhatsApp.

The starting point for developing your digital media strategy and activities is the same as developing the other components of your influencing strategy: your overall change goal and objectives (see **Section 2.7**) and your theory of change (see **Section 2.9**). To choose the right digital tool or channel, ask yourself these questions:

• Who is your audience? How inclusive is your strategy based on which digital channels you intend to use? (i.e. are you addressing intersectional and gender identities in your choice of channels, engagement and messaging?)

• What types of media do they like to use?

• How are you ensuring the safety of people taking part? Do you need to do a risk assessment to ensure you are including all relevant data rights issues?

With this information, you can choose the most appropriate tools and channels from: mobile phone messaging; video or audio pieces on YouTube; or more general online sharing through Facebook, Twitter and blogs.

The two areas to focus your digital objectives on are **exposure** and **engagement.**[23] Exposure refers to:

• **Reaching your core audiences** with your key messages;

• **Raising awareness** of the issue among unfamiliar audiences and in the digital space;

• **Promoting your organization,** alliance or coalition.

Engagement refers to:

• **Increasing engagement** on the issue among a new audience; and

• **Reaching and influencing** your audiences, leading to more active sharing of the story, petition signatures, and community organization.

We recommend the use of a digital objectives planning template that includes some sample measurement indictors for tracking progress (i.e. metrics). **Figure 12** shows some examples.

Image courtesy of **Nana Kofi Acquah**/OXFAM

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	CAMPAIGN OBJECTIVES	DIGITAL OBJECTIVES	SOCIAL MEDIA ACTION & CHANNELS	DIGITAL/SOCIAL METRICS	
ENGAGEMENT	To make "concrete" political/ institutional change (law, budget, declaration, policies, etc.) and private sector change (reporting, transparency, policy,	To reach "advanced engagement" of your audience by pressuring for political/private sector changes	Launching a petition	**Petition**	
				# signatures obtained in a petition	
			Asking your community to make comments in Facebook FanPage of the political parties/ companies/ other key actors	**Facebook**	
				% of your community participated	
				% of increase of engagement benchmarked	
				# of comments that are on Facebook Page	
			Asking your community to mention the target individual or group via Twitter to pressure them to respond and to change.	**Twitter**	
				# of profiles that participated to pressure 2.0 (using social media)	
				% of your community is involved in these high-level engagement actions	
				Leve l of engagement (% of TW / ΣTW+RT)	
EXPOSURE	To make change in the perception and discourse on the issue	To reach a key/wide audience with your report, your campaign key messages	Sending a specific email to your wide audience to communicate about the issue / key message and the petition	**Email**	
				% opening rate	
				# of persons reached	
			Publishing posts and Tweets on the issue and/ or key message of your report in Facebook and in Twitter	**Facebook**	
				# like / # Share/ # comment benchmarked	
				Twitter	
				# RT and TW	
		To raise awareness on the issue within unfamiliar audiences	Promoting (push) a post with a new audience potentially sensitize to your issue in Facebook	**Facebook**	
				% of increase of your fan page	
				% of increase in your like / share/ comment in your promoted post	

FIGURE 12: Example digital objectives planning document | Oxfam International

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Below we have outlined some tips taken from Oxfam's Toolkit: Digital and Social Media Monitoring, Evaluation and Learning for NGOs.

Testing is extremely important in improving results and fine-tuning your digital strategy and your activities. For example, in a petition, the size of the 'sign' button can make a big difference to the signing rate.

Without a clear strategy, social media actions reach people who are already aware of the issue and your organization. This might not be a problem if your social media actions are designed to further engage your existing community, such as signing a petition or pressuring decision makers. However, if you have designed your social media action to raise awareness, you must be able to reach **new audiences** that do not know about the issue, your organization or your movement.

Alongside your digital objectives, create a **calendar** to schedule messages across your digital channels, while remaining open to new opportunities and being reactive. Flexibility is key to success.

3.5.1 ADDITIONAL RESOURCES ON DIGITAL AND SOCIAL MEDIA

Moblab: Four Magic Steps to Creating Shareable, Purpose-Driven Social Media Content. To create content that engages audiences beyond your current supporters, put your efforts into spotting, creation, distribution and listening. https://mobilisationlab.org/resources/four-magic-steps-to-creating-shareable-purpose-driven-social-media-content/

Access to and effective use of technologies is affected by intersecting forms of exclusion, including gender, ethnicity, age, social class, geography, and disability. See the digital-focused July 2018 edition of *Gender and Development* for more: https://www.genderanddevelopment.org/issues/262-icts/

Take Back the Tech runs campaigns that highlight the problem of technology-related violence against women and provide resources around safety, hate speech, extortion and others: https://www.takebackthetech.net/

JASS, the Association for Progressive Communications and Women's Net have created a toolkit on digital technology for feminist movement building, helping activists think through their communication strategies: https://www.apc.org/en/pubs/icts-feminist-movement-building-activist-toolkit

Data rights and responsible data practices require upholding respect for the dignity for people through their data. See: R. Hastie and A. O'Donnell. (2017). *Responsible Data Management training pack*. Oxfam. https://policy-practice.oxfam.org.uk/publications/responsible-data-management-training-pack-620235

Image courtesy of **Kieran Doherty**/OXFAM

3.6 MOBILIZATION AND ORGANISING

3.6.1 PARTICIPATORY ACTION AND LEARNING

An important and common influencing objective is strengthening the voice and capacity of marginalised individuals and organisations to participate in decision making spaces and secure their rights on issues that matter to them.

One powerful and enduring way this can be achieved is through participatory action and learning, also known as critical awareness raising, transformative education or participatory community education.[24] These tactics are based on an approach to education that empower people to transform oppressive structures through a cycle of reflection, action and reflection.

Other tactics to support and strengthen civil society voice including providing core funding or technical support to civil society organisations; facilitating shared learning opportunities for individuals and organisations to find solutions to common problems and learn from each other's strategies; leadership training and mentoring; technical support to develop effective influencing strategies; helping to convene and facilitate access to policy makers and decision-making spaces.

As well as developing effective influencing strategies, civil society and women's organisations can increase their influence and strengthen their own sources of power by building:

• **their group power** – increasing their numbers and representation, ensure consultative and participative ways of working and equitable partnership principles

• **their legitimacy** – ensuring diversity, representation and accountability to stakeholders

• **their knowledge and expertise** – strengthening their evidence base, research, action learning and practical knowhow

3.6.2 MASS MOBILIZATION

Also referred to as 'popular mobilization', 'public activism' or 'public campaigning', mass mobilization is a way of creating and directing public pressure to achieve change. It can complement and build on policy, research and lobbying efforts, and often links up with media and digital work.

Many # hashtag campaigns (see next page) combine digital and social media with other forms of mobilization and activism.

Mass mobilization and activism can:

• Demonstrate public concern to put pressure on decision makers who need to see that people, including affected communities, are coming together and taking action;

• Help create an environment that is conducive to the desired change;

• Bring about wider behaviour change and empowered activism, ensuring that policy and practice change happens and is implemented and therefore is sustainable.

At the same time, popular mobilization can also be resource intensive and sometimes may not be necessary to achieve the change you want to see. If mobilization is necessary to achieving your objectives, ensure that this approach is integrated throughout the strategy process and not 'added on' at the end.

Important considerations for mobilization are:

• Mobilizing takes a lot of time and energy, so is it necessary to create the change you want to see?

• Does your organization, coalition or group have the reach and capacity to mobilize? If not, who will you campaign with?

• How are you engaging with affected communities and your supporters and activists around decisions to mobilise or not?

• Which people can have influence on your targets? e.g. is it a specific constituency of voters, young people and women, or a business's customers?

• Which strategy is more influential? Big numbers of people involved in a big event, or a smaller number of decentralized mobilizations?

• Does mobilization need to be on the streets, online or a mix of the two? If the latter, how can they reinforce and support each other?

• Who else can you work with to maximize pressure on your targets?

• Who can help you reach the audiences that will be most influential on your campaign target?

• What are the risks?

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3.6.3 SOME EXAMPLES OF TYPES OF MOBILIZATION CAMPAIGNS

Grassroots groups and chapters empowered to lead within countries and across continents. For example, the #FridaysForFuture student strikes against climate chaos are organized autonomously in cities or countries.

#Fightfor15, which campaigned for an increase in the US minimum wage, was organized in across hundreds of cities. Their actions directly led to a collective $68bn raise for 22 million low-wage workers, and their campaign is ongoing.

The Women's March in 2017 was the largest single-day protest in US history and became a model for subsequent annual Women's Marches run by chapters around the world. In 2019, 5 million Indian women held hands in a human chain for gender equality. In 2020, there were marches in more than 24 countries.

@freetheperiod Isabella Akaliza describes the campaign as a 'grassroots initiative aimed at ending period poverty. We do this through raising awareness, advocacy, and lobbying policy makers to create policies that create equal access to period products.'

3.6.4 WHO SHOULD YOU MOBILIZE?

If you are considering a mobilization strategy, use your context (see Section 2.2), gender (Section 2.3) and power (Section 2.5) analyses to:

• Identify which people and groups are **most relevant to and most affected by** your issue or message;

• Identify which people and groups have the **most influence on your campaign target**; and

• Create a Venn diagram (see **Figure 13**) placing these audiences into interlocking circles. You should aim to mobilize those in the middle.

COMMUNICATION IS KEY TO EFFECTIVE MOBILIZATION

Communicate to your audience where they are, not where you want them to be. You will need to ensure that your messages are simple and strong. Overcomplicated messages will confuse people and make them less likely to respond. Consider audience research and testing – even if this is very informal through a group of friends.

Facts and numbers are not enough: remember the power of storytelling (see **Section 3.2**). Link your story with what people already know and their values; use experiences of shared humanity and ask people to tell their own stories. Mobilization narratives should give people agency and power.

MOST INFLUENCE   **MOST RELEVANCE**
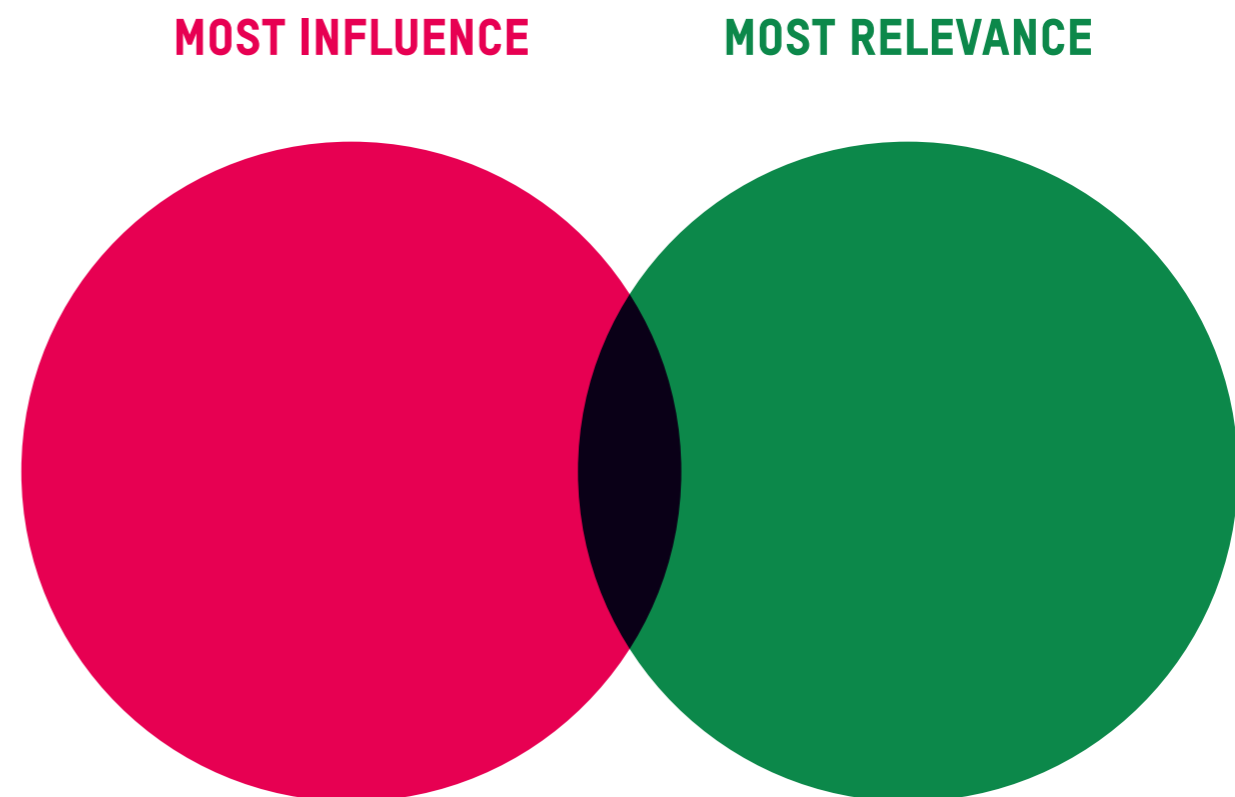
FIGURE 13: Venn diagram of who to mobilize | Oxfam International

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REACHING A WIDER PUBLIC AUDIENCE

Even if you have developed a great campaign action, it is worthless if you have not thought about how the public is going to discover it. Knowing your audience will help you identify the best ways of reaching them to promote your narratives. Traditional media channels and face-to-face communication work for large events may be the most effective way to achieve results with some audiences. Digital and social media channels may be more relevant to others.

Much of public campaigning is about movement building – supporting and creating initiatives that contribute to a public environment that is positive towards the changes you want to see. Campaigners can initiate and nurture conversations that bring new or controversial issues into public debate. Finding ways to excite and encourage people to share initiatives with their friends is also great way to get your messages and actions out further.

3.6.5 WHICH TACTIC?

The right type of mobilizing approach and activity must be based on your theory of change (see Section 2.9). You need to consider both what your activist-base and audiences are willing and able to do, as well as what is most likely to influence your targets.

3.6.6 TAKING ACTION

To encourage people to engage and then take action, consider the following four important elements in your mobilization strategy.

- **Motivation:** Why would someone want to do this? Why would they care?

- **Ability:** How can you make it clear that taking an action will achieve the tangible results they want to see happen? People may care about an issue but feel that the problem is 'too big' for them to make a difference. You will need to change their perception of impact, and design actions that they are comfortable taking and that will make a difference.

- **Invitation:** Major 'real world' events can trigger an outpouring of compassion, anger, indignation and action, but generally people need to be persuaded to do something. Your campaign communications should engage them first on the issues they care about. Think about giving them a meaningful but easy first step.

- **Modality:** Combine online and offline actions for maximum effect.

3.6.7 MOBILIZING DIFFICULT POLITICAL CONTEXTS

There are differing restrictions on citizens to mobilize and different levels of political repression in countries globally for both mass mobilization and digital activism.

In many of the contexts in which Oxfam works around the world, mobilizing large numbers of people can be met with repression. Analysing risks (see **Section 2.11.2**) is vital before embarking on mobilization activities. It is critically important to understand the legal framework nationally and how laws are enforced in practice.

This **MobLab Live webinar** contains useful ideas on how to resist growing authoritarianism. Its main points are:

- To effect positive change, you need a compelling story. Authoritarian regimes often offer up a clear vision in which the country is under threat from the 'other'.

- Tackle authoritarianism as a wider phenomenon; do not only think of its efforts within the context of elections that bring 'strongman' politicians to power.

- In this new landscape, civil society organizations can find themselves at a considerable disadvantage with little room to campaign and mobilize effectively. Grassroots people's movements, however, can continue to influence the conversation despite repression.

- Growing authoritarianism is a global phenomenon that requires global solidarity from civil society organizations and their allies. Social movements need to be even better connected globally than the authoritarian regimes.

- Social media can create problems. Think about the role of Facebook and Whatsapp in bringing certain regimes to power. However, disengaging is not the answer. Citizens and civil society organizations need to be present online.

- The time to act is now. There may be a very small window to stem the tide of authoritarianism before it becomes the new normal.

The four-minute video **How to Bring Down a Dictator** also contains some interesting reflections. Srdja Popovic was a leader of the student movement **Otpor!** that helped topple Serbian president **Slobodan Milosevic** in 2000. Popovic established the **Centre for Applied Nonviolent Action and Strategies** in 2003.

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3.7 WORKING WITH OTHERS

Global development, humanitarian and environmental challenges are enormous and cannot be solved if civil society groups act in isolation. Working with and through a range of partners and allies is critical to achieving shared influencing and campaign goals. This means there needs to be a focus on the quality of the relationship to be effective in achieving change.

This section is mainly focused on Oxfam's approach and learning from its work with others. However, we hope it is also useful to others interested in developing and sharing their learning and knowledge in this critical area of influencing.

3.7.1 OXFAM'S APPROACH TO WORKING WITH OTHERS

Oxfam considers its relationships with other actors critical for:

• adapting its interventions to local contexts;

• solidifying ownership among local actors;

• shifting unequal power dynamics; and

• achieving leveraged impact in the programmes it supports.

For Oxfam, **partners are autonomous, independent, accountable organizations that share core values** and with whom we agree to work jointly towards common goals. Oxfam distinguishes between **project partnerships** (collaborations on specific projects that benefit both partners, perhaps involving a grant or staff time) and **strategic partnerships**, which are longer-term relationships that advance the aims of both organizations.

Tactical allies are individuals or organizations with whom Oxfam works towards a specific goal. These relationships tend to be shorter term and focused on common interests. Their organizational and institutional mandates and long-term purpose may be different from those of Oxfam.

Networks and coalitions are a collection of civil society organizations and other institutions with shared issues, values, identities and objectives. These are not mutually exclusive categories, and the nature of the relationship with a particular organization may evolve over time or vary across programmes.

Oxfam's explicit aim is to support, resource and stand with local and national partners and allies to build movements for change. This is an approach that is built on a rights-based framework to strengthen active citizenship and enable people to exercise their right to be heard.

Oxfam's partnership principles are, in brief:

• Shared vision and values;

• Complementarity of purpose and value added;

• Autonomy and independence;

• Transparency and mutual accountability;

• Clarity on roles and responsibilities; and

• Commitment to joint learning.

Shared ways of working

When working with others it is important for all partners and allies involved to agree and commit to **a set of shared working principles** focused on the following elements:

• Maintaining good quality relationships – which requires clarity and humility about your own role and recognition that your work is informed by, and often only made possible, by the struggles and successes of others;

• Being respectful and of mutual benefit;

• Core values are identified and shared, e.g. respect for individual autonomy, recognition for contributions, open space for all members, transparency and trust;

• Taking care not to take up spaces that others may want to occupy, identifying roles collectively and being prepared to subsume your own organisational name or brand when needed;

• Taking care not to transfer any risks to other partners or allies and be prepared to stand by, support, speak out and defend each other over time;

• Being aware of power imbalances that can constrain equal relations or authentic participation and feedback. Mitigating power imbalances can require changes to your own institutional cultures and practice (such as reporting requirements) and partnership principles as well as personal humility, listening, brokering and conflict resolution skills among your staff your people.
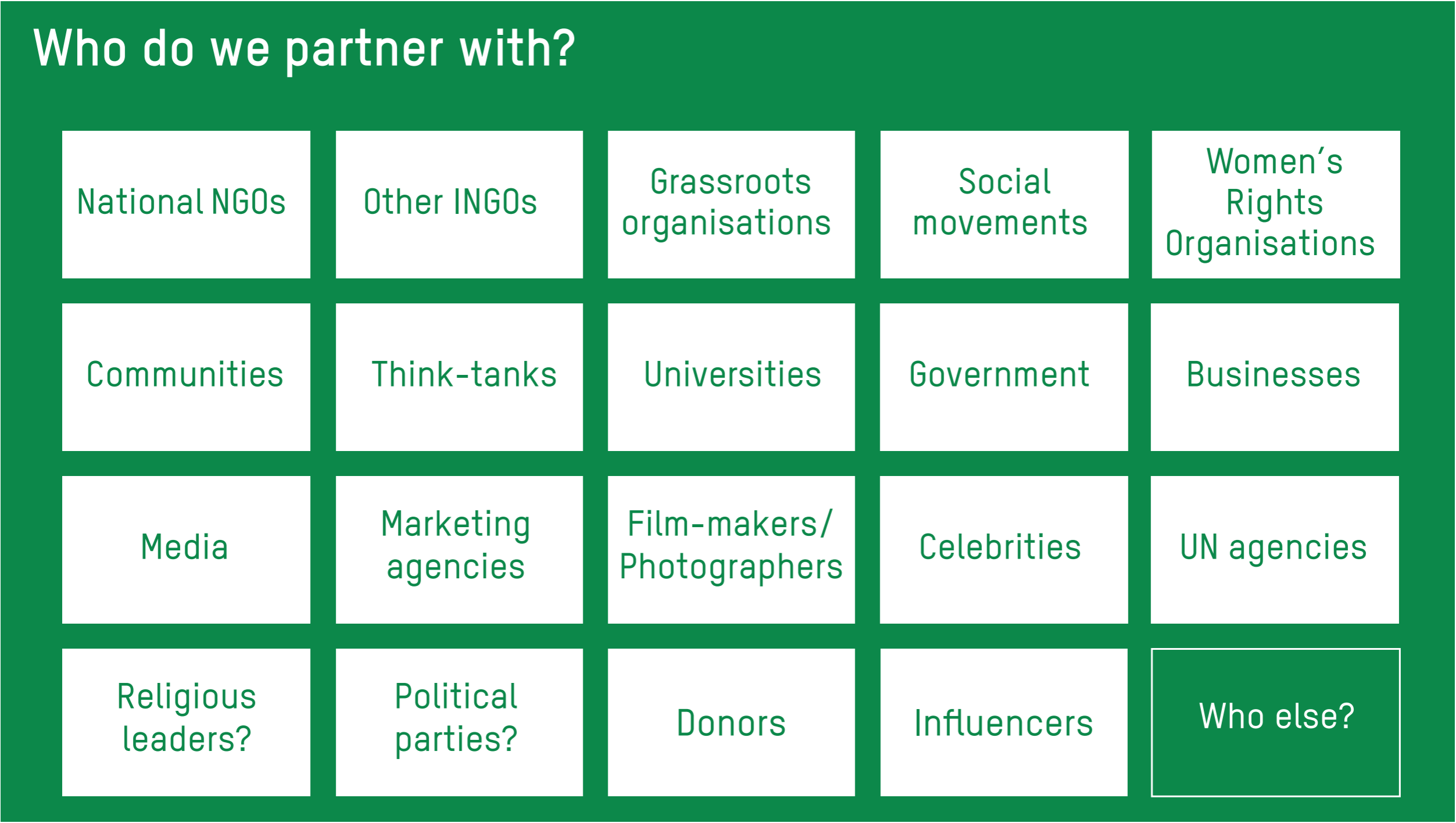
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Who do we partner with?

National NGOs	Other INGOs	Grassroots organisations	Social movements	Women's Rights Organisations
Communities	Think-tanks	Universities	Government	Businesses
Media	Marketing agencies	Film-makers/ Photographers	Celebrities	UN agencies
Religious leaders?	Political parties?	Donors	Influencers	Who else?

FIGURE 14: Who do we partner with? | Oxfam International[25]

3.7.2 WORKING WITH WOMEN'S RIGHTS ORGANIZATIONS

Women's rights organizations and movements across the world have been a vital force for changing policies, social norms, beliefs and values on gender equality and other rights-based issues.

For example, several studies[26] have shown that the presence of strong and autonomous feminist movements is the single most important factor in bringing about changes in a country's willingness to recognize and address violence against women.

Oxfam staff have learned a lot about good partnership from feminist partners. This is because, crucially, a feminist lens is **not just about results, but processes**. Fundamental to feminist processes are integrity, honesty, contextualization, intersectionality, learning, collaboration, participation, inclusivity and responsiveness.[27]

When thinking about **working with women's rights organizations**, ask yourself the following questions:

• Have you considered how they will be engaged with your influencing strategy through partnership, networks and coalitions?

• Are they to be co-implementers or just invited to take part in specific activities?

• How will you help deliver their objectives alongside your own?

• Would this relationship constrain them in any way from meeting their objectives or raise new risks for women activists and their organizations? If so, how will you tackle them together?

3.7.3 THE POTENTIAL BENEFITS OF PARTNERSHIPS

• Build the voice and capacity of civil society and citizens to hold decision makers to account;

• Increase skills and resources invested in advocacy and campaigning;

• Provide opportunities for mutual learning;

• Avoid duplication of effort and be valued by donors and influencing targets alike;

• Reduce advocacy risks by providing safety in numbers;

• Add authority to messages, making the case more compelling;

• Enable you to present a united front by building consensus before communicating key messages;

• Help you work with high-profile or non-traditional allies, like celebrities and businesses; and

• Increase the chance of advocacy success.

3.7.4 THE POTENTIAL PROBLEMS OF PARTNERSHIPS

• Coalitions and alliances can be time-consuming, frustrating and slow to make decisions;

• Achieving common policy positions takes time and can mean compromise;

• You must not exert undue influence on a coalition, if you represent one of the larger members;

• Competition or public disagreement between allies is potentially very damaging; and

• Coalitions can be overly bureaucratic or out of touch, and even work against the needs of members.

3.7.5 TIPS FOR BUILDING STRONG PARTNERSHIPS

• Think about your alliance strategy at an early stage and choose your allies carefully based on strategic alignment;

• Have a clear memorandum of understanding or 'statement of expectations' on how everyone in the coalition will engage, contribute and make decisions. This can prevent arguments later down the line. Compromise where necessary at this stage;

• Ensure your core values are shared, e.g. respect for individual autonomy, recognition for contributions, open space for all members, transparency and trust; and

• Think about your long-term plan, including when and how to leave or close a coalition, alliance or partnership.

3.7.6 NETWORKS FOR INFLUENCING

Activist and campaigning organizations are often well networked and recognize the strength of collective action. While networks of like-minded organizations and groups can clearly be a powerful force for change – and are relatively easily set up – they are not so easy to maintain. All too often, we approach a particular influencing initiative with the idea of creating a network without fully thinking through what is required, and perhaps even the function that the network will fulfil.

Sometimes networks are sustained far past their necessary life. It is important to consider sustainability from the outset, but also to be prepared to have honest conversations about when a network should be closed down.

A successful network is characterized by:

- **Strong commitment**, with members prepared to invest time and energy;

- Clear, shared **purpose and objectives**;

- Clear **roles and responsibilities**, with defined norms, codes of conduct and ways of working;

- **Good leadership**, possibly rotating, giving equal respect to all members;

- Excellent, regular **internal communication**;

- Agreed protocols for **external communication**;

- **Consensus decision making,** based on the participation of all members;

- Ability to address and **resolve conflicts between members**;

- **Not reliant on a single funder**, particularly if the funder is also a member of the network;

- **Ability to strengthen the knowledge, skills, contacts and other capacities** of all members and the network as a whole; and

- The ability for members of the network to respond to and act on different members' needs.

3.7.7 WORKING WITH SOCIAL MOVEMENTS

According to [Alina Rocha Menocal](#) from the Governance and Social Development Resource Centre, 'social movements are large, often informal groupings of people who come together against power holders around a common cause, in response to situations of perceived inequality, oppression and/or unmet social, political, economic or cultural demands.'[28]

Oxfam has a history of working with and supporting social movements around class or labour rights, identity-based movements and specific issues such as land reform and large-scale infrastructure projects.[29] These include funded relationships and joint campaigns, as well as behind the scenes support.

PRINCIPLES AND APPROACHES FOR WORKING WITH SOCIAL MOVEMENTS

In their report [Understanding Activism: How International NGOs, Foundations and Others Can Provide Better Support to Social Movements](#), Rhize, a network of movement-building coaches, provide some useful guidance.

- It is important to create safe spaces for social movement activists to define their own priorities in line with local political, social, and economic dynamics.

- We need to undertake more careful analysis to identify which emerging movements will be most able to take advantage of the kind of support we can provide.

- Once engaged in partnership, we should take time to regularly meet and reflect on the health of that relationship.

Other suggestions include supporting social movements through:

- leadership training;

- public education activities;

- providing protection to their advocates and leaders;

- training on legal issues;

- respecting their autonomy;

- specific activities such as organizing a national assembly event, or setting up a webpage; and

- working with others on advocacy activities to protect, defend and expand the civil society space in which social movements operate.

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However, there is no clear model for how you should engage with social movements. Focus on developing good relationships, building trust, being honest and transparent and open to the challenges that will arise.

CHALLENGES WITH SOCIAL MOVEMENTS

When aiming to engage with social movements, remember:

• The emergence of social movements is often unpredictable;

• Social movements are dynamic, with rapidly evolving political agendas;

• Social movements are deeply political in what they hope to achieve, often in confrontational ways, and they cover a wide political spectrum from progressive rights-based movements to conservative ones that can be allied to right-wing populism;

• The use of campaigning tactics such as protests, civil disobedience, land and building occupations might be uncomfortable areas of partnership for some organizations;

• Tensions can arise with other groups and within the ranks of the same social movements, which can divide and splinter; and

• Members of social movements can resort to violence as situations cause increased tension and frustration.

Image courtesy of **Percy Ramírez** /OXFAM AMERICA

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3.8 INFLUENCING SOCIAL NORMS AND BEHAVIOURS THROUGH SOCIAL LEARNING GROUPS

One of the most powerful ways of influencing social norms and behaviours is via participatory social learning groups.

Social learning[30] is based on the idea that individuals learn new behaviours in safe informal group settings through:

• interactions with others in informal settings;

• observation of role models; and

• feedback about their behaviours.

Group or community-based, face-to-face interactive social learning processes have been found to be effective in addressing individual and group-level influences across a range of issues and as such can be considered a leading complement or alternative to mass information campaigns.

They do so by creating safe informal spaces for people to learn, copy and test out new behaviours from peers and role models. They can also simultaneously help to strengthen individual agency and collective capacity. By creating new reference groups, social learning groups can also help spread new social norms.

Linked to social learning, communities of practice theory highlight how know-how is built through regular interaction between groups of people with shared interests, known as **'communities of practice'** This suggests that participative learning experiences can build skills and agency, and encourage innovative and collaborative ways of thinking to address complex problems.

There are many other tactics you can use to influence social norms and behaviours and we encourage you to access the **Influencing Behaviours and Practices to Tackle Poverty and Injustice** and **Social Norms Diagnostic papers** for guidance and additional links and Annex 3 for some key steps in planning a behaviour change strategy.

For those of you in Oxfam working across our programmes and countries there are two important sets of resources for capacity development and training in influencing, advocacy and campaigning work:

They are:

Influencing Training Facilitation Pack - **A training pack on influencing, advocacy, and campaigning for facilitators**

Influencing Capacity Needs and Assessment Guides

ANNEX 1
THE INFLUENCING STRATEGY & PLANNING TEMPLATE

THIS DOCUMENT SHOULD BE USED ALONGSIDE THE GUIDANCE IN THE OXFAM INFLUENCING FOR IMPACT GUIDE

Title:

Date:

Duration of Strategy:

CONTEXT & GENDER ANALYSIS	**Overall problem(s) to address:** *Brief description of problem, explaining how it affects women and men differently, other relevant factors (e.g. class, ability, age, race, education etc.).* *Why there is a problem and what is enabling or constraining change? What aspects of power and the way resources are distributed are contributing to the problem? Does the problem relate to: policies, laws, practices or their implementation; attitudes, behaviours or social norms? What are the local, national, global dimensions of the problem?* *(Sections 2.2 – 2.6 of the Oxfam Influencing for Impact Guide and pages 11 – 18 of the Oxfam Guide to Feminist Influencing)* **Solution(s):** *What are the solutions for the problems(s) you've identified? Do the solutions relate to: laws, policies, practices and their implementation; attitudes, behaviours or social norms?* *(Section 2.7 of the Oxfam Influencing for Impact Guide)*
Insert here	

OVERALL GOAL/AIM of the influencing strategy:	*Overall headline statement of the proposed change sought through the influencing and campaign strategy. Should be succinct, compelling and inspiring, focused on results of your influencing on improvements in people's lives or the environment.*

Insert here

SPECIFIC OBJECTIVES	*Set out the specific changes you need to achieve at the various levels as a contribution to realising the overall goal. Are they: Clear (well defined and focused); Trackable (can identify if achieved or not); Plausible (based on the Theory of Change; Timebound (working to a specific timeframe).* *Women and men are affected by poverty and inequality issues differently and it is important to reflect this in your objectives.* *(Sections 2.7 of the Oxfam Influencing for Impact Guide and pages 25 – 27 of the Oxfam Guide to Feminist Influencing)*

Insert here

    1.

    2.

    3.

YOUR THEORY OF CHANGE (TOC)	*Add a brief summary description or diagram of your ToC.* *(Sections 2.9 of the Oxfam Influencing for Impact Guide and pages 19 - 23 of the Oxfam Guide to Feminist Influencing)*

Insert here

POWER ANALYSIS & MAPPING (SEE GRID BELOW)	*Use the power analysis and gender and power questions outlined in pages 2.8 of the Oxfam Influencing for Impact Guide pages and use the Power Analysis Grid attached below.* *(Sections 2.5 and 2.8 of the Oxfam Influencing for Impact Guide)*
Insert here or capture in Power Analysis Grid attached below	
KEY OPPORTUNITIES FOR CHANGE:	*Identify the main political processes, external trends, key meetings, decision-making moments, or events that can affect, or be used to help you achieve your objectives.* *(Section 2.4 of the Oxfam Influencing for Impact Guide)*
Insert here	
KEY OBSTACLES OR CONSTRAINTS TO ADDRESS:	*What might prevent you from achieving your objectives if you fail to take them in to consideration?* *(Section 2.4 of the Oxfam Influencing for Impact Guide)*
Insert here	

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OVER-ARCHING MESSAGE, OFTEN CALLED 'A NARRATIVE'	*Insert here*
KEY MESSAGES	*Insert here*
KEY STRATEGIES AND TACTICS	*Decide on the best strategies and tactics or combination to achieve maximum influence.* *(Sections 2.10 of the Oxfam Influencing for Impact Guide and pages 29 – 33 of the Oxfam Guide to Feminist Influencing)*
NARRATIVE & KEY MESSAGES:	*What is the overarching message on your influencing/campaign (often called a narrative)?* *What are your key messages for your main target audiences?* *In developing your messages are women's rights issues visible in your messages?* *(For guidance see Sections 3.2 and 3.4 of the Oxfam Influencing for Impact Guide and pages 43 – 45 of the Oxfam Guide to Feminist Influencing)*
	Insert here *Strategies:* *Tactics:*
ACTIVITY PLAN (SEE FRAMEWORK BELOW)	*Using the framework below to focus on, develop a detailed activity plan to deliver your strategy.*

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MONITORING AND EVALUATION PLAN –	We recommend you develop a separate document for your MEL Plan
	The most effective strategy involves ongoing planning and action.
	A good MEL plan will: help you improve your overall strategy and theory of change; enable you to adapt and improve your delivery as you go along; help you measure your effectiveness and to reflect and learn so you can be more impactful in the future.
	A good MEL Plan will have a clear goal and objectives with indicators; be gender aware; be clear on what information is needed, who collects it and what tools to be used; and be properly resourced.
	(See section 2.12.2 of the Oxfam Influencing for Impact Guide

POWER ANALYSIS GRID

OBJECTIVES	DECISION- MAKERS	INFLUENCERS	POTENTIAL STRATEGIES/ TACTICS	FORMS OF POWER	ALLIES	SPACES	IMPLICATIONS?
Your policy, practice, attitude, behaviour or social norm change objectives And at the level at which decision-making is made e.g. individual, household, local, district, national, regional, global	Key decision-makers? What is their current position on issue: Champion (potential driver of change) Floaters (undecided and persuadable) Blocker (opposed)	Who can influence them? And their current position on issue: Champion/Supporter, Floater or Blocker Level of influence: High or Low	What will influence decision-makers? Ideas; evidence and research; peer pressure; popular pressure; shocks; etc.	What are the main sources and forms of power? Is it visible? Is it hidden? Is it invisible?	Who are the key allies or partners on this issue? What is their influence and position? What role can they play?	Where are particular decisions made? – the spaces • Closed • Invited • Claimed	What advocacy strategies, tactics and activities should you be adopting and are there any implications for what you are currently doing?
1.							
2.							
3.							

ACTIVITY PLAN

Objectives	Strategies	For each strategy/ approach decide on your tactics/activities	Timing: main phases in the delivery of the activities	Who will lead on the activity e.g. Oxfam, Partners; Coalition Members	Budget and other resources needed to deliver your activities
1.					
2.					
3.					

RISK MANAGEMENT ASSESSMENT TOOL:

You can use this tool to assess the likelihood/probability of the risk happening, and impact if it does. You should do this at the planning stage but also keep it updated as you respond to opportunities and situations that arise as you implement your plan of activities.

What might stop us achieving our objectives? Will this work bring any risks to your programmes, campaigns, activities staff, allies or partners? What is the likelihood of 'it' happening, and the impact if it does? What can be done to reduce or mitigate these risks?

Note: not everyone that's part of our campaign or influencing will face the same levels of risk. Factors such as a person's gender, age, race, and socioeconomic status are likely to affect both the likelihood that they will face backlash, including violence and abuse. In particular, women human rights defenders and women activists face retaliation both because they are challenging unequal power and resource allocation, and because many people view it as unacceptable for women to speak and demand to be heard. Indeed, a significant proportion of the violence women human rights defenders face comes from their own families and communities and may be largely invisible to outsiders. So, it's vital that women themselves are part of designing and implementing risk mitigation strategies.
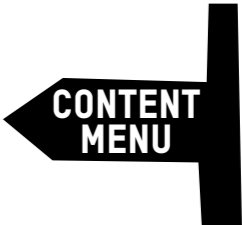
TRAFFIC LIGHTS GUIDANCE:

Green: opportunities outweigh risks, which are not seen as significant. Proceed to run the risk but monitor.

Amber: situation is more balanced, proceed with caution. More rigorous mitigation and monitoring required.

Red: risks far outweigh opportunities. Avoid the risk by not proceeding with the activity.

Influencing Objective/ Opportunity	Key stakeholders affected	Risk scenario – What could happen – type of risk	Key stakeholders who can influence decisions	Probability – high, medium or low	Impact – high, medium or low	Weighing - are benefits perceived to outweigh likely risks – yes or no	Status – Green; Amber; Red	Actions
1.								
2.								
3.								

CONTENT MENU

ANNEX 2

EXTRACT FROM OXFAM GUIDE TO FEMINIST INFLUENCING

THE TRAFFIC LIGHT CHECKLIST: TO ENSURE YOUR CAMPAIGN OR INFLUENCING STRATEGY IS INTEGRATING AND MAINSTREAMING GENDER

This Traffic Light checklist offers a quick and easy tool to ensure your campaign or influencing strategy is on track. Use it at regular intervals during the campaign or strategy cycle to check your progress, assess your integration of gender, and get back on track if necessary. Your entire team and any key partners should fill out this checklist together, so that different viewpoints on how well gender is being mainstreamed into the influencing work are accounted for. Additionally, this will allow for dialogue among team members about this important topic.

ACTION	🟥	🟧	🟩	PLAN TO IMPROVE
Reflecting on Internal Culture				
Campaign/influencing leadership reflects on the internal culture of the organization and team, identifies inequalities, and remedies them.				
Staff have the space and support to raise or report issues related to internal culture as they come up.				
Gender Analysis of Context & Situation				
Our research strategy identifies how gender and social relations analysis will be integrated, and how sex-disaggregated data will be collected.				
Our context and situational analysis integrates gender, is regularly updated, and informs the design & ongoing rollout of the campaign.				
Our context & situation analysis is informed by our partner organizations.				
Gender Analysis of Context & Situation				
Our research strategy identifies how gender and social relations analysis will be integrated, and how sex-disaggregated data will be collected.				
Our context and situational analysis integrates gender, is regularly updated, and informs the design & ongoing rollout of the campaign.				
Our context & situation analysis is informed by our partner organizations.				

🟥 **Red**
This action is not happening at all.

🟧 **Orange**
This action is sometimes happening, but not systematically or across all parts of the campaign or strategy.

🟩 **Green**
This action is definitely happening!

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ACTION	🟥	🟧	🟩	PLAN TO IMPROVE
Gender Power Analysis				
We regularly update our gender power analysis in collaboration with women's rights organizations and integrate new findings into our strategy & tactics.				
Formulate objectives with a Gender Lens				
The campaign/influencing strategy has clear objectives relating to gender equality.				
Realization of objectives benefit people of different genders appropriately, and promote women's rights and empowerment in the long term.				
Strategy Design & Tactics				
The influencing strategy is transformative in its approach, in that it seeks to change the relationship between men, women and gender non-conforming people and the issue area, including the role of marginalized people in decision making.				
Our influencing work lends itself to the promotion and achievement of gender equality, either explicitly (with a focused campaign) or implicitly (by engaging women and girls as empowered actors in campaigning).				
The strategy builds on the gender context and power analysis, and explicitly recognizes and takes into consideration the lived realities of women and girls.				
The voices of women and girls impacted the design of the influencing work. We are working with feminist allies, both women's organizations and feminist thought-leaders.				
Implementation				
Staff, stakeholders and campaigners have access to information, a budget for gender-focused activities, resources and opportunities to carry out their responsibilities around integrating gender.				
Our strategy is implemented in a way that meaningfully and respectfully engages women's rights organizations.				
Senior managers hold ultimate accountability for ensuring women's rights are at the heart of this influencing strategy.				
The voices of women and girls impacted the delivery of the influencing work. We are working with feminist allies, both women's organizations and feminist thought-leader.				

🟥 **Red**
This action is not happening at all.

🟧 **Orange**
This action is sometimes happening, but not systematically or across all parts of the campaign or strategy.

🟩 **Green**
This action is definitely happening!

CONTENT MENU

ANNEX 3
PLANNING A BEHAVIOUR CHANGE STRATEGY

EXTRACT FROM <u>INFLUENCING BEHAVIOURS AND PRACTICES TO TACKLE POVERTY AND INJUSTICE</u>. AN OXFAM DISCUSSION PAPER. JANUARY 2018

Below we outline some key steps for planning and designing a behaviour change strategy. They do not provide a detailed or definitive guide. Readers are also referred to Oxfam's Influencing Guidelines (Oxfam undated, internal) and complementary frameworks and guides.

STEP 1: CLARIFY YOUR AIMS AND OBJECTIVES

• Is your aim to improve health, hygiene, the environment or empower people to take sustained action?

• Is your objective to promote desirable behaviours or curtail undesirable behaviours?

STEP 2: ASSESS THE BEHAVIOUR

• Who is doing the behaviours and who is affected by the behaviours? Disaggregate by gender, class, ethnicity, and geography, as applicable.

• What is the nature of the behaviours? Are they e.g.:

  - one-off or deep-seated/routine/habitual?

  - largely conscious or unconscious?

  - isolated or involving interaction with other people, or part of a wider practice or system?

• What do others think about the behaviours?

• Are there existing examples of desirable behaviours or behaviour change strategies at individual, group or institutional level? If so, what do they look like and who is carrying them out, and are they replicable?

STEP 3: CONTEXTUAL ANALYSIS

• Identify the main individual, group and societal influences (actors and factors) enabling or constraining behaviour change e.g. by consulting, or holding workshops with stakeholders.

• Refer to additional theory and research to identify key influences and relevant interventions; and/or conduct additional research, if required.

STEP 4: POWER ANALYSIS

• Identify and prioritize your target audiences i.e. the key individuals and organizations that have the responsibility and capability to influence behaviours (e.g. either by addressing the key influences constraining behaviour change and/or promoting new desirable behaviours at different levels).

• Identify the key actors (or factors) that influence the priority target audiences e.g. the public, colleagues, parliament, family members, media etc.

• Categorize the target audiences and influencers according to whether they are supporters/promoters, blockers or floaters of the behaviour.

STEP 5: IDENTIFY AN APPROPRIATE MIX OF CHANGE INTERVENTIONS

Use the diagnosis above to identify the mix of interventions at each level that:

• your organization has the responsibility, distinctive competence and resources to undertake itself;

• Your organization will use to influence the priority target audiences and influencers.

STEP 6: PILOT AND TEST THE IDENTIFIED INTERVENTIONS

• Pilot both your direct behaviour change interventions and your strategies to influence and catalyse other organizations to take action.

• Conduct monitoring and evaluation to test what works/doesn't work and the underpinning change assumptions.

STEP 7: USE THE EVIDENCE FROM STEP 6 TO HELP DISSEMINATE AND SCALE UP SUCCESSFUL INTERVENTIONS AND STRATEGIES

• Identify and/or pioneer desirable behaviours and strategies.

• Disseminate them through social networks and shared learning processes (peer-to-peer learning workshops, mentoring).

• Influence government and other organizations to adopt, fund, support and promote them.

• Identify and change key structural influences or system elements that constrain change.

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FURTHER INFORMATION AND LINKS

OXFAM RESOURCES:

Oxfam Guide to Feminist Influencing

National Influencing Guidelines

Oxfam Program Framework

Rights in Crisis Guide to Influencing

Oxfam's MEL of Influencing Toolkit

Oxfam's Digital MEL Toolkit: **https://oxfam.box.com/s/0sks5a41h84 g9wtescnnrgn41hkh1qbj**

For those of you in Oxfam working across our programmes and countries there are two important sets of resources for capacity development and training in influencing, advocacy and campaigning work

Influencing Training Facilitation Pack - A training pack on influencing, advocacy, and campaigning for facilitators

Influencing Capacity Needs and Assessment Guides

EXTERNAL RESOURCES:

https://www.storybasedstrategy.org/tools-and-resources

https://mobilisationlab.org/resources/the-mobilisation-cookbook/

https://www.activisthive.org/

https://heartwiredforchange.com/wp-content/uploads/2019/04/Heartwired-Toolbox-digital.pdf

CONTENT MENU

NOTES

1 Oxfam's National Influencing Guidelines **https://oxfam.box. com/s/df2ta4qa3p3ofzdkn2mese5wfkjlag4h** Oxfam's Guide to Feminist Influencing **https://policy-practice. oxfam.org.uk/publications/oxfams-guide-to-feminist- influencing-620723**

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