DEVELOPING A DECISION MAKER ENGAGEMENT PLAN

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Organizations and activists can inform and shape decisions around policy, budget and draft legislation by engaging with government officials and lawmakers at all levels. By providing decision makers with expert knowledge of their area of practice, organizations and activists can provide critical information that would not otherwise be brought to the government's attention about how certain policies, procedures and laws operate on the ground and affect the communities they represent. This guide is designed to support disabled persons organizations and disability rights advocates to develop a plan for strategically engaging decision makers at the local, regional and national levels. The guide provides an overview of the various components that make up a decision maker engagement plan and considerations for successful engagement. Topics include:

- Defining short- and long-term goals
- Decision maker mapping
- Identifying entry points
- Preparing for engagement
- Storytelling
- Evaluating and sustaining engagement

DEFINING SHORT- AND LONG-TERM GOALS

Before beginning to persuade officials that something needs to change, it's important to gather the facts and identify the priorities. Great ideas for a new law or regulation, improving an existing one, or getting rid of all or part of one, can come from anyone - not just political officials. In fact, the majority of laws grow out of the personal experiences of citizens who bring an issue to the attention of decision makers.

To begin defining and developing goals, think back on the situation or experience that prompted action. What was the situation? Was it related to employment, housing, or political and civic participation? What should have happened but didn't? What would need to happen in the future to correct the situation? Does it represent a one-time situation or ongoing? Why is it important? When identifying an issue, it's important to ensure the issue applies to many people, and, if corrected, could have far-reaching implications.

Once the issue is identified, map out short- and long-term goals to determine the intermediary steps needed towards successfully achieving the overall objectives. Goals increase the likelihood for success and help those involved maintain their focus and align their expectations.

When developing goals, ensure they are **SMART:**

- **Specific:** A goal must be simple and well-defined, communicating what you wish to happen and avoiding dubious interpretations. This can best be achieved by using strong action verbs, such as: expose, develop, build, plan, execute, and perform. Some questions that can make your goal more specific are:
  - What exactly are we hoping to achieve?
  - What are the benefits to reaching this goal?
  - How evident is the result?

- **Measurable:** When a goal is measurable, it's easier to monitor our actions as we progress. The possibility of measuring allows comparisons. If you can't measure, you won't be able to manage your actions and evaluate your results. Some of the questions that can help with this are:
  - How will we know that the change has happened?
  - What are the indicators of success?

- **Achievable:** Goals should be bold and challenging, but they should never be impossible to achieve — and if the SMART logic is employed correctly, they won't be. If the objective requires resources that your group simply doesn't have, then everyone will be frustrated. Some questions to consider include:

- Has anyone ever done this successfully?
- Are all the restrictions evident?

- **Relevant:** Can often be mistaken for Achievable. The basic difference is that in many cases while the goal can be achieved, it is not particularly realistic for the people involved due to some form of conflict. Consider the following factors:
  - Is the goal aligned with the group's mission and vision?
  - Are there enough resources available?

- **Time Bound:** A time limit means setting a deadline to reach the goal. This criteria can slightly overlap with Specific. Time bound provides the necessary impetus to keep people motivated to make things happen, and the start and end periods must be achievable and realistic. This time period must not be so short that the objective is impossible to reach, nor so long that the group disintegrates over time. Deadlines create the necessary urgency and stimulate action. The definition of what is short- and long-term will depend on your overall objectives and the larger context in which it is happening. In some cases, short can mean a few weeks, while for others it can mean two or even three years. Some questions to consider include:
  - Is there a window of opportunity which we would need to act?
  - When will this goal be reached?

An example of a SMART goal might look like: *Organization leadership will hold meetings with at least three relevant ministries and government bodies between September 1st and October 30th to discuss the policy proposals developed in relation to ensuring accessible elections.*

When developing short- and long-term goals, involve the communities you represent to get their feedback as well as buy-in from staff. Methods for collecting community feedback can include: hosting community forums, participating in call-in radio shows, conducting online and/or in-person polling, focus group discussions and key informant interviews. Also be sure to copy or build on things that you have worked on before or pull ideas from other civil society and disabled persons organizations working on similar efforts.
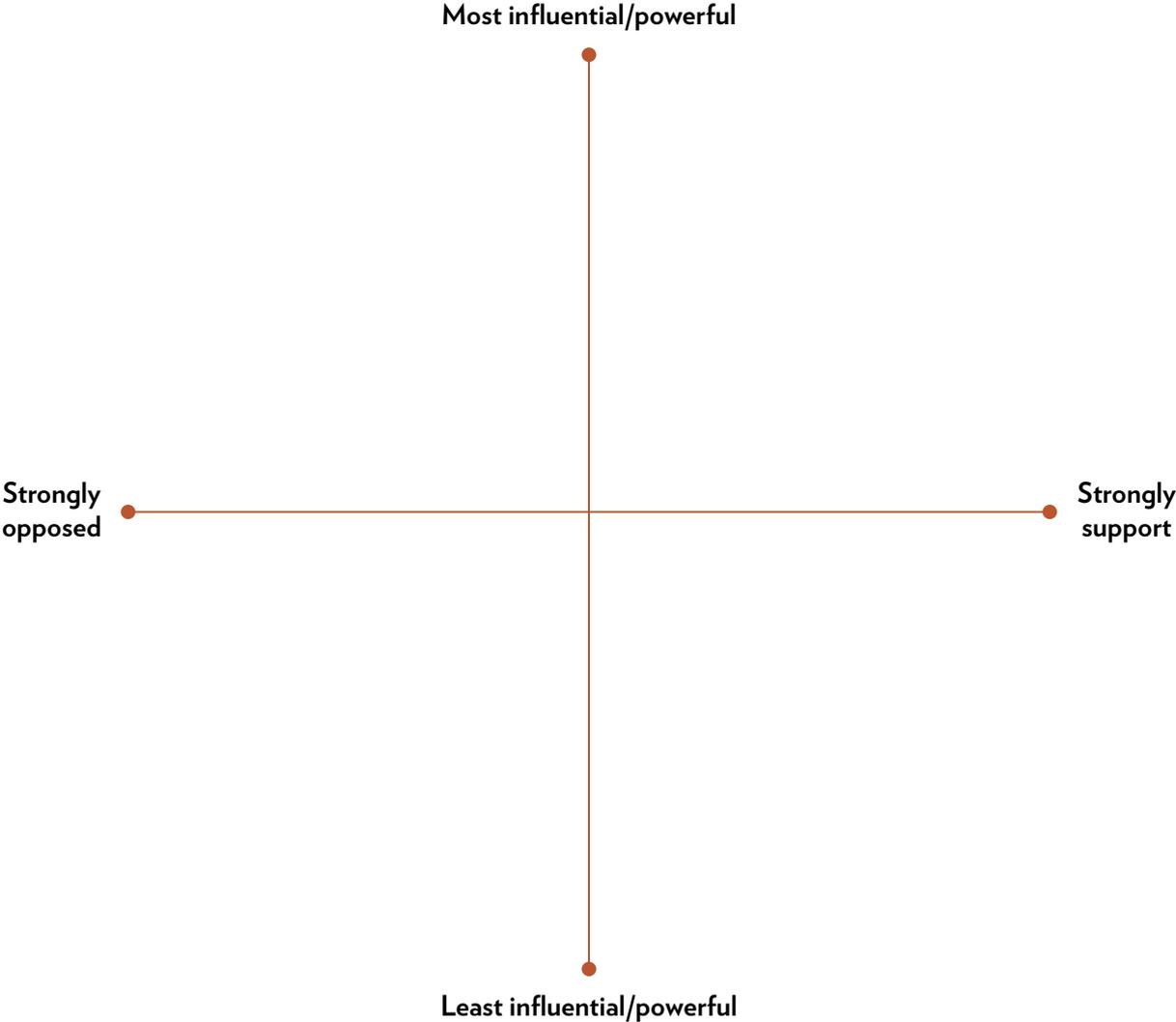
DECISION MAKER MAPPING

Once the goals and overall priorities have been developed, next it's important to identify which decision makers to engage or target. These should be decision makers who can actually make the changes you are seeking and those who can influence the decision makers themselves. In addition to identifying which decision makers have the most influence or add the most value to your work, mapping decision makers can ensure resources are being allocated towards the right decision makers and that specific strategies can be developed for engaging individuals or groups of decision makers.

First, start with developing a comprehensive list of decision makers. Consider the following questions when identifying stakeholders:

A. Who are all the relevant decision makers?
    a. Key decision makers may include:
        i.   National and state or provincial government ministers
        ii.   Members of parliament and their staff
        iii. Local leaders
        iv.   Public servants

B. Who specifically should be engaged?
    a. When identifying decision makers to approach, organizations should think about who would have political motivation to engage on a particular issue. Is the issue important to their electorate? Could you make it important? Have they expressed an opinion on the issue before?

C. Which of the decision makers have the most influence and could be allies?

D. Which of the decision makers have the least influence and don't need to be engaged at this time?

E. Which stakeholders within your networks could be allies and/or help you build relationships with decision makers?

Utilizing the list of decision makers, place them on a four-quadrant power mapping grid (see Figure 1 for a sample template). When placing decision makers on the grid, consider their level of power and their position regarding the issue or priority area you seek to address. It is likely that those stakeholders placed closest to one another on the grid will have relationships. Those placed higher on the grid will have more power and influence and those further to the right hand-side will be more supportive and could serve as possible allies.
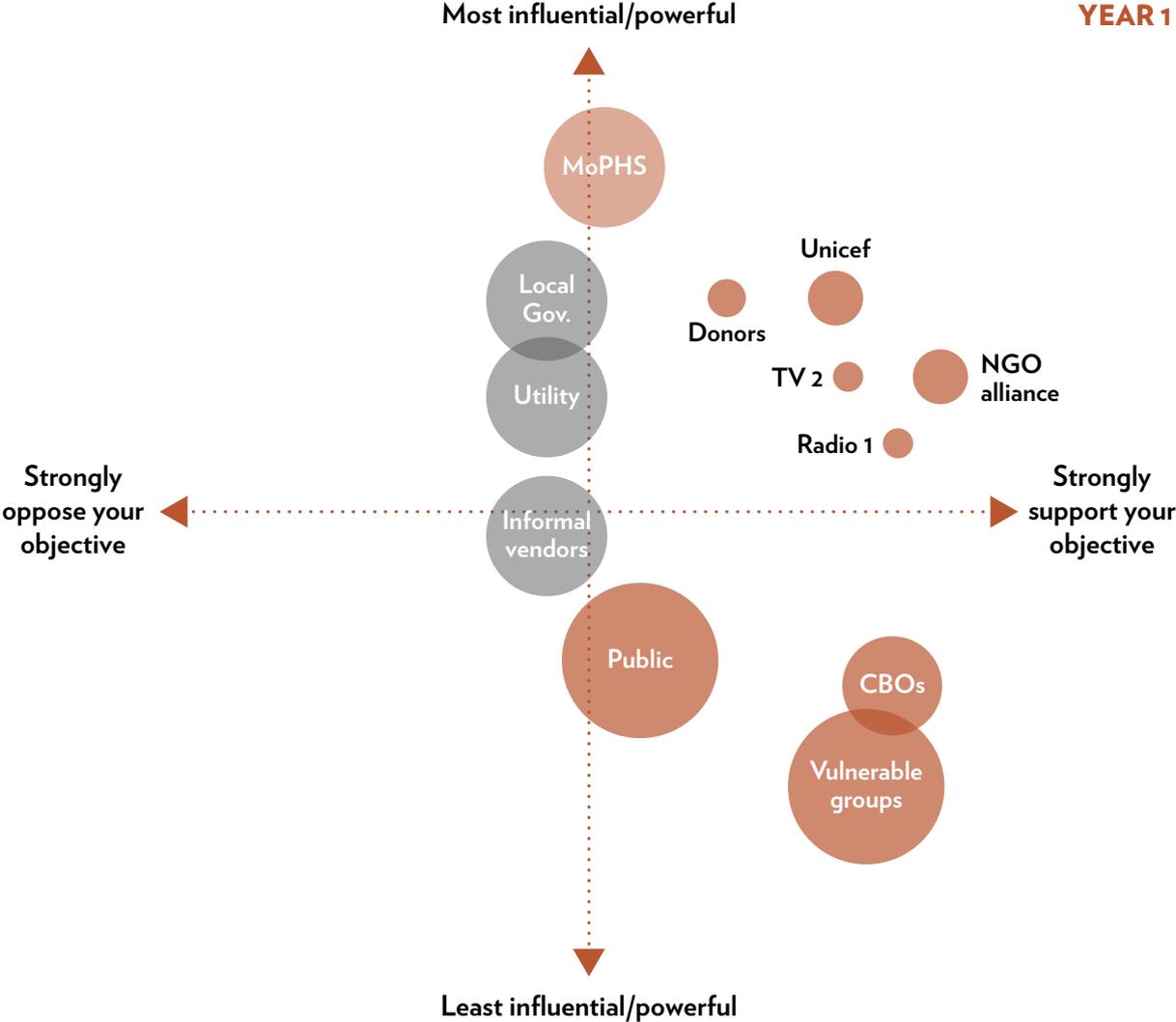
Figure 1: Power Mapping Grid

Once mapped (see Figure 2 for an example of a completed map), you should be able to identify which decision makers have the most influence to resolve or improve the problem or issue area, and therefore should be the targets for engagement. In addition to those that should be targeted, the map should also help to identify:

1. Opponents: decision makers who may oppose efforts related to resolving or improving the problem or issue area
2. Allies: Decision makers who will support efforts related to resolving or improving the problem or issue area
3. Neutral: Decision makers who have no position.

Figure 2: Example of Completed Power Map

Most influential/powerful

YEAR 1

MoPHS

Local Gov.

Utility

Unicef

Donors

TV 2

NGO alliance

Radio 1

Strongly oppose your objective

Strongly support your objective

Informal vendors

Public

CBOs

Vulnerable groups

Least influential/powerful

IDENTIFYING ENTRY POINTS

With target decision makers identified, next you need to determine which entry point you will utilize to engage decision makers. Taking a more systemic approach to identifying entry points for engagement can ensure those entry points are the most accessible and effective. Entry points can take many forms, both formal and informal, traditional and nontraditional. It's important to acknowledge that some entry points may not be possible depending on the context and in some cases, it may also be useful to utilize a combination of entry points for engagement.

The most common forms of entry points include:

- One-on-one meetings with decision makers and relevant government officials per the request of the organization or activist.
- Regular meetings and/or ad hoc hearings conducted by elected bodies attached to national, regional/ provincial, municipal/district or village-level governments. This could include participation around policy formulation or budget allocations.
- Regular meetings and/or special hearings conducted by governing boards attached to ministries or relevant institutions such as schools, hospitals and unions.
- Invitations for written public comments on proposed legislation as well as submitting inquiries via online platforms.
- Meetings or community forums hosted by the organization or activist of which decision makers and relevant government officials are invited.

When thinking through entry points, consider the following:

1. Level of Government at which to Engage - depending on the issue or problem area, engagement may be most effective at the national, regional/ provincial, municipal/district or village level.
2. Routine Ways to Engage - consider budget and electoral cycles as well as staying on top of parliamentary sessions and public hearing calendars.
3. Create Your Own Entry Points - consider hosting your own public hearings or forums and inviting relevant decision makers and their staff. When implementing activities or community events, be sure to include decision makers on the invite list.
4. Hidden Entry Points - even when public meetings don't allow for public comment or participation, attending those meetings may still allow for ad hoc participation and be a way to build relationships.
5. Write it Down - letters and emails can be an effective way to initiate engagement, even if it's just to request a meeting.

6. Social Media - utilize social media platforms as an entry point for engagement. This could include following a decision maker, liking a post, retweeting a tweet with information about your issue, using hashtags, and sending messages via direct message.

There may often be multiple ways to engage. If combining or engaging in multiple entry points, consider the following when needing to prioritize:

- Where is the entry point located? Specifically located at the target level of government or not located at the target level of government?
- Is the entry point accessible? Is it a regular meeting or an ad hoc meeting that only happens once?
- Who is participating in the entry point? Is the target decision maker participating or attending?
- If it's a meeting or public forum, what is the agenda of the entry point? Is there room in the agenda to highlight or discuss the problem or issue area?
- If it's a meeting or public form, how are participants being selected for the entry point?

See Annex 1 for more details on different types of entry points/engagement including when they're most effective and appropriate.

PREPARING FOR ENGAGEMENT

Ahead of any engagement with a decision maker, it is important to prepare. Preparation will depend on the entry point for engagement. This requires doing your research and considering the following:

1. Understand as much as you can about the decision maker's agenda and interests and understand where your issue fits within that agenda

   a. Information on a decision maker's agenda can be found on their websites or via old campaign materials. Browsing the decision maker's social media platforms can also be informative in identifying their stances on different topics and priorities. Think through your networks and whether or not you know other organizations or individuals that have relationships with the decision maker and can give you insight into the decision maker's interests. Consider how the issue you're seeking to advance fits into broader issues or agenda items.

2. Preparing briefing materials such as one-pagers (click here for a **sample one-pager**), photos (click here for a **sample photo**), stories (click here for a **sample story**), infographics (click here for a **sample infographic**), pamphlets/brochures (click here for a **sample brochure**), videos (click here for a **sample video**), etc. There are a variety of platforms available that can assist in developing materials. These include:

   a. **Canva**: a free-to-use online graphic design tool for creating social media content, presentations, posters, videos, logos, infographics and much more. Canva has pre-made templates and a large database of stock images that makes creating a variety of materials simple, quick and easy.
   b. **Piktochart**: similar to Canva, Piktochart is a free-to-use online graphic design tool for creating a variety of content including infographics, reports, presentations and much more.
   c. **Veed**: a free online platform for creating and editing videos. Veed makes video creation and editing accessible, with no prior experience needed. Through Veed, videos can be formatted for YouTube or other social media platforms.

3. Preparing other materials such as press statements/releases, opinion pieces for newspapers and other media outlets.

   a. Engaging media can be an effective way to apply pressure ahead of or after engagement with decision makers. When developing press statements, releases or opinion pieces, be sure to consider the angle, have a clear, concise but catchy headline, and keep it brief (click here for a **sample press statement**).

      b. When formatting a press statement/release, be sure to include the following components:

         i. Heading - grab the attention of the readers

         ii. Intro/Lead - answer as many of the five W's - who, what, where, when and why - as possible

         iii. Source - prove your credibility by providing sources

         iv. Essentials - explain why your story is significant

         v. Quotes - show the perspective of others

         vi. Contact Information - ensure readers know how to reach you

4. Developing a clear and realistic "ask" as well as relevant talking points

      a. Consider the action you're asking the decision maker to take and focus on one issue at a time.

      b. When developing the ask think about the following questions:

         i. What experience or experiences made you choose this issue?

         ii. What do you think should have happened but didn't? What do you want to happen in the future?

         iii. What makes you think - "that's not right" or "that's not legal"?

      c. Practice writing the "ask" down in thirty words or less. For example - *We are asking you, as representatives of the disability community, to sponsor legislation that would require all schools to be constructed using universal design principles so that all students, teachers, staff and parents can use and access them, regardless of their disability.*

5. Ensure everyone participating in the engagement understands their roles and responsibilities to avoid confusing the decision makers or appearing ill-prepared. If presenting to decision makers, be sure to rehearse talking points to ensure they are clear and concise.

STORYTELLING

Storytelling can be a powerful way to draw attention to unfair laws and a crucial component of effective engagement. A personal story can add life to a complex issue, create a platform for public discussion and inspire people to confront discrimination. Telling stories has a unique potential to build understanding and empathy in relation to difficult problems. In addition, it can empower the individual affected and their community, recognize their expertise and promote their agency. Storytelling isn't just a form of publicity but also a means of organizing.

It's important to remember that storytelling is about meaning. What makes a story powerful or impactful is how the facts and personal experiences come together and resonate with its audience and convince people of what they already know. Stories are up to 22 times more memorable than facts and help make the case for why a decision maker should take a stand on your issue.

There are two key components when choosing the story that will resonate most with decision makers:

1. **The Ask** - why are you there and what do you want the decision maker to do?
2. **The Audience** - be familiar with whom you plan to speak. Frame the story based on values, relevance to the decision maker's constituents and how the story might reflect broader community issues.

To tell an effective story, consider the following components:

Figure 3: Storytelling Components
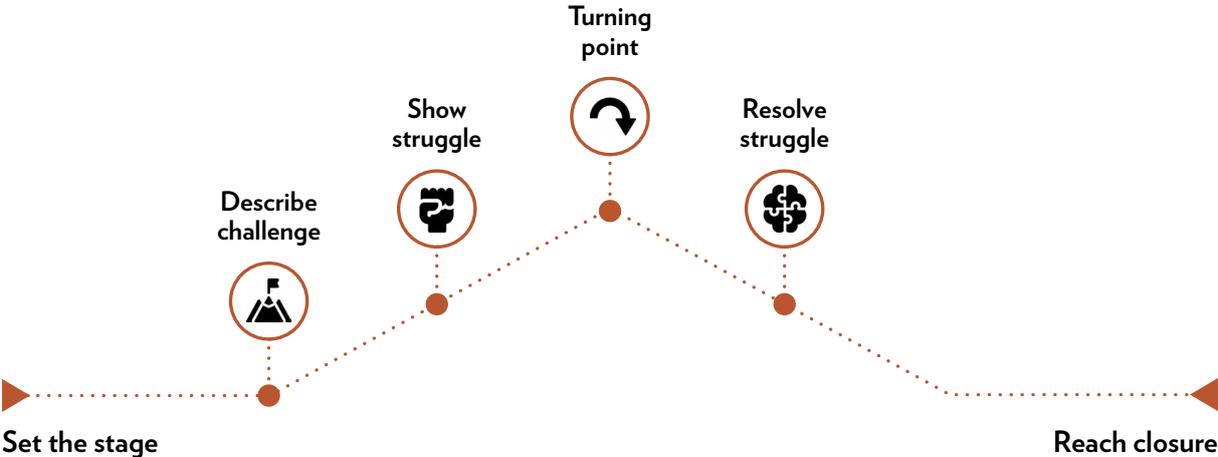
- **Set the Stage** - lay the groundwork for the story, describing the setting and context and establishing the stakes. Where does the story take place? Who is involved? What will happen if action is not taken?
- **Describe the Challenge** - describe the main conflict of the story and utilize a few sentences to "hook" the audience, making them want to know what happens next. What did you see, hear, feel, smell?
- **Show the Struggle** - struggles can be internal, physical, philosophical or emotional programs that move the story forward and create tension, suspense or excitement. When describing the struggle use vivid and strong objectives. How did the issue impact you or the individual? What challenges did you or the individual face?
- **Highlight the Turning Point** - explain a moment of discovery or the point of highest tension.
- **Resolve the Struggle** - describe how the conflict was resolved and link the story to a broader context that connects to policy and possible opportunities for success.
- **Reach Closure** - craft a final sentence to leave with the decision maker while reemphasizing the importance of the story and the "ask."

EVALUATING AND SUSTAINING ENGAGEMENT

Change takes time and requires constant follow-up and long-term relationship building. Therefore engaging a decision maker once is not enough. When developing a decision maker engagement plan, it's important to identify and map multiple opportunities that will allow for consistent and frequent engagement. Don't always rely on emails, attending public forums, or in-person meetings but rather mix it up and take a multi-pronged approach to engagement. After each engagement, continue to apply pressure via social media, press releases and media engagements. This will ensure your issue stays on the radar of the decision maker and makes it clear to them that this is a priority that won't go away until they act.

In addition to targeting the decision maker, you should also build relationships with their staff and other relevant individuals in their networks. Outside of meetings and other forms of communication, be sure to invite decision makers and their staff to your organization's events and activities throughout the year to deepen your relationship and build opportunities for future engagements and addressing other issues together.

As your organization engages decision makers, it's important to regularly debrief with staff after engagements to discuss what went well and what could be improved. In addition to debriefs on each engagement, regularly revisit the short- and long-term goals and assess any progress made. If a goal hasn't been achieved, it may need to be updated to be more actionable, practical or relevant to the context. It may also require a change in approach. After reflection sessions, make any necessary updates to the decision maker plan and keep on engaging.

ANNEX 1 - CHOOSING THE RIGHT TYPE OF ENGAGEMENT

Engagement Type	Advantages	Disadvantages
Telephone Calls • Best for: • Registering an opinion	• Opportunity to notify a decision maker that you support or oppose their position on an issue.	• Usually speak to a staff member rather than the elected official. • Typically limited to business hours or leaving a message after-hours.
Personal One-on-One Meetings • Best for: • Personalizing issues • Educating the decision maker • Asking for sponsorship if legislation or policy change	• Create personal connections. • Opportunity to tell your story directly to a decision maker. • Opportunity to respond to questions immediately.	• Require advance planning. • Limited opportunities if the decision maker's calendar is crowded. • Need to schedule in advance. • Meetings may be very brief.
Site visits, "field trips" and home visits • Best for: • Personalizing issues • Establishing yourself as a resource • Building support for legislation	• Opportunity for an elected official to learn about and experience an issue first-hand. • Opportunity to bring your story to life.	• Requires access to a location. • Must be planned in advance. • May require complex arrangements. • Requires significant time commitment.
Invitation to Participate or Attend Local Events • Best for: • Building awareness • Building connections	• Opportunity for casual, social connection. • Opportunity to meet many constituents at once who share an interest. • Builds a foundation for more formal contacts.	• Events must be scheduled well in advance. • Decision maker's schedule must coincide. • Events must be meaningful and present obvious benefits for the decision maker.

Host Roundtable Discussions Featuring the Decision Maker • Best for: • Recognizing commitment to an issue or constituency	• Helps position the elected official as an expert. • Allows an elected official to show involvement in constituent issues. • Exposes the decision maker to other perspectives.	• Decision maker must understand all sides of the issue. • Decision maker must be willing to take a position. • Minimal control over the direction a discussion takes.
Meeting at Local Government Office • Best for: • Asking a policymaker to sponsor a bill • Presenting your case in detail • Showing support for/opposition to pending legislation	• The official is focused on what's happening in their community. • Usually more openings on the decision maker's calendar. • More relaxed pace.	• Less sense of urgency. • More difficult to tie a visit to a specific bill.
Attending Town Hall Meetings • Best for: • Building awareness. • Identifying potential allies/supporters.	• Chance to make your case to a broad audience and gain supporters. • Hear opposing views. • Evaluate an elected official's support for your issue.	• Limited opportunities for one-on-one contacts. • Open forum may make it difficult to control the discussion. • Limited control over the direction a discussion takes.
Meeting at the Legislature or Government Office • Best for: • Asking a decision maker to sponsor legislation or vote a specific way. • Building awareness.	• Can be scheduled to coincide with a key debate or vote. • Visit can be tied to a specific bill or topic. • Opportunity to respond to questions.	• Time is usually limited to 10-15 minutes, which may make it difficult to make your case fully. • Often difficult to get an appointment.
Giving Testimony • Best for: • Sharing your story. • Personalizing issues. • Asking for a specific action.	• Opportunity to make your case before multiple decision makers. • Positions you as an expert. • Formal, scripted presentation ensures that key messages and specific requests are communicated.	• Strict time limitations – usually no more than 3-5 minutes. • Opportunities are usually limited.