

**GUIDE**

**2% AND MORE WOMEN IN POLITICS**

# AN ADVOCACY EXPERIENCE TO SHARE

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## National Democratic Institute for International Affairs (NDI)

NDI is an international non-profit, non partisan, nongovernmental organization based in Washington, D.C. It works in more than 125 countries to support and strengthen democracy. Calling on a global network of volunteer experts, NDI provides practical assistance to civic and political leaders advancing democratic values, practices and institutions. NDI works with democrats in every region of the world to build political and civic organizations, safeguard elections, and to promote citizen participation, openness and accountability in government.

## National Institute for Women (INMUJERES)

The *Instituto Nacional de las Mujeres* (Mexico's National Institute of Women) is the federal government institution charged with directing domestic policy to achieve equal opportunities between women and men, through the institutionalization and mainstreaming of the gender perspective in the actions of the Mexican state, its broad aim being to promote and encourage conditions that lead to non-discrimination, equal opportunities and treatment for the sexes, and the full exercise of women's rights and their equal participation in national political, cultural, economic, and social life.

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## Foreward

*Success without democracy is improbable. Democracy without women is impossible.*

Madeleine K. Albright  
— NDI Chairman

The full and equal involvement of women in public life is a vital element in building and sustaining strong, vibrant democracies. Women's participation in politics has profound positive and democratic repercussions on communities, on legislatures, on political parties, on the lives of citizens, and on the ability of a democracy to produce real results. Women's participation in politics has brought tangible benefits for democracy, including greater responsiveness to the needs of all citizens and increased cooperation among political parties. Furthermore, it helps to promote equality among women and men and affects both the range of political issues discussed and the types of solutions proposed. Women that are involved in politics are able to represent the interests of women, as well as those of other marginalized voters, and at the same time help improve responsiveness in policymaking.

There is strong evidence to suggest that an increase in the number of women being elected is accompanied by an increase in the design of policies that emphasize the quality of life of citizens, reflecting the priorities of families, women, and ethnic and racial minorities. Therefore, women must be encouraged and supported in order for them to become strong political and community leaders, since it is only through greater participation in national, local, and community leadership positions that they will be able to contribute to the accomplishment of development goals throughout the world and so support the building of solid and sustainable democracies.

NDI firmly believes in this, which is why it is committed to working with women the world over through its wide range of programs and projects. Since 1985, NDI has organized innovative programs around the world to increase the number and effectiveness of woman leaders of political parties, civic organizations, women voters, and women elected officials, in the firm belief that the more women are involved in public life, the more responsive institutions will be to citizen concerns. In particular, and with the aim of building more inclusive political environments, NDI encourages the formation of alliances between women of different ideologies and parties to allow these to support each other, at a national level and regardless of their political affiliation. This strategy has allowed for the creation of a range of coalitions of women that have worked together to ensure the development and adoption of the types of public policies and legislation that are so vital to the lives of women.

This is precisely the experience of the movement *2% y + Mujeres en Política* (2% and More Women in Politics), a cross-sectoral effort in which men and women from a range of political parties, civil society organizations, academia, and government institutions reflected upon and sought to bring about change in the application of Mexico's electoral reforms of 2008, which established that political parties should dedicate at least 2% of their regular resources to providing training in, promoting, and developing women's political leadership.

United by a common interest to support local efforts aimed at strengthening the participation of women in politics, NDI and the *Instituto Nacional de las Mujeres* set about gathering and systematizing information on the experience of the *2% y + Mujeres en Política* movement, so that this might serve as a guide for state and local groups in Mexico and help these to promote similar processes in their own states.

We hope that this guide proves useful and provides suitable ideas for political party and civil society activists, so that they can more effectively promote the desired change and reform through dialogue and consensus building.

NDI Mexico

## Introduction

Over the last few decades, Mexico has signed a significant number of international agreements and conventions that seek to reverse inequality, violence, and discrimination against women. These agreements and conventions highlight the need to develop institutional mechanisms, legal frameworks, and affirmative actions to guarantee greater participation by women in the exercise of public power and in decision-making opportunities, including within the electoral arena.

In this spirit, in 2008 the *Dirección General de Transversalización de la Perspectiva de Género* (Office of Gender Perspective Mainstreaming) of the *Instituto Nacional de las Mujeres* (INMUJERES), through the *Dirección de Participación Social and Política* (Department of Social and Political Participation, or DPSP), implemented the Strategic Platform for Political Equality, one of the components of which, the Women's Political Rights Watchdog (*Observatorio para la Promoción y Defensa de los Derechos Políticos de las Mujeres*), comprised of expert academics, civil society, and public officials, has played a leading role in promoting and monitoring the progress of women's participation in politics.

Based on research carried out by its President, Dr. Natividad Cárdenas, the Women's Political Rights Watchdog, a constituent element of the citizen council *Mujeres al Poder*, detected a number of issues regarding how political parties were using the 2% of budget resources allocated for providing training in, promoting, and developing women's political leadership, a requirement established in the 2008 Federal Code of Electoral Procedures and Institutions (COFIPE). This research produced data that suggested that parties were misusing these resources and pointed to a lack of regulation on the part of Mexico's Federal Electoral Institute (the IFE).

Given this evidence, the citizen council *Mujeres al Poder* decided to work on a proposal for rules that would serve to ensure more effective regulation of how these resources were used by political parties and present this to the IFE. In this context, Dr. Cárdenas shared this idea with NDI, whose team recommended consulting with women from political parties and involving these in the effort, due to their being the ones who benefit, or not, from the use of such resources.

With the technical assistance of NDI, a number of consultation meetings were conducted with women from political parties, as well as with women who were former federal legislators and had taken part in the discussion on and adoption of the 2008 electoral reform.

These initial meetings provided an opportunity to find out the viewpoint and concerns of women members of political parties regarding this issue, and to try to find out how interested they were in participating in a discussion process aimed at defining new oversight mechanisms to ensure compliance with the 2% requirement.

These initial consultations led to a whole series of work meetings being organized, which included a review of the proposals and planning aimed at promoting the adoption of the rules governing the correct use of these resources.

Involved in this process were *Mujeres al Poder*, representatives of political parties, civil society organizations (CSOs), and international organizations, along with INMUJERES' Department of Social and Political Participation team, the team from NDI's Mexico office, women legislators, the director and other staff from the IFE's Political Party Resource Oversight Unit (the Oversight Unit), as well as representatives of various members of IFE's Electoral Council.

The activities aimed at producing agreements and advocacy strategies for the adoption of the aforementioned rules took place over a period of nine months, during which time a number of obstacles arose. There were success stories and setbacks, all of which provided valuable lessons for the participants involved and which in turn gave rise to the 2%+ *Mujeres en Política* movement. This diverse cross-sectoral group succeeded in ensuring that the guidelines for regulating the oversight of the resources granted to political parties to provide training in, promote, and develop women's political leadership were included in the Oversight Rules published in Mexico's *Official Gazette of the Federation* (the DOF) on July 7, 2011.

In response, this guide was created by the *Instituto Nacional de las Mujeres'* (INMUJERES) Department of Social and Political Participation and the National Democratic Institute's (NDI) Mexico office in an effort to summarize this experience and provide effective tools for other groups of women interested in generating social change towards equality.

This document is designed as a practical guide for groups, communities, and civic organizations interested in becoming agents of change and in strengthening their influence on governments and institutions, through a series of exercises designed to help readers generate key materials for the planning and implementation of any political advocacy initiative.

In this document you will find discussion of a number of basic advocacy concepts and factors that ensure greater efficacy. We also present different steps to help increase the probability of success of the process', along with exercises and recommendations for each of these.

Once you have read the guide in full, you will be left with no doubt that social change is indeed possible when there is cooperation, planning, and a willingness to work hard, and when the interests of the group are given priority over the interests of individuals. We hope you enjoy it!

## I. What is Political Advocacy and How is it Used?

Political advocacy processes can be defined as citizen-led activities aimed at influencing public affairs and carried out by mass social movements or small groups of individuals that come together to achieve a given end.

In today's world, political advocacy is becoming ever more important due to the fundamental role played by civil society in government decision-making, whether it be to make sure its agenda is included in public debate or to monitor the actions and resources of those in power.

To put it more clearly, political advocacy is an effort to generate change in an aspect of society with which we are unhappy and one that goes beyond simply presenting a proposal or set of proposals. Political advocacy is more than one single action; it requires planning, a range of strategies implemented with great creativity and integrity, and, above all, perseverance, in order to increase the chances of ensuring a positive response to any given proposal.<sup>1</sup>

According to the Washington Office on Latin America's (WOLA) advocacy manual, there are a range of factors that can help achieve real change in public policy. These elements are fundamental to the implementation of any advocacy strategy. However, the fact that one of these elements is missing does not mean that advocacy cannot take place, but rather that the planning and strategy will need to take obstacles and other potential solutions into account.

**Table 1** - Factors that help make a political advocacy strategy a success.

<b>EXTERNAL FACTORS</b>
<b>Democratic Openness.</b> Political advocacy initiatives require a certain commitment to democratizing processes on the part of governments, which includes a manifest respect for basic human rights. Without that commitment, there is little room for citizens to participate in democracy.
<b>Social, Economic, and Cultural Equality.</b> Poverty and social, economic, and cultural exclusion weaken the ability of the most marginalized sectors of society to organize and to plan and implement initiatives aimed at influencing public policy.

<sup>1</sup> Ashoka, *Incidencia en políticas públicas, Sistematización de las experiencias*, available online at [[http://www.ciudadviva.cl/sitio/index.php?option=com\\_docman&task=cat\\_view&gid=41&Itemid=16&limitstart=10+](http://www.ciudadviva.cl/sitio/index.php?option=com_docman&task=cat_view&gid=41&Itemid=16&limitstart=10+)], consulted September 9, 2012.

**Decentralization.** In order to be able to conduct political advocacy, it is important to have access to those individuals who have the power to make decisions and to other key individual players.

**Democratization of Access to the Media.** Influencing public opinion and generating favorable currents of public opinion are key tasks in ensuring the success of political advocacy.

**Transparency.** If citizens are to influence the actions of the State, access to public information is needed. Without this, groups or coalitions seeking to influence public policy will lack the information they need to analyze the problem they are addressing and to develop viable proposals to solve it.

### **INTERNAL FACTORS**

**Internal Democracy.** Internal democracy within organizations promoting political advocacy initiatives empowers, broadens levels of participation, and allows for the generation of initiatives that are more likely to succeed.

**Willingness to Interact with the Government.** Political advocacy is a game of interests within a political context that is sometimes conflictive or polarized, though one basic prerequisite needed for it to take place is a fundamental willingness on the part of civil society to interact with government in a more constructive and less confrontational manner.

**Willingness to Build New Alliances.** The impact made by political advocacy proves greater when various sectors or groups within civil society come together. This helps reinforce existing alliances and weaken traditional opposition blocs.

**Viewing the Advocacy Process within a Strategy of Long-Term Global Change.** Though political advocacy seeks to achieve concrete results in the short or medium term, it has to be framed within more strategic long-term change objectives.

**Clarity Regarding the Group's or Coalition's Mission.** Political advocacy initiatives do not spring from a random list of issues or problems but are the result of a group's pre-established mission.

**A Basic Knowledge of State Institutions.** It is extremely important for any group seeking to influence public policy to have at least a working knowledge of domestic legislation and of how the various decision spaces within a State function, as well as of public policy relating to the issue in question.

**Knowledge of the Current Political Context.** Knowledge of the political context is often what determines a group's ability to conduct proper analysis and to formulate technically and politically viable proposals.

**Research Capacity and Use of Information.** Information is power! Political advocacy requires truthful information to allow one to analyze problems, formulate proposed solutions, become familiar with decision spaces, identify key players, establish strategies, and formulate arguments in support of proposals.

**Clear Agreements between the Individuals or Organizations Promoting the Advocacy Initiative.** To clarify interests, expectations, and responsibilities, it is important for any group that undertakes political advocacy to establish clear agreements amongst those involved.

**Willingness to Dedicate Human and Financial Resources to the Advocacy Initiative.** Political advocacy requires human, material, and financial resources.

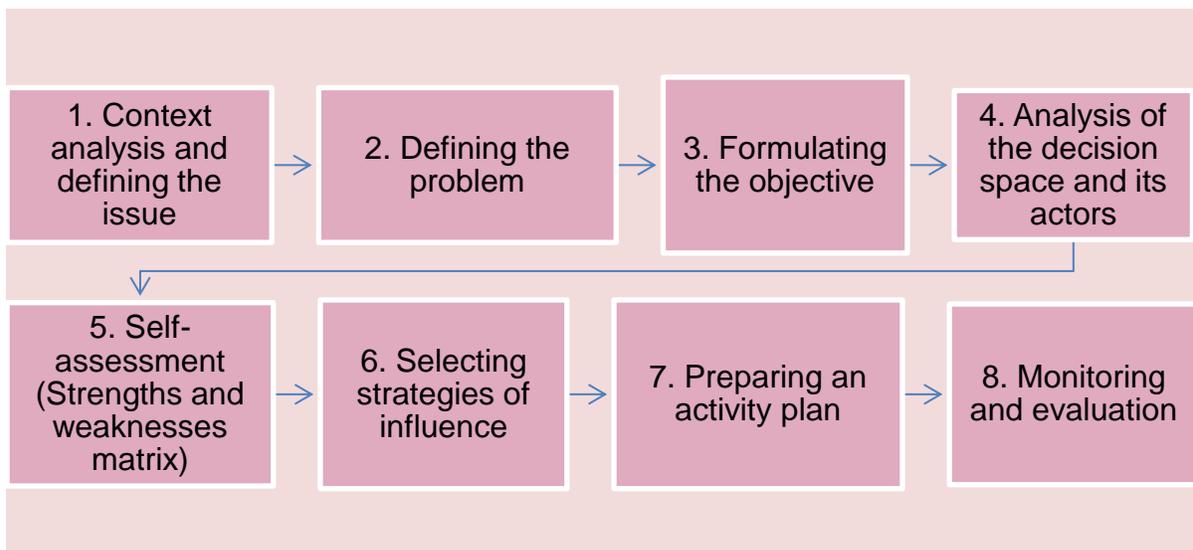
*Source:* Andrés McKinley and Patrick Baltazar, *Manual para la facilitación de procesos de incidencia política*, Washington Office on Latin America (WOLA) and The Centre for Development and Population Activities (CEDPA), Washington, D.C. (2005), pp. 23-26.

## II. Basic Political Advocacy Methodology: “The 8 Steps”<sup>2</sup>

Many women’s groups have undertaken political advocacy efforts. However, one of the weaknesses of these initiatives has been the tendency to leap straight from identifying the problem to taking action to solve it in an entirely improvised way— with no planning process involved—, by engaging in isolated actions and failing to specify exactly what the desired goal is, who exactly has the power to make decisions, what interests are at play, and without establishing exactly what the most appropriate strategy would be. In summary, a large proportion of political advocacy initiatives are undertaken without any real methodology or systematic approach, which limits the possibilities for sharing and learning from past experiences.

If you really hope to improve your chances of success and bring about genuine change, you need to stick to a precise rather than a piecemeal methodology and so be able to make the leap from the impossible to the possible. To do this, we recommend a simple 8-step methodology that will enable one to acquire a capacity for analysis, making proposals, negotiation, research, and information management. The example we will use in designing each of the exercises included is that of the process for the adoption of the Oversight Rules to ensure compliance with the 2% of resources requirement.

**Chart 1** – The 8 Steps to Designing an Advocacy Plan



<sup>2</sup> There are a range of ways to carry out political advocacy work. The main references for the case summarized here were the Washington Office on Latin America’s (WOLA) *Manual para la facilitación de procesos de incidencia política* and *Manual 2 El cabildeo, una estrategia para incidir en las políticas públicas* published in 2001 by Paraguay’s *Centro de Información y Recursos para el Desarrollo* [Development Information and Resources Center, or CIRD] and the United States Agency for International Development (USAID), though adapting some of the steps to the experience of the group.

The most common approach in terms of methodology is to start by defining the problem, though in this case the group began its advocacy effort by conducting the context analysis as there were already enough elements to predefine the problem. You may want to start with step 1 or 2, depending on how much information is available to be able to define the problem. If information is scarce, start by defining the problem and then its context.

## Step 1 Context Analysis and Defining the Issue

The first step in political advocacy is to define the specific issue and analyze the context you are to work on. What is it that you want to change? Why do you want to change it? Can it actually be changed? What is needed in order to bring about that change? Do you have any knowledge of the issue? What do individual experts have to say on the matter? Are there any national or international best practices that could serve as a model?

### Sample issue **The budget for leadership training, instruction, and development in electoral legislation**

Once you have defined the advocacy issue you wish to address, we suggest performing a context analysis. This is simply a question of sifting through the large amounts of quantitative and qualitative information you have on the issue. During this phase, it is important that the information generated provides an idea of the existing level of gender discrimination and the impact this has.

You can use any method to systematize the information, although it is a good idea to prepare a matrix to obtain overall larger picture of the issue and to keep this matrix readily available throughout the exercise for consultation purposes.

**Table 2** Context Analysis Matrix

Information	Progress	Obstacles
International agreements	Are there any international agreements, conventions or treaties relating to the issue? e.g., CEDAW, Belem do Para, Quito.	
National legislation	Is there any national legislation regarding the area of interest? e.g., The COFIPE provides	e.g., Very few people know of the existence of this resource and party members have little to do with planning and

	for 2% of the regular budget of political parties for women's political leadership training, promotion and development.	implementing spending.
Local legislation	Is there any local legislation regarding the area of interest? e.g., There are 16 states currently considering earmarking budget resources for training women members.	e.g., Bringing 32 local sets of rules into line is an enormous challenge and there is no local regulation as regards overseeing compliance with the 2% requirement.
Success stories	Have there been any successful experiences in this area? e.g., In Argentina, oversight rules for political parties were adopted.	
Current situation regarding the problem	How much do you currently know about the issue? (Quantitative and qualitative data.) e.g., At the federal level, 63 million pesos have been allocated for training.	e.g., In 2008 and 2009, political parties misused the 2%.

Source: Natividad Cárdenas Morales, *El financiamiento público de los partidos políticos nacionales para el desarrollo del liderazgo político de las mujeres* [National Political Parties' Public Funding for the Development of Women's Political Leadership], an information booklet from the Electoral Justice Series published by the Electoral Tribunal of the Judicial Power of the Federation, available at: [\[http://www.te.gob.mx/documentacion/publicaciones/Cuadernos\\_div\\_je/cuaderno\\_1\\_je.pdf\]](http://www.te.gob.mx/documentacion/publicaciones/Cuadernos_div_je/cuaderno_1_je.pdf), consulted September 7, 2012

### Activity 1 Defining the Advocacy Issue

**Instructions:** Write down your chosen advocacy issue. Take into account the experience and motivations of the group before choosing.

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### Activity 2 Performing a Context Analysis

**Instructions:** Work on the following matrix using the information available on the issue you wish to address; include more boxes if the information you have requires them.

Information	Progress	Obstacles
International agreements		
National legislation		
Local legislation		
Success stories		
Current situation regarding the problem		

Once you have defined your issue and conducted the corresponding context analysis, the next step we recommend is to set out the vision you have for your advocacy effort, i.e., how you ideally envision the state of society after the change that is needed. This vision will provide meaning and coherence to all you do.

Even when you have a clear notion of what you want to do and how to do it, it is easy to lose your way when you are confronted with the day-to-day problems that arise when undertaking any advocacy action; this vision statement will help to see beyond this, i.e., to keep the underlying aim of efforts ever present.

There is a simple exercise you can do to help set out this vision, which consists of answering the following questions:

- What do we want to change?
- What kind of environment would we like to create?
- What should the aim of the advocacy action be?

**Sample vision** “In 2012, national political parties will be planning and managing an annual program for promoting, providing training in, and developing women’s leadership, whereby women will have more tools available to them to allow them access to elected office, with at least 2% of the budget earmarked for funding.”

**Activity 3 Defining the Advocacy Vision**

**Instructions:** Try to define the change you would like to achieve through this advocacy process or how you envision the situation after the process is complete.

Group vision:

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**Step 2 Defining the Problem**

Once you have a clear vision to guide you in your advocacy efforts, you then need to identify the problems associated with the chosen issue, which will most likely be interconnected though require different approaches.

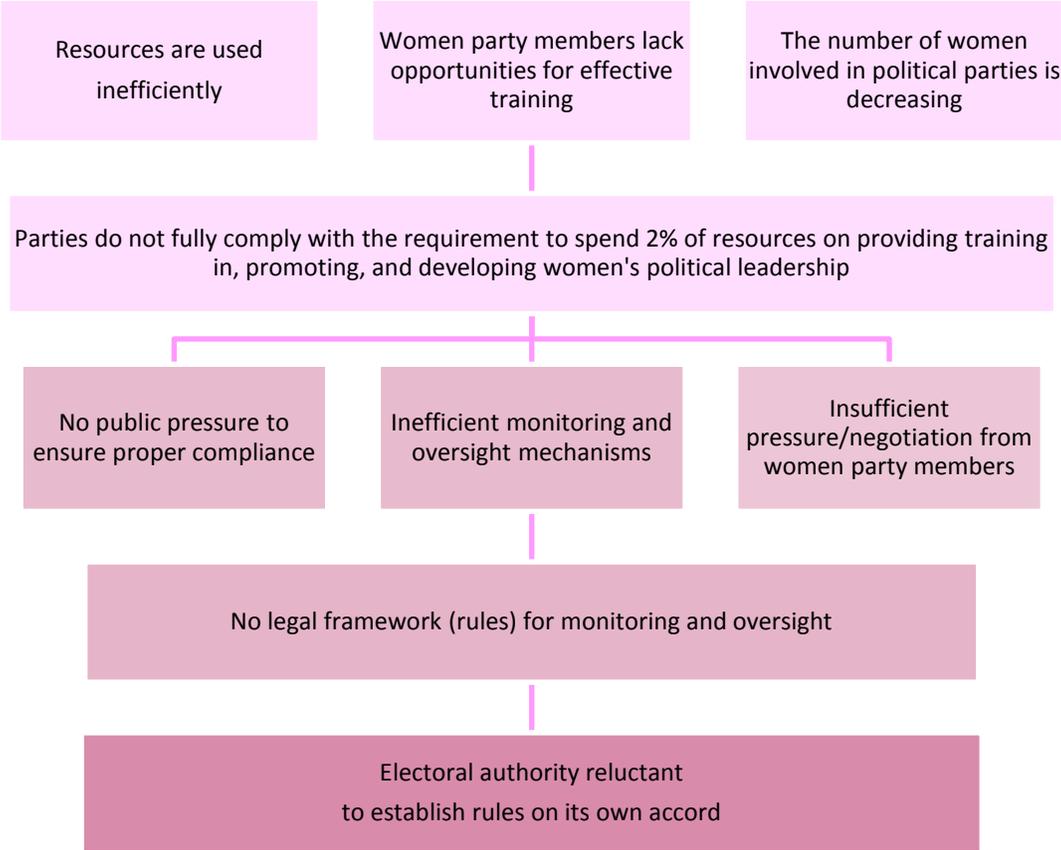
However, it is not always possible to address all problems, as there will not be enough time or resources to deal with all of them at once. This is why you need to identify a specific problem, one on which you can have a real effect in the short or medium term.

To do this, the problem to be solved has to be clearly defined and well-analyzed. We advise you to seek out more details of the problem, which may require contacting those that have information, which could be experts or the groups affected.

**Sample core problem** Parties do not fully comply with the requirement to spend 2% of resources on providing training in, promoting, and developing women’s political leadership.

Once you have targeted the problem, you will need to analyze it thoroughly, identifying causes and effects. There is a very effective tool available to help with this, known as a “problem tree”. This technique enables you to identify and differentiate between the situations or conditions that give rise to the problem (i.e., the causes) and those that prove it exists (i.e., the effects). Remember to differentiate between how these negative situations affect women and how they affect men.

**Chart 2** 2% Problem Tree



The first thing to do is define what the public problem (core problem) is that has been identified and what needs to be done to address it. To do this, it is useful to list all the problems connected with the issue identified (for example, women’s

participation in politics) and then prioritize these. Next, hold a brainstorming session to identify first the causes, then the effects. Bear in mind the connection and hierarchical relationship between the various causes and effects, i.e., the causes of the causes, and the effects of the effects. (See Diagram 2)

When you are completing your problem tree, remember:

- The causes and effects must be specific
- Causes are those elements that give rise to the problem and effects the consequences of that problem
- You need to identify all of your options and leave nothing out
- Avoid circular chains of causes, e.g., do not write “the problem is poverty; the cause is that there are many poor people, and the effect is that their numbers are increasing.”
- In the definition of the problem itself, avoid the words “no” and “lack of”; try to identify what the negative situation is.
- Once you have completed your tree, check it to make sure that you have not missed any other causes or effects or if any of these need to be placed elsewhere within the tree, i.e., causes that are actually effects and vice versa.

Once you have reviewed the tree, identify which of the causes identified is the highest priority; to do this, decide which cause can be addressed in the short or medium term, which needs to be addressed most urgently or which has an impact on various effects.

**Sample high-priority cause** Inexistent legal framework (regulation) for monitoring and oversight.

**Activity 4 Identifying the Core Problem**

**Instructions:** On the basis of your chosen issue, identify the public problem you will focus on. List some of the problems associated with the issue:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Next, choose the one problem that is to be the focus of the advocacy effort and which represents the interests of those participating. You also need to consider how politically and technically feasible it is to solve it.

Core problem:

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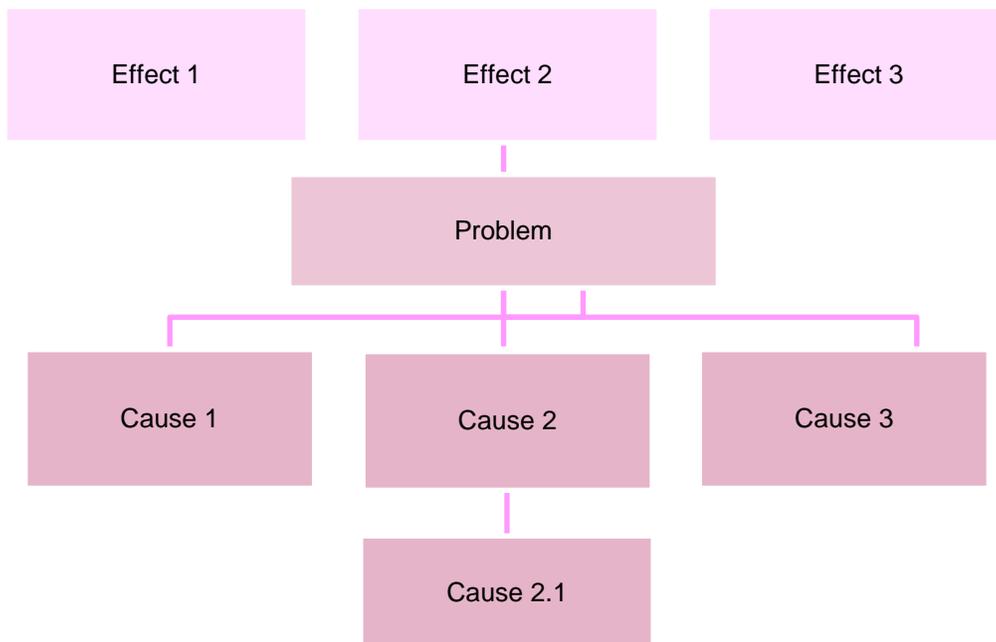
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### Activity 5 Preparing the Problem Tree

**Instructions:** Now apply this tool to the core problem identified. Use the following diagram as a guide to get you started. You can add as many boxes as you need.

**Chart 3** Identification of the core problem.



Now that you have identified the core problem and its causes, you need to prioritize one of these as it will be difficult in terms of time and resources to address each

one. To do this, you need to assess the importance, relevance, and impact of each cause, bearing in mind the following criteria:

- Its relation to public policy
- Its feasibility in the short and medium term
- Its degree of impact on the effects of the problem
- Possible solutions

**Activity 6      Choosing the Highest-Priority Cause**

**Instructions:** Write down the highest-priority cause that will be the focus of your advocacy process.

Highest-priority cause:

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Once the main cause has been selected, it is then time to identify possible solutions.

**Activity 7      Identifying Possible Solutions**

**Instructions:** Now that you have identified the highest-priority cause, the first thing you must do is to think of three possible solutions for how to overcome it or address it.

Potential solutions:

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

You might like to brainstorm all the solutions you believe could help tackle the cause of the problem, but you will also need to assess which of these options is the most viable. A mistake often made by groups involved in advocacy processes is that they choose the solution they understand the best or the one that is “most appealing” to them, without actually taking the time to evaluate whether it is the most viable. This kind of omission could result in your group coming up with proposals that are impossible to put into effect.

One way to do the necessary analysis is by using a “**solution analysis matrix.**” This tool suggests a number of criteria that can help you identify what the best option is. It is important to consider various criteria in your assessment in order to be able to judge which solution is the most likely to make progress and convince the decision-makers.

**Table 3** Sample check sheet for prioritizing possible solutions (Solutions Analysis Matrix)

CRITERIA/POTENTIAL SOLUTIONS	PROMOTE CHANGE IN THE COFIPE CODE	PROMOTE THE ADOPTION OF OVERSIGHT RULES	CAMPAIGN FOR PARTIES TO COMPLY WITH THE 2% REQUIREMENT
Would it solve the problem?	X	X	
Is there any data to prove that it would help solve the problem?	X	X	
Is its success feasible?		X	
Does it generate favorable public opinion?		X	X

Can it be solved in the short or medium term?		X	X
Are there specific individuals responsible for making the decisions regarding this issue?	X	X	X
Is it politically feasible?		X	X
Is it technically feasible?	X	X	
Is it economically viable?	X	X	
Would the proposal help motivate and unite the group?		X	X
Would it contribute to the formation or strengthening of alliances?	X	X	
Would it help mobilize those affected?	X	X	X
Would it strengthen us as a group or could it help consolidate a group?		X	X
<b>TOTAL</b>	<b>7</b>	<b>13</b>	<b>7</b>

*Source:* Andrés McKinley and Baltazar Patrick, *Manual para la facilitación de procesos de incidencia política*, Washington Office on Latin America (WOLA) and The Centre for Development and Population Activities (CEDPA), Washington, D.C. (2005), p. 97.

As the results of our example show, option 2 is the one that satisfies most of the criteria and therefore is the most feasible proposed solution. In this exercise, it is important to remain objective and evaluate every single aspect of the potential solutions. You also need to establish whether you have enough information or data to be able to assess whether or not a potential solution satisfies the given requirements.

**Sample solution** Adoption of oversight rules to ensure compliance with the 2% of resources requirement.

## Activity 8    Prioritization of Possible Solutions (Solutions Analysis Matrix)

**Instructions:** Rate each potential solution based on the criteria below. Place an “X” next to all solutions that satisfy the criteria presented. When you have finished, add up the total score for each.

CRITERIA	Solution 1:	Solution 2:	Solution 3:
Would it solve the problem?			
Is there any data to prove that it would help solve the problem?			
Is its success feasible?			
Does it generate favorable public opinion?			
Can it be solved in the short or medium term?			
Are there any specific individuals responsible for making the decisions regarding the proposal?			
Is it politically feasible?			
Is it technically feasible?			
Is it economically viable?			
Would the proposal help motivate and unite the group?			
Would it contribute to the formation or strengthening of alliances?			
Would it help mobilize those affected by the problem?			
Would it strengthen us as a group?			
<b>TOTALS</b>			

**Chosen solution:**

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**Step 3 Formulating the (SMART) Objective**

Once you have established your proposed solution, you can start to draft your advocacy objective, i.e., the general aim of your advocacy effort. It is a good idea to look back at certain aspects of your vision to help formulate your objective. When drawing up any goal, try to ensure that it meets the following characteristics:

<b>Characteristics</b>	<b>Initial</b>	<b>Goal</b>
SPECIFIC	<b>S</b>	Clarifies where, when, and how the situation is going to change and what is going to bring about that change.
MEASURABLE	<b>M</b>	Establishes quantifiable targets and benefits.
ATTAINABLE	<b>A</b>	Sets achievable objectives (given the resources and capacities available to the group).
RELEVANT	<b>R</b>	Envisions a level of change (as indicated in the objective) that is possible to attain.
TIME-BOUND	<b>T</b>	Sets a specific deadline for the achievement of each.

**Table 4** Sample SMART Objective

SPECIFIC	In 2012, oversight rules are implemented to ensure compliance with the 2% requirement and at least 5 of the 7 national political parties publish their annual work plan.
MEASURABLE	The number of political parties that publish their annual work plan in compliance with the rules.
ATTAINABLE	5 political parties present their work plan in accordance with the rules.
RELEVANT	All political parties subject to said rules shall be obliged to provide training for women party militants.
TIME-BOUND	Year 2012

Once you have identified your overall objective, you need to present this in terms of the policies, practices, and attitudes you wish to change through your advocacy effort.

The following guidelines can help make this exercise more precise:

- **Make sure you have a group vision.** This will help greatly with the development of coherent and relevant objectives. If you do not know where you are headed in the long term, your goals are likely to be less focused.
- **Break complex goals into smaller goals.** Dividing your objectives into smaller ones will help to keep them in perspective.
- **Avoid using negative words in your goals.** Negative words have a detrimental effect on motivation and how things are perceived.
- **Keep the tone positive.** When writing SMART objectives, keep the tone positive and optimistic. This reinforces the sense that they are achievable.
- **Use verbs.** Using words that make you think in terms of images and actions is a good way to bring energy to your goals.
- **Use the present tense for greater impact.** Phrase the goal as if you have already achieved it. Use the present tense, as this provides a sense of something having been accomplished.

Part of this step is the drafting of the proposal, a document that describes and justifies the solution identified, and clearly and precisely outlines how it can be implemented.

As with other potential solutions to the problem, it is important to assess the proposal to ensure that it is precisely defined, but above all, to prove that it is possible to raise grassroots support for it.

### Activity 9 Formulating the Objective and the Proposal

**Instructions:** Draft the advocacy objective, checking to make sure it satisfies the aforementioned SMART characteristics. Next, complete the criteria matrix to assess the proposal made in your stated goal.

Objective:

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Now complete the following Proposal Analysis Matrix<sup>3</sup> based on the stated criteria, answering the questions in columns 2 to 4. You do not need to complete the entire table; in certain cases, it may be impossible to answer any of the three questions.

Criteria for a precise proposal	How does the proposal satisfy the criterion?	In what ways does it fail to satisfy the criterion?	How do we propose to improve the proposal?
Generates favorable public opinion			
Helps solve the problem			
Achievable in the short to medium term			

<sup>3</sup> Andrés McKinley and Baltazar Patrick, *Manual para la facilitación de procesos de incidencia política*, Washington Office on Latin America (WOLA) and The Centre for Development and Population Activities (CEDPA), Washington, D.C. (2005), pp. 116-117.

Those responsible for making the decision regarding the proposal are easily identifiable			
Politically feasible			
Technically feasible			
Economically viable			
Sets a realistic deadline based on the procedure defined in the decision space			
Motivational and brings the organization or coalition together			
Helps form or strengthen alliances and coalitions			
Fosters the mobilization of those affected by the problem			
Of interest to all parties involved			
Other criteria...			

Bear in mind that the proposal drafting process can be time-consuming as it may require input from experts, technicians, and the people directly involved in the problem, depending on the proposal. In the case of the *2% y + Mujeres en Política*, movement, their particular proposal sprang from a consensus building process across the various sectors involved, as outlined below.

#### Step 4 Analysis of the Decision Space and its Players

Once the advocacy proposal has been developed, the next phase consists of analyzing the decision space, which is where the proposed solution will be discussed and defined. You will also need to identify those individuals responsible

for making the decisions regarding the issue and analyze their interests, positions, level of power or influence, and the relationships among the various actors.

The following **Decision Space Analysis Matrix**<sup>4</sup> can be used to analyze the decision space. This matrix allows you to clearly define exactly where decisions are made, and the parties and procedures (both formal and informal) involved in the decision-making.

Key question	What you need to know
What is the decision space? Body/entity within the public sphere	The structure of the various powers and settings.
Who exactly has the power to decide on the proposal? Name and title of the person who makes the decision.	The full names and titles of the decision-makers.
What is the formal procedure for decision-making? What legal/regulatory/judicial provisions exist?	This will depend on the decision space; hence the procedure will be different in each case.
What is the informal procedure for decision-making? What happens in practice? What factors play a role?	This will depend on the decision space; hence the procedure will be different in each case.
What is the time period for decision-making? What legal/regulatory/judicial provisions exist?	The period needed for drafting proposals or for presenting the proposal to the appropriate agency/official.

Public institutions are complex entities, which is why you need to know exactly where formal and, indeed, legal responsibility for the decision to accept your proposed solution or not actually lies and in whose hands. The matrix will help you define this information clearly:

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<sup>4</sup> Ibid, pp. 98-99.

**Table 5** Sample Decision-Space Analysis

What is the decision space?	The General Council of the IFE
Who exactly has the power to decide on the proposal?	The members of IFE's Electoral Council
What is the formal procedure for decision-making?	<p>The IFE's Oversight Unit draws up a proposal for Rules to be presented to the members of its Electoral Council.</p> <p>The proposed Rules are distributed among the members of the Electoral Council.</p> <p>The members of the Electoral Council vote on the proposal.</p> <p>If the Rules are adopted, they are published in Mexico's <i>Official Gazette of the Federation</i> (the DOF).</p> <p>These come into effect on the date set forth in the Rules and published in the DOF.</p>
What is the informal procedure for decision-making?	The proposed Rules must be discussed with the secretaries of finance/administration and the presidents of the political parties, as well as with those who represent the parties before the IFE and with the advisors to the members of the Electoral Council.
What is the time period for decision-making?	As it coincides with the commencement of the electoral period established on October 7, 2011, all electoral legislation or regulations must be approved 90 days prior to the start of the electoral period.

## Activity 10 Analyzing the Decision Space

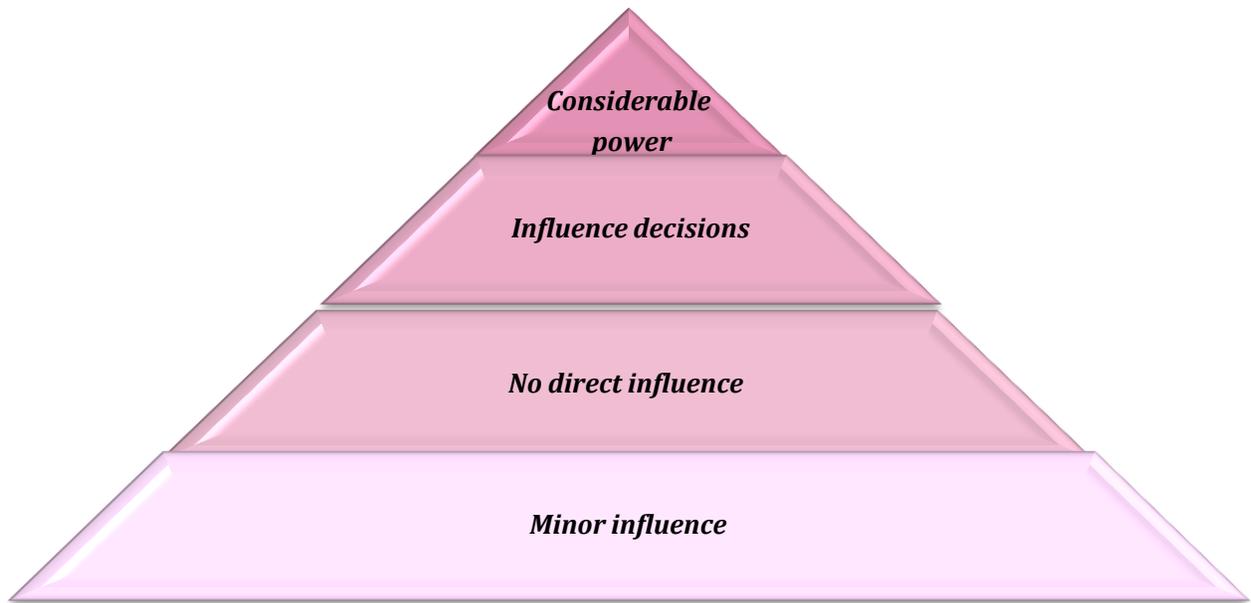
**Instructions:** Complete the following decision space analysis matrix. To do this, first research the formal and informal procedures involved, either by consulting the websites of the bodies/entities you have identified or through interviews with key players close to the decision-makers.

<p>What is the decision space? (Body or entity within the public sphere)</p>	
<p>Who exactly has the power to decide on the proposal? (Name and title of the individual(s) that make the decision)</p>	
<p>What is the formal procedure for decision-making? What legal/regulatory/judicial provisions exist?</p>	
<p>What is the informal procedure for decision-making? What happens in practice? What factors play a role?</p>	
<p>What is the time period for decision-making? What legal/regulatory/judicial provisions exist?</p>	

Once you have analyzed the decision space and identified the key players, it is time to construct the power pyramid.

Traditional levels of power can be represented as follows:

**Chart 4** Traditional Levels of Power



This technique will enable you to clearly identify those players with a greater or lesser ability to influence the accomplishment of your objective. This distinction will allow you to define your strategy to convince those players with more power and/or to motivate those with less influence to provide support or to open doors.

**Table 6** Sample Classification of Players

<b>Key individual</b>	<b>Classification</b>	<b>Interests regarding the proposal (personal, political, party, ideological, economic, etc.)</b>	<b>Arguments or strategies to be used with the key individual</b>
Alfredo Cristalinas Kaulitz, Director General of IFE's Oversight Unit	Influence decisions	Adoption of a single set of Oversight Rules	Invite him to participate in talks on the oversight rules to ensure compliance with the 2% requirement
Leonardo Valdés Zurita, Chairman of IFE's Electoral Council	Considerable power	Support for political party accountability	Meet to present the proposed oversight rules to ensure compliance with the 2% requirement
Secretaries of Administration/Finance of the main political parties	Influence decisions	Resistance to new oversight rules that imply more work for them and their teams	Meetings to present the proposed oversight rules with the support of CSOs and women party leaders

## Activity 11 Level of Influence of the Players

**Instructions:** Take time to analyze which individuals can be of influence in achieving your objective. Ask yourselves what their motivations and interests are and what strategy you should adopt to have an effect on these.

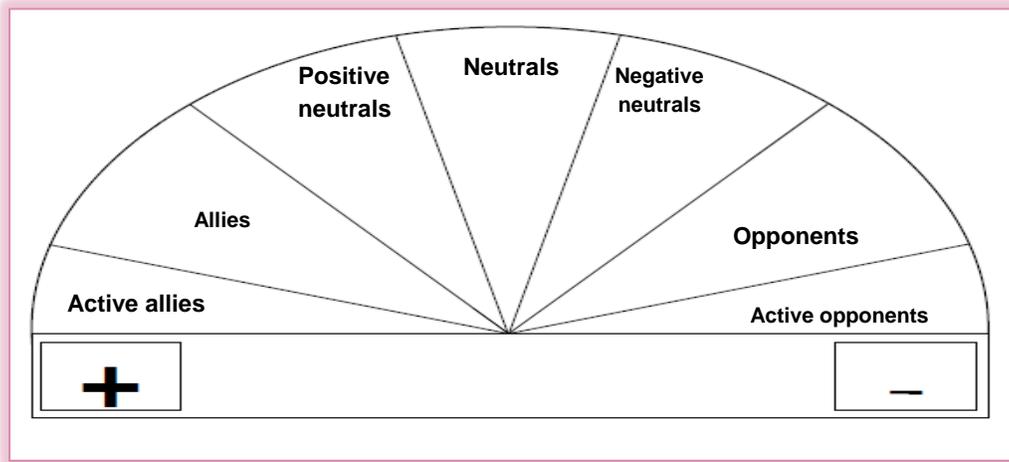
Key individual	Classification	Interests regarding the proposal (personal, political, party, ideological, economic, etc.)	Arguments or strategies to be used with the key individual

Once you have identified the key individuals connected with the accomplishment of your objective, you need to remember that in situations of social change there is always conflict between those who want change and those who do not. During the development of any advocacy effort you will come across groups more in favor and groups less in favor of the change you propose. Therefore, you need to clearly identify the level of influence each of the actors involved has, as well as their personal interests regarding the proposal and the connection between them.

This exercise is known as “**actor mapping.**” When attempting to define the positions of the actors involved, it is customary to classify these as either allies (those for) or opponents (those against). However, there are different levels on which the actors can support or hinder the progress of your proposal. The diagram below illustrates these levels.

- **Allies** are those actors, individuals or organizations with whom alliances can be formed once the latter are in agreement with the proposal. After you have identified those with whom you have things in common, you should arrange to meet so that you can work together to help promote the campaign or encourage action in support of it. It is a good idea to analyze the interests that motivate these individuals in detail and/or research them thoroughly. Strategic actions in connection with this group should focus on maintaining and consolidating mutual cooperation. As reflected in the next diagram, there is a distinction between allies who take action and those who are passive and don't openly advocate on this issue.
- **Opponents** are those actors, individuals or organizations who are against the initiative. You should also be aware of your opponents' interests and familiarize yourselves with their arguments so that you can develop strategies to counteract these or mitigate the negative effect they could have on your work. Furthermore, strategic action should be taken to demonstrate the drawbacks of their proposal. As reflected in the next diagram, there is a distinction between those opponents who will openly oppose your proposal and others who will take a more passive position.
- **Neutrals** are those actors, individuals or organizations who are on the fence as regards the proposal, whether it be because they are unsure as to how the proposal fits in with their own politics or because they are simply unaware of it. These can be classified as either positive or negative, i.e., those who, with the right strategy, can become allies or who may be against certain aspects of the proposal and so eventually become opponents.

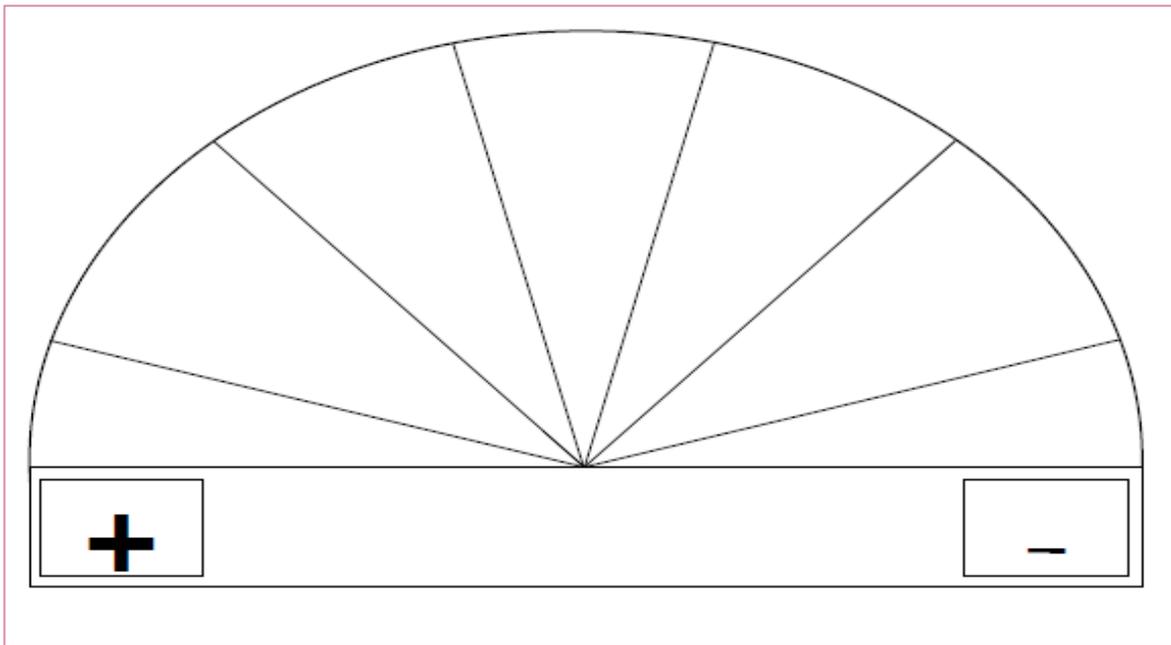
The following diagram shows the levels outlined above.



Be aware that in most advocacy efforts it is not necessary to get your opponents on your side, however powerful they may be, or for them to share your point of view. All you need to do is to ensure that the cards are stacked a little more in your favor. There is often a mistaken notion that you need to get universal support across the full spectrum of the actors identified (which can lead to a feeling of desperation) or that you should focus your attention exclusively on gaining the support of the men and women in power (another cause of desperation).

## Activity 12 Actor Mapping

**Instructions:** Place the players you listed in the previous chart (Activity 7) according to their relationship to the issue. Identify whether they constitute active allies (i.e., are willing to take action), allies, neutrals (either positive or negative) or opponents (either willing to take action or not). If you prefer, you can write their names in different colors according to the degree of influence you identified in the previous exercise.



### Step 5 Self-Assessment (Strengths, Weaknesses, Opportunities, and Threats Matrix)

Let us now analyze both the group's strengths and its weaknesses. Self-assessment is a tool that allows the internal and external situation of the individuals and/or organizations that make up the group to be gauged in order to engage them in the advocacy process. By using this tool, also known as SWOT, the group can analyze the factors that are under its control (strengths and weaknesses), as well as those over which it has no control, but which have an influence on the process (opportunities and threats).

This analysis allows you to make better use of the group's strengths, formulate solutions to counteract any weaknesses found, exploit any opportunities that arise, and identify ways of defending the group against any threats. It is important to be able to make a clear distinction between these four aspects. To help you do this, consider the following descriptions and key questions:

**Table 7** Description of elements of SWOT analysis

<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<p><b>Strengths</b> are those positive internal elements that make up the group’s set of abilities, skills, and advantages. Some of the questions you can ask in order to identify strengths are:</p> <p>What are the advantages of the organization or group?</p> <p>What resources are available?</p> <p>What do people see as a strength of the group?</p> <p>How organized is the group?</p> <p>What characteristics of the group are positively valued?</p> <p>How diverse is the group?</p> <p>What are the profiles of its members?</p> <p>How well-positioned is the group in terms of media access, drawing power, power of mobilization, and so on?</p>	<p><b>Weaknesses</b> are the negative elements or conditions of the group, and those which constitute barriers that could potentially hinder the advocacy project’s progress. Weaknesses are internal issues that, once identified and by developing a suitable strategy, can be eliminated or have their impact diminished.</p> <p>Are the group’s resources limited in any way?</p> <p>Are there any problems with regards to the structure or coordination of the group?</p> <p>How committed are the group’s members?</p>
<b>OPPORTUNITIES</b>	<b>THREATS</b>
<p><b>Opportunities</b> are those external situations that are generated within the specific setting and which can be exploited by the group to advance its advocacy objective. Some of the questions you can ask in order to identify opportunities are:</p> <p>What changes in legal and/or political regulations are appearing?</p> <p>What changes in social patterns and lifestyles are taking place that may benefit the project?</p> <p>How does public opinion view the issue?</p> <p>What happens in other countries/states that could benefit my advocacy process?</p>	<p><b>Threats</b> are negative situations which, though extraneous to the project, can jeopardize it. Some of the questions you can ask identify threats are:</p> <p>What are our opponents doing?</p> <p>Is there any public opinion against my issue?</p> <p>Is there any disinformation or are there any strong interests that could be influential?</p> <p>Is there any other issue on the public agenda that could diminish the impact of my proposal?</p>

**Table 8** Sample SWOT analysis

	<b>Strengths</b>	<b>Weaknesses</b>
<b>Internal Analysis</b>	<p>We are a diverse group of women and men made up of members from all parties and organizations.</p> <p>We are public figures whose impact in terms of the media is considerable.</p> <p>The group's members have specific knowledge of the issue associated with the proposal.</p>	<p>The group lacks structure; consequently attendance at its meetings tends to be irregular.</p> <p>All of our members have very busy schedules, which makes it difficult for us to meet our commitments.</p>
	<b>Opportunities</b>	<b>Threats</b>
<b>External Analysis</b>	<p>Citizens are manifestly pro-equality.</p> <p>There is a regulatory framework that supports the proposal.</p> <p>There are elections next year and the parties do not want any conflicts or challenges.</p> <p>There is support for the advocacy effort from international organizations.</p>	<p>There are elections in the coming year and these could generate internal conflict.</p> <p>The General Council has many issues requiring solutions and may postpone adoption.</p>

This combination of strengths and opportunities gives rise to a whole range of possibilities that help define the most promising lines of action for the organization to take. The limitations, as determined by a combination of weaknesses and threats, send a serious warning.

The results of the matrix should serve as a guide to enable you to come up with possible strategies to enable you to best exploit the points in your favor and build on or eliminate the points against you. The first thing we recommend you do is to conduct an analysis of the relationships that exist among the various variables, for example, identify whether there is any particular strength that could be used to exploit an opportunity or to counteract a threat. The search for these relationships could potentially enable you to ascertain how to put all the aspects you already have in your favor to better use.

**Example of activities identified through SWOT analysis.**

- 1) Obtain advice on planning communications strategies involving both traditional and digital media.
- 2) Engage in a broad consultation with CSOs on the need for oversight rules to ensure compliance with the 2% requirement.

**Activity 13 Building the SWOT Analysis**

**Instructions:** Complete the following chart by listing all potential strengths, weaknesses, opportunities and threats. If you are unclear as to which specific box to use in each case, put your answer in all those you consider applicable. Think beyond the immediate environment.

	<b>Strengths</b>	<b>Weaknesses</b>
Internal Analysis		
	<b>Opportunities</b>	<b>Threats</b>
External Analysis		

Activities identified through SWOT analysis (more than two can be listed):

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

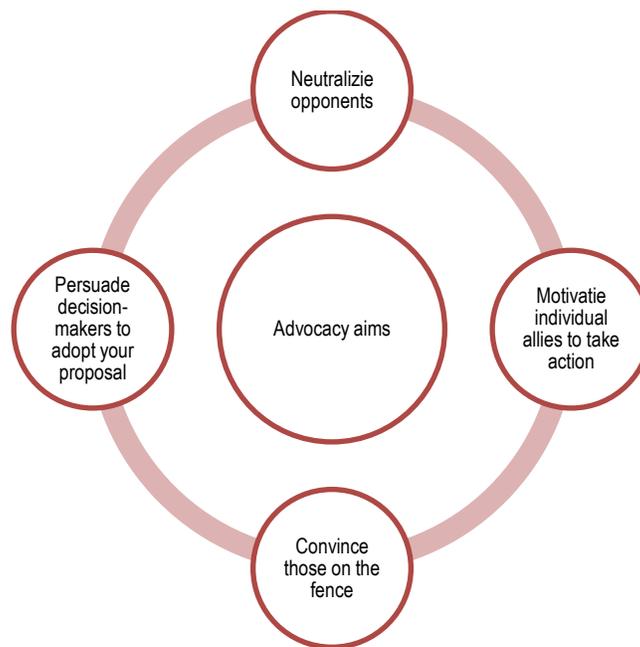
## Step 6 Selecting Strategies of Influence

Once you have completed this task you will then have more elements with which to identify the strategies you can use to influence decision-makers, considering not only the proposal that the group is promoting but also the group's potential and limitations.

The success of any political advocacy process lies in the group's capacity to develop a series of strategies aimed at achieving the following:

- Neutralize opponents
- Motivate individual allies to take action
- Convince those on the fence
- Persuade decision-makers to adopt your proposal

**Chart 6** Advocacy Strategies



There are various ways to influence strategic individuals or actors. The following is a list of those we regard as the most useful:

## **1. Lobbying**

Lobbying consists of face-to-face meetings with decision-makers and other key players. It implies diverse encounters at which groups have the opportunity to present their proposed solutions and attempt to convince decision-makers as to their viability.

Lobbying involves interpersonal persuasion targeted at those individuals identified as key elements in decision-making. To do this, the advocacy group needs to have:

- Knowledge of the issue
- Knowledge of the precise profile of the actors with whom it is meeting
- A file containing everything that might be needed (the group's proposal, a profile of the group's members, statistical data, information on international good practices, and so on)
- The proposal needs to be concrete, technically sustainable, and have grassroots support
- A list of well-prepared arguments to support the proposal. We suggest you prepare a visual presentation to allow clearer and better understanding.
- A list of arguments aimed at neutralizing any opinions that may be expressed against the proposal
- Familiarity with political interests and with decision-making mechanisms and how these work
- A composed and assured attitude. If the objective is not achieved, ensure the possibility of future dialogue is left open.

## **2. Organization**

This involves broadening and strengthening the internal structure of the group by bringing in and/or establishing alliances with other organizations or institutions that share the same interest in promoting the proposal. Very few groups are capable of carrying out advocacy processes effectively on their own. It can be useful to get together and coordinate with other groups and organizations to better address weaknesses, meet needs, and undertake broader dissemination efforts.

Form a network of alliances with:

- People who are knowledgeable on the issue (academics, technicians, independent researchers, etc.)

- People who live with the problems in question (members of the community or sector affected by the problem, civic organizations that work in the sector affected, etc.)
- People who serve as alternative sources
- Writers and editors connected with the issue
- Assorted bodies/entities
- Social networks (Facebook, Twitter, YouTube, website)

For the organization between groups and/or institutions to work, you need to determine actions such as the organization of work tasks, the creation of committees or work groups, the identification of communications mechanisms, decision-making mechanisms, and any activity that increases the technical capacity and social force of the group.

### **3. Education and Awareness-Raising**

This strategy implies organizing public events such as forums, workshops, seminars, theater performances or ad campaigns around the issue and the advocacy proposal. The goal of these initiatives is to educate and sensitize citizens and key actors on the advocacy issue and generate a base of support. The strategy also includes the creation of information and promotional materials, including publications, videos, and research. All advocacy strategies need to be accompanied by awareness-raising and training activities, relying on accurate information on the situation these aim to change.

### **4. The Media**

The media is used as part of advocacy campaigns to get topics on the public agenda, create currents of opinion, generate pressure, and build credibility as a source of information.

Establishing and maintaining a relationship with the media requires practice, persistence, and, above all, preparation. It is important to be knowledgeable on the media and its workings to be able to engage in actions aimed at gaining media attention for your advocacy proposal.

Consider the following recommendations when drafting your action plan regarding the media:

- Compile a comprehensive directory of the media, preferably categorizing these according to specialty.
- Draft messages worded so as to attract and hold the interest of journalists; the challenge is to get their attention and to keep it. And, of course, the

messages should also be created for particular target audiences in the advocacy process.

- Create messages that are sensitive to the needs and values of the public (personalized messages)
- The person responsible for liaising with the media needs to be on good terms with journalists (especially those with power to make decisions) and be familiar with the specific workings of each medium.
- Journalists and the media should be kept fully up-to-date on how the process is developing. This makes it possible to keep the issue on the public agenda and generate currents of opinion.
- Perform daily media monitoring tasks.

Complement this strategy with other more public activities to generate a presence and interest among the press.

## **5. Mobilization**

This is used to generate political will and pressure to negotiate, gain the attention of the media and society as a whole, protest when there is injustice or draw attention to situations of inequality. The most common types of mobilization are:

- Protest camps/sit-ins
- Strikes
- Vigils
- Citizen fairs
- Artistic activities
- Information stands
- Petitions
- Marches
- Marathon protests

It is important to remember that no advocacy process can be built upon a single strategy. You need to assess a range of strategies of influence and decide which of these would be most useful to your proposal and be most suitable given the actors involved. Some key individuals are more concerned about media attention, whilst others are more influenced by social mobilizations.

You should choose strategies that will help you to persuade those who are on the fence, persuade undecided individuals to accept the proposal, neutralize opponents, and motivate individual allies to take action.<sup>5</sup>

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<sup>5</sup> *Ibid*, p. 199.

The following matrix is a device you can use to do this:

**Table 9** Example of rating matrix for advocacy strategies.

<b>Strategy</b>	<b>Pros (based on the proposal)</b>	<b>Cons (based on the proposal)</b>
Lobbying	Direct contact with decision-makers with different levels of influence and in different influential sectors	Requires time and persistence to arrange interviews
Use of the media	The extent of the impact you can have by using traditional media to draw attention to the problem.  Social networks and the contacts of the various members of the group can be used.	Financial resources or strategic contacts are needed to buy air time (TV and radio)
Education and awareness-raising	Provides a deeper understanding of the problem and the solution proposed by the advocacy process	Institutional change leads to those individuals who are already on board to lose interest, and the process having to start anew.  Cultural change tends to be slower.
Coalitions	Ensure greater support from CSOs and women party members and project an image of plurality and inclusion	Some organizations may be accidentally left out in the convening process; there also could be complications in the selection of leadership roles and the distribution of activities
Mobilization	Demonstrates the support for the proposal and puts pressure on decision-makers	Requires organization, grassroots support, and resources

## Activity 14 Assessment of Advocacy Strategies

**Instructions:** Complete this matrix and when you have, choose the most appropriate strategies for your advocacy process.

Strategy	Pros (based on the proposal)	Cons (based on the proposal)
Lobbying		
Use of the media		
Education and awareness-raising		
Coalitions		
Mobilization		

Chosen strategies:

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

## Step 7 Drafting an Activity Plan

We are now reaching the end of the process. This last-but-one phase involves attempting to catalogue the precise activities needed to add the finishing touches to the proposal. This is perhaps the most important stage of the entire advocacy plan. Planning is the only way to guarantee success, which is why it is so important to draw up an activity plan that is as detailed and realistic as possible.

Based on WOLA's *Manual para la facilitación de procesos de incidencia política* [Handbook for Facilitating Political Advocacy Processes], activities should be divided into three groups:

1. Research tasks aimed at filling gaps in information or strengthening the proposal
2. Activities aimed at strengthening the group
3. Activities that help to persuade the relevant decision-maker (strategies of influence)

For each activity and task you need to define which specific individual is responsible for its execution, which indicator is to be used to assess progress, and the time period for the activities. To enable you to be better organized, we recommend you use the “**Activity Plan Matrix.**”

This tool helps you to arrange the series of activities to be undertaken during your advocacy campaign in a logical order. These activities should also include campaign preparations (research aimed at filling any gaps in information, drafting the proposal, consultation on the plan, financial management, and preparing the technical proposal).

Similarly, based on the strategies identified and using the strategy selection matrix, you need to identify specific activities for each.

**Table 10** Example of Activity Plan

Activity	Expected Outcome	Indicators	Person Responsible	Date	Resour-ces
<b>Preparation of the advocacy campaign</b>					
<b>Consultation with women leaders of political parties, former women legislators, and CSO members</b>	Consensus on the need to find regulatory mechanisms to ensure proper enforcement.  Formation of the work group.	# of meetings with women leaders of political parties  # of members in the group  % of attendance at meetings  # of actions and persons responsible identified	External technical assistance	August–September 2010	A venue and refreshments
<b>Design and discussion of the proposed rules governing compliance with the 2% requirement (consensus building)</b>	Consensus agreement reached on the proposed oversight rules to ensure compliance with the 2% requirement	Consensus document on the proposed oversight rules	External technical assistance	October 2010–February 2011	Venue Refreshments Experts in consensus building

<b>Strategy 1: Lobbying</b>					
<b>Meetings with Electoral Council member Macarita Elizondo</b>	Ratification of support for the proposal	# of meetings # of agreements	Representatives of CSOs and political parties	February–March 2011	Transportation
<b>Meetings with political party presidents</b>	Presentation of the proposal to party presidents	# of meetings	Representatives of CSOs and political parties	February–March 2011	Transportation
<b>Meeting with Alfredo Cristalinas, Director of the IFE's Oversight Unit</b>	Feedback on the final proposal for the oversight rules to ensure compliance with the 2% requirement	# of meetings Written response to the feedback on the proposal	Representatives of CSOs and political parties	February–March 2011	Transportation Computers
<b>Strategy 2: Use of the Media</b>					
<b>Planning sessions to discuss the communications strategy for traditional and digital media</b>	The design of a communications strategy for traditional and digital media	# of planning sessions # of people attending the sessions # of strategies approved	External technical assistance	April–June 2011	Experts in traditional and digital media Venue Refreshments
<b>Creation of a Communications Committee</b>	A Communications Committee created to expedite decision-making	# of members of the Committee established	External technical assistance	May 2011	Venue
<b>Opening of a Facebook/Twitter account</b>	Active Facebook and Twitter accounts	# of followers on Twitter # of friends on facebook	Communications Committee	June 2011	Computer Internet

**Activity 15      Preparing an Activity Plan**

**Instructions:** Complete the following matrix based on the tasks involved in preparing your campaign and the specific activities for each of the strategies you selected in the previous exercise.

Activity	Expected Outcome	Indicators	Person Responsible	Date	Resources
<b>Preparation of the Advocacy Campaign</b>					
<b>Strategy 1</b>					
<b>Strategy 2</b>					

Strategy 3					
Strategy 4					

The advocacy plan needs to be very specific and precisely define the actions, mechanisms, and the main human and financial resources you will have to provide if the enterprise is to be a success.

### Step 8 Monitoring and Evaluation

The final step involves the monitoring and evaluation of actions conducted. Monitoring is the **regular and systematic** scrutinizing of the performance of an activity or project to verify the progress made in terms of accomplishing the Concrete Goal (efficacy), the appropriate use of resources to achieve that progress (efficiency), and the accomplishment of the objectives defined during the performance process (effectiveness), to ensure the timely detection of deficiencies and hurdles, and/or where adjustments are needed. We emphasize the regular and systematic aspect because sometimes there is a mistaken notion that monitoring or evaluation can be left until the end of the advocacy project. However, these really need to be permanent practices because they allow you to identify where there is room for improvement while your advocacy strategies are actually being implemented.

The information generated by monitoring can help demonstrate innovative and effective strategies with which to generate financial and political support for promotional activities and enhance the group's image.

A monitoring plan is a basic administrative tool that provides the members of the network and other stakeholders with crucial information for the design, implementation, administration, and assessment of the activities undertaken, and help with the process of accountability.

To satisfy a monitoring function, the plan has to include mechanisms for data and information collection on key activities, and to synthesize, analyze, and apply the information to take decisions and begin action.

Ideally, a specific individual should be in charge of this activity, one who should have a directory of all members and should keep constant track of all activities.

The monitoring plan should contain the following elements:

- A clear and consistent definition of the results to be attained, which can be achieved by defining input, process, product, and effect or result indicators; and
- A willingness to gather information and analyze the data required for the system.

The monitoring information entered in this matrix will serve as an element in the drafting of Assessment Reports.

**Table 11** Sample Monitoring Matrix

Activity	Expected Outcome	Indicator	Period	Person(s) Responsible	Outcome	Status
Consultation with women leaders of political parties, current and former women legislators, and CSO members	Consensus on the need to find regulatory mechanisms to ensure proper enforcement	# and types of sectors represented	August–September 2011	External technical assistance	Consensus on and formation of a diverse and inclusive work group made up of women from all political parties, CSOs, and academia	Concluded
First session to design and discuss the proposed rules to ensure compliance with the 2% requirement (consensus building)	Consensus reached on the chapters to be included in the oversight rules to ensure compliance with the 2% requirement	# of unanimously approved chapters % progress % of participants	October 2010	External technical assistance	First draft of the draft Rules Attendance by 90% of the group	
Second session to design and discuss the proposed rules to ensure compliance with the 2% (consensus building)	First general and exhaustive revision of the oversight rules to ensure compliance with the 2% requirement	# of approved chapters % progress % of attendance	December 2010	External technical assistance and CSO representatives	Second draft of the draft Rules Attendance by 80% of the group	Concluded

Activity	Expected Outcome	Indicator	Period	Person(s) Responsible	Outcome	Status
Third session to design and discuss the 2% rule proposal (consensus building)	Second fully revised version of the oversight rules to ensure compliance with the 2% requirement	# of approved chapters % progress % of attendance	January 2011	External technical assistance and CSO representatives	Third draft of the draft Rules Attendance by 60% of the group	Concluded
Fourth session to design and discuss the proposed rules to ensure compliance with the 2% requirement (consensus building)	Unanimous agreement reached on the final proposal for the oversight rules to ensure compliance with the 2% requirement	Full agreement reached on the proposed Rules # of members of the Electoral Council that receive the proposal	February 2011	External technical assistance and CSO representatives	Final fully-drafted and fully-approved version of the proposed rules sent to the members of IFE's Electoral Council Attendance by 100% of the group	Concluded

## Evaluation

The final step is to evaluate the advocacy project, a process which involves an objective and systematic analysis of the group's performance, its effectiveness, and its impact with regard to meeting its objectives.

In this sense, by providing information on the degree of accomplishment of the plan's goals, as well as on the main problems and obstacles requiring attention, the assessment constitutes a tool that enables decisions to be made.

**Table 12** Structure of a Evaluation Report

<b>Evaluation Report</b>	
Executive Summary	Needs to specify the main accomplishments, conclusions, and recommendations of the project, and summarize these in a few pages  (The first report document but the last to be drawn up)
Context, situation, and behavior of the group	Compares the information contained in the initial and/or revised plan to identify the capacity of the group
Progress made towards meeting the goals	Detects the degree of efficacy and efficiency in accomplishing goals, as well as any discrepancies
Accomplishments	The accomplishments should reflect the progress being made towards fulfilling the objectives as shown by performance indicators
List of problems that have arisen	Consists of determining the causes of any observed departures from proposed goals and objectives. Requires the compiling of a detailed list of the critical issues and problems encountered during the process of implementing activities.
Determination of corrective measures	Consists of compiling a detailed list of the solutions implemented to address the problems specified in the previous section. This will allow you to assess the group's capacity to deal with and overcome any issues that arise and to make decisions.
Conclusions and Recommendations	The conclusions should provide a clear and detailed summary of everything that has been accomplished.  The recommendations should suggest actions that will allow the situation to improve based on the results of the assessment, and should propose necessary mechanisms that are potentially feasible in management processes.

The impact of political advocacy must also be assessed on the following levels:

- In terms of the effectiveness of concrete strategies and activities to convince the person with the power to make decisions to support the proposal
- In terms of the scale of the impact of the campaign, measured on the basis of the specific changes achieved in policies, laws, programs or behavior
- In terms of the number of positive changes in the daily lives of the population affected by the problem
- In terms of the ranking of the issue on the public agenda
- The increase in the knowledge and abilities of the advocacy group or the coalition's member organizations and the consolidation of new leaders, both men and women
- The accomplishments in terms of the organizational and institutional strengthening of the organizations that make up the coalition and the capacity these will have in conjunction with other actors to defend the changes achieved and/or undertake more lasting policy advocacy initiatives in the future
- The changes in power relationships both within and among organizations, as well as those involving the State
- The ability to promote democracy in terms of processes and opportunities for citizen participation and dialogue between citizens and government

**Table 13** Sample Impact Assessment Chart<sup>6</sup>

	<b>Criteria</b>	<b>Score *</b>	<b>Comments</b>
Solving the problem through public policy	Adoption of the proposal	10	The new Rules were published on July 7
	Application or implementation of the proposal	N/A	To be assessed in 2012 when the Rules have come into effect
	Public debate on the issue	8	Invited to take part in radio shows; following the adoption of the Rules, the issue was the subject of analysis in the national press. An article on the issue was published on the front page of <i>El Universal</i> newspaper.
	<b>Getting the issue on the agenda</b>	<b>8</b>	
	Incorporation of the population affected by the government plans	9	Men and women from various political parties were involved in drafting the proposed Rules
	Accomplishments in terms of solving the problem addressed	8	It is hoped that the Rules will help ensure the proper use of the resources corresponding to the required 2%
<b>Internal reinforcement and empowerment of civil society</b>	Research capacity	6	
	Information gathering and systematization	6	
	Capacity to generate proposals	10	The proposal was generated through a consensus building process in which women and men from political parties, civil society, government, and electoral and legislative authorities participated

<sup>6</sup> Ibid, pp. 254-255.

	Identification of new non-traditional allies	10	Worked with allies in the electoral authority
	Greater credibility	10	The information presented provided evidence of the problem and consensus was reached among the various sectors
	Raising awareness of the issue	8	
	Formation of sustainable alliances	9	The <i>2% y + Mujeres en Política</i> movement
	Strengthening of local power	8	
	Participation of under-represented sectors	9	
Transformation of power relationships	Establishment of other mechanisms for State-civil society relations	9	
	Generation of accountability mechanisms	10	The Oversight Rules establish mechanisms to ensure greater transparency in the use of the resources of political parties and promote accountability by allowing greater citizen oversight
	Raising of awareness among government officials	8	Electoral officials and other public officials were made more aware of the issue
	Increase in influence at a local level	8	Recognition of the movement
	Clarity in institutional operations	9	Clarification was made of the responsibilities and scope of the electoral authority regarding the oversight of the use of resources by political parties, particularly the 2% in question
	Identification of allies within the government and the establishment of alliances	10	Alliances with male and female government officials at the IFE, as well as with the aforementioned Electoral Council member and a few of her colleagues

	Exercise of their rights as citizens	9	The Rules will help ensure a more effective exercise of the political and electoral rights of women as they will involve affirmative action aimed at promoting women's participation in political life
	Reinforcing the role of State institutions	8	

\* Score based on a level-of-impact scale of 1-10, 1 being limited impact and 10 being significant

## Activity 16 Evaluation Matrix

**Instructions.** Once your advocacy process has ended, it is then time to assess its achievements and failures. To help to do this, we present you with the following matrix.

	<b>Criteria</b>	<b>Score</b> (on a level-of-impact scale of 1-10, 1 being limited impact and 10 being significant)	<b>Comments</b>
Solving the problem through public policy	Adoption of the proposal		
	Application or implementation of the proposal		
	Public debate on the issue		
	Getting the issue on the agenda		
	Incorporation of the population affected by the government plans		
	Accomplishments in terms of solving the problem addressed		
Internal reinforcement and empowerment of civil society	Research capacity		
	Information gathering and systematization		
	Capacity to generate proposals		
	Identification of new non-traditional allies		

	Greater credibility		
	Raising awareness of the issue		
	Formation of sustainable alliances		
	Strengthening of local power		
	Participation of under-represented sectors		
Transformation of relationships of power towards democracy	Establishment of other mechanisms for State-civil society relations		
	Generation of accountability mechanisms		
	Raising awareness among government officials		
	Increase in influence at a local level		
	Clarity in institutional operations		
	Identification of allies within the government and the establishment of alliances		
	Exercise of citizen rights		
	Reinforcing the role of State institutions		

Very good! So far we have presented a methodology and a number of tools to help in the effective implementation of advocacy processes. Moreover, we have shown how the *2% y + Mujeres en Política* movement used this methodology to bring about the adoption of the Oversight Rules, including those relating to the use of the 2% of the resources of political parties to provide training in, promote and develop women's political leadership.

In what follows, we will share with you some of the comments made by the members of the *2% y + Mujeres en Política* movement regarding their personal advocacy experience . While every political process and change process is different, we hope this experience will serve as a model of success.

### III. The 2% y + Mujeres en Política Movement: An Experience Worth Sharing

We began by proposing a methodology for policy advocacy based on the experience of the 2% y + Mujeres en Política movement. Now we feel it is important to review the opinions of the various sectors involved, which have been compiled through consultation with the movement's core group.

#### A. Main Obstacles to Participation

Women from several political parties reported having felt pressure from within their own political groups with regard to this issue. Promoting the adoption of oversight rules not only meant defining the main guidelines, but also implied a need to make those in charge of party finances more aware of the issue.

One of these women spoke at length on this process and on the complications encountered in defending the 2% of resources:

*“The most important issue we had to deal with was the party’s institutional structure, which demanded accountability and precise numbers in relation to the use of our public funding. We had to defend our budget constantly and force the party to pay the payroll out of the regular budget, and prevent them from using our funding to pay for other things that had nothing to do with gender issues.”*

Another of the difficulties highlighted by the members of the 2% y + Mujeres en Política movement was the time it takes to work together and in parallel to build the kind of consensus needed to make any progress regarding the proposed rules. Then of course there was the phase of lobbying political parties, which involved convincing their national leaders and administrative and finance sections. This in addition to interchanges with the relevant departments of the IFE (the General Council and the Oversight Unit), which required the participation of civil society representatives and party representatives.

#### **How were the obstacles overcome?**

The members of the core group of the movement mentioned that it was possible to overcome the obstacles thanks to the involvement of allies, both men and women, from civil society, parties, the IFE, and international organizations. Internal communication within the political parties also made a positive contribution, through meetings between the respective departments responsible for women and/or gender issues and their national leaders, administration/finance sections

and state bodies, as well as with their representatives at the IFE. Similarly, the party representatives highlighted the need for building alliances among party members (National Committees), women legislators, and grassroots members, as well as with other areas within political parties.

Representatives in the government sector highlighted the importance of reporting the decisions of the meetings at which the proposed rules were drafted.

## B. Accomplishments of the Advocacy Process in its Efforts to Obtain the Adoption of the Rules to Ensure Compliance with the 2% Requirement

The advocacy process aimed at obtaining the adoption of the Oversight Rules to ensure compliance with the 2% requirement brought together civil society, political parties, the government, and various international organizations in a single combined effort. This effort was channeled through a diverse and inclusive work group which, according to a range of sectors, was the **main success story of the process**. This demonstrates that with a clear and unifying goal it is possible to bring together diverse political party and civil society groups. Another positive element was the incorporation of women legislators and representatives of INMUJERES and IFE. In this regard, one party representative emphasized the following:

*“The biggest impact we had was the fact that all of the women in the various political parties took responsibility for ensuring that our budget was not used for anything other than gender issues and that party political interests were ignored.”*

Furthermore, the following factors helped facilitate the group’s work:

- The fact that a thorough assessment was made of the situation prior to initiating activities (involving the documentation of resources diverted by political parties)
- The role of an unbiased body that coordinated and mediated between the various sectors involved
- The timely monitoring of activities and tracking of the names of those responsible and of strategic dates
- The commitment of the group’s members beyond mere personal interest
- The establishment of good relations with strategic players inside the IFE
- The pressure generated through social networks
- The ongoing communication with all members of the group

By consulting with actors from all of the sectors represented by the *2% y + Mujeres en Política* movement it was possible to identify how each of these contributed to the process:

**Table 14** Contributions from the Various Sectors of the *2% y + Mujeres en Política* Movement

<b>Political Parties</b>	<b>Civil Society Organizations</b>	<b>Government</b>
<ul style="list-style-type: none"> <li>• By sharing daily experiences and practices within parties with regard to the participation of women, including their access to elected office</li> <li>• By bringing the issue to the attention of a wider audience and its importance in the everyday activities of the party</li> <li>• By understanding and promoting rights and obligations in order to apply the 2% of resources in a strategic and focused way</li> <li>• By promoting the importance of gender-focused public funding to create political cadres and leadership among women</li> <li>• By publicizing the Rules</li> </ul>	<ul style="list-style-type: none"> <li>• Through the ability to exchange views to create consensus, especially with party representatives</li> <li>• Through discussion of the political significance of the Rules</li> <li>• By providing conceptual definitions for the Rules</li> </ul>	<ul style="list-style-type: none"> <li>• Through institutional support for the drafting and adoption of the rules</li> <li>• Through the effort to incorporate all of the group’s proposals in the new Oversight Rules,<sup>7*</sup> within the scope of legislation</li> <li>• By clarifying the process for providing proof of expenses</li> <li>• By circulating the proposal and the guidelines for the appropriate use of the 2% of resources for providing training in, promoting, and developing women’s political leadership stipulated in the IFE’s new Oversight Rules</li> <li>• By creating networks liaising with other bodies/entities and individuals</li> <li>• The experience in terms of enforcing regulations, which helped improve the draft document</li> </ul>

\*The Oversight Rules adopted by IFE’s General Council on July 4, 2012 and published in the *Official Gazette of the Federation* on July 7, 2012 constitute a far-reaching document that includes regulations pertaining to the spending of national political parties, along with guidelines for the appropriate use of the 2% of resources; of national political groups; of electoral monitoring organizations, and citizen organizations aiming to be granted formal recognition as national political parties.

## C. Common Mistakes in the Advocacy Process in its Efforts to Obtain the Adoption of the Rules to Ensure Compliance with the 2% Requirement

The most common mistake made throughout the advocacy process was the delay in reaching agreements due to the fact that meetings were not always attended by the same people and that some of these took longer to argue their case than others, which made it difficult to make progress when it came to reviewing the document and reaching agreement. Other weaknesses identified were the fact that the work with some parties was carried out in isolation and the fact that the adoption of the Rules was not widely publicized among the parties.

As one party representative pointed out:

*“At times, it perhaps seemed that the intention was to get individual political parties to support the issue, but in the end we managed to overcome that and decided to act as one so that the 2% would be accepted by all the parties to benefit all women and their ideologies.”*

Similarly, people were sometimes unaware of electoral legislation and the scope of what the IFE could do to ensure the proper use of the 2% of resources.

## D. Recommendations on How to Implement Similar Processes Locally

Representatives of the range of sectors involved in the *2% y + Mujeres en Política* movement made the following recommendations on how to implement similar processes locally.

### 1. Advocacy Strategies

#### a. Build Alliances

Map male and female actors alike to help identify potential allies among political parties, civil society, the state electoral body, and Congress. These alliances also need to be developed within political parties. In this regard, one party representative suggested promoting the proper use of the 2% of resources as a training and education strategy for party cadres.

From the outset, the alliance-building process needs to allow for the formation of a diverse group made up of institutional actors and civil society (political parties, civic organizations, authorities, legislators, and other groups), and one that together helps to advance the adoption of the kind of regulatory frameworks needed to ensure the existence and proper use of resources to reinforce women's leadership. We also recommend the inclusion of established national and local networks that share your position on the issue and with whom you can develop a gender agenda.

### **b. Use New Information and Communications Technology**

One of the strategies used by this movement was the use of social networks to publicize the proposal to regulate the use of the 2% of resources and to put pressure on key actors, in this case the members of IFE's Electoral Council. This was possible thanks to the attention drawn to the issue, primarily by means of emails sent to political parties and the public at large. In this way, a database of 650 supporters of the proposal was created, which made it possible to maintain communication via email and through the main social networks (i.e., facebook and Twitter). Similarly, these supporters were engaged in advocacy strategies through messaging, mainly via Twitter, aimed at IFE decision-makers. The use of these tools as a means of putting pressure on specific targets was acknowledged by some members of IFE's Electoral Council at its General Council's Special Session held on July 4, 2012,<sup>8</sup> during which the Oversight Rules were adopted.

## **2. Planning**

As mentioned in the previous chapter, before any advocacy process begins, you need to establish what its goal is, the strategies to be adopted to achieve that goal, and an activity plan to be followed—and adapted—during the process. This plan needs to include deadlines and the names of those responsible for each of the various tasks included in the list.

## **3. Operational Coordination**

The tasks of following up on the activities and reporting the results of the advocacy process should be the responsibility of a single individual. In the case of the *2% y + Mujeres en Política* movement, one of the factors in its success according to the responses given during the consultation phase was the fact that the organizers were neutral and had a significant ability to get people involved, and took it on themselves to send out invitations and monitor all of the work sessions and the

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<sup>8</sup> An audio recording of the Special Session of IFE's General Council of July 4, 2012 (in Spanish) is available at: [http://www.ife.org.mx/portal/site/ifev2/Sesiones\\_del\\_CG/](http://www.ife.org.mx/portal/site/ifev2/Sesiones_del_CG/)

advocacy strategies agreed upon by the group, using the aforementioned business plan as a guide.

#### 4. Advisors

Seek out experts in electoral legislation and women's participation in politics that can advise the group on the technical aspects of rules or, where appropriate, state electoral reform. Similarly, use IFE's Oversight Rules as a reference for any proposal at a state level.

To cover this aspect, it was vital for the movement to have the support of experts within civil society, academia, and among former women legislators, party activists with experience in these matters, and members of IFE's Oversight Unit.

#### 5. Publicizing the Proposal and the Results

Advocacy processes need to include actions aimed at publicizing the proposal and reporting its results. To do this, you need to take into account the need for resources and think of creative ways to inform all the members of the various political parties. Furthermore, you need to inform citizens of the mechanisms in place for overseeing the use of political party resources, especially those meant to be used to strengthen and promote women's political leadership.

In the particular case of this movement, events were held to present the Oversight Rules with the support of the Senate and IFE's Oversight Unit.

Finally, one civil society representative summarized the movement's experience and its future challenges as follows:

*“It was a positive, concrete, and rewarding experience that helped enhance women's participation in politics. How it is assessed will need to be reviewed once they have been put into effect, as it seems that the women members of political parties are encountering challenges in the Rules that, in practice, need to be overcome.”*

## Conclusions

Throughout this guide, we have presented you with a methodology that has proved effective in a range of advocacy processes. In particular, we have looked at the experience of the *2% y + Mujeres en Política* movement in its efforts to ensure proper use of resources intended to strengthen women's political leadership. Remember that social change is slow and requires significant cooperation and teamwork. You will need to be very patient and have many motivational strategies up your sleeve if you are to achieve your goal. Knowing that you have affected or changed your social reality will make everything worthwhile.

In all advocacy processes, particularly those concerning changes in the relationships between women and men and eliminating the obstacles to women's exercising their rights, it is very important to keep the advocacy group motivated, which is why we recommend you organize fun activities to celebrate each individual accomplishment, however insignificant it may seem. If ever there is a sense of the group's energy waning, press on; keep all of the members up to date on what is going on and informed of the dates of meetings. Emphasize how important it is for everyone to be involved for the goal to be achieved.

Whilst the advocacy effort presented in this guide was undertaken at a federal level, we hope that it inspires the formation of diverse groups of women and men whose aim is to promote women's participation in public decision-making at a local level. We also wish to point out that one of the challenges faced in attempting to bring about broader and more effective participation by women in politics is trying to identify and remove the barriers to this, which will also require their active involvement and specific commitments at both a national and local level.

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## Glossary

**Impact to influence:** The term comes from the Latin *incidere* and is synonymous with insist, to emphasize something. Dictionary: *Real Academia Española*.

**Public policy:** This concept involves the idea of the public as a dimension of human activity regulated and operated by governmental action.<sup>9</sup>

**Decentralization:** Involves increasing the power, decision autonomy, control of resources, responsibilities, and competences of local authorities at the expense of the central government bodies. Decentralization implies political-administrative reform and aims to achieve a territorial redistribution of power that puts an end to decisive centralism, which is responsible for a range of problems afflicting local communities.<sup>10</sup>

**Democratization:** Democratization is a process that leads an authoritarian state to become a pluralist democracy.<sup>11</sup>

**Coalition:** It comes from the Latin *coalitu, supino de coalescere*, to come together, to unite. It is a confederation, league, or union. Dictionary: *Real Academia Española*.

**Decision or Management Space:** Those who have the power to approve or reject a proposal that has been developed and determine what the procedure used for making this decision should be.

**Key actors:** The actors possessing the power to influence the achievement of specific objectives.

**Objective:** Program element that identifies the purpose which determines where resources and efforts ought to be directed to fulfill the mission.

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<sup>9</sup> Parsons, Wayne. *Políticas Públicas, Una introducción a la teoría y la práctica del análisis de políticas públicas*, Flacso, Mexico, 2007, pp. 22.

<sup>10</sup> De Mattos Carlos A., *La descentralización, ¿una nueva panacea para impulsar el desarrollo local?*, Revista de estudios regionales, ISSN 0213-7585, N<sup>o</sup>. 26, 1990, págs. 49-70, available online at [<http://dialnet.unirioja.es/servlet/articulo?codigo=251594>], October 9, 2012.

<sup>11</sup> Cansino César, *Democratización y liberalización*, Cuadernos de Divulgación de la Cultura Democrática, IFE, available online at [[http://www.ife.org.mx/documentos/DECEYEC/democratizacion\\_y\\_liberalizacion.htm](http://www.ife.org.mx/documentos/DECEYEC/democratizacion_y_liberalizacion.htm)], October 9, 2012.

## Appendix

*Official Gazette of the Federation (DOF): 7/7/2011*

**AGREEMENT of the General Council of the Federal Electoral Institute with regard to the issuance of the Oversight Rules, which supersede the following rules: Oversight Rules for the Resources of National Political Parties, Oversight Rules for the Resources of National Political Groups, Oversight Rules for the Resources of National Political Parties that Form Coalitions, Oversight Rules for the Resources of Election Observer Organizations, and Oversight Rules for the Resources of Organizations Seeking Formal Recognition as National Political Parties.**

[...]

### **Chapter III. Planned Expenditure**

#### **Section I. System of Accountability**

##### **Article 281**

1. In the system of accountability for planned expenditure, which parties must abide by, all program projects and operations in connection with spending on specific activities must be registered, along with **spending on the provision of training in, promoting, and developing women's political leadership.**
2. Parties must ensure that the administration of the resources used is carried out based on criteria of legality, honesty, efficiency, efficacy, cost-effectiveness, rationality, transparency, control, accountability, and **gender equity.**
3. Political parties have exclusive authority over planned spending targets, planning, indicators, budgets, when resources are used, and the incurrence of expenditure.

##### **Article 282**

1. The system designed by the Oversight Unit will consist of all program records relating to planning, scheduling, budgeting, implementation, assessment, monitoring, and control.

##### **Article 283**

1. Parties must ensure that the system:
  - a) Reflects accurate and verifiable information in its records to enable verification of how resources were used;

- b) Allows expense categories to be recognized;
- c) Reflects a consistent and orderly record of operations, and
- d) Allows the measurement of how effective and efficient spending is.

**Article 284**

1. Pursuant to Article 78, Section 1, paragraph a) sections IV and V, and paragraph c) of the Code, the General Council, through the Oversight Unit, shall ensure that the projects implemented by parties apply the planned spending to the following:
  - a) Specific activities:
    - i. Political education and training;
    - ii. Socioeconomic and political research;
    - iii. Editorial tasks;
    - iv. Every political party must allocate at least two percent of its annual public funding to the development of specific activities, and
    - v. Every political party must allocate two percent of its standard public funding each year to provide training in, promote, and develop women’s political leadership.
  - b) Spending to provide training in, promote, and develop women’s political leadership:
    - i. Training and education in women’s political leadership;
    - ii. Research, analysis and comparative studies, and
    - iii. Publicity and promotion
2. Furthermore, parties must divide the categories specified into subcategories according to the type of expense.

**Article 285**

1. Parties must possess a manual and guidelines for planned spending, these to be provided by the Oversight Unit.

**Section II. Program Guidelines**

**Article 286**

1. Within thirty days of the approval by the Council of public funding for ongoing

regular activities, parties must submit a spending plan for the development of specific activities and another for spending to provide training in, promote, and develop women's political leadership.

2. Planned spending for providing training in, promoting, and developing women's political leadership must reinstate the following components:

- a) **Affirmative Action:** Temporary measures to accelerate the equal participation of women in the political, economic, social, cultural, civil or any other field. General Recommendation 25 of the Committee of the UN Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) regarding the application of these measures as part of a necessary strategy to achieve substantive equality for men and women in the exercise of their human rights and fundamental freedoms rather than an exception to the rule of non-discrimination;
- b) **Advancement of Women:** Narrowing the gap in terms of the inequality between women and men to ensure the full recognition, enjoyment, and exercise of their rights based on substantive equality as state policy;
- c) **Women's Empowerment:** A process through which women pass from a situation of oppression, inequality, discrimination, exploitation or exclusion to a state of consciousness, self-determination, and autonomy, which manifests itself in the exercise of democratic power emanating from the full enjoyment of their rights and freedoms;
- d) **Substantive Equality:** Implies a change in the circumstances that prevent people from fully exercising their rights and their access to opportunities through structural, legal or public policy measures;
- e) **Women's Political Leadership:** That is, the ability of women to influence the public sphere in full exercise of their rights within the political arena;

“Development of political leadership” means the progressive evolution of the condition of women to foster their political leadership in decision-making spaces.

Furthermore, “promoting political leadership” should be understood as promoting affirmative action to enable effective political leadership by women; and

- f) **Gender Perspective:** Provides a clear image of the differences in society's assignment of roles and tasks based on sex; highlights the differences in terms of opportunities and rights that result from such assignment; brings to light the power relations that these differences provoke, and questions the differential impact of laws and public policies based on these assignments, differences, and power relations.

3. Whenever parties change or modify previously reported spending plans to include specific activities or to include spending for providing training in, promoting, and developing women's political leadership pursuant to paragraph 1 hereof, they must report this fact to the Oversight Unit within thirty days of such change or modification.

#### **Article 287**

1. The aims of the projects that comprise each program must seek:
  - a) In the case of specific activities, to promote the participation of citizens in democratic life and the propagation of a political culture.
  - b) In the case of training in, promoting, and developing women's political leadership, to generate knowledge, skills, and attitudes focused on the advancement of women towards the exercise of political power.

Training shall be understood to mean the teaching/learning program that political parties must implement to improve and expand knowledge, skills, and abilities that promote the political leadership and the empowerment of women to ensure their inclusion in decision-making under the same conditions as men.

#### **Article 288**

1. Programs focused on:
  - a) Specific activities must incorporate information, values, ideas, and attitudes focused towards the political sphere and be developed within Mexico, whilst seeking to benefit the greatest number of people.
  - b) Training in, promoting, and developing women's political leadership must include information, values, conceptions and attitudes aimed at promoting equal opportunities for political development in access to public power and participation in decision-making processes. Furthermore, these must take place within Mexico and seek to benefit as many women as possible.

#### **Article 289**

1. Each project of the program must include:
  - a) Annual objectives, goals, and indicators;
  - b) The activities that will ensure the achievement of such objectives, goals, and indicators;
  - c) The budget allocated to each activity, clearly identifying each expense category;

- d) The schedule for monitoring results and indicators;
- e) The person responsible for organizing and implementing the project;
- f) The person responsible for control and follow-up, and
- g) Projects can be registered at any time during the year provided these meet the conditions of the program and include the components specified herein.

#### **Article 290**

1. The [expense] category pertaining to political education and training for specific activities includes courses, workshops, seminars and the like, aimed at:
  - a) Instilling knowledge, values, and democratic practices and teaching citizens how to exercise their rights and obligations, and
  - b) Providing ideological and political education for [party] members to instill in these tolerance for differences, [and] respect for opponents and their right to participate in politics.

#### **Article 291**

1. The [expense] category pertaining to socioeconomic and political research and specific activities includes analysis, diagnostics, and comparative studies, among others, related to national and regional socioeconomic or political problems. Such studies should contribute directly to the understanding and development of proposals on how to solve the problems detected, and must:
  - a) Be original and self-authored;
  - b) Abide by the generally accepted standards and practices of the scientific and professional community. For this reason, works must be organized in sections according to the following content structure:
    - i. Introduction (this will serve as a guide for the reader): a brief overview of the phenomenon being studied, the aim of the study, and the research questions. This section must also specify the methodology to be used in the study and the research design employed, that is, whether it is qualitative (e.g., a case study), quantitative (a study relying on numerical data) or experimental in nature;
    - ii. Justification for conducting the research and its importance, analyzing the relevance of the subject studied to the expense category reported and the proposed solutions. This section should clarify why it is advisable to analyze the subject of the study and what the benefits are (results, social relevance, and the potential contributions in terms of theory, methodology, and so on that may result from the study);

- iii. Research objectives are what guides the study and should be expressed clearly in order to avoid any departure from these during the research process; they should also be achievable. The aims of scientific research should be established by answering the following question: What does the research aim to achieve? Furthermore, if the research is intended to contribute to solving a particular problem, then it should also state what the problem and is how the study could help solve it;
- iv. Definition and scope of the problem: This section introduces the problem being researched; this needs to be done in a clear and unambiguous way, and preferably by posing a series questions. Similarly, it should imply possible empirical testing (a quantitative approach) or data gathering (qualitative approach). As regards the scope, the section should also specify what is to be discussed and what not;
- v. Theoretical and conceptual framework: Description and analysis of the theories, paradigms, research, and historical background of the problem being researched. The theoretical framework helps to detect and prevent the mistakes made by previous studies; it provides background information on how the issue has been approached by researchers in the past and helps establish hypotheses to be tested during the research; and inspires new lines and areas of research;
- vi. Hypothesis: Tentative explanation, presented in the form of propositions, for the questions raised in relation to the problem being studied. Hypotheses need three basic components: a unit of analysis, variables, i.e., the characteristics or properties of the unit of analysis, and the logical components that relate the units of analysis to the variables;
- vii. Empirical or qualitative proof of the hypothesis: This section uses the data gathered to test whether the hypothesis holds or not. A range of tools can be used to test hypotheses empirically, e.g., statistical analysis, case studies, focus groups, surveys, and controlled experiments;
- viii. Conclusions and new research agenda: This section presents the results of research through the empirical testing instruments used, an overview or detailed description of the results, and should also define specific proposals for the problems addressed. Finally, new research agendas can be proposed to address the social problems studied and as yet unsolved; and
- ix. Bibliography: Bibliographical list of the material used in the research to enable any researcher to consult primary sources to be able to replicate the analysis and assess the accuracy of the knowledge generated.

3. These work documents must show a certain level of quality in terms of basic spelling, syntax, and referencing rules; and
4. When publishing its activities, the party shall report on the mechanisms used and its success in circulating the research work published.

#### **Article 292**

1. The [expense] category pertaining to editorial tasks for specific activities shall include the editing and publication of printed documents, video recordings, electronic, optical, and magnetic media used to publicize material or content that promotes democratic life and political culture, including:
  - a) The publications that parties are obliged to produce pursuant to Article 38, Section 1, paragraph h) of the Code;
  - b) The documents presenting the results of the research referred to in Article 291 of the Rules;
  - c) The publication of the party's basic documents, i.e., its mission statement, programs, statutes, rules, and other related documents;
  - d) Series and collections of articles and information materials of interest to the party and its membership;
  - e) Information materials, such as brochures, pamphlets, leaflets, and other one-off publications produced for specific purposes;
  - f) Legislative, regulatory, administrative or judicial texts, provided these form part of equivalent texts, interpretations, comparative studies, annotations, comments, and other similar work associated with the creation of an original work; and
  - g) Other materials used in the analysis of national or regional problems and their possible solutions.

#### **Article 293**

1. The [expense] category pertaining to training and education for women's political leadership comprises, without limitation, activities consisting of courses, workshops, seminars, conferences, diploma courses, symposiums, and the like that promote the development of skills for the political participation of women (knowledge, abilities, and attitudes) and for advocating political rights on issues such as:
  - a) Substantive and effective gender equality;
  - b) Mexico's legal framework;

- c) Electoral and parliamentary law;
- d) The theory of gender perspective and women’s human rights;
- e) Public policy and budgets with a gender perspective;
- f) Negotiation and dispute resolution;
- g) Political communication;
- h) New technologies;
- i) Political leadership;
- j) Lobbying;
- k) Political marketing;
- l) Parliamentary oratory; and
- m) Monitoring of access to power with a gender perspective.

**Article 294**

1. The [expense] category pertaining to research, analysis, diagnosis, and comparative studies concerning training in, promoting, and developing women’s political leadership must incorporate topics similar to those established for economic and policy research and must also contain the requirements of Article 291 of the Rules.

**Article 295**

1. The [expense] category pertaining to publicizing training in, promoting, and developing women’s political leadership must include topics similar to those established for training and education in *women’s political leadership* and the dissemination of information on women’s rights and on how to exercise these in both the party statutes and the Code. Furthermore, these must meet the requirements of Article 293 of the Rules.
2. The activities identified in the previous paragraph include the editing and production of printed documents, video recordings, electronic, optical, and magnetic media, and new information technologies used to publicize material or content related to at least one *women’s political leadership* training or education activity.

**Section III. Annual Planned Expenditure Report**

**Article 296**

1. In reporting planned spending, this must be divided as follows:
  - a) Spending on registered projects;
  - b) Spending per expense category;
  - c) Into yearly objectives, goals, and results indicators;
  - d) According to the dates or periods on or during which the activities were performed; and
  - e) The results obtained.

#### **Article 297**

1. Planned spending reports must be accompanied by the corresponding receipts for items justifiably linked to the activity in question, together with samples or evidence of the activity to prove its having been performed, all of which, in combination and without exception, must indicate the time, manner, and location that connects them with each activity, and include the respective contract with the supplier and/or service provider, as well as a copy of the check used for payment.

#### **Article 298**

1. Planned spending shall be subject to the provisions of Articles 149, paragraph 1, 153, 154, 155, and 219 of the Rules.

#### **Article 299**

1. Up to ten percent of travel and per diem expenses in connection with specific activities and to provide training in, promoting, and developing women's political leadership may be verified by petty cash logs. These should be linked to the activities performed and will only be accepted if they involve expenditure in rural areas.

#### **Article 300**

1. Parties shall seek to register all research and publications with the National Institute of Copyright, and all editorial and audiovisual activities carried out in connection with specific activities and those related to the provision of training in, promotion, and development of women's political leadership.

#### **Article 301**

1. Parties must provide samples of the following:
  - a) In the case of education, political training, and women's political leadership training and education activities:

- i. The invitation to the event;
  - ii. The event program;
  - iii. A signed list of attendees. If unavailable, parties may submit a copy certified by an official of the corresponding district or local board of the institute designated by the Oversight Unit to verify the details of the event held;
  - iv. Photos, video footage or a press report of the event;
  - v. Where applicable, the educational materials used, and
  - vi. Publicity for the event, if any.
2. For socio-economic and political research activities and for research, analysis, diagnosis, and comparative studies, the research or research update is to be attached; in each case, this must specify the methodology used, pursuant to Article 291 of the Rules. If a research project is deemed to have been plagiarized either in whole or in part, the work submitted will not be considered an expense in specific activities.
3. For publishing, publicity, and promotional activities:
  - a) All printed publications must include the following data:
    - i. The name, commercial name or registered name of the publisher;
    - ii. The year of publication or reprinting;
    - iii. The number of the issue or reprint;
    - iv. The date on which the final copies were printed; and
    - v. The number of copies printed (unless a regular publication).
  - b) The requirements of the preceding section shall not apply to “information” publications as defined in Article 292 hereof. For the purposes of the exception referred to in this section, information publications shall not include magazines, newspapers, weeklies or any other regular publication;
  - c) In all cases where the cost of printing or reprinting a publication is greater than the equivalent of one thousand two hundred and fifty days’ of the statutory minimum wage in effect in Mexico City, an official designated by the Oversight Unit shall corroborate the existence of the print run in question. To do this, the party must notify the Oversight Unit, within five days of the run, as to where, when, and at what time this is to take place;
  - d) To determine whether the print run needs to be verified, the party shall

take into account the total value of each issue printed or reprinted, even when the cost of each printing or reprinting was less than that stipulated above; and

- e) The party must report its activities to its members and the public; this must include, as a minimum requirement, the distribution of copies or a public presentation on the activities in question. Furthermore, the party must inform the Oversight Unit of the mechanisms used to publicize these and provide relevant evidence consistent with the nature of the media used.

### **Article 302**

1. The party will invite the Oversight Unit to witness political education and training activities, activities in connection with the printing of published materials, and activities related to training in, promoting, and developing women's political leadership.
2. The fact that any activity is to be undertaken shall be reported to the authority no later than ten days before it is to take place. Such report shall include a description of the event and specify the venue at which it is to take place, the times, the topics to be addressed, and the estimated number of attendees.
3. The Oversight Unit shall appoint an official to attend and draft a report that must contain, as a minimum requirement, the following information:
  - a) A clear and precise description of the activity observed;
  - b) The date on which the activity took place;
  - c) The duration of the activity;
  - d) The location at which it took place;
  - e) A detailed description of how the activity was performed and of the resulting products or articles, and
  - f) Any other item that the Institute deems useful for the Oversight Unit to confirm when, how, and where the activity took place.

### **Article 303**

1. The Oversight Unit shall issue a copy of the reports made of the observations referred to in the preceding article to the party concerned within five days of the date on which the activity took place. Such minutes or reports must provide full proof of the activities under the terms stated in the respective minutes, and will complement, where appropriate, the samples referred to in Article 301, paragraph 1, subparagraph a), item iv and paragraph 3, subparagraph a), item v of the Rules.

## **Article 304**

1. The following are not regarded as planned spending items:
  - a) Ongoing regular party activities, including those related to the operating expenses and general and personal services of the women's sections of parties or similar bodies when these do not relate directly and exclusively to specific activities and activity related to the provision of training in, promotion, and development of women's political leadership;
  - b) Party electioneering activities in connection with the campaigns of candidates seeking elected office and campaign operating expenses in any election, be it federal or local;
  - c) Activities the aim of which is to assess the conditions of the party or which aim to prepare its leaders to assume leadership positions;
  - d) Courses, events or electioneering aimed at promoting a single individual male or female candidate or pre-candidate seeking elected office;
  - e) Surveys, research, studies, analysis, publications or any other documentation containing questions regarding voting preferences;
  - f) Activities aimed primarily at promoting the party or its position on national issues in the mass media;
  - g) Gatherings held in connection with anniversaries, congresses, and internal meetings to discuss administrative matters or internal organization;
  - h) Expenditure on mortgaging the party offices, institutes and/or foundations responsible for carrying out the specific activities referred to in the Rules;
  - i) Spending related to maintaining telephone lines; premises, cleaning or security services; and
  - j) The preparation, editing, printing, and circulation of electoral platforms.

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