

ADVOCACY TOOLKIT: For Individuals



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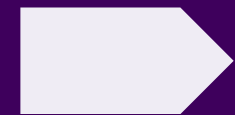
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CONDUCTING RESEARCH 101

Primary and Secondary Research



IDENTIFY STAKEHOLDERS

Find people with interest in your priorities
Focus on the Right Decision-Makers
Factor in Election Cycles

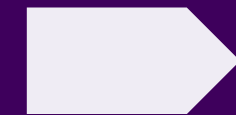


CURRENT POLICY ANALYSIS



GET CLEAR ON PRIORITIES

Define a Long Term Goal
Prepare a Clear Ask



DEVELOP TACTICS FOR ADVOCACY

Generate Ideas
Select Tactics



TEST - LEARN - ITERATE



Conducting Research 101

PRIMARY RESEARCH

- Interviews, surveys, and experiments help gather detailed insights and patterns.
- Use surveys or experiments for statistical data.

SECONDARY RESEARCH

- Academic Research: Use Google Scholar and check citations for further reading.
 - Reports: Look for publications by public offices and departments.
 - Statistics Websites: Useful data can be found on dedicated platforms.
 - Books/Documents: Use trusted sources for additional information.
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Conducting Research 101

MAKE THE MOST OUT OF AN INTERVIEW

Remember to always assess the trustworthiness of materials we learn from. Also consider that the world is complex, which is exactly why it is meaningful to weigh together perspectives.



Conducting Research 101

OUR MAIN TASK IS TO LISTEN AND LEARN

- Our goal is to listen and learn, seeking their perspective, not validation of ours.
- Stay open and humble—avoid early conclusions.
- While interviewees may struggle with generalities, they know their reality best!

ORDER QUESTIONS BY SPECIFICITY

- Start with broad questions to build trust and gather background.
- Avoid leading or opinionated questions.
- Save specific ideas for after hearing their open responses.

GET PEOPLE TALKING

- Encourage discussion—people enjoy sharing their views.
- Prompt deeper responses with phrases like “Say more,” “Why is that?” or “What did you think?”
- Reflect their words to keep the conversation flowing.

Identify Stakeholders

FIND PEOPLE WITH INTEREST IN YOUR PRIORITIES

- **Research Public Officials:** Study their backgrounds, connections, and priorities.
- **Find Personal Connections:** Look for individuals with a personal link to your cause.
- **Engage with Officials:** Meet to understand their priorities and seek alignment.
- **Know Their Scope:** Understand their work, goals, challenges, and motivations.

Identify Stakeholders

FOCUS ON THE RIGHT DECISION-MAKERS

- Prioritize elected officials or public bureaucrats based on their ability to act.
- Start with local officials familiar with your community, then consider provincial and federal representatives.

FACTOR IN ELECTION CYCLES

- Current Leaders: Focus on those prioritizing current mandates.
- Incoming Leaders: Look for openness to change with those entering power.



Current Policy Analysis:

A method to evaluate a policy's intent, impact, strengths, and weaknesses, identifying current policies, stakeholders, and decision-makers.

Questions	Response
What is the present policy?	
How, when, and why did the policy come into being?	
What influenced policy -makers to adopt a particular course of action, what were the objectives of the policy?	
Who are the policy-makers?	
Which, if any, interest groups do they represent?	
What have been the stages and methods, including organizational arrangements and structures, used in the policy-making process?	
What interested groups, if any, have been consulted and what sources and kinds of advice have been obtained?	
Is the process of policy -making that has been adopted the best we can hope for? How might it be improved?	
Is it good policy?	
What has it achieved?	
Would a different policy be likely to yield better results? For whom?	
Does the present policy need changing?	
Is it feasible to change it and in what ways?	

Source: World Health Organization. (2005). Health Service Planning and policy-making: A toolkit for nurses and Midwives. World Health Organization. <https://iris.who.int/handle/10665/207061>

Get Clear on Priorities:

DEFINE A LONG-TERM GOAL

PREPARE A CLEAR ASK

DEFINE A LONG-TERM GOAL:

MEASURE PROGRESS

- Set a measurable, evidence-supported goal to track progress.
 - Stay flexible with tactics to remain on track.
 - Think long-term—consider 5-, 10-, 20-, and 25-year timeframes.
 - Work backwards from the long-term goal to establish intermediate goals.
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PREPARE A CLEAR ASK:

When communicating with decision makers, make it tangible. Avoid broad asks and instead speak of specific actions and solutions. Avoid speaking of funding requests on their own.

Be Specific:

Focus on tangible actions, not broad requests.

Clarify the Issue:

What needs to be addressed? Why should decision-makers care?

Align with Priorities:

How does your ask match their goals and interests?

Propose a Solution: What change will strengthen communities and support citizens?

Value Proposition: How does your ask benefit society?



PREPARE A CLEAR ASK:

ADAPT MESSAGING TO THE AUDIENCE

- Tailor messaging to your audience and context for relevance.
- Cut through the noise for different groups (e.g., politicians, bureaucrats, public).
- Use the "sandwich approach"—work both bottom-up and top-down.
- Focus on listening to build understanding and trust.

Develop Tactics For Advocacy

Adjust your approach to fit your audience. Work with others to brainstorm ideas, choose the best ones, and test them. Show why your change matters, even with other government priorities.

- *Generate ideas*
- *Select tactics*
- *Test, learn, iterate*



GENERATE IDEAS

UNLOCK CREATIVITY TO FIND MANY AND UNEXPECTED IDEAS



Creativity helps us generate many ideas

Start with many ideas before choosing the best ones to develop. Working together and using creative methods can help. Innovative thinking is key to standing out and gaining attention from the public and decision-makers.



Help each other stay playful and curious

- Warm up exercises can take the edge off and help us be playful.
- Facilitators need to be very mindful of how they express themselves and lowering barriers to playfulness. Be clear, be appreciative, relax and have fun.

Done right, idea generation can be a lot of fun

GENERATE IDEAS

UNLOCK CREATIVITY TO FIND MANY AND UNEXPECTED IDEAS



Create brave spaces for creativity

Fear of looking foolish can limit creativity. To encourage free thinking, set rules like:

- Stay open-minded with a "Yes, AND..." approach.
- Save critical thinking for later.
- Focus on quantity, not quality—bring all ideas.
- Remind each other of these principles as needed.

SELECT TACTICS:



A **patient**, who can share their personal story. People connect emotionally with stories, so balance facts with storytelling. Choose a clear, comfortable communicator for the best impact.



A **caretaker** is possibly the one who can best speak for patients who are for some reason not able to speak for themselves. They can also share their personal experience of fighting with disease, as they are also affected indirectly.



A **doctor** who can speak about the population, but has also met patients and can speak of the patient perspective.

Test - Learn - Iterate

TEST KEY MESSAGES WITH YOUR TARGET AUDIENCE AND BE OPEN TO FEEDBACK.

Recognize that people may be polite, so create an environment for honest reactions. Treat all feedback as valuable information. Stay open, learn, and adjust your approach based on reactions and follow-ups to improve your advocacy efforts.
