**Volunteer Advocacy Campaign Planning Guide**

# **Introduction**

This guide is designed to support community advocates (that’s you!) as they work to remove systemic barriers that disproportionately impact people who are blind or partially sighted. You will learn about:­

* Getting started
* Choosing an issue
* Defining Roles
* Campaign Goals
* Key Messages
* Activities
* Timeline
* Engaging Stakeholders
* Evaluation

# **Getting started**

An advocacy campaign is an organized effort to mobilize people to support a specific issue, policy, or position. An advocacy issue may come to your attention through a variety of sources:

* A friend or family member
* A colleague
* Media
* A government announcement
* A stakeholder organization
* The wider disability community

**Example: CNIB’s Accessible Insulin Pump Campaign**

CNIB’s accessible insulin pump campaign was launched in response to feedback from Canadians living with diabetes and sight loss regarding the inaccessibility of insulin pumps. People who are blind or partially sighted are unable to safely and independently use insulin pumps because users must interact with visual features on a digital display screen.

## **Choosing an issue**

As an advocate for the sight loss community, you will encounter many important issues affecting those who are blind or partially sighted. While every advocacy issue matters, you won’t have the capacity to launch an advocacy campaign for all of them. Additionally, an advocacy campaign isn’t always the right solution to a particular problem. Before developing a campaign, you should think carefully about the specific issue you want to address and ensure that an advocacy campaign is the best way forward.

Ensure that the issue:

1. **Is systemic**

An issue is systemic when it is created and maintained by social, economic, or political institutions and forces, meaning it has consequences for a number of people. For example, systemic issues may take the form of attitudinal barriers, barriers caused by government policies and laws, or barriers related to inaccessible business practices. You should choose an issue that impacts the broader sight loss community, not just an individual.

1. **Matters to the affected community**

An advocacy campaign should be informed and led by community members. If your campaign is focused on an issue that you don’t have personal experience with, you should engage with members of the affected community to make sure the problem you’re addressing matters to them.

For example, if your campaign is advocating for the rights of guide dog teams but you’re not a guide dog handler, you should consult with guide dog handlers in your community for their perspectives.

1. **Is based on research and facts**

Over the lifespan of your advocacy campaign, you’ll need to speak with various stakeholders about the issue. Ensure that you have all the relevant facts about the issue so that you’re prepared to speak about it when asked. Be sure to gather research from credible sources. Potential sources of information could include:

* Advocacy and non-profit organizations (e.g. CNIB resources)
* Government publications (e.g. Statistics Canada research reports)
* Scholarly research articles
* Persons with lived experience

1. **Is aimed at the appropriate audience**

You wouldn’t want to approach your municipal government with an issue that is regulated by the provincial government, nor would you want to contact the Premier about an issue with a local business. Be sure that you are contacting the person or organization that has jurisdiction over the issue and thus the power to help you create change.

## **Campaign Plan Template — Background**

Once you have chosen an issue, you’re ready to begin writing a campaign plan. You can create a campaign plan in many ways, but your plan should include the elements outlined in this guide.

The first section of your campaign plan should outline the context of the campaign, including a summary of the problem being addressed and any information that’s relevant to your campaign goals and activities. This information will allow everyone to understand the campaign issue and objectives, identify key opportunities, and determine the best direction for action.

You do not need to provide a detailed explanation of the campaign issue in this section, as that step will come next. The background section should only include the basic information someone would need to understand the reason for the campaign.

The types of information you may want to provide in this section could include:

* Definitions of key terms
* Key facts and data about the campaign issue
* Key pieces of legislation relevant to the campaign issue
* Important dates or upcoming events
* Recent updates or significant changes related to the campaign issue
* Key stakeholders related to the issue area, such as other local advocacy groups or government representatives for the relevant jurisdiction
* Past or current local campaigns, actions, or advocacy events related to the campaign issue

### **Background Sample (CNIB Insulin Pump Campaign)**

* Insulin pumps are medical devices that are used by people with diabetes as an alternative to administering insulin through a syringe or pen.
* Diabetic retinopathy is the fourth leading cause of blindness in Canada, and approximately 750,000 Canadians live with diabetic retinopathy.
* 2021 marked the 100th anniversary of the discovery of insulin by Sir Frederik G Banting at the University of Toronto.
* November is National Diabetes Awareness Month, with 14 November being World Diabetes Day.
* The Federal government allocated $35M over five years in the 2021 budget to implement a national framework for diabetes in Canada.
* In June 2021, Bill C-237, an act to establish a national framework for diabetes, passed into law.
* In 2020, CNIB ran an awareness campaign for National Diabetes Awareness Month, sharing the stories of Canadians with lived experience of diabetes and sight loss and their struggles in managing their insulin. CEO John Rafferty also submitted an OpEd that was picked up by print media.

## **Campaign Plan Template — The Issue**

The background section of your campaign plan summarized the key points and information needed to understand the context and landscape of the campaign. The next section should explain the campaign issue in greater detail. The purpose of this section is to briefly explain:

* The problem
* The impacts of the problem
* The people or communities affected by the problem
* The actor or actors responsible for enabling a solution

### **Issue Sample (CNIB Insulin Pump Campaign)**

CNIB’s accessible insulin pump campaign was launched in response to complaints from Canadians living with diabetes and sight loss regarding the inaccessibility of insulin pumps. People who are blind or partially sighted are unable to safely and independently use insulin pumps because users must interact with visual features on a digital display screen.

Insulin pump manufacturers have a responsibility to ensure that a significant segment of their end-user market can safely use their device. Pump manufacturers should be designing pumps using universal design features. We do not need a special pump that blind people can use, we need pumps that everyone can use.

Insulin pump manufacturers assert that retrofitting existing insulin pumps with accessible or audible features is problematic because regulating authorities would then view them as new devices, requiring a new approval process.

Health Canada has processes in place for approving medical devices based on efficacy and safety, but there are currently no criteria to ensure medical devices entering the market are fully accessible.

This has resulted in apathy in making improvements to the accessibility of existing devices.

## **Campaign Plan Template — Roles**

It may be helpful to form a campaign team of engaged participants who can support the development of your campaign. This could include people in your family, social networks, or other volunteers passionate about the issue. When considering who to recruit, think about people with subject matter expertise or lived experience related to your campaign issue who you could engage.

Once you’ve identified the members of your campaign team, gather everyone together for a campaign kickoff meeting. This is your opportunity to set expectations, outline goals, and divide tasks.

Projects run most effectively when everybody involved has a clear idea of their responsibilities. Your campaign plan should specify the role of each person involved to keep organized and prevent misunderstandings. It is helpful to create a table or list that defines the role of each team member and their responsibilities as a member of the campaign team.

### **Roles Sample**

|  |  |
| --- | --- |
| **Name** | **Role** |
| Doris Day | Project Lead |
| Jackie Chan | Spokesperson and Government Relations Coordinator |
| Idris Elba | Social Media Coordinator |
| Salma Hayek | Event Coordinator |
| Sam Smith | Researcher and Writer |
| Nina Simone | Researcher and Writer |

# **Developing the Campaign**

## **Campaign Goals and Asks**

Now that you’ve chosen an issue and identified the key members of your team, you’ll need to determine the specific outcomes that you want to achieve in your advocacy campaign. Identifying your campaign goals will allow you to craft your key messages, determine a timeline of activities, and engage stakeholders.

Remember that specificity is important when defining your campaign goals. While we can all agree that making neighborhoods accessible is important, “make my neighborhood accessible” is not a specific enough goal, nor does it include any information that would allow you to determine whether you’ve been successful.

A more specific and measurable goal could be something like, “Persuade the City of Moncton to designate funding to install APS on all signalized intersections as part of the next annual budget.” This achieves the goal of making the neighborhood more accessible but provides specific, measurable information about what you want to achieve and when.

When considering your desired outcomes, think about your capacity and the available resources. Small advocacy initiatives can be extremely powerful but be mindful of the concrete results you want your campaign to achieve.

Don’t be afraid to be bold and get creative! There are many changes that can be made in a community, but which they may not all get the attention needed to drive change. “Small” issues are often the ones that have the greatest impact on people’s day-to-day lives.

### **Goals Sample (CNIB Insulin Pump Campaign)**

* Health Canada commits to making accessibility one of the criteria it uses when approving insulin pumps for the Canadian market and providing a projected timeline for implementation.
* Build on the successes of CNIB’s 2020 diabetes awareness campaign to further raise awareness of this issue among the diabetes community, federal politicians and policymakers, and the public

## **Key Messages**

Your key messages are the information that you’ll share with decision makers and the public in order to persuade them that your issue matters.

Your key messages should clearly articulate the relevant background information, the issue, and the call to action. A call to action is a statement calling for members of the public to do something that will support the campaign objectives, such as contributing to a letter writing campaign or signing a petition. This gives people a clear and direct entry point to support your campaign and get involved with the issue.

### **Key Messages Sample (CNIB Insulin Pump Campaign)**

* 2021 marks the 100th anniversary of the discovery of insulin by Frederick G Banting at the University of Toronto
* We have come a long way since that discovery, with the first insulin pumps being developed in the 1970’s. In spite of technological advances, insulin pumps have become less accessible over time, as tactile features are consolidated or removed in favor of digital displays.
* Whether through diabetes or another condition, sight loss can affect anyone at any time. We call on all people living with diabetes to support us, as we share a common goal to widen and improve access to insulin devices.
* Health Canada has an established process for approving medical devices and ensuring that they are safe, effective and high quality. Approval criteria should be expanded to include accessible and universal design. The six million Canadians living with disabilities deserve equal access to medical devices and autonomy over their own health.

## **Activities**

You will need to determine the specific activities that will allow you to reach your advocacy campaign goals. Activities vary widely depending on the scope and nature of your campaign. For more information and advice on a range of advocacy activities, visit our [Advocacy Resources](https://www.cnib.ca/en/advocacy-resources) page.

Keeping track of the specific activities required for your campaign is one of the most important steps to stay organized, track progress, and maintain effective collaboration between team members.

It is important that you engage the members of your campaign team as you build out your strategy. Each member of your team may bring different skills and experience, and working together will help strengthen your plan,

### **Activities Sample**

**1. Internal Communications**

* Provide weekly updates to campaign team members every Friday.
* Hold weekly all-member update meetings every Monday.

**2.Community Relations**

* Provide updates and key messages to disability community and partner organizations, urging them to share content on their social media and encourage their membership to take action.
* Notify City Councillors in relevant wards about the forthcoming campaign and request meeting to discuss.
* Outreach to community members with lived experience for testimonials.

**3. Media Relations**

* Contact local journalists about coverage of the campaign.
* Invite media to end-of-campaign action to be held at City Hall.

**4. Social Media**

* Create Facebook page and Twitter accounts for the campaign.
* Share petition link on social media encouraging others to sign and share.
* Publish an open letter to City Council and tag relevant Councillors with a call to action.

**5. Special Events**

* Contact bylaw to inquire about permits for end-of-campaign action at City Hall.
* Solicit volunteers to assist with end-of-campaign action.

## **Timelines**

Along with outlining the activities that will allow you to reach your advocacy campaign goals, you will need to determine your timelines for completing them. This will keep you organized and help you to avoid feeling overwhelmed by all the moving parts of the campaign.

Organize your activities into a table, in order of when they need to happen. Share it with your campaign team to determine if you’ve missed anything. Once you’re confident that everything is in order, assign a date to each item. It may help to work backward, assigning a deadline to the last item first and then moving through each activity until you reach the start date of your campaign.

When building timelines, you’ll need to be mindful of what’s happening around you in relation to your advocacy issue. Take note of any relevant political activities, competing interests, or milestones that may impact the success of your campaign.

### **Timelines Sample**

|  |  |
| --- | --- |
| **Task** | **Date** |
| Notify City Councillors in relevant wards about the forthcoming campaign and request meeting to discuss. | January 30 |
| Provide updates and key messages to disability community and partner organizations | February 1 |
| Share petition link on social media encouraging others to sign and share. | February 2 |
| Contact local journalists for coverage of campaign. | February 10 |
| Contact bylaw to inquire about permits for end-of-campaign action at City Hall. | February 24 |

# **Engaging Stakeholders**

It is essential to identify other organizations, individuals, or groups that are advocating on the campaign issue and look for ways to work together to increase success. This can also greatly expand the reach of your campaign, as you can leverage each of your respective networks.

It is also important to consider unlikely allies that may share some common ground related to your campaign issue. When different groups with different priorities can unite on an advocacy issue, this strengthens the case for change and can influence decision makers. In the case of e-scooter advocacy, CNIB has found unlikely allies in the cycling community, lending strength and support to the voices of both communities.

There is no secret to outreach. If someone in your network works for or is familiar with the organization that you want to connect with, ask them who would be the best contact person for your issue. If you don’t have a contact who can help you to connect, you’ll need to begin with an introductory phone call or email.

An introductory email should include:

* Who you are and who you represent
* A brief overview of the campaign
* A link to your campaign website, if applicable
* Why you think your campaign will matter to them, such as how the issue impacts their community
* What they can do to help. Be specific. Instead of asking for their support, ask them to sign a letter or invite their community to your event.

For further information and advice on stakeholder engagement, see our guide on [How to build advocacy partnerships](https://www.cnib.ca/sites/default/files/2023-01/How%20to%E2%80%A6build%20strong%20advocate%20partnerships_EN.docx).

# **Evaluation**

While the impacts of advocacy work can be difficult to quantify, evaluating the outcomes of your campaign can highlight important insights and lessons learned. Once the campaign is complete, it’s helpful to determine whether the goals of the campaign were met and, if applicable, to compare outcomes with other previous campaigns. This way, you will have a better understanding of best practices which you can apply and improve upon for future campaigns.

Quantitative methods, or statistics, are typically the easiest evaluation metrics to collect and analyze for the purposes of your advocacy campaign.

The following metrics may help to evaluate the success of your campaign:

* Number of people sending letter to MP
* Number of social media impressions
* Number of website traffic to campaign website
* Number of external partners promoting action