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Final Workshop Report on

Strategic Action for Change

Kathmandu, Nepal
February 12-15, 1997

Sponsored by

Promoting Women in Development (PROWID)

and

facilitated by

The Centre for Development and Population Activities (CEDPA)

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In particular, PROWID would like to thank Nancy Russell, Kalpana Chitrakar, Arun Shrestha and the entire staff of the CEDPA-Nepal office in Kathmandu for their guidance, support, and hospitality extended to the PROWID staff and workshop participants throughout their stay. In addition, PROWID would like to recognize the skillful facilitation of the workshop's trainer, Dr. Socorro Reyes of the Center for Legislative Development in the Philippines. A special note of gratitude is also extended to Jane Nandy and to Nancy Langworthy of the USAID Mission in Kathmandu for their insights into the NGO community in Nepal and their continued support of the PROWID program.

Also worthy of note were the contributions of the women and men who participated so enthusiastically in *Strategic Action for Change*. The workshop discussions and outcomes were enriched by the wealth of ideas, experiences, and concrete strategies they shared throughout the week.

Last, but certainly not least, PROWID would like to offer its thanks and appreciation to the Office of Women in Development of the United States Agency for International Development (USAID) for its financial support of the PROWID project.

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EXECUTIVE SUMMARY

Promoting Women in Development (PROWID), a grants program funded by the Office of Women in Development of USAID and managed by the International Center for Research on Women (ICRW) in collaboration with The Centre for Development and Population Activities (CEDPA), held its second regional workshop on February 12-15, 1997 in Kathmandu, Nepal. The workshop, titled ***Strategic Action for Change***, brought together 22 participants from seven Asian countries to discuss and develop advocacy strategies to address women's basic needs, promote women's rights and strengthen women's participation in the political process.

Participants in the workshop included women and men NGO leaders from Bangladesh, Cambodia, India, Indonesia, Nepal, Philippines and Sri Lanka. All brought with them extensive program experience with a variety of nongovernmental agencies dealing with issues of women, gender, and development. Specifically, participants represented organizations and programs seeking to provide: legal counseling and support services; economic development; advocacy skills; domestic violence support systems; media campaigns; gender training; maternal and child health services; policymaking workshops; environmental protection activities; and programs that increase women's participation in civil society. For more information on participants and their organizations, please see Participant Biographies, p. 9.

The goal of the workshop was to strengthen the capacity of women's groups and institutions to respond to the demands and challenges of social, economic, and political change. The workshop concentrated on providing the acquisition of new knowledge and skills to achieve the following objectives:

- To appreciate the importance of strategic planning in advocating for policies that will affect women's lives.
- To enhance participants' skills in identifying and analyzing issues and problems that will constitute the focus of their advocacy.
- To formulate alternative solutions that will address existing problems more efficiently.
- To develop strategic options and choose what is most appropriate to an organization based on its internal strengths and weaknesses as well as the opportunities and threats from its environment.
- To operationalize the chosen strategy through a well-developed advocacy plan.
- To translate the advocacy plan into reality by developing project proposals and identifying funding sources.

The workshop was facilitated by PROWID staff and by Dr. Socorro Reyes, Director of the Center for Legislative Development in the Philippines. Dr. Reyes has extensive experience in strategic planning for advocacy and has done training on this issue throughout the Asian region.

Workshop content focused on: developing a framework for analysis of strategic planning for advocacy; analysis of the vision, mission, and objectives of the participants' organizations; problem analysis and environmental assessment; formulation of policy alternatives and determining policy recommendations for Asian NGOs; development of a strategic plan of action for advocacy; resource mobilization; and development of project proposals.

The participatory, experience-based approach to training, designed to develop critical thinking skills and focused on the application of new knowledge, allowed participants to play an active role in the workshop learning process. A series of participatory methods such as small group discussions, role plays, radio interview simulations, and group problem-solving exercises, provided participants the opportunity to fully use the extensive knowledge and experience they had brought to the workshop.

Participant evaluations indicated that the small group sessions on problem analysis, related to their own needs and realities in the Asian region, were an instrumental factor in learning from each other and in raising their awareness of issues that are of common concern. The learning that participants indicated to be most important and useful was the acquisition of technical tools for developing a strategic plan for advocacy within their own organization. Additionally, many were successful in deepening their knowledge about the need for and importance of developing a strong institutional framework that can sustain advocacy work over time.

As a result of the workshop, participants proposed the need for follow-up in the areas of: networking and coalition-building in the Asian region; leadership training for NGO activists; management training and capacity-building for NGO growth; and proposal development and fundraising. Issues of concern for further consideration related to: gender analysis; legal empowerment of women, in particular the area of violence against women; economic rights issues, specifically land and inheritance rights; and the need to document advocacy efforts so that case studies may be used as learning tools for future work.

PARTICIPANT LIST

Bangladesh

Farah Kabir
Centre for Analysis and Choice
House # 65, Road #6A, Dhanmondi R/A,
Dhaka 1209
Bangladesh
Tel: 880-2-815919
Fax: 880-2-815919
E-mail: farah.cac@drik.bgd.toolnet.org

Rabeya Rowshan
Nari Shanghati
52/C University Staff Quarter, Shohid
Shoroni Road, Dhaka-1000
Bangladesh
Tel: 880-2-912-0499
Fax: 880-2-863-470 or 867-647
E-mail: rahnuma@drik.bgd.toolnet.org

Afroja Parvin
Nari Unnayan Shakti (Women Development
Power)
823/A, Khilgaon Chowrasta
Bangladesh
Tel: 880-2-933-4640
Fax: 880-2-837-462
E-mail: ANUPAM@Bdmail.net

Elisabeth Fulton
Nari Unnayan Shakti (Women Development
Power)
823/A, Khilgaon Chowrasta
Bangladesh
Tel: 880-2-933-4640
Fax: 880-2-956-5636
E-mail: Lfulton@dhaka.agni.com

Cambodia

Sar Samen
Project Against Domestic Violence (PADV)
House 23A, Street 278 Boeng Keng
Kang I, Khan Chamcar Mon
P.O. box 2459, Phnom Penh 3
Cambodia
Tel: 855-23-721-654
Fax: 855-23-362-344
E-mail: padvc@pactok.peg.apc.org

Cathy McCarthy
Women's Media Center of Cambodia
House 9, Street 384, Sangkat Tuol Svay
Prey 1
Khan Chamkarmorn, Phnom Penh
Cambodia
Tel: 855-23-364-882
Fax: 855-23-426-011 c/o WMC
E-mail: wmc@pactok.peg.apc.org

India

Kamla Nath
Centre for Social Research
C4/68 Safdarjung Development Area
New Delhi 110 016
India
Tel: 91-11-685-5837
Fax: 91-11-686-3697
E-mail: csr@giasdl01.vsnl.net.in

Laboni Jana
Child in Need Institute - Chetana Resource
Centre
Vill + P.O. Amgachi, Dist - 24, Parganas (S)
West Bengal 743512
India
Tel: 91-33- 467-8192 / 1206
Fax: 91-33-245-2706
E-mail:
CINI.cal@sm1.sprintrpg.ems.vsnl.net.in

Carmen Melania Madrinan
Society for Participatory Research in Asia (PRIA)
42, Tughlakabad Institutional Area
New Delhi 110 062
India
Tel: 91-11-698-1908
Fax: 91-11-698-0183
E-mail: pria@sdalt.ernet.in

Indonesia

Nursyahbani Katjasungkana
Indonesian Women's Association for Justice
Jl. Radar AURI D5/4
Cimanggis 16952
Indonesia
Tel: 6221-8725383
Fax: 6221-8726343

Ningky Munir
Institute for Management Education and Development
Jl. Menteng Raya No. 9
Jakarta 10340
Indonesia
Tel: 62-21-230-0313
Fax: 62-21-230-2051
E-mail:
Lembaga.PPM1@Graha.Sprint.com

Nepal

Chandra Bhadra
Women's Studies
Padma Kanya Campus
Kathmandu, Nepal
Tel: 977-1-483-346
Fax: 977-1-527-290

Durga Ghimire
Agroforestry, Basic Health and Cooperatives
Koteshwor, Narephat
PO Box 5135
Kathmandu, Nepal
Tel: 977-1- 483-346
Fax: 977-1-227-372

Sunita Sharma
Pro Public
PO Box 8304
Kathmandu, Nepal
Tel: 977-1-221-043
Fax: 977-1-226-088
E-mail: fppi@fppipc.wlink.com.np

Swastika Singh
Dalit Mahila Singh
PO Box 4366
Lalitput, Nepal
Tel: 977-1-520-982

Heet Singh Shrestha
Institute for Integrated Development Studies
P.O. Box 2254, Purano Baneshwor
Kathmandu
Nepal
Tel: 977-1-478930
Fax: 977-1-470-831
E-mail: info@iids.wlink.com.np

Manju Thapa
Asmita Women's Publication House, Media & Resource Center
Pulchowk, Lalitpur
Nepal
Tel: 977-1-523-871
Fax: 977-1-527-941
E-mail: glocom@mos.com.np

Shanta Thapalia
Legal Aid Consultancy Center
Pulchowk, Lalitpur
Nepal
Tel: 977-1-523871
Fax: 977-1-527941 Attn LACC 527-334
E-mail: glocom@mos.com.np (attn LACC 527-334)

Surendra Tandukar
NGO Forum-Nepal
P. O. Box 6961
Kathmandu, Nepal
Tel: 977-1-242-993
Fax: 977-1-220-161
E-mail: decore@casnov.attmail.com

Suraj Manandhar
Development Communication and Research Consultancy (DECORE)
P.O. Box 4343, Anam Nagar
Kathmandu, Nepal
Tel: 977-1-220961
Fax: 977-1-220161
E-mail: decore@casnov.attmail.com

Philippines

Shirley Torrecampo
Tambuyog Development Center
Room 108-A PSSC Building
Commonwealth Avenue
Diliman, Quezon City 1004
Philippines
Tel: 63-2-926-4415
Fax: 63-2-926-4415
E-mail: tambuyog@phil.gn.apc.org

Sri Lanka

Muriel Nilaweera
Central Province Women's Chamber of Small Industries and Commerce
35/2/71 Silverdale Complex
Yatinuwara Street
Kandy, Sri Lanka
Tel: 94-08-224-618
Fax: 94-08-224-618

Facilitator

Socorro Reyes
Center for Legislative Development
Rm. 217, Philippine Social Science Center,
Commonwealth Ave.
Diliman, Quezon City
Philippines
Tel: 632-927-4030
Fax: 632-927-2936
E-mail: cld@misa.pfi.net

PROWID Resource Persons

Patricia Ahern
PROWID Manager
CEDPA
1717 Massachusetts Ave., NW
Suite 200
Washington, DC 20036
Tel: 202-667-1142
Fax: 202-332-4496
E-Mail: Trisha@cedpa.org

Julia M. Masterson
PROWID Coordinator
CEDPA
1717 Massachusetts Ave., NW
Suite 200
Washington, DC 20036
Tel: 202-667-1142
Fax: 202-332-4496
E-Mail: Julia@cedpa.org

PARTICIPANT BIOGRAPHIES

BANGLADESH

Ms. Farah Kabir
Centre for Analysis and Choice (CAC)

CAC facilitates democracy in Bangladesh by providing legislative support to parliament and the legislative branch of government. Ms. Kabir is currently setting up a *Women in Politics Program* to strengthen the capacity of women to articulate themselves in politics.

Afroja Parvin
Nari Unnayan Shakti (NUS)

Founded in 1987, NUS enables women to become decision-makers through a variety of interventions such as credit provision programs, training workshops on income generation, AIDS prevention classes at local brothels, and sex abuse prevention programs.

Rabeya Rowshan
Nari Shanghati

NS is a feminist-oriented research organization that focuses on issues of poverty and development affecting women. Researchers attempt to understand how gender operates in different class, geographical and cultural settings in Bangladesh. Ms. Rowshan concentrates in socioeconomic research and analysis.

CAMBODIA

Cathy McCarthy
Women's Media Center of Cambodia (WMC)

WMC is a non-governmental organization established in 1995 to improve the status of women through the media. The center sponsors media campaigns for women's NGOs, has an audio-visual center that lends out equipment to women's groups, and broadcasts a network program to improve the portrayal of women in the media. Ms. McCarthy's tasks involve fundraising and supervising the network program.

Sar Samen
Project Against Domestic Violence (PADV)

Established in 1995, PADV aims to eliminate domestic violence in Cambodia through a variety of programs including research, education, advocacy, and community organizing. Ms. Samen manages fundraising, planning, and networking activities of the organization.

INDIA

Laboni Jana
Child in Need Institute, Chetana Resource Centre

Established twenty-three years ago, the CRC provides maternal and child health services to rural dwellers in West Bengal. It also organizes women's groups and conducts training in local capacity-building. Ms. Jana currently manages a child health program.

Ms. Carmen Melania Madrinan
Society for Participatory Research in Asia (PRIA)

PRIA is an Asia-based research organization whose mission is to increase women's participation in civil society. Ms. Madrinan supervises planning and resource mobilization in capacity-building projects.

Kamla Nath
Centre for Social Research (CRS)

CRS is a public-interest law firm that provides legal information to the general public. It also conducts workshops on policy-making, acts as a watch-dog body and collects information on current development issues.

INDONESIA

Ms. Nursyahbani Katjasungkana
Indonesian Women's Association for Justice (IWAJ)

The Legal Aid Institute (LAI) of IWAJ was established in 1989 to provide legal assistance to poor Indonesian women. LAI conducts legal awareness campaigns and research. Ms. Katjasungkana's work involves research on employment and the family.

Ms. Ningky Munir
Institute for Management Education and Development (IMED)

IMED is an independent, for-profit institute that offers business consulting services to improve the quality of management systems in Indonesia.

NEPAL

Ms. Chandra Bhadra
Lecturer, Women Studies Program

The Women's Studies Program develops gender sensitive human resources and provides consultancies to national and international NGOs. Ms. Bhadra worked as a consultant from 1994-95 for the Planning Commission, and later as an Advisor for the Ministry of Women and Child Welfare.

Ms. Durga Ghimire
Agro-forestry, Basic Health and Cooperatives (ABC)

ABC was founded in 1987 to empower women through the provision of skills training, educational classes and economic incentive programs. In addition to her responsibilities at ABC, Ms. Ghimire is also vice-president of the South Asian Association for Women's Studies which promotes the equal participation of women in politics and advocates against domestic violence.

Mr. Suraj Manandhar
Development Communication and Research Consultancy (DECORE)

DECORE provides research and consultancy services to national and international NGOs operating in Nepal. Ms. Manandhar's work involves analyzing statistical information and carrying out surveys in various districts of the country.

Ms. Swastika Singh
Dalit Mahila Singh (DMS)

DMS is a non-governmental organization that aims to improve the lives of lower-caste women in Nepal. It fights gender and caste discrimination by providing social, economic and health care services to these women.

Mr. Heet Singh Shrestha
Institute for Integrated Development Studies (IIDS)

IIDS is a non-profit institution established in 1990. It conducts research on human development issues such as water resource management, economic liberalization, women in microenterprise development and appropriate development models.

Mr. Surendra Tandukar
NGO Forum

The NGO Forum is a coalition of some twenty NGOs in Nepal. It provides supervision, monitoring, and capacity-building services to its partner organizations.

Ms. Manju Thapa
Asmita Women's Publication House, Media and Resource Organization

Ms. Thapa publishes a monthly magazine to increase the awareness of women's issues at the national level. In addition, Publication House also develops and produces posters and booklets for neo-literate woman.

Ms. Shanta Thapalia
Legal Aid Consultancy Center (LACC)

LACC was founded in 1986 to further the development and well-being of women and children in Nepal. LACC provides free legal counseling services to women, provides the government with drafts of gender-responsive bills and laws. Ms. Thapalia organizes and coordinates training programs for women lawyers and manages a legal awareness program.

PHILIPPINES

Ms. Shirley Torrecampo
Tambuyog Development Center (TDC)

TDC is involved in environmental protection activities for coastal communities. The organization attempts to strengthen the capacity of local communities to influence local and national bodies about the importance of sound and responsible resource management policy.

SRI LANKA

Ms. Muriel Nilaweera
Central Province Women's Chamber of Small Industries

Created in 1993, this non-governmental organization aims to create awareness about women's economic issues and empower women to enter the economic mainstream. Ms. Nilaweera supervises training programs, trade workshops, and networking activities with collaborating agencies.

SESSION I: INTRODUCTION AND EXPECTATIONS

Nancy Russell, Resident Advisor for the Nepal office of the Centre for Development and Population Activities (CEDPA), opened the *Strategic Action for Change* workshop by welcoming the participants to Kathmandu. She described CEDPA's work in Nepal and introduced the rest of the workshop planning team.

Trish Ahern, CEDPA's Project Manager for PROWID, shared with the participants how the PROWID program was launched to support and promote successful strategies for addressing women's basic needs, promoting women's rights, and strengthening women's political participation. She also extended a warm welcome to the group and encouraged them to use the wealth of their own experiences to enhance the workshop's content.

Dr. Socorro Reyes, Director of the Center for Legislative Development in the Philippines and the workshop facilitator, then asked participants to introduce themselves by simulating a radio talk show format. During the interview, each participant was asked to briefly describe the work of her or his organization, its mission and objectives, and his or her particular role in that organization. Participants took turns "interviewing" one another. For more information on workshop participants, please see Participant Biographies, p. 9.

Following introductions, participants clarified their expectations of the workshop. Participant expectations were to:

- Learn group planning and strategy development skills
- Share experiences and exchange ideas across the Asian region
- Network with other Asia development organizations and regional partners
- Share and understand women's issues from different perspectives
- Strengthen skills in proposal development
- Learn about innovative strategies of other groups working in the Asian region
- Develop knowledge and expertise on gender and women's issues
- Develop regional cooperation mechanisms on common issues such as girl's trafficking and land issues
- Develop advocacy skills for promoting women in development
- Build an alliance of women development workers
- Develop skills in strategic planning and institution-building
- Develop skills in analysis and documentation of development experiences
- Acquire new knowledge on how to fundraise effectively
- Develop ways to conduct advocacy activities in very sensitive political situations
- Discuss specific strategies for influencing policy and programs at the regional levels
- Discuss and develop integrated strategies for effective participation of women in decision-making, especially on issues of legal rights

After discussing the participants' expectations and comparing those expectations with the objectives of the workshop, it was stressed that the workshop would address:

- advocacy skills;
- fund-raising skills related to the implementation of strategic plans;
- strategic planning and institution-building skills to provide organizations with an advocacy orientation;
- women's participation in decision-making and policymaking processes;
- innovative group strategies; and
- the development of integrated strategies to increase women's participation in decision-making.

This clarification of workshop expectations led to a presentation of the workshop goals and objectives.

SESSION II: WORKSHOP GOAL AND OBJECTIVES

The **goal** of *Strategic Action for Change* was:

to strengthen the capacity of women's groups to respond to the demands and challenges of social, economic, and political change.

The specific **objectives** were:

- To appreciate the importance of strategic planning in advocating for policies that will affect women's lives.
- To enhance participants' skills in identifying and analyzing issues and problems that will constitute the focus of their advocacy.
- To formulate alternative solutions that will address existing problems more effectively.
- To develop strategic options and choose what is most appropriate to the organization based on its internal strengths and weaknesses, and opportunities and threats from its environment.
- To operationalize the chosen strategy through a well developed advocacy plan.
- To translate an advocacy plan to reality by developing project proposals and identifying funding sources.

The facilitator then presented the workshop's agenda, describing the content areas and where and how the workshop would be able to meet the objectives and expectations. Please see the Appendix of this report for a complete workshop agenda.

SESSION III: WHAT IS POLITICS?

The facilitator introduced the need for a framework for understanding politics and political change given that, in many areas of the world, involvement in the political arena is relatively new for women. She then introduced a brainstorming exercise called "What is Politics" which elicited participants' understandings and ideas on the meaning of ***politics***.

Following the brainstorm, participants were asked to discuss in plenary the key questions below. A synthesis of their discussion follows.

Questions

- *What comes to people's minds when they hear the word politics?*
- *What do these words tell us about how we think of politics?*
- *Why do we say that women's NGO's are not "in to" politics?*

In response to the questions, most participants felt that politics was about power, decision-making, and negotiation. They also associated it with tricks, manipulation, in-fighting, law, governments and male politicians. Some said politics was corrupt and lacked credibility, while others maintained that politics was a valid means to influence people and attain goals.

The facilitator used the above responses to illustrate how participants had raised three main areas of politics: *players, process,* and *product*. From their responses, she said it seemed as though most participants regarded men and governments as the main players in the decision-making process—the products of which are laws and policies.

This exercise helped participants realize that strategic action for change meant getting involved in politics. As activists, women have a responsibility to transform the decision-making process from one of manipulation to one that will enable them to reach their goals. It is, therefore, a cross-cutting means to address all types of problems and issues and to ensure women's rights, for instance, to be free from violence or to inherit property. This workshop, the facilitator noted, would serve as a tool to enable participants to make politics an effective means to promote systemic social, economic, and political change.

The facilitator followed the above discussion by asking participants how they could transform politics to meet their needs. After a lively discussion, participants felt that a plurality of players, a less divisive approach, and a greater move towards national consensus-building would enable politics to become a friend rather than a foe to activists. If nothing else, these changes would redefine politics to mean equal and active stakeholder participation in decision-making processes at all levels.

SESSION IV: WHO MAKES DECISIONS? THE WOMEN'S MAP

The facilitator again emphasized how understanding the nature of politics would enable participants and their organizations to make the change from only providing services to advocating for rights and increased decision-making power for women. She then introduced the next activity called **The Women's Map** which would help participants to begin to look at women and decision-making and how societal institutions can inhibit women's full participation in that decision-making.

Participants were asked to divide themselves into country and regional groups and to determine concrete examples of how women can be marginalized, and how institutions such as the **(1) the family, (2) schools, (3) the workplace, (4) religion, and (5) the media** may contribute to or reinforce this marginalization. To guide them in their small groups, participants were asked to reflect on the three questions listed below, and then to report their findings for discussion in plenary.

- *What is the role of women in each of the institutions?*
- *What teachings or beliefs that depict women's disadvantaged position in society are reflected in these institutions?*
- *How does the institution reinforce women's disadvantaged positions?*

Through the **Women's Map** exercise, participants shared examples of how women in their countries are disempowered. For example, schools exclude women from decision-making processes in Sri Lanka and the Philippines by appointing males as school heads. In the classrooms, those women fortunate enough to have access to higher levels of education are still discriminated against by the types of coursework they are encouraged to follow and curricula that reinforce stereotypical roles for women. Women in India and Cambodia are marginalized in the workplace through inequitable remuneration for work and a lack of access to child care facilities. In Bangladesh and the Philippines, women are represented in the media in a very negative way, used as either sexual objects to sell consumer goods, or relegated to the familiar roles of wives and mothers.

Interestingly, while many women are relegated to subservient roles through their religions, women in religions institutions in Nepal are depicted as very strong goddesses of wealth and power. Despite this fact, however, Nepali women also face a lot of discrimination. For example, society demands that women and girls lead lives of purity and chastity, they are often made to fast for their brothers and husbands, and, in some remote areas, girls are even sold to temples as prostitutes.

As far as women and governments were concerned, participants from all countries felt that women are marginalized in government because they are not encouraged to run for political office or to actively participate in policy matters. They also have restricted access to legal mechanisms and routinely face discrimination on matters of family law.

Participants found the Women's Map exercise both challenging and enlightening as each area of decision-making depended on changing social, economic, political, and religious circumstances. They unanimously agreed, however, that poor, rural women are generally not involved in any area of decision-making. For example, not only does this group of women have no control over budgeting decisions, but many of them must also ask their husband's permission before seeking care for reproductive health concerns. The Women's Map was an important unifying exercise for participants because it clearly illustrated that national boundaries create no barriers to the problems women face. While the context or specifics may differ, discrimination and its effects on women remain the same.

SESSION V: WHAT IS ADVOCACY? WHAT IS STRATEGIC PLANNING FOR ADVOCACY?

Advocacy is an important tool for educating policymakers and targeting audiences and can ultimately be used to influence public policy. At times, advocacy can be defined as a lobbying process, focused directly on influencing policy and decision-makers. However, under different circumstances, advocacy may mean an emphasis on the educational and empowering processes aimed at communities so that they can become more effective advocates and build stronger grassroots organizations. Advocacy depends on the individual concerns, values and problems faced by a particular group or organization. Therefore, advocacy is a process of social change and transformation directed at making the relationships of power in society more democratic, by ensuring that marginalized people have a place in public decision-making in order to bring about healthier, safer, and more productive livelihoods.

Strategic planning for advocacy is a systematic process that enables an individual or organization to assess the vision, mission, and objectives of an organization, as well as to identify the measurable outcomes of an advocacy effort. It aims to produce the best result, while efficiently using scarce resources. Strategic planning also requires the formulation of a framework which helps an organization to identify and analyze the issues or problems it perceives, to systematically select those issues which can be best addressed by an organization, and to develop alternative solutions to the problem.

SESSION VI: VISION, MISSION, AND OBJECTIVES

The basic foundations of strategic planning for any organization are **Vision, Mission, and Strategy**.

A **Vision** is an organization's ideal view of how it would like the world to be in the future; it is a hoped-for reality. Visions are expressions of ideals and may not be attainable in one's lifetime or even in many lifetimes. A shared vision can be the initial force that brings people together for

collective action, and a clearly articulated vision can provide momentum and cohesion to individuals working in an organization or a network. It is a statement of social commitment and the starting point for maintaining an effective organization. An exercise in bringing together staff, board, and members to define a common vision can be vital to an organization's strength and capacity.

A **Mission** describes an organization's primary purpose for existence, given its vision of the future. A clear mission translates the vision into a practical, viable action. An organizational mission is essential for:

- guiding major policy decisions about alternative sources of action;
- prioritizing activities, demands, and use of resources;
- channeling collective action in one direction; and
- providing meaning and motivation to hard work that may produce few concrete results.

The facilitator stressed the fundamental importance of a clear vision, mission and objectives for any organization and its activities. After a brief discussion of the definitions provided above, participants were given a case study on *The Women's Welfare and Health Organization (WWHO)* and asked (1) to define the vision, mission and objectives of the organization, and (2) to tell whether and how the organizational characteristics had changed from the 1970s to the 1990s. The group's findings are presented in the chart below. To view a copy of the case study, see the Appendix of this report.

[The definitions and the case study used in this session of *Strategic Action for Change* were adapted from *Strategic Thinking: Formulating an Organizational Strategy Workshop* (Facilitator's Guide), 1996, from the Institute for Development Research, Boston, Massachusetts.]

WWHO's VISION, MISSION, AND OBJECTIVES

WWHO	1970s	1990s
Vision	A society where rural, poor women have information and equal access to family planning services.	A society which adequately provides for and protects the physical, psychological, and socioeconomic well-being of all women.
Mission	To provide family planning services through WWHO's national and local level health clinics.	• To advocate for enforceable gender - responsive laws and policies, that ensure the comprehensive and integrated well-being of women, at national and local levels of government • To advocate for the implementation of these programs and projects at national and local levels of government that ensure the comprehensive and integrated well-being of women
Objectives	• To set up more clinics • To reduce maternal and child maternity rates • To increase the number of women who avail themselves of pre- and post-natal care • To increase the number of women users of family planning services and methods • To share information on safe family planning methods	• To formulate a gender sensitive policy agenda • To build strategic alliances for policy reform • To monitor the implementation of policy reform at national and local levels • To increase awareness of policy reforms enacted and implemented • To sensitize health planners and practitioners to the feminist perspective • To mobilize internal and external resources • To advocate for comprehensive, quality, low-cost health care packages for women • To increase awareness and consciousness of health and health rights • To provide shelter and necessary support services to female victims of violence

Participants stressed that over the years, as the social, political, and economic environments changed, WWHO adapted its mission and objectives from simple service delivery to advocacy initiatives that would attempt to influence policy and decision-makers and to reallocate resources to promote the integrated health and well-being of women. Participants found that the exercise demonstrated the difficulty of formulating a strategic plan for advocacy given changing environments and different audiences. The exercise also helped participants to understand the relationship between an organization's overall vision and mission and its advocacy strategies.

SESSION VII: ISSUE IDENTIFICATION

The next step in strategic planning for advocacy is to carefully identify and analyze the problems or issues to be addressed. To illustrate the complexity of political, social, and economic factors that need to be explored in identifying problems, the facilitator divided participants into four groups and asked that they represent a particular problem through a role play. In plenary, participants then analyzed the myriad problems illustrated by the role plays.

Group #1 dramatized how economic development initiatives dislocate people from their native lands and force them to seek work that can adversely affect the health and welfare of themselves and their families, while leading to numerous environmental problems. Participants used this role play to illustrate how all these problems could be traced to vague economic policy.

Group #2 depicted the difficulties of rural village life, and more specifically, the problems that poor, landless women face vis-à-vis discrimination, low wages and a lack of employment, education, and health services.

Group #3 vividly illustrated issues of domestic violence, alcoholism, polygamy, dowry, and a lack of knowledge about legal rights. This mini-drama was also useful in emphasizing the importance of NGO involvement to help formulate policies to improve the legal status of women.

Group #4 tackled problems of sexually transmitted diseases (STDs), and, in particular, the difficulties women face in seeking and receiving quality reproductive health care and in persuading males of their responsibilities, e.g., wearing condoms for contraception and to stop the spread of STDs and HIV/AIDs.

The facilitator concluded the session by discussing the role of problem analysis in strategic planning for advocacy. It is important, she stressed, that organizations consider the following questions when deciding to address a problem:

- *What are the problem's extent and magnitude?*
- *What are the underlying political, social, and economic causes related to the problem?*
- *Who is concerned about it and might want to get involved?*
- *What are the motives of those concerned and what are their values and attitudes?*
- *Which players are able to get what they want?*
- *Where will decisions be made?*

SESSION VIII: DEVELOPING POLICY ALTERNATIVES & RECOMMENDATIONS

Participants were asked to reflect on the different problems depicted by the role plays presented earlier and to select four main issues on which to base their next activities. The following were selected:

- **Sexual harassment in the workplace**
- **Agricultural reform in poor rural communities**
- **Violence against women**
- **Women's lack of control over economic resources**

To begin to define a framework for advocacy strategies, participants then worked in their selected issue groups to address several key questions. They were:

- *What should be the policy framework and alternative solutions to the problem?*
- *What should be the objectives of the alternative solution?*
- *What are the essential features of the solution?*
- *Who will be affected by the solution?*
- *What criteria should be used in choosing policy?*
- *What kind of research data is needed?*

Summaries of the groups' discussions are provided below.

Issue #1: Sexual harassment of female garment workers in factories

Representing factory workers, managers and NGOs, members of this group defined sexual harassment, depicted how it impacted the lives of women, and described how a health service organization had decided to improve the situation of female garment factory workers. The group's solutions to this particular problem included counseling victims of harassment, sensitizing male factory managers, and advocating for enforceable gender sensitive policies at a macro-level to eliminate such discrimination.

Issue #2: Agricultural reform in poor rural communities

As representatives of an NGO coalition, participants here addressed issues of poverty, inequitable land distribution, and a lack of employment opportunities for women. Participants in this group decided to work on reducing poverty at the household level, diversifying employment opportunities, and advocating for skills development and land reform laws.

Issue #3: Violence against women

This group defined the different types of violence women face in society, what NGOs were doing to help victims of this violence, and what legal provisions existed to combat the problem. They decided to network with NGOs working in

the same area to formulate a plan for educating society, sensitizing the media, and advising the government on drafting and implementing laws against violence.

Issue #4: **Women's lack of control over their own economic resources**

Participants in this group discussed how WWHO (the health services organization they had focused on in the case study of the day before) had broadened its mission to one of advocacy. As hypothetical members of WWHO, they decided to advocate to redefine women's work and make land, credit, and inheritance laws more gender responsive.

By answering the above questions, participants recognized the complexities of the problems they and other women face, and how many different ways a problem may be addressed. Workshop participants began to realize that strategic planning was an essential process to undertake when analyzing a problem, reviewing options for advocacy activities, and selecting those options which they and their organization are best suited to address.

SESSION IX: STRATEGIZING FOR ADVOCACY

The strategic planning process is essential to an effective advocacy strategy because it allows an organization to systematically select from among different options. Good strategic planning is essential to advocacy as it enables an organization to:

- identify its internal strengths and weaknesses. In other words, strategic planning helps an organization to determine whether it possesses the capacity to conduct certain programs or activities by reviewing such areas as its human resources, research capabilities, available resources, media outreach, and leadership potential.
- conduct an external assessment of its allies, opponents, constituents, and stakeholders;
- classify areas of opportunities and threats; and
- formulate a strategy chart that details goals, targets, allies and opponents, advocacy and policy influence tactics, organizational considerations ,and citizen education considerations.

SESSION X: ENVIRONMENTAL ASSESSMENT

For the purpose of practicing strategic planning and completing the activities of the workshop, participants were asked to select two of the four previous issue areas and to reflect on the

Women's Welfare and Health Organization (WWHO) case study. Based on that organization and the issue selected, participants identified their organizational strengths and weaknesses and then outlined the opportunities and threats their NGO might encounter when conducting an advocacy project. The charts below summarizes the plenary discussion that ensued.

Economic Empowerment Group	
Internal Strengths	• grassroots base and experience • institutional motivation • health field focus and leadership • experience in alternative health delivery programs • institutional flexibility
Internal Weaknesses	• lack of experience in advocacy work and analysis • lack of networking with other organizations • narrow focus on women's health • lack of experience in economic planning
Opportunities	• democratic governance structure • women sensitive national assembly members • health department and other development agencies • experienced NGOs* • investors and other business groups • grassroots support/people power/voter power • other women's organizations and women's movements
Threats	• religious fundamentalism • cultural fundamentalism • local elites • patriarchal structure • powerful interest groups, interest groups and people who might lose from change • unmanaged economic growth

*Some noteworthy debate took place on the issue of NGOs. Often NGOs working in the same area undercut and compete with one other, rather than being helpful and supportive. Therefore, NGOs can be both opportunities and threats. If NGOs work in different areas or with different target groups, then this problem may not exist, but there are numerous concerns that should be taken into consideration. Participants felt that discussion on the issue of NGOs emphasized the importance of networking—to which more time should be devoted.

Domestic Violence Group	
Internal Strengths	• clear vision, mission, and objectives • strong leadership • committed volunteers • community support through beneficiaries • wide outreach • ability to mobilize resources • ability to deliver services • access to print media • networking ability • research
Internal Weaknesses	• small staff • outreach limited in terms of issue and geographic coverage • dependence on volunteers – need professional researchers, counselors and psychologists • slow adaptability of management
Opportunities	• law enforcement agencies, e.g., judges and the police • media • women victims • donors • women's organizations • community volunteers • human rights advocates • women's ministries* • medical practitioners • community • legal provisions • government budget • international recognition of the issue
Threats	• law enforcement agencies • judges • medical practitioners • media • community • legal provisions • women • victims • women's organizations and ministries

*Participants spent some time discussing how women, themselves, are often not responsive to women's needs. In fact, they mentioned how women are often used as tokens by the patriarchal system. For instance in the Philippines and India, female ministers are products of political dynasties that have their own agendas. Therefore, increasing the number of women in parliament is not a guarantee that they will work on women's issues.

SESSION XI: STRATEGIES FOR ADVOCACY

Following the environmental assessment, participants were then ready to begin developing their strategies for advocacy. Working in their same issue groups, participants proposed: **Goals, Short-Term Victories, Targets of Advocacy, and Secondary Targets.** Time permitting, participants should also look at their: **Constituents, Allies and Opponents, Policy Influence Tactics, Organizational Considerations, and Uncertainties.** The charts below synthesize participants' group work on advocacy strategies.

Economic Empowerment Group			
Goals	**Short-term victories**	**Targets**	**Secondary Targets**
• to eliminate the feminization of poverty • to secure women's control over all basic economic resources	• a change in inheritance and property laws • the provision of credit opportunities for poor women and communities of women • an increase in income-generation opportunities for women • appropriate legislation for regulating public and private investment • legislation that protects women's safety	• cabinet members, specifically from the national planning commission, economic affairs department, industry and commerce departments, ministries of urban and rural development and women's affairs • parliamentarians • judiciary • local community leaders • trade union leaders • national banks and other financial lenders • chambers of commerce • media persons	• local elites • opposition politicians • local officials • NGOs and development agency representatives • leaders of women's groups

Economic Empowerment Group, Continued			
Constituents, Allies and Opponents	**Policy/Advocacy Influence Tactics**	**Organizational Considerations**	**Uncertainties**
Constituents • poor women **Allies** • women's organizations • development groups • donor agencies • women in government • other politicians concerned with poverty and women's issues • concerned media • religious leaders concerned with women' issues • prominent members of society • male members of household **Opponents** • fundamentalists and conservatives • local power holders • politicians • interest groups and investment groups who don't want to change their power	• use media to highlight platforms on women's issues at election time • educate candidates on women's economic issues • work on drafting of bills • lobby concerned ministries • organize lawyers to work on women's economic issues • use a highly visible case to draw attention to women's economic issues • build alliances with prominent theologians, thinkers, and activists who influence religious debates and thinking • organize a national strike where women do not work (and are compensated) – draw attention to the value of women's labor • create a quality award based on equal employment opportunities and women-friendly environments • create public ratings of banks based on loans and credits offered to women • provide officials with data to highlight the economic disempowerment of women	• experience in health • broad reach • extensive constituency base • health skills and reputation	• budget for advocacy • limited staff • network capabilities with key decision-makers is still in its infancy • leadership capabilities yet unknown

Domestic Violence Group			
Goals	**Short-term victories**	**Targets**	**Secondary Targets**
Long-term • freedom from violence against women • removal of gender inequality and discrimination **Short-term** • gender responsive laws (awareness campaign) • implementation/enforcement of existing legal provisions and laws	• amendment and enforcement of laws • altered power relations • increase of people's access to policymaking	• community leaders • people • local legislators • politicians • elite groups • religious leaders • local media • educational institutions – teachers and students • local institutions and organizations • activists	• local and national legislative bodies • United Nations and Human Rights groups

SESSION XII: THE ADVOCACY PLAN

Participants divided themselves according to their issue groups and began to formulate advocacy plans around those issues. The plans were to detail objectives, activities to be undertaken, resources required, and indicators of effectiveness. The following information was presented in plenary by the groups on economic empowerment and on domestic violence against women:

Domestic Violence Advocacy Plan				
Objectives	**Activities**	**Resources Required**	**Where to obtain the resources?**	**Indicators of effectiveness***
• advocate for the eradication of violence against women • ensure that police, officials, legislature, community and women are sensitized • make women aware of their legal rights	• network • create support service centers • create legal rights awareness among women and the community • design rallies/posters for mobilization and awareness creation campaigns • host training and workshops/seminars • host radio and TV programs (talk shows, dramas and discussions) • conduct ongoing research for monitoring/action and best practice research • lobby legislators on a one-to- one basis as an organizational activity • create global awareness of the issue	• human (trained managers/skilled service providers/technical expertise/volunteers) • cash or in-kind contributions • capacity building (training of trainers and advocates) • government support • traditional and non-traditional media • contingencies	• internal (WWHO's staff and board members) • community (tax-exempt contributions) • government projects (lobbying) • donors (project proposals) • political parties/interest groups	• longitudinal statistical data on the decrease in the number of violence cases • increase in the number of complaints registered with NGOs and the police (indicator of health seeking behavior) • policy changes • increase in size of network • increase in level of awareness among service providers • increase in media coverage • increase in staff/volunteers and capacity • increase in help-seeking behavior of women at centers

*Some participants felt that there should be two types of indicators— one type that measured objectives and another that measured activities. For example, a report could be as much an indicator of final output as an indicator of activities. This debate generated much discussion with no consensus reached.

Economic Empowerment Advocacy Plan				
Objectives	**Activities**	**Resources Required**	**Where to obtain the resources?**	**Indicators of effectiveness***
• Changes in property and inheritance laws	• review existing laws • collect and research the effect of inheritance laws • undertake comparative research on laws of other countries • propose new drafts to legislators or appropriate concerned ministry • educate local leaders and others at the community level on the ill effects of present laws • lobby key players for implementation / ratification of proposed legislation	• legal, professional experience • money • research personnel • popular educators • training for existing staff from experienced activists • pool of resource persons to draw on for professional expertise • full-time core of experts in a mufti-disciplinary field • office space	• legal expertise groups (NGO/law contacts) • funds from government grants and local foundations/ philanthropic sources • sponsorship forum • multinationals who are acceptable donor agencies • university research institutions • the community • personal linkages • networking • partner recommendations • advertisements • extensive interviewing • donors	• changes in property and inheritance laws • report on status of existing laws • documents providing synthesis and analysis of data gathered • new draft of bills • dissemination of materials • increased level of participation in education and campaign activities • number of positive responses to education activities • number of contacts with key players • media coverage • use of "our" data and information resources by others

SESSION XIII: PROPOSAL DEVELOPMENT

After the groups' strategies were presented, the facilitator discussed the components of effective, strategic proposals. She then asked the two groups of participants to develop project proposals that define:

- what the project aims to achieve;
- the duration of the project;
- who would benefit;
- what activities would be involved;
- what the proposal's impact would be; and
- how much funding would be required and from what sources?

Prior to the activity, participants raised the issues of donor-driven projects, shifting funding realities, and the importance of networking with other NGOs in securing donor money. The facilitator emphasized that participants should keep in mind the organizational vision, mission, and objectives, and she provided participants with tips on dealing with various funders. The issue groups then began their task to develop project proposals.

Participants concluded the content of the *"Strategic Action for Change"* workshop by presenting their proposal outlines on ***Legal Education on Inheritance and Property Rights*** and ***Advocacy on Women's Rights in the Family.***

Legal Education on Inheritance and Property Rights					
Problem Statement	The Problem Statement would include: • poverty statistics with disaggregated data to highlight women's situation; • the historical context; • the socio-political context; • the legal status of women; • established links between health and economic status of women; • information on our specific target groups with supporting data on land holding patterns, economic resources, distribution, access of resources, etc.; and • a strong statement regarding the connection between lack of economic empowerment and women's poor health status.				
Rationale	• Show link between inheritance law, the current social situation and the disempowerment of women to highlight the need for our work. • Demonstrate why our organization is uniquely suited to do this work at this time. • Clarify that our program is a component of a comprehensive effort at eradicating inequitable inheritance/property rights				
Objectives	• raise awareness about discriminatory property/inheritance laws among communities • lay the foundation for the acceptance of a need for new laws • build pressure groups				
Project Description	This project will work with community-based organizations in *x* communities, as well as with local groups working specially with women. We also will conduct education programs.				
Methodology	• popular education methods • materials development • training of trainers • implementation plan (This will be done in conjunction with partner organizations and groups.)				
Time Frame	Phase I	Identify local partners	Train local partners	Develop materials	Field test materials
	Phase II	Support local trainer programs	Identify and create pressure groups	Assess impact and revise strategy	Evaluate
Beneficiaries	• *x* number of communities and women in those communities • local community-based organizations				

Advocacy on Women's Rights in the Family	
Problem Statement	The Problem Statement would include: • a socio-economic profile of the working area/community; • the number of complaints registered with WWHO; • survey reports; and • secondary data.
Rationale	Women are ignorant of their rights in the family, society and in the legal system. As a result, women are being exploited at all levels (economic, social and physical).
Objectives	• create awareness among women of their rights and develop their self-reliance and confidence to fight for their rights • provide support, infrastructures for women • develop advocacy material/curricula (formal and informal) • sensitize and mobilize media for projecting women positively
Project Description	• awareness campaign • sensitizing training workshops • coalition-building • lobbying at different levels
Methodology	• Six 2-day training workshops for twenty participants (police, lawyers, social workers, community workers) • Focus group discussions with families, religious leaders and opinion leaders • Regular consultations with coalition members/network • One-to-one counseling
Time Frame	2 months preparation 20 months activities 2 months evaluation ---------- 2 years
Beneficiaries	• women • children • families • communities
Expected Results	• awareness among women • decrease in the number of domestic violence cases • increase in awareness and sensitivity of officers, police, etc.
Output	• development of materials and curricula • support service centers • network/coalition building collectives
Impact	• decrease in the cases of domestic violence • introduction and adoption of gender sensitivity program by departments • positive projection in media of women • improvement of the status of women in family/community • decrease in early marriage • decrease in divorce rate • decrease in polygamy • globalization of the issue • decrease of sexual harassment in the family

Indicators	• rate of divorce • rate of polygamy • rate of early marriage • rate of sexual harassment case • rate of torture cases	
Budget	• Advocacy • Materials Development • Training/Workshops • Networking/Coalition-Building • Media (electronic and print) • Support Services human resources, counseling centers, skills development, medical and counseling services, program coordination, other • Staff Overhead	$ 30,000 7,000 15,000 3,000 5,000 50,000 12,750 **Budget Total: US $ 97,7500**
Other Funding Sources	• human rights organizations • pharmaceutical/business enterprises • USAID/UNICEF/UNDP/UNIFEM • government	

WORKSHOP EVALUATION

The final hour of the workshop was devoted to a comprehensive, written evaluation. Participants had also been asked to provide daily written and oral evaluations so that the facilitators could gauge the pace and success of the day's learning and activities. The final evaluation, however, was more in-depth and asked participants to share their thoughts and impressions on a variety of aspects of the workshop, including methodologies of instruction, relevance of topics and handouts presented, quality of facilitation, and satisfaction with the hotel and workshop site.

Overall workshop evaluations indicated that small group work on problem analysis, related to the participants' own needs and realities in the Asia region, was instrumental to learning from one another and in raising awareness of issues that are of common concern. The majority of the participants reported that they had been successful in deepening their knowledge and experience of women's issues in the region. The learning that participants indicated to be most important and most useful was the acquisition of technical tools for developing a strategic plan for advocacy within their own organization, and many felt that they would be able to successfully use the new skills when they returned home. Participants cited the opportunity to network and to learn more about their colleagues' work as the most enjoyable aspect of the workshop, and some even expressed the need for more time to devote to that form of informal learning. The participatory approach was also lauded as a means for everyone to take part in the learning and sharing, and it was thought to be essential in establishing an environment conducive to sharing ideas and experience.

As a result of the workshop, participants proposed the need for follow-up in several areas, including: networking and coalition-building for joint advocacy activities in the Asia region; leadership training for women NGO managers; management training and capacity-building for the growth and expansion of women's NGOs; and proposal development and fundraising skills. Issues of concern and in need of further consideration were related to gender analysis, legal empowerment of women, in particular in the area of violence against women, economic rights issue, specifically land and inheritance rights, and the need to document advocacy efforts so that case studies may be used as learning tools for future work.

Participants were unanimously satisfied with the workshop site and hotel accommodations, and they were pleased to have had the chance to attend the opening reception where they could get to know one another better and meet with other Nepali and international NGOs not represented at the workshop.

RECEPTION AND CLOSING CEREMONY

Reception

In addition to the formal training agenda, participants were also invited to a reception hosted in their honor on the second evening of the workshop. Held in the gardens of the Shangri-La hotel, the reception gave participants the opportunity to meet and network with USAID Mission representatives, CEDPA-Nepal staff members, and persons representing a variety of local and international NGOs. As part of the entertainment, participants were also treated to a program of traditional Nepali dance.

Closing Celebration

On the afternoon of the final day, participants took part in a closing ceremony to mark their week-long accomplishments and to celebrate new friendships, shared visions and new strategies. The women presented one another with certificates, signed by Patricia Ahern, PROWID's Manager, and Nancy Russell, CEDPA-Nepal's Resident Advisor. The certificates indicated the women and men's participation in the workshop and their membership as CEDPA alumnae. Participants closed the workshop by expressing their thanks to their Nepali hosts and the workshop coordinators, and by singing songs that were inspirational to their shared commitment to gender equity.

APPENDIX

PROGRAM SCHEDULE

Strategic Action for Change

February 13-15, 1997

TIME	DAY 2, Feb.13	DAY 3, Feb. 14	DAY 4, Feb.15
8:30-8:45	Energizer	Energizer	Energizer
8:45-9:00	Summary & Evaluation of Day 1	Summary & Evaluation of Day 2	Summary & Evaluation of Day 3
9:00-10:00	Presentation of Refined VMO	Policy Intervention for Change: Developing Policy Alternatives & Recommendations	Workshop on Creating Strategy
10:15-10:30	Tea/Coffee Break	Tea/Coffee Break	Tea/Coffee Break
10:30-11:30	Identifying the Issues/Problems for Advocacy Based on the Organization's VMO	Workshop on Formulation of Policy Alternatives & Choosing Policy Recommendations	Presentation of Workshop Results
11:30-12:30	Workshop 2: Issue Identification	Presentation of Workshop Results	Preparing the Advocacy Plan
12:30-1:30	Lunch	Lunch	Lunch
1:30-2:30	Plenary: Presentation of Workshop Results	Strategizing for Advocacy Grounding Strategy on Reality: Internal & External Environmental Assessment	Presentation of Advocacy Plans
2:30-3:30	Issue/Problem Analysis	Case Study: How Strong Is WWHO? How is the World Outside?	Development of Project Proposals
3:30-3:45	Tea/Coffee Break	Tea/Coffee Break	Tea/Coffee Break
4:00-5:00	Workshop on Issue/Problem Analysis Plenary: Presentation of Workshop Results	Plenary Presentation Creating Strategy Definition of Strategy Generating Strategic Alternatives	Writing Workshop
5:00-6:00		Optional Sightseeing (5:00-7:30 pm)	Presentation of Drafts and Evaluation and Closing Ceremony
6:00-8:00	Reception at the Shangri-la Hotel		

Program Schedule

Strategic Action for Change

Day 1, February 12, 1997

TIME	DAY 1, Feb. 12
9:00-9:15	Welcome and Opening Remarks
9:15-10:15	Introduction of Participants Expectations Check Review of Workshop Objectives; Presentation of Workshop Framework; Review of Program Flow
10:15-10:30	Tea/Coffee Break
10:30-11:30	What is Politics? Exercise: The Ball of Politics
11:30-12:30	Who Makes Decisions on What & Why? Exercise: The Women's Map
12:30-1:30	Lunch
1:30-2:30	What is Advocacy? What is Strategic Planning for Advocacy (SPA)? Framework of Strategic Planning for Advocacy
2:30-3:30	The First Level of SPA: Formulation of the Vision, Mission, and Objectives of Advocacy (VMO) Case Study: The Women's Welfare & Health Organization (WWHO)
3:30-3:45	Tea/Coffee Break
4:00-5:00	Workshop: Drafting of VMO
5:00-6:00	Plenary 1: Presentation of Workshop Results

GOAL

To strengthen the capacity of women's groups to respond to the demands and challenges of social, economic and political change.

OBJECTIVES

1. To appreciate the importance of strategic planning in advocating for policies that will affect women's lives.

2. To enhance the participants' skills in identifying and analyzing issues and problems that will constitute the focus of their advocacy.

3. To formulate alternative solutions that will address existing problems more effectively.

4. To develop strategic options and choose what is most appropriate to the organization based on its internal strengths and weaknesses, and opportunities and threats from its environment.

5. To operationalize the chosen strategy through a well-thought of advocacy plan.

6. To translate the advocacy plan to reality by developing project proposals and identifying funding sources

LIST OF HAND-OUTS

1. What is Advocacy?
2. What is Strategic Planning for Advocacy?
3. Framework of Strategic Planning for Advocacy
4. Vision and Mission
5. Vision, Mission and Objectives
6. Case Study: The Women's Welfare and Health Organization
7. Problem Analysis
8. Environmental Assessment
9. Strategy and Strategic Issues
10. Formulating Strategy and Goals
11. Strategy Chart
12. Policy Players: A Power Map
13. 14 F's of Effective Strategies

WHAT IS ADVOCACY?

Advocacy involves different strategies aimed at influencing decision-making at the local, provincial and national levels, specifically:

Who decides - elections, appointments and selection of policy-makers, judges, ministers, boards of advisors, Managing directors, administrators, etc.

What is decided - laws, policies, national priorities, services, programmes, institutions, budgets, statements.

How it is decided - accessibility of citizens to information and the process, extent of consultation with public, accountability and responsiveness of decision-makers to citizens and other stakeholders.

How it is enforced, implemented - ensuring accountability so that decisions are put into action, laws enforced equitably, etc.

Policies and decisions contribute to solving problems. Effective advocacy requires a sharp understanding and analysis of a concrete problem and a coherent proposal for its solution.

ADVOCACY FOR WHAT?

More importantly, advocacy for what? Effective advocacy may succeed in influencing decision-making, by:

- changing or educating leaders, policy-makers and those who carry out policies;
- reforming policies, laws and budgets, developing new programmes;
- making decision-making and procedures more transparent, democratic and accountable.

Equally critical to the success of advocacy is the extent to which advocacy **permanently expands citizen participation in policy-making and governance.** Specifically, it is critical that advocacy help to:

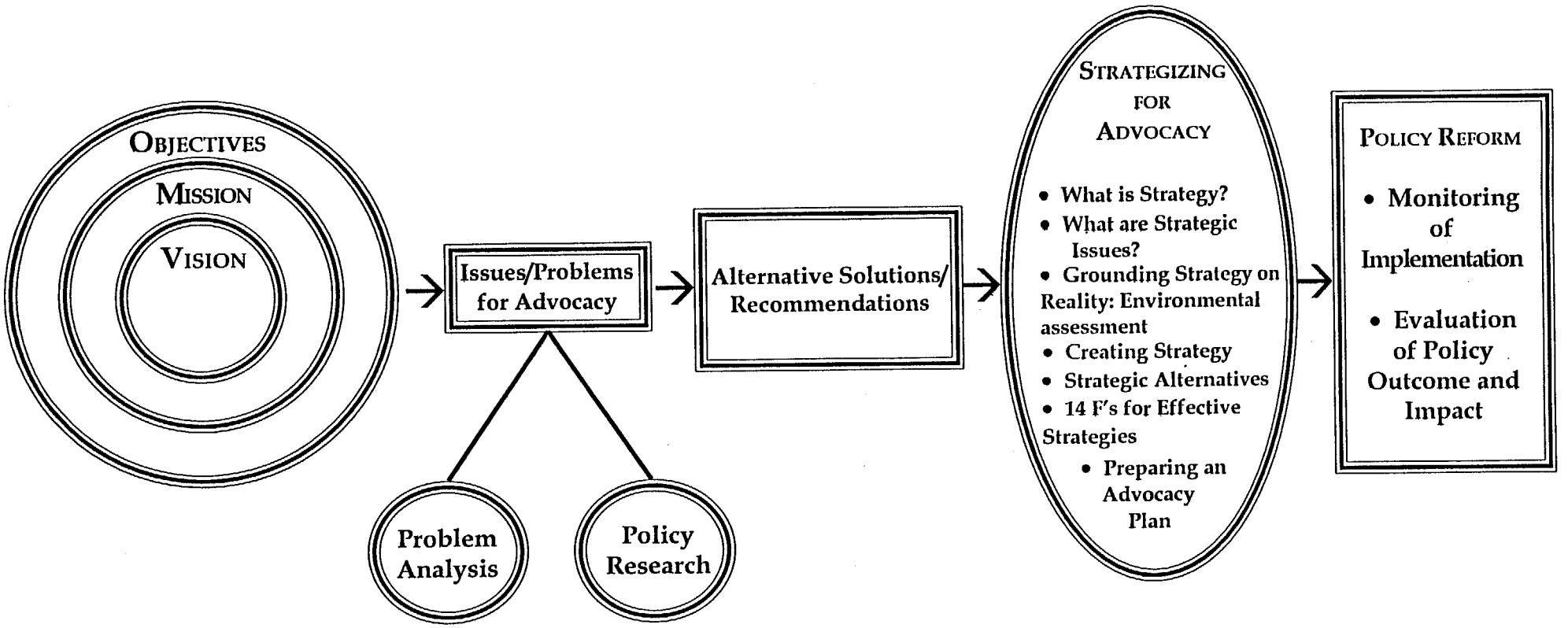
- educate women, workers and marginalized communities to be able to identify and analyze problems, define their own priorities and solutions, exercise their rights and understand and use the "system" to their benefit;
- build and strengthen citizen organization, social movements and NGOs that assist disadvantaged communities to articulate demands to the state and ensure sustained participation and influence on the political process.

VeneKlasen/InterAction/CEDPA

What is Strategic Planning for Advocacy?

- It refers to the process of defining clearly what the VISION,MISSION and OBJECTIVES of advocacy are over a specific period of time.
- It involves identifying the measurable end results of advocacy which reflect the fulfillment of its vision and mission.
- It aims to produce the best result to effort, outcome to task and output to input ratios.
- It allows the most efficient use of scarce resources for advocacy

FRAMEWORK FOR STRATEGIC PLANNING FOR ADVOCACY



PREPARED BY:
DR. SOCORRO L. REYES
THE CENTER FOR LEGISLATIVE DEVELOPMENT

READING I: VISION AND MISSION

This reading explores the role of vision and mission in the formulation of organization strategy. A clearly articulated and shared vision and mission is the foundation on which effective organizational strategies are built.

Background

Most development organizations are committed to changing some aspect of the current social, political, or economic reality. For instance, an organization may form to provide literacy training to village women. In time, however, the organization may find itself involved in a wide variety of other activities such as non-formal education, advising on small business development, and organizing campaigns to protect the rights of self-employed women.

These expanded activities usually result from peoples' real needs and from the peoples' trust in the organization's past successes. However, the new activities may have little to do with the organization's original purposed, or with the existing skills or capacities of the organization. If this happens, the organization's energies may be spread very thin, effectiveness may suffer, and organization members may begin to wonder about the usefulness of their work, or about what they should be doing.

So what are visions and missions, and how can they be of use in maintaining an organization's effectiveness?

Organizational "Vision"

An organization's vision is its view of how it would like the world to be, its hoped for "reality to be" as opposed to the "reality that is." Visions are expressions of ideals, and may not be attainable in one lifetime or even in many lifetimes.

Organizational visions often originate with an individual visionary founder, or with a group of people who have some ideas about how life could be better than it currently is. These ideas may spring from personal experience, or from a religious or ideological source. Whatever the source, visions are the lifeblood of effective development organizations in several ways.

A shared vision is often the initial force that brings people together for collective action. People with visions of social or political change frequently decide they must join with others who share their vision if they are to have nay hope of attaining it, and so join existing organizations or start a new one. Once joined together in an organization, members may reexamine or refine their individual visions until a truly

shared or collective one emerges. It is usually the role of the visionary founder or founding group to ensure that the vision is kept alive, and stated in a way that it may be broadly shared by other organization members.

Shared visions are vitally important throughout the life of a development organization. Voluntary development work is often difficult, poorly paid, personally threatening, and results are sometimes invisible. A clearly articulated vision can provide energy, momentum, and strength to individuals working in development organizations and can be a continuing focus for their social commitment. A shared vision can also help bind an organization together in times of crises, and provide the incentive to work through internal conflicts.

A vision is only a starting point for building and maintaining an effective organization. There are many ways in which a single vision may be pursued, so it becomes necessary to decide more specifically what the organization exists to do.

Organization Mission

A statement of organization mission describes the organization's purpose for existing given its vision of the "reality to be." It describes in general terms how the vision is to be pursued. For example, one organization whose vision is to create "a world where no child ever dies of a preventable disease," has as its mission "to reduce infant mortality by providing health services to women and children in underserved areas." Another organization with the same vision, might choose as its mission to "engage in social mobilization to change the economic conditions which foster malnutrition and disease."

A clear mission connects the vision to a method for achieving that vision, and this has a number of benefits. A clear mission can guide an organization's leaders in major policy decisions about alternative courses of action. It helps define both what the organization will do and what it will not do. If broadly understood and shared, the mission helps channel collective action in a common direction, so that peoples' energy and organization resources serve a common purpose. Otherwise, even people with a shared vision may pursue individual paths to the vision and the power of collective action would be lost. For people working on day-to-day operations, a shared mission may provide meaning and motivation since it can help them see how their work contributes to attainment of the vision.

The mission is the starting point for keeping an organization focused and effective. A shared mission functions like a compass, bringing the organization back on course despite constantly changing demands from constituents, and shifting political and economic forces.

As with the vision, it is usually the role of an organization's leaders to articulate the mission and help others understand it. But including other organization staff, board members, and other constituents in formulating the mission can be an effective way of building joint ownership and understanding of the mission.

An organization's understanding of the social and political context is an important influence on its choice of mission. This can be seen in the different missions of the two organizations described above. Different theories of social change and different understandings of the external context can lead to very different missions.

Only rarely, and usually after extreme organizational tension and pain, will an organization change its vision. Changing mission is also a major shock to an organization, and is a relatively unusual event. However, if there has been a big change in an organization's analysis of development problems, political space, or other constituent demands, reexamination of organization mission <u>may</u> be in order. A change in strategy is often sufficient to keep an organization effective, even in the face of major shifts in its external context. But unless the mission is occasionally tested against an analysis of the current situation, the organization could cease to be an effective instrument for realizing the vision.

VISION

A clear, measurable and challenging description of a desired future goal around which an organization can direct its program of work. Such a future goal, when achieved, should reflect some impact the organization has on its target beneficiaries.

A society where:

- *women participate actively and effectively in the determination of policy decisions in the political, social and economic fields.*
- *women's interests and perspective are defined, articulated and heard in all policy debates.*
- *policy decisions recognize and guarantee women's basic human rights*
- *women have equal opportunities as men to be appointed and elected to decision-making positions*
- *women's vote is a strategic resource to promote and advance the women's cause and transform structures and values that marginalize women.*

MISSION

Encompasses a statement of purpose, the primal motivation of the organization, its very reason for existence.

A specific performance-related vision, a set of strategic guidelines about how and where the organization will operate, and a set of organizational values.

To facilitate women's participation in the decision-making process as advocates and/or holders of formal positions of political power and authority at all levels of government by providing research, training and information development services.

OBJECTIVES

Objectives are measurable end results that derive their impetus from the mission statement.

- *To develop legislative advocacy skills of women's organizations in pushing for the passage of laws in the national and local levels of government that promote and protect their welfare and interest.*

- *To raise the level of policy debates on issues affecting women such as violence, reproductive health rights, family and marriage, political representation, economic opportunities, gender-fair education, etc.*

- *To actively participate in the creation of a women's vote for more effective women's representation in policy-making bodies.*

- *To train women with a feminist perspective and agenda to run and win elections.*

KEY RESULT AREAS AND PERFORMANCE INDICATORS

Objective 1: Develop Legislative Advocacy Skills

KRA Gender-Sensitive Legislation

PIs:

1) Legislative Initiatives of Women's Groups
2) Effective Policy Advocacy of Women's Groups
3) Enactment of Legislative Initiatives Into law
4) Monitoring of Implementation and Evaluation of Outcome

Objective 2: Raise the Level of Policy Debate on Women's Issues

KRA: Relevant, Responsive, Meaningful Legislation on Women's Issues

PIs:

1) More Thorough Committee Discussions, Deliberations on Women-Related Legislative Proposals

2) Increased Participation of Women in Committee Hearings
3) More Research-Based Information Provided to Policy-Makers by Women's Groups
4) More Forums on Women's Issues

Objective 3: Creation of A Women's Vote

KRA: Inclusion of Women's Issues in the Policy Agenda and More Women Appointed to Policy-Making Bodies

PIs:
1) Significant Budgetary Allocation for Women's Programs and Projects
2) Increase in Number of Women in Decision-Making Positions
3) Women's Issues are Prioritized in Policy Agenda

Objective 4: Field Feminist Women in Elections

KRA: Formation of a Critical Mass to Support Pro-Women Legislation

PIs:

1) Women's Issues Become Part of the Legislative Agenda
2) More Legislative Initiatives Protecting Women and Promoting their Welfare are Enacted Into Law
3) Women Legislators Head More Committees
4) Distinct Women's Voice in Congress

WOMEN'S WELFARE AND HEALTH ORGANIZATION (WWHO)

The Women's Welfare and Health Organization was founded in the early seventies by five women health care providers and social workers in a poor, underdeveloped country ruled by a corrupt, military dictatorship. A very patriarchal and conservative society, more than 50% of the people are Muslims, a quarter are Hindus, the rest are Buddhists, and a handful are Christians. Religion has a very strong influence over the people's values, attitudes, and preferences. Poverty stalks the countryside where 65% of the population lives. The major sources of livelihood are farming and fishing where women are very visible but not paid.

Social service delivery was grossly inefficient and unreliable and WWHO was one of several organizations set up to provide alternative service delivery to millions of women all over the country, particularly in the rural areas who cannot access health services. The maternal mortality rate is high at 209 deaths per 100,000 women: 10-15% of the women are nutritionally deficient, only 32% avail of post-partum care while 94% avail of pre-natal care, both of which are below accepted standards of quality; and 12% of those pregnant in the last three years suffered major obstetric complications. Moreover, one-fourth have had an unwanted pregnancy, of which 5% aborted, 14% tried to abort but failed, 4% did something to bring on their period and 5% of those who did something to terminate the pregnancy were hospitalized as a consequence.

WWHO runs a national clinic and five (5) others in different parts of the country offering basically family planning services to poor women. They provide information and access to all kinds of contraception and menstrual regulation. In response to the women's demands, the clinics diversified its services to include maternal and child health care, family counselling, and the treatment of other health problems. The clinics are always busy attending to hundreds of poor, rural women who hardly received any medical attention in the past.

Its staff is composed of one full-time medical doctor and nurse and volunteer health care workers. Aside from the five founders, its Board consists of a university professor, a lawyer, two medical practitioners, a business entrepreneur, and a newspaper columnist. They are all women known for their commitment to the women's cause.

It draws its resources mostly from international donors with whom it has established a solid reputation for effectiveness and efficiency. Government looks with suspicion at WWHO and accuses it of serving foreign interest. A law was recently passed regulating NGOs access to foreign money.

WWHO enjoys the support of other nongovernmental and people's organizations particularly the women, the urban poor, human rights advocates, peasants and workers. It is severely criticized however by Islamic and other religious groups for subverting their basic doctrines and teaching women to question their traditional roles in society.

In the early 80's the military dictatorship was overthrown by a popular people's revolt and the process of democratization began. National elections for both the Presidency and the legislature were held. Several political parties contested the elections and with citizen vigilance, the results were deemed reflective of the public will. A multi-party coalition was formed since no one political party won the majority needed to form a government as required in a parliamentary system. Most of the legislators elected were men: of the 120-member National Assembly only five were women.

A constitution was drafted to provide the legal framework for the political system and define the distribution of powers among the three branches of government, the relationship between the national and local units, citizens' rights and responsibilities, and the mechanism for political accountability. The Constitution explicitly provided for citizen representation in all policy-making bodies at both the national and local levels. It also expressly declared the equality between women and men.

Two years later local elections were held to fill up executive and legislative seats in the twenty-one provinces all of whom were led by governors and a nine-member legislative council. The women won 5% of the gubernatorial positions and 10.5% of the legislative seats. In the same year, the National Assembly enacted a local decentralization law that devolved the following functions to local government units: health, environmental management, general welfare, and development planning. It also increased their share in internal revenue allotments

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and expanded their powers of taxation.

Inspite of the democratic space created by the new constitution and the newly-installed government, organized groups like WWHO were reluctant to mainstream in the policy process. More than a decade of military rule has destroyed people's confidence in the government's capacity and commitment to address their needs and demands. They prefer the parliament of the streets to the halls of the legislature where the players are the rich and powerful, the process tedious and laborious, and the product status-quo maintaining.

The nineties saw some transformation in this attitude as sectoral groups including women's organizations inched their way through the legislature. Civil society became vibrant participants in the policy-making process as more and more groups realized that like it or not, government lays down the rules through public policy tools such as laws, executive orders, and administrative regulations. Increasingly, they also realized that their work will be more effective if there is a favorable and supportive policy environment that provides not only the framework of democratic governance but also allocates resources for the delivery of social services.

The country's economic growth also dramatically increased from 3% to 7%. Three of the five clinics operated by WWHO are in so-called economic growth areas characterized by a rapid rise in investments in industrial projects. The emergence of factories created problems of environmental pollution and respiratory diseases. The economic boom encouraged investors to put up hotels, recreation centers, beer houses, golf courses, and the like. There was a resurgence of prostitution and the Department of Health reported a significant escalation of sexually transmitted diseases.

The peace and order situation also deteriorated. Crimes of violence against women increased and rape was estimated to be committed every six hours in the country. Its occurrence jumped to 25% between 1991 and 1993 and the percentage can be higher considering that only 20% of cases are reported. Conceivably the 2,285 cases reported in 1993 can be as high as 11,425. For the first quarter of 1996, the police reported a 40% increase in reported cases of rape.

WWHO realized the need to augment its health service delivery strategy with advocacy for gender-responsive policies, programs and projects targeting national and local legislators. Its latest research showed that inspite of significant

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gains in the overall status of women in the country in the last two decades of its work, the current state of health of women particularly the poor, remains an area of great concern.

There was also some pressure for WWHO to expand its services to providing support services to survivor victims of rape, incest and other forms of violence against women. This included medical assistance, psychological counseling and therapy, and serving as a temporary safehouse.

The time for advocacy has come for WWHO. The Executive Board has scheduled a meeting to discuss how the organization will respond to the changing socio-economic and political environment while at the same time remaining faithful to its original mandate of providing health services for women. How will you as a Board member respond to the challenge for change?

Developed by Dr. Socorro L. Reyes, President of the Center for Legislative Development with some ideas from L. David Brown's "Women's Health Agency"

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PROBLEM ANALYSIS

When faced with problems in our personal lives, we are often frustrated by the many angles that have to be considered and the conflicting nature of possible solutions. The more people we consult about a problem, the greater the number of factors that are brought to our attention. The more we delve on the problem, the more aspects we find that need evaluation. The same dilemma arises in problem analysis. Don't accept the initial problem statement without question.

1. Determine if the problem exists: what are its symptoms? what are its causes? what are its consequences?

2. If the problem exists, what is its magnitude and extent?

3. Who are the individuals or groups usually concerned about this problem and who might reasonably be expected to become involved in the current problem?

4. What are their motives, needs, desires, goals and objectives? What do they want? What will it take to satisfy them?

5. What are their values and attitudes? What do they see as desirable means and ends? What will they accept?

6. What can they use to get what they want? Which of the players are most able and likely to get what they want?

7. Where will decisions be made: in the legislature? the bureaucracy? the executive?

ENVIRONMENTAL ASSESSMENT

The second level of good strategic planning is environmental assessment where the strategist grounds the organization according to the realities of the environment it operates in. There are two environments:

External Environment: the area or sector affecting or being affected by the organization.

Internal Environment: the resources, personnel, capabilities and constraints of the organization itself.

EXTERNAL ASSESSMENT

1. Study events unfolding and resources of the environment.

2. Evaluate trends, directions, movements in the environment.

3. Identify opportunities for development by the organization.

4. Identify obstacles or threats to development by the organization.

INTERNAL STRENGTHS AND WEAKNESSES

The INTERNAL STRENGTHS of the organization refer to its capabilities as:

HUMAN RESOURCE CAPABILITY: refers to the competence (training, skills, knowledge) and commitment (motivation, attitudes) of staff. Numbers are, of course, important too.

RESEARCH CAPABILITY: research is not only data gathering. It also includes analysis of data using a framework that will show cause and effect relations. Policy research shows the social, economic and political consequences of specific policy alternatives:

Does your organization conduct regular research?
Are the results of this research widely shared?
Are they utilized by policy-makers?
Do they affect the direction of the policy process? And the nature of policy decisions?

MOBILIZATION CAPABILITY means getting people to act, to do something about a problem such as environmental pollution, alcoholism, drug addiction, lawlessness, etc., also, to generate a critical mass of supporters.

RESOURCE CAPABILITY: the availability of money for use in advocacy. Business groups are able to buy radio and TV time, space in the newspapers to advocate their cause.

MEDIA PROJECTION CAPABILITY: access to newspaper editors, columnists and reporters is invaluable. As well, a good relationship with broadcast media people is an asset.

LEADERSHIP CAPABILITY: the ability to provide direction, unify efforts and motivate people to solve problems.

The INTERNAL WEAKNESSES of the organization refer to its limitations and deficiencies such as:

- Lack of competent, committed, full-time personnel
- Lack of research-based information and capacity for policy analysis
- Lack of financial resources
- Inadequate media projection
- Bureaucratic inefficiency
- Lack of grassroots network i.e., no mass base
- Internal Strife and division

READING II: STRATEGY AND STRATEGIC ISSUES

Many organizations are quite clear about the vision of the world they want to pursue. (For example, a world free of economic exploitation.) Many organizations also have a clear understanding of their mission, or reason for being. (For example, to reduce the number of bonded laborers and improve the quality of their lives.)

Far fewer organizations have a clear understanding of how they should best use their resources in order to achieve their mission. In other words, they lack a clear strategy.

Strategy

A strategy is a set of concepts that guide an organization's use of its resources to pursue its mission.

The same resources can be used in many different ways to address development problems. As is true of organization mission, choice of strategy will also depend in large part on the organization's **social change theory**, and on its analysis of the problem and of contextual forces and trends. An accurate analysis and theory of social change should help identify leverage points where organization activity will have the most impact. Organizations that are very ideologically driven must be careful that the purity of the ideology does not limit their strategic options, and result in reflective or irrelevant strategies. For example, an ideological belief that social mobilization for advocacy is the only way to address development problems may blind an organization to the possibility that non-formal education could be a valuable aspect of their strategy.

Embedded in a strategy are answers to the questions:

1. What is the nature of the development problems the organization seeks to solve?
2. How will the activities of the organization contribute to substantial and sustainable change in those problems?
3. How can the organization use its strengths and avoid its weaknesses to accomplish its mission?

We can illustrate these points with the following example:

The Problem: Bonded labor is common in our province although it is illegal. It exacerbates poverty and dependency among those in bondage so they are deprived from the chance to exercise their constitutional and human rights. The system is perpetuated by the economic and political power of landlords, indifference of public officials, and disempowerment of the bonded laborers themselves.

Theory of change: Those benefitting from bonded labor will not willingly release them. Change will involve conflict, even including physical confrontation. We can win by using the law and non-violent protest, but we must be prepared for repercussions at least in the short term. Newly released bonded laborers will need assistance to "rehabilitate" themselves since their prior life has had detrimental effects on their ability to be self-sufficient. We will need to build strong group solidarity in the face of physical threats and we will need to appeal to those who disapprove of bonded labor for support against vested interests.

Strategy: Identify bonded labor, gain their release through legal means, and organize them to create a new life for themselves. Get media coverage of the issues and individual cases to build public support, force the government to enforce the law, and provide "protection" from vigilante landlords.

Strategy and Day to Day Program Operations

Most importantly, strategy provides concepts that guide choices about:

1. **What to do.** Strategy allows decisions about where and how to use scarce resources (time, money, people) for maximum impact toward accomplishing the organization's mission.

2. **What <u>not</u> to do.** The organization should avoid activities that:

   - require more people, time, skills or funds than it has available,

- will not produce results because of external constraints (such as government repression or lack of popular support),
- will have few sustainable impacts,
- will drain energies away from more central concerns, or
- for other reasons will not advance the organization's mission.

All organizations have characteristic ways of using their resources, whether or not this "strategy" is ever explicitly stated. Some organizations may be successful in achieving their missions without an explicit strategy, but most will not. Changes in the problem, or in the external context or in the organization's abilities may make old programs and activities irrelevant to new situations.

Fit

Strategies work best that reflect a close **fit** between the problem, the external context, and the organization's strengths and weaknesses. For example, a strategy that relies heavily on media coverage will not work if the media is antagonistic to the cause (negative coverage might result in such a case). When the media is sympathetic, and the organization is skilled at getting this message across, such a strategy can be very effective. In order to achieve a good "fit," the organization must have a clear understanding of these components.

Assessing the Current Situation and Identifying Strategic Issues

In order to make good choices about how to pursue your organization's mission and identify issues that must be addressed, it is important to understand these key aspects of the present reality:

1) the **development problems** the organization seeks to solve, including an understanding of the causes of the problems. It is also important to know what measures can be used to show whether the problem is getting better or worse. (For example, literacy rates, number of bonded laborers released, etc.)

2) the **external context** in which the organizations works. This can included people, or organizations or other forces which control the organization's access to needed

resources, or the degree of political space.

3) the organization's present **capacity**, including the quantity and quality of such factors as leadership, formal structures, workers' skills, technology, norms and values, communication, decision-making styles, etc.

Assessing these aspects of the present situation will also help identity **strategic issues** now facing the organization. A strategic issue can be defined as a question facing an organization that is:

- subject to influence by organizational action, and
- significant to the attainment of its mission.

An example of a strategic issue is:

> "Should we focus our efforts on rehabilitating previously bonded laborers in the 14 villages where we now work, or expand our efforts to release bonded labor in 5 more villages that require our help? Our organization was set up to work for the release of bonded labor, but the people we're already working with have so many other immediate problems for which they want our assistance."

Some important issues cannot be influenced by the organization. Others have no real consequences for the organization's mission. They are not strategic issues. And example of an issue that is <u>not</u> strategic is:

> "Should we include the entire staff in our monthly coordinators' meeting or only include those people who are directly involved in issues on the agenda?"

In this example, the decision is subject to organizational control, but the outcome will probably not significantly affect attainment of the mission. The choice may affect the organization's morale, quality of decisions, efficiency, etc., but will most likely not be a decisive factor in attaining the mission.

Strategic issues may result from a variety of factors, especially those that undermine the fit

between problem, context, and organizational capacity:

- Changes in development problems, such as the solution of old problems or the rise of new ones, may pose strategic issues. For example, emerging federations of people's organizations may replace voluntary organizations as channels for voicing peoples' concerns. This may solve a key development problem but leave NGOs without a familiar role.

- Changes in external context, such as the appearance of new threats and opportunities, may pose a strategic issue. For example, a change of government may bring in a regime that is hostile to the organization's work, so it must decide about how to deal with government harassment.

- Changes in organizational strengths and weaknesses, such as new leaders or rapid organizational growth, may create strategic issues. Rapid organizational growth may raise issues of coordination that require choices about new organizational systems or structures.

- Pro-active planning, such as anticipating future trends, or wanting to initiate strategies that will help shape the future context in which the organization functions.

The emergence of strategic issues calls for strategic decisions. These decisions will shape the future of the organization significantly. It is important that strategies chosen be consistent with the underlying mission and vision. For example, if the mission is empowerment of landless labor, but the strategy emphasizes service delivery, one needs to ask whether the strategy "fits." A service delivery strategy may fit some aspects of the problem, of the context, and of the organization's capacity, but may not fit the mission.

In many cases strategic issues call for strategy reformulation. Most strategic issues do not require reconsideration of the organization's mission.

READING III: FORMULATING STRATEGY AND GOALS

A. Formulating and Reformulating Strategy

A good strategy uses the organization's analysis of development problems, the environment, and its own capacities to identify activities that will best serve to accomplish its mission and promote its vision. Strategy defines the role the organization seeks to play in promoting social change and development, and provides guidance in addressing current and future strategic issues.

Strategy formulation and reformulation is a continuing process. This is especially true for voluntary development organizations that face rapidly changing problems and external contexts. The diagram at the end of this reading presents an overview of strategy formulation, including concepts from Readings I, II and III of this resource material. In reality, these processes are seldom this neat or linear. But ideally strategy formulation includes some attention to each of the elements shown.

Strategy formulation (or reformulation) is required when:

- The organization is new and making basic choices about how to use its resources
- Significant changes in the organization, the external context, or the development problems have called into question the organization's fundamental mission.
- Current strategic issues arise that threaten to prevent achieving the organization mission. Such issues might arise from changes in development problems (e.g., the emergence of many new organizations of bonded laborers), changes in the environment (e.g., a new government hostile to the bonded labor movement), or changes in the organization (e.g., leadership transition or a rapid increase in size).
- An organization decides to play an active role in shaping the future environment in which it will function, and so identifies future strategic issues. (This process will be described in more detail in the section below on "Picturing a Desired Future")

1. Preparation for Strategy Formulation and Re-formulation

Strategy formulation, or re-formulation, requires some preparation. Thought should be given to several factors before beginning the process, including:

- Is there agreement on the need to reformulate strategy? The process will be much easier if there is general agreement ahead of time on the need for, and goals of, formulating strategy. People who think that current strategies are working just fine will be reluctant to invest time in creating new ones. Discussing the need for strategy formulation will create a shared understanding of the present situation and build support for moving in new directions.

- Who should be included? In order to generate high quality strategies, be sure to include people in the process who have the relevant information. To increase the likelihood that a new strategy will be accepted and used, include in the process people who will be most affected by the strategy and who are essential to its implementation. The best strategies in the world will be ineffective if good relationships are not maintained with key constituents within and outside the organization.

- Consider what additional resources may be needed to complete the strategy formulation process, such as:
  - information about future trends
  - funds for convening key constituents
  - information about the work of other organizations

2. Assess Current Situation and Identify Current Strategic Issues

[This is covered in detail in Reading II]

Strategy formulation uses all the concepts presented in Part I (Vision and Mission) and in Part II (Strategy and Strategic Issues). A good assessment of the present situation and current strategic issues is an <u>essential</u> component of good strategy formulation.

3. Picture a Desired Future and Identify Future Strategic Issues

Most organizations have a very long-term vision of the world they want to create. (This is the vision as described in Part One.) This sort of vision is so long term that it can easily be expected to take many generations to achieve.

But some organizations also picture desired futures that are closer at hand, such as two to five years. These future-driven organizations imagine what the organization would actually be doing, what sort of impact it would be having, how its constituencies would behave, and what the organizations capacities would be several years ahead. These organizations do not only <u>react</u> to present forces, but anticipate future trends and actively reformulate strategy to create the future situation they desire. By doing this, the organization creates a positive "pull" into the future, and may be much more effective by proactively "creating" its future than are organizations that are

merely reactive.

Picturing a desired future for your organization also allows you to identify **future strategic issues**. Future strategic issues are changes that must occur, if your organization's is to achieve its desired future. These may include:

- changes needed in relations with key constituents (e.g. government needs to see our organization as an effective ally in its own land reform efforts, otherwise our work may not be tolerated by the next regime.)

- changes needed in organizational capacity (e.g. we need to increase our organizing capacity to meet the growing expectations of villagers over the next few years.)

4. Identify Alternative Strategies

There are usually a number of potential strategies that might be effective in achieving a single mission. (For example, to address problems of inadequate health services, an organization could employ a strategy of direct service delivery, or advocacy with the government health ministry, or social organizing to create independent clinics, etc.) Identifying a broad range of potential strategies before evaluating them can be a good way to generate creative strategies.

Ideally, a statement of strategy should 1) indicate what organization skills will be needed to carry out the strategy; 2) provide more concrete guidance about how the method the organization will use to pursue its mission; 3) indicate the desired outcome of the method. (The strategy may also give guidance about what the organization will not be involved in.)

Here are two examples of very complete statements of strategy:

> "Use our organizing skills to build independent organizations of poor people in neighboring villages to promote local initiatives and increase peoples' influence with government officials. Respond to groups that seek organizing help, but do not commit scarce resources to village elites."

and

> "Building on our extensive contacts, create a network of health care projects that are locally controlled by existing community organizations and share organizational and financial resources. Begin with those that have already demonstrated responsiveness to local needs rather than donor priorities."

5. Evaluate and Choose Strategies

After generating a number of potential strategies, you can choose among them according to criteria that you decide are most important. An important criteria in formulating and selecting any strategy is to achieve a fit between the development problem analysis, context analysis, issues, and organizational strengths and weaknesses. This involves an in depth look at strategic issues, and at gaps between what the organization is now doing and what it will be called on to do in the desired future.

Examples of the sort of "fit" we're referring to here include:

- fit of strategy with the vision and mission
- fit of program activities with development problems
- fit of organization skills with organization strategy
- fit between current assessment (of problems and context) and strategy
- fit between planned strategies and actual program activities

Strategies which have the potential for replication in other areas or organizations are usually preferable to those which do not have the potential for increasing impact. (For example, while direct service delivery strategies may address an immediate need in one place, a pilot program to demonstrate the effectiveness of new kind of people's organization could have much wider impact.) Likewise, strategies that are sustainable over the long term without the continues assistance of a voluntary organization are usually preferable to those that require continued voluntary organization involvement. Not only are self-sustaining strategies more empowering of people at the local level, they also free up voluntary organization energy and resources to tackle new problems. A good strategy can sometimes be identified by its usefulness in making decisions about what not to do. These are just a few examples of the kinds of criteria you may wish to use in choosing among potential strategies for your organization.

B. Formulating Goals

The strategies that an organization selects will provide guidance in setting goals that are very specific and measurable. For example, "Organize landless groups to solve problems defined by their members in ten villages over the next six months, and demonstrate to their members that those groups can in fact solve problems that would otherwise go unsolved."

As you can see from this example, the goal refers to the strategy ("organize landless groups to demonstrate their ability to solve their own problems"), but also specifies a particular task to achieve (organize in ten villages) and a time frame for achieving it (six months). As with all the other aspects of the strategy formulation process, goals should "fit" with all the other elements: vision, mission, desired future, etc.

Implementing new strategies and goals frequently requires changes in an organization's skills and ways of doing things. (For example, implementing a new strategy may require that new goals communicated and broadly accepted, or that people need training to take on new responsibilities and tasks.)

Strategy Chart

(adapted from Midwest Academy)

After choosing your issue, fill in this chart as a guide to developing strategy.
Be specific. List all the possibilities.

Goals	Targets	Constituents, Allies & Opponents	Advocacy/ Policy Influence Tactics	Organisational Considerations	Citizen Education Considerations
1. List the long-term objectives of your advocacy campaign, organization and educational programs. 2. State the intermediate goals. What constitutes victory? To what extent will the campaign: • Win concrete improve-ments in people's lives? • Give people a sense of their own power? • Alter the relations of power? • Build Organiza-tion? • Improve alliances. • Incorporate political awareness? • Increase citizen/ NGO access to policy making. • 3. What short-term or partial victories can you win as steps toward your long-term goal?	1. Primary targets: Local, National & International. A target is always a person. It is never an institution or elected body. • Who has the power to give you what you want? • What power do you have over them? 2. Secondary targets: Local, National and International. • Who has power over the people with the power to gie you what you want? • What power do you have over them?	Constituents Direct Stakeholders 1. Who cares about this issue enough to join or help the organization? • Whose problem is it? • What do they gain if they win? • What risks are they taking? • What power do they have over the target? • How can you engage them? 2. Allies • Whose problem is it? • What do they gain if they win? • What risks are they taking? • What power do they have over the target? • Into what groups are they organized? • How can you engage and involve them? 3. Who are your opponents? • What will your victory cost them? • What will they do or spend to oppose you? • How strong are they?	1. For each target, list the tactics that each constituent group can best use to make its power felt. Tactics must be: • In context of political moment: ie. elections, drafting of legislation, policy formulation, • Flexible and creative • Directed at a specific target • Make sense to the membership • Be backed up by a specific form of power • If you're confronta-tional, will it cause a backlash? • If you're not confronta-tional, will you gain any attention? Advocacy tactics can include: • Media events • Actions for information and demands • Public hearings • Strikes • Voter registration and voter education • Law suits • Accountability sessions (US example) • Negotia-tions • Lobbying • Model Projects	1. List the resources that your organization brings to the campaign. Include: money, number of staff, facilities, reputation, experience, etc. What is the budget, including in-kind contributions, for this campaign? 2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers where possible: • Expand leadership • Increase experience of existing leadership • Build membership base • Expand into new constituen-cies • Raise more money • Alliances with other groups. 3. List internal problems that have to be considered if the campaign is to succeed. 4. List structures of internal accountability and decision making necessary for an effective campaign.	Constituency education programs need to: • tap grassroots concerns and knowledge and link local concerns with global issues • be based on a long term vision and strategy for social change that includes education for immediate advocacy goals such as changing laws or policy as well as education for longer-term goals such as building strong civic organisations to hold authorities accountable • Educational programs need to include methods and processes that are participatory, problem posing and empowering such as participatory research. They need to include a mix of learning opportunities that involve: the development of political analysis and conflict resolution skills; the affirmation of self-esteem, solidarity and sense of humour; and the development of knowledge and experience in the practice of power, accountability, coalition-building and collaborative problem-solving.

Policy Players: A Power Map For Advocacy Planning

Hand-Out No. 12

Short-term Advocacy Objectives of Organisation/Coalition:

Long-term Advocacy Objectives of Organisation/Coalition:

I. Major Players	II. Institution/ Structure	III. Key Individuals	IV. Opinion/ Viewpoint on Issue	V. Link to Beijing Platform/ Process
GOVERNMENT/STATE DECISION MAKERS & KEY ACTORS:				
National				
Provincial				
Local				
OTHER INFLUENTIAL ACTORS:				
Business				
Media				
Political Parties				
NGO's				
Community Groups & Associations				

I. Major Players	II. Institution/ Structure	III. Key Individuals	IV. Opinion/ Viewpoint on Issue	V. Link to Beijing Platform/ Process
Labor				
Religious Groups				
Academic & Professionals				
Other				
INTERNATIONAL ACTORS:				
Donors				
Other NGOs Civic Groups				
United Nations Bodies				
IMF World Bank				
Other Governments				
Banks/MNCS				

Building Empowerment

Political Power

Implementing Strategies

Organizing

Gaining Skills

Collective Consciousness

Individual Consciousness

Knowledge Of The Situation

- Research The Issue
- Study The Economic, Social, Cultural, Legal And Political Context
- Develop Clear Definition Of The Problem

Organization Of The Group

- Training/Study
- Shared Decision
- Democratic Leaders
- Personal And Group Growth
- Capacity To Take Action

Strategy

Set Clear Objectives And Goals For Change

Gain Support

- Target Political Allies
- Educate And Organize Them
- Create Alternative Means of Communication
- Transmit Message To Public By All Possible Means

Mobilize Forces

- Mobilize Groups To Take Action In Support of the Change
- Use Available Legal Mechanisms - Law Reform, Litigation
- Use Political Means - Lobbying, Political Pressure

FOURTEEN F's OF EFFECTIVE STRATEGIES

Good strategies must:

1. Be Fundamentally Sound and Correct. This means it must be anchored on the realities of the environment or situation the organization is in. It must recognize major trends and directions in this environment. It must take account of what the organization can do and can not do, what it has and does not have.

2. Have Foresight. It must be able to determine the most likely future scenario in order to properly position the organization.

3. Take a Favored Course of Action. The implementors of the strategy must empathize with what they are doing. Otherwise, their motivation level would be low. They must actually identify with their strategy based on their vision, values and preferences.

4. Focus Efforts on a Few but Critical Activities. Effective strategies are rifle shots at a chosen target, not shotgun blasts that scatter the resources of the organization. They choose the few things that would make a big difference.

5. Have Force behind the Chosen Few Things. Organizations must put their full force and major resources behind the strategies taken. They must "put their money where their mouth is."

FOURTEEN F's... (continued)

6. Follow Through. A golfer or tennis player knows that hitting the ball is not enough. There must be a completed swing that directs the ball to its chosen destination. The whole organization must move to support its major thrusts all the way to final acceptance by and satisfaction of its client system.

7. Have a Fit Among the Objectives, Tasks, People and Structure of the Organization. There must be consistency between the type of people operating within certain organizational structures and systems and the defined objectives, the chosen strategies and tasks of the organization. Avoid mismatches.

8. Have a Finite Time Frame. Unreachable starts have less motivating power than realizable objectives within the finite time frames of five, ten to even twenty years.

9. Be Feasible. This means that strategies must be do-able by the organization. It must work out in the field and produce good benefit-cost relationships.

10. Take a Full and Wholistic Approach. Compartmentalized approaches lead to partial solutions that often lead to greater problems. Organizations must look at the full implications of relationships among variables employed in the strategies adopted. They have to make sure that these variables reinforce rather than cancel each other out.

FOURTEEN F's .... (continued)

11. Get Feedback through Good Monitoring and Evaluation Systems. Every action produces a reaction and this reaction must be monitored closely and assessed as to whether it is moving towards the desired objectives.

12. Be Felt with Sufficient Impact by the Intended Targets. Development organizations tend to forget the very purpose of their strategy which is to positively affect the lives of the people they are serving. Strategies must therefore translate into felt impact.

13. Be Flexible Depending on Environmental Changes. The assumptions governing strategies chosen may change overtime. Hence, there is a need to modify, alter or overhaul strategies in the face of environmental changes.

14. Be Final Results Oriented. At the end of the day, the development organization must be responsible for its intended results and be accountable to the beneficiaries for such results. They should not concentrate on inputs or tasks only but should make sure that these inputs or tasks lead to the desired outputs and outcomes.

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To Meet Asian Women NGO Leaders
Participating in a Workshop Sponsored by

Promoting Women in Development (PROWID),
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and the
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Women in Development office of USAID

Thursday, February 13, 1997
6:00 p.m. to 8:00 p.m.
Hotel Shangri-la
Kathmandu

R.S.V.P. CEDPA/Nepal Field Office Tel: 413069

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For more information on PROWID workshops or to receive copies of this report, please contact PROWID staff members:

Patricia Ahern
PROWID Manager
Trisha@cedpa.org

Julia Masterson
PROWID Project Coordinator
Julia@cedpa.org

The Centre for Development and Population Activities (CEDPA)
1717 Massachusetts Avenue, NW, Suite 202
Washington, DC 20036
Tel: 202-667-1142
Fax: 202-332-4496

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