Module 2: Planning and consultation

Introduction

If you have used the tools in the previous module, Agenda Setting, then you now have a clear idea of the malaria issues in your country and where to focus your efforts.

In any project, planning can save time and energy and increase your impact, allowing you to be as effective as possible in driving lasting changes. Planning involves setting the objectives that best suit your campaign based on country needs and your own capabilities. Once you have chosen one or several objectives, this module will then help you design a strategy and action plan to achieve them.

Consultation with the stakeholders and experts you have identified can help you evaluate the risks and feasibility of your plan, as well as building relationships that could materialize into alliances or partnerships.
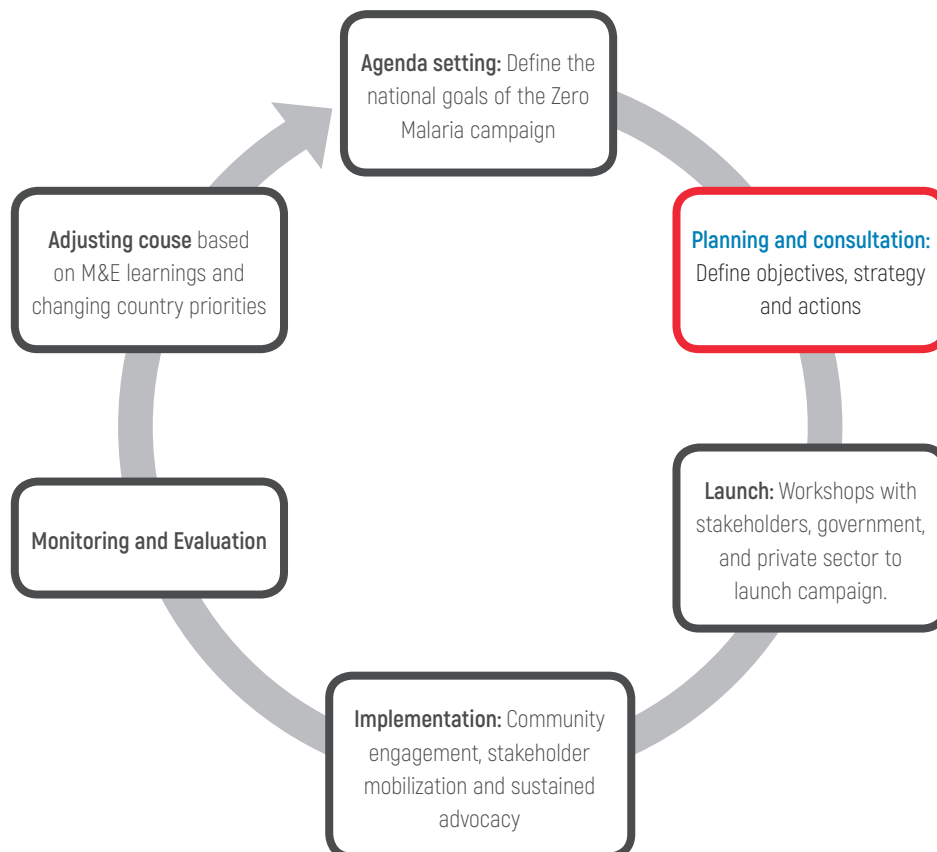
Keep in mind that planning is a continual process. If circumstances change or new opportunities arise, come back to your plan and revise it. It may be useful to schedule revisions of your plan periodically to ensure it is still useful.

Learning objectives
By the end of this module, you will:

- have defined a set of specific, measurable, achievable, realistic, and timebound (SMART) objectives;
- define a strategy for achieving these objectives;
- set an action plan for beginning work;
- consult with key stakeholders;
- identify the resources, both human and material, you will need to meet your objectives; and
- understand the risks involved in your project.

Figure 4: Planning and consultation in the Zero Malaria project cycle

Agenda setting: Define the national goals of the Zero Malaria campaign

Planning and consultation: Define objectives, strategy and actions

Launch: Workshops with stakeholders, government, and private sector to launch campaign.

Implementation: Community engagement, stakeholder mobilization and sustained advocacy

Monitoring and Evaluation

Adjusting couse based on M&E learnings and changing country priorities

Section 1: Setting objectives

With a problem in mind, you are ready to choose objectives for your campaign. This section will help you define what you want to accomplish, who you will need to work with, how you will proceed, and what messages you can use to influence decisions.

From evidence to policy

After researching the issue and identifying how certain changes could cause major benefits, the way forward may seem deceptively obvious. But as you have no doubt noticed, it takes more than a good idea to change policies, and the links between evidence and policy development are often complex.

Consultation: engaging with other voices

Before defining your strategy and taking actions, it may be useful to consult with some of the stakeholders you have identified or with others working on similar advocacy campaigns. One of the key elements to campaigns is uniting a variety of actors towards a shared vision. Engaging early with individuals or organizations you may want to partner with is critical for success.

Meeting with others will help you look at the problem from a new perspective and understand how others see the issue. You may or may not agree with them, but it is important to know what others believe. These meetings might yield detailed information about current anti-malaria efforts or the political climate that could help you define your approach. Additionally, you may learn about ideas others have had for possible solutions. Rather than starting from scratch, you may find out about work already in progress that you can build on.

As you develop the campaign, you will want to develop partnerships, which can either be formal arrangements or cooperative working relationships. Partnerships with government institutions, companies, community organizations, and individuals will allow the campaign to have a greater influence in your country. Having the right partners can raise the profile of an issue, transforming it from an individual's idea to a subject of national concern. The campaign will have a stronger voice and a greater ability to influence others. Partnerships also lend more credibility to the issues that you raise, giving the campaign more legitimacy. Through partnerships, the campaign can eventually rally a "critical mass" behind the issues, making change much easier to achieve.

When looking for partners or collaborators, seek to develop the right mix. A strong Zero Malaria Starts with Me-style campaign will have a diversity of actors united to end malaria. Including different types of partners will broaden the skills, knowledge, influence, and resources available to support the campaign, and allow it to reach new audiences and networks. By including both community-based and high-level political partners, for instance, the campaign will be able to promote behaviour change interventions and affect national policy decisions simultaneously.

There may be other health-related campaigns active in your country. If possible, it could be useful to join forces and share experiences with them. Ultimately, advocates for health should not view each other through a competitive lens, but rather seek to work together toward the ultimate goal of a healthier population.

The methods you use to engage potential partners will vary considerably. Conferences, World Malaria Day, and other events may offer an opportunity to meet others working on malaria. When you have a chance to discuss their thoughts about your chosen issue, be sure to ask open-ended questions that will allow them to explain their view, rather than guiding their response through closed questions (Example: "What do you think about current drug procurement policies?" versus "Should we change drug procurement policies"?)

If meeting with a new stakeholder for the first time, you may also want to learn more about their interest, alignment, influence, and potential for engagement (see Stakeholder Analysis tool, module 1) to determine where they stand before offering a partnership. While a range of views and opinions is welcome in a coalition, you want to ensure that partners share a vision for Zero Malaria.

Choosing objectives:
What will the campaign achieve?

Many changes may be needed to eliminate malaria, and by now you may have an idea of what specific changes your campaign could target. When defining your objectives, consider using the SMART tool below, using the right language and being very clear about your objectives will lay the foundation for a successful campaign. Once you achieve them, you can always add new, more ambitious objectives later.

SMART objective criteria

S	M	A	R	T
Specific	**Measurable**	**Achievable**	**Relevant**	**Time-bound**
Be as specific as possible when defining objectives so that it is clear what you are working toward.	Ensure that the objective is measurable so that you can tell when you have achieved it.	Choose realistic objectives that can be accomplished with your available resources, partners, and skills.	Ensure that objectives are an important contribution to your overall vision for a malaria-free country.	Specify when you intend to complete or make progress toward your objective.

Here are some examples of SMART objectives and objectives that do not satisfy these criteria:

Sample objective 1: Obtain public pledges of commitment to malaria elimination from 100 members of parliament by January 2020.

Is this objective **specific?**	**Yes,** it defines the type of pledge (public, to malaria elimination) and the people who should make the pledge (100 members of parliament).
Is this objective **measurable?**	**Yes,** the objective will be achieved when 100 members have made public pledges.
Is this objective **achievable?**	**Yes,** if the campaign gains a high enough profile to gain access to parliament members, asking them to pledge their support is a realistic objective.
Is this objective **relevant?**	**Yes,** parliamentarian support on will be critical for achieving malaria elimination.
Is this objective **time-bound?**	**Yes,** a date for achieving the objective is specified.

Sample objective 2: Raise funds for malaria programme.

Is this objective **specific?**	**No,** it does not specify what type of funds, how much to raise, who to raise it from, etc.
Is this objective **measurable?**	**No,** though funds are easy to measure, it does not specify how much should be raised.
Is this objective **achievable?**	**Yes,** raising funds is a realistic objective for a campaign, but it depends how much is targeted.
Is this objective **relevant?**	**Yes,** funding for malaria elimination is an essential piece of a successful campaign.
Is this objective **time-bound?**	**No,** no date is specified for this objective.

Who does the campaign need to influence?

The [Stakeholder Analysis tool](#) can help you identify the major players or potential actors in malaria in your country. Now that you have a better understanding of your objectives, you can prioritize stakeholders for partnerships or outreach. Who among the listed stakeholders has influence that may help you achieve your objectives? This influence could be through political connections, scientific or advocacy networks, access to funding, or a platform for spreading messages to key audiences.

Some stakeholders may be easy to get in touch with, but with little influence, or perhaps with a position contradictory to your vision. Other stakeholders may be very influential and very positive, but hard to access–such as the President or celebrities. Try using the following tool to create a "map"

	Influence	
	Low	**High**
Alignment **High**	**Secondary supporters** These stakeholders support you but do not have very much power. Keep them engaged, as it is important to have a broad support base.	**Primary supporters** These stakeholders could become major allies and help you achieve your objectives. Focus engagement efforts here.
Low	**Secondary opponents** Though they oppose your work, they do not have much power. Listen to them to understand their concerns, but otherwise they can be ignored.	**Primary opponents** These stakeholders may disagree with your objectives or have other plans. Be aware of them and try to change their views if possible.

of stakeholder's influence, attitude, and accessibility to determine who to approach and how to approach them.

Supporters and opponents map

Not every stakeholder will be willing to work in your favour, some may even oppose some of the campaign's objectives. This map will help you gain awareness of who will be willing to help and who may impede progress. Group stakeholders in the boxes grouped by **Influence** and **Alignment** like in the table below.

Using the tool above, how would you classify the following sample stakeholders? What would you do to engage them effectively (how much resources would you invest in engaging them, how would you approach them, etc.)?

- **The mayor of a small town:** This mayor is interested in protecting young children from the disease. They aren't well connected with other mayors though and intend on working alone.
- **A group of parliamentarians:** In this example, these parliamentarians want to cut public expenses. They do not believe that the government should increase investments in health and have some influence over the budget.
- **The Minister of Health:** The Minister of Health is a former paediatrician who is very concerned about malaria. They are well respected among other members of government.
- **A small business in the capital city:** This business wants to build a positive name for itself but does not have that many resources to support the campaign.
- **The leaders of a small village:** In this example, the leaders of a small village that is very isolated, but has many malaria problems, do not trust national health workers. They are suspicious of attempts to increase health services and have refused to participate in past indoor residual spraying campaigns.

- **Religious leaders:** A group of prominent religious leaders want to help alleviate poverty and solve health problems. Many people respect them and listen to their weekly radio broadcasts.

Section 2: Toward a plan of action

At this point, you are ready to develop a concrete plan for how you will engage your target audiences to achieve your objectives. This section will help you articulate your theory of change, build a detailed action plan to guide your work, assess the resources you will need, and evaluate risks.

Action planning

Action planning should take place with members of your campaign before beginning activities. Working together, you and your team will agree on an approach suited to your team structure and aims, with clear responsibilities defined for all parties.

Action planning matrices are best organized by objective, to visualize how each action contributes to their achievement. After listing your top-line objectives, add the indicator you will use to measure progress, the targets you hope to achieve, the date you hope to achieve them by, and delegate their responsibility to an individual.

The **Political engagement**, **Private sector engagement**, and **Community engagement** modules can help you decide what types of actions to use to reach each stakeholder.

The action planning stage is the ideal time to begin thinking about monitoring and evaluation (M&E). Use the M&E framework tool on page 76 after developing your action plan to choose indicators and show how they related to the activities, outputs, and outcomes covered by your campaign.

Action plan

Objective	Activity	Indicator	Target	Date	Responsibility

Below is a sample, filled action planning matrix. Note how there can be multiple activities under each objective, and multiple indicators for each activity.

Sample action plan

Objective	Activity	Indicator	Target	Date	Responsibility
Obtain public pledges of commitment to malaria elimination from 100 members of parliament by January 2020.	Organize a parliamentary workshop about the Zero Malaria Starts with Me campaign	Workshop attendees Public pledges following the workshop	200 100	May 2019 May 2019	National Malaria Control Programme Policy Director
	Meet with parliamentarians to encourage them to become champions for the campaign	Meetings with parliamentarians	10	June 2019	National Malaria Control Programme Policy Director
Increase national use of long-lasting insecticidal nets (LLINs) in malaria-endemic areas to 80% by January 2020	Launch radio advertisement campaign encouraging LLIN use	Radio advertisements transmitted	1000	May 2019	Partner non-governmental organization (NGO) Behaviour Change Communication Lead
	Promote LLIN use at school workshops led by community champions	School workshops held	100	June 2019	Partner NGO Behaviour Change Communication Lead

Message development

When you engage partners, stakeholders, decision-makers, and the public, you will need to agree on key messages that answer the question: **What is your campaign about?**

A good message is simple and easy to understand. Avoid all acronyms and steer clear of jargon (LLINs, vector control, ACTs, etc.). You want your message to resonate with people and make them care about your issue. A useful format could be to start with a description of the campaign, then use a key piece of evidence about the problem, and finish with your campaign's goal.

For instance: "Zero Malaria Starts with Me is a campaign for a malaria-free Africa. Malaria is entirely preventable and treatable, yet still kills a child every two minutes. With your help, we can end the disease for good."

Once you have developed a few general messages to describe your goals, think about how you can adapt, or frame, the message for different audiences. Many of the stakeholders you will need to engage have other priorities and interests besides malaria. When interacting with them, you will want to make the campaign as relevant as possible to their work. What do they care the most about? Then, be

sure to include the specific action you will need them to talk to support the campaign. This style of messaging is often called an "elevator pitch." Imagine you find yourself in an elevator with someone who can support your campaign. You need to convince them to join you in under 30 seconds to get their attention.

For instance, if you are meeting with a mining company that could become a partner, you could say: "Zero Malaria Starts with Me is building a coalition to end malaria in our country. Malaria causes suffering, hurts families, and makes it harder for people to work. This hurts everyone in our country, even your business. Help us eliminate malaria, we need your support for next year's bed net distribution to reach as many people as we can."

Besides the message itself, think of how it can be delivered for maximum effect. Some audiences may be very interested in the issue and willing to read a one-page or two-page brief about your work. Most people simply are not interested enough and are better reached through short paragraphs or single sentences. Your message could be incorporated into speeches, presentations, documents, social media, or any format that will reach your audience.

Sometimes, the messenger is just as important as the message itself. If you have a spokesperson with a strong reputation and influence among the target audience, consider having them deliver the message.

> **Message development checklist**
> ○ Simple and easy to understand
> ○ No jargon
> ○ Positive, inspiring tone
> ○ Focus on the solution
> ○ Evidence-based
> ○ Includes a call to action
> ○ Tailored to the recipient's interests
> ○ Delivered in an appropriate format
> ○ Delivered by the right messenger

Be especially careful with how your message comes across. If you focus too much on the problem, it can seem too difficult, depressing, and even hopeless. Also, be careful with any images you use. People prefer to look at happy people making their lives better than people who are suffering. Use a positive tone, and partners will want to be a part of the solution!

Resource and need identification
Now that you have an action plan, think about what it will take to get there. Do you have the money, skills, and influence you need to achieve your goals? In the following tool, brainstorm some of the advantages you have for each category, and then think about some challenges, or what you lack.

Resource and need identification tool

	Advantages	Challenges	Next Steps
Human resources			
Financial resources			
Partners			
Relationships			
Reputation			

Adapted from: WaterAid 'The Advocacy Sourcebook' (2007) London

Sample resource and need identification tool

This example is filled in for a fictional country to demonstrate how this chart might look once filled in.

	Advantages	Challenges	Next Steps
Human resources	O Several skilled and dedicated staff members with advocacy experience	O Lack of enough staff to manage routine project management tasks	O Plan projects with a light administrative burden to ensure staff has enough time for their other duties
Financial resources	O The National Malaria Control Programme supports the campaign through an initial grant of US$ 50,000	O The campaign doesn't have sufficient resources for brand awareness and outreach activities	O Propose a co-branded marketing to private sector partners
Partners	O A large telecommunications company has agreed to partner on a social behaviour change campaign	O Lack of partners within the Ministry of Health to champion the cause	O Organize an awareness-raising session for Ministry of Health staff to share malaria messages and generate support for the campaign
Relationships	O Many contacts in the Ministry of Finance	O No contacts in Parliament	O Ask a colleague in the Ministry of Finance to mention the campaign to Parliamentarians at their next meeting. O Ask supporters of the campaign to introduce themselves to Parliamentarians at informal events.
Reputation	O Many members of government heard about the campaign through the African Union	O Very few people in the business community or wider population have heard of the campaign.	O Use billboards and radio advertisements to let people know about the campaign.

Few public advocacy campaigns secure enough financial resources to meet their goals. To allow your campaign to be effective, you will need to be creative and resourceful. Finding private sector sponsors, reducing administrative costs, and partnering with other campaigns are all ways to get the most value out of what you have.

Risk analysis
Every activity carries some measure of risk. Risk is an acceptable and normal part of any project, but it is important to know what is at stake before you begin. Risks can be factors that could cause the project to fail or cause harm to your organization's funding, reputation and even existence.

Try the following brainstorming exercise. Imagine it is one year from today (or five years, or ten years). Imagine that you failed to meet your objectives. Now write down several reasons why this may have occurred.

Now consider how likely each risk is to occur and how severe the consequences would be. You can use the map below to chart each risk, helping you make informed decisions about what to do next.

Risk map tool

		Likelihood		
		Low	**Medium**	**High**
Consequences	**High**			**High risk:** Take measures to avoid or consider changing plans.
	Medium		**Medium risk:** Prepare to avoid or mitigate	
	Low	**Low risk:** Maintain awareness of risk and avoid if possible.		

Once you and your team have brainstormed a number of risks to the project and organization, record them and identify strategies for avoiding them or mitigating them if they are not avoidable.

Risk management tool

Risk	Avoid the risk	Mitigate the risk

Adapted from: UNICEF 'Advocacy Toolkit' (2010) New York

Additional tools

The RAPID framework for assessing research-policy links: This tool can help you understand how research can best influence the decision-making process. https://www.odi.org/sites/odi.org.uk/files/odi-assets/events-documents/2764.pdf

Identifying types of risk: Describe-es different types of risk based on their correct identification and measurement (Known-knowns, known-unknowns, and unknown-unknowns). https://www.projecttimes.com/articles/things-known-and-unknown.html

Risk management: How to prepare for unidentified risks https://www.pmi.org/learning/library/characterizing-unknown-unknowns-6077

Kim, S. D. (2012). Characterizing unknown unknowns. Paper presented at PMI® Global Congress 2012–North America, Vancouver, British Columbia, Canada. Newtown Square, PA: Project Management Institute.