

# How to design a policy influence plan?

## Toolkit N°9

## Who, how much and when. Define resources and timeline

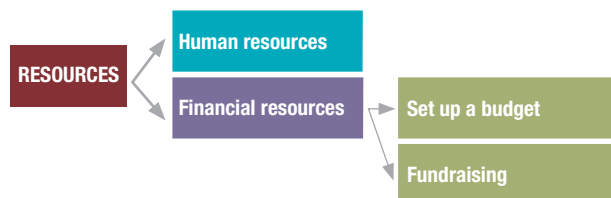
*This toolkit is part of a series addressing the various components of a public policy influence plan.*



Close to the final design stage of the influence plan it is important to reflect upon the timeframes in which every activity will be developed, and about how the organization's resources will be used in order to carry them out. Although it is recommended to consider the availability of resources from the moment in which influence strategies are designed (for

example, from the production of a SWOT<sup>1</sup>) this is the instance in which to assign, in a specific manner, the available resources and define how to obtain those not in hand.

*Figure 1. Necessary resources to carry out an influence plan*



### Human resources: the importance of leadership and coordination

To achieve effective results, an organization must take advantage of the different abilities and experiences of each member. It is recommended that the leader assign tasks according to those interests and capacities; for this he/she must know if they are, for example, specialists in communication, researchers or lobbyists and what kind of dedication

<sup>1</sup> See **Toolkit N° 3: Where are we and how far can we go? Identify strengths, weaknesses, opportunities and challenges.** Available at: [www.vippal.cippec.org](http://www.vippal.cippec.org)

is needed from each profile in each stage of the plan.

The working team leader is also responsible for encouraging and motivating other members who join the project (Weaving global networks, 2006). This human resources designation will be useful for the fundraising team as well (if the organization has an area that fills this function), since it will not only seek support for the direct costs of the activities, but also for contracting specialists who need ad hoc or to incorporate the total cost of the influence effort into the projects presented to potential donors.

Simon Maxwell (2009), Overseas Development Institute highlights four useful models to think about the leadership role within what he calls “policy entrepreneurship,” which are:

#### **Story tellers**

One way of motivating and involving individuals in pursuit of an objective is to develop powerful stories with a clear message which help reach individuals (the working team as well as decision-makers) and which establish problems and solutions.

#### **Networkers**

In the arena of organizations seeking to influence policy, it is common that individuals who known to each other interact. The leader who involves his/her organization in these networks will increase possibilities of influence for the project. It is about being “inside or outside the tent:” if one is inside, the voices of the leader and of the organization will be heard; if one is outside, they will not.

#### **Engineers**

Within the policy framework, the leader must be aware of what is happening and what is the thinking at the decision-makers level inasmuch as what is really happening in the “field.” It is about not being purely academic, but becoming

involved in a practical manner in the testing of ideas.

#### **Fixers**

When interacting with decision-makers, the leader must take advantage of the power involved in being an “expert” in a specific policy area of or in the process of policy formulation in general. In this way, his/her influence capacity will be increased.

The majority of leaders combine diverse styles according to the moment. It is not about being an expert in all styles, but if one often works with a certain style, it is important to reflect and balance with another, or find a partner within the team who may complement his/her abilities.

Source: CIPPEC, based on Maxwell (2009)<sup>2</sup>.

## **Inter-program coordination**

If an organization counts on programs and teams dedicated to diverse policy subjects, it is interesting to reflect about the possible articulations facing the influence objective, to add different insights and perspectives. Also, joint projects usually generate valuable institutional learning, in terms of knowledge management. For example, if the proposal consists in comparing a budget destined to health in a series of national localities, joint work can be encouraged among a program dedicated to fiscal policy, one dedicated to health, and one to local development.

<sup>2</sup> Available at: [www.odi.org.uk](http://www.odi.org.uk).

## Some questions before allocate human resources:

- How many individuals work on the team?
- Are they involved in other projects?
- Have they time enough to tackle a new project with commitment and quality?
- What type of abilities and experience do they possess? Are these the right ones for the new project activities?
- Are they interested in being involved in a new project or in learning about new issues?
- What profile type, and how much experience are needed in order to incorporate? (expert researchers in one policy area, communicators, evaluators, administrators, etc.)
- Where can people with this type of background be found? (universities, state agencies, other organizations)
- What can the project and the organization offer them?

## The importance of adding strategic views

Inasmuch as the budget allows, it is useful to create spaces of dialogue with experts on the specific subject of the proposal as well as people with knowledge of the political context, in order that they may share their strategic views about the best way to implement the proposal.

## Financial resources I: How to set up a budget? What to keep in mind?

Setting up a budget is a key instance in an influence plan: what is needed is a realistic reflection of the timeframes and human resources which must be committed, and of the direct costs of each strategy for influence planned.

The budget must be based on the strategy and the activities to be carried out (lobby, work with media, coalitions, stakeholder mobilization, etc.). It is probable that some activities may not imply direct costs, and that others may be too costly.

For example, contracting a consultant or a communications agency may be a costly activity, yet a necessary one in order that the message is effective and that it reaches key audiences. Instead, if it is decided to use the institution's resources to write media articles or policy briefs, the cost of the communication component will be lower.

If the proposal involves a national scope, perhaps it is necessary to include face-to-face meetings which may involve travel and accommodation costs, etc. In this regard, virtual (or web 2.0) tools allow for cost reductions as well as greater scope. It is about thinking how to maximize financial resources to achieve successful results.

The context may present opportunities (and threats) which could impact the budget; therefore, an expenditure item for unforeseen events must be assigned as well: it is good to count on a margin of money (and time) to be used, for example, on strategic trips to present the proposal or to spend on publications.

In this sense, it is useful to count on a budget model or "template" which ensures that the members of the organization become accustomed to being precise and to consider all variables. If there are individuals managing this knowledge, it is recommended that other members are trained, so that an ability which promotes efficiency becomes an installed capacity.

Beyond the sophistication level of the utilized tool for budget design (this will depend on resources, knowledge and needs of the organization), what is most important is that regular controls exist regarding its compliance. It is fundamental to know whether resources are being assigned efficiently or if









