

Strategic and Tactical Influencing workshop

The programme for this workshop incorporates the needs of the Donor Policy and Partnerships team at DFID to develop a long term strategy to influence the behaviours of DFID various external partners. It attempts to transfer basic tools and skills that would enable the team to detail, review, monitor and adapt the strategy in the future; help them outline a basic strategy for the team; and plan future strategy development work for specific areas, issues or partners.

The workshop includes a series of presentations from ODI on policy processes, policy influence processes, context assessment, knowledge management and communications to help clarify some concepts and provide the basic skills necessary to address strategic planning. However, most of the time will be spent in group work learning about and using strategic planning tools as well as learning through role play.

Some basic principles and assumptions that underpin the outline of the workshop:

1. DFID (as other donors or policy actors) can only contribute to changes in the behaviours of the policy actors it works with directly; and cannot be directly responsible for the changes in the behaviours of others it does not work with.
2. Contexts, actors and ideas change, therefore, strategies to influence policies need to be ready to change and adapt in the short, medium and long term.
3. Change is progressive, uncertain, non-linear and can take a long (unpredictable) time.
4. There are other factors that influence those policy actors that DFID is trying to influence so it is difficult to attribute any given change to any one factor/actor; at best, is it only possible to assess DFID's contribution to that change.
5. Policy influence processes (changes in behaviours) are continuous processes that do not necessarily 'come to an end' with the end of a campaign to influence policy, and are affected by multiple forces out of the control of DFID, therefore, monitoring needs to be focused on learning and adapting; not on evaluating.

The workshop follows the following narrative:

1. Identify long term objectives
2. Identify policy actors with which the team is working with directly and whose behaviours it is trying to influence to contribute to the achievement of the long term objectives
3. Consider the changes that these policy actors need to undergo in the short, medium and long term
4. Develop a strategy that the team can follow to contribute to those changes
5. Consider and set out basic monitoring and learning methods
6. Consider the team's capacity needs to carryout its strategy effectively and develop a plan of action

Strategic and Tactical Influencing

Duration		Two days (plus pre-workshop preparation and follow up)
Objectives		<p>At the end of the workshop, participants will:</p> <ul style="list-style-type: none"> • Have identified the key partners they need to influence; and are able to identify those who need to be influenced and by who they are influenced • Have identified allies and 'enemies'; and understand what roles they play • Have identified a vision of progressive changes in the behaviours of key partners that they try to influence for the short, medium and long term • Have developed a draft strategy for influencing in relation to their longer-term work objectives • Be able to incorporate issues of strategic communication approaches into their influencing strategy • Be able to understand how to monitor their strategy and learn from their successes and failures to adapt and improve its effectiveness • Recognise their own strengths, limitations and development areas in influencing. • Develop an action plan to address capacity needs for influencing
Content	Pre-workshop	<p>At least one month before:</p> <ul style="list-style-type: none"> • Discussion with Team Leader, Programme managers, LDS and ODI to discuss draft outline of workshop and team expectations. <p>At least three weeks before:</p> <ul style="list-style-type: none"> • Define team expectations • Identifying priority stakeholders: Using the Alignment-Interest-Influence matrix, the team identifies the key priority stakeholders to address during the Strategic and Tactical Influencing workshop *Delivered by ODI in the UK and by Office Staff/ODI partners overseas (using a template provided by ODI) • Research and introduce specific content matter and case studies into workshop programme: cultural awareness issues; balance between Knowledge Management, Communications and Policy Influence; etc.

Content	Part one	<p>Introduction</p> <ul style="list-style-type: none"> • Introductions • DFID case study • What do we mean by policy influence? Policy Influencing Grid: Advocacy, Advice, Lobby, Campaign • Policy influencing stories: successes and challenges • Priority Check: are the priority stakeholders right
	Part two	<p>Analysis</p> <ul style="list-style-type: none"> • Understanding the context: culture • Understanding the context: opportunities and threats (time-line) • Priority stakeholders: where are we today and where are we going • Thinking about the changes and the forces for and against
Content	Part three	<ul style="list-style-type: none"> • Summary and review of Day 1 <p>Strategy</p> <ul style="list-style-type: none"> • Developing a strategy: activities • Developing a strategy: resources • Developing and strategy: Reporting Back
	Part four	<p>Wrap up</p> <ul style="list-style-type: none"> • Monitoring and learning: identifying priorities and activities • Capacity needs: identifying individual and team capacity needs • Action Planning: next steps • Closing and evaluation

Content	Follow up	<p>Next month</p> <ul style="list-style-type: none"> • Informal discussions (phone, email and possibly face to face) with Team Leader, Programme managers, team administrators and LDS to provide support for follow-up on pledged made during the workshop. Might include help in designing follow-up workshops; away days; support in using some tools; etc. <p>Next three months</p> <ul style="list-style-type: none"> • As above and possibly direct support in developing and running follow-up activities (depending on availability of funds) <p>Next six months</p> <ul style="list-style-type: none"> • As above and participants (or someone responsible) keep a diary of their work after the workshop registering (at least) activities and impact.
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Parallel discussions on flip-charts that feed into Wrap-up session

1. Communication Challenges
2. Knowledge Management Challenges
3. Capacity Development Needs

Handouts:

(Handouts need to be prepared for the specific workshops. For instance, rather than handing out full Toolkits –unless asked for- we would identify the relevant tools and provide those as a hand out.)

1. Available tools

Policy impact: http://www.odi.org.uk/rapid/Publications/Tools_Policy_Impact.html

Communications: http://www.odi.org.uk/rapid/Publications/Tools_Comms.html

Knowledge Management: http://www.odi.org.uk/rapid/Publications/Tools_KM.html

2. Presentation

3. Case Studies

Examples currently available and of relevance to DFID:

The PRSP Initiative: Multilateral Policy Change and the Relative Role of Research:

http://www.odi.org.uk/rapid/Publications/RAPID_WP_216.htm

Sustainable livelihoods: A Case Study of the Evolution of DFID Policy:

http://www.odi.org.uk/rapid/Publications/RAPID_WP_217.htm

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