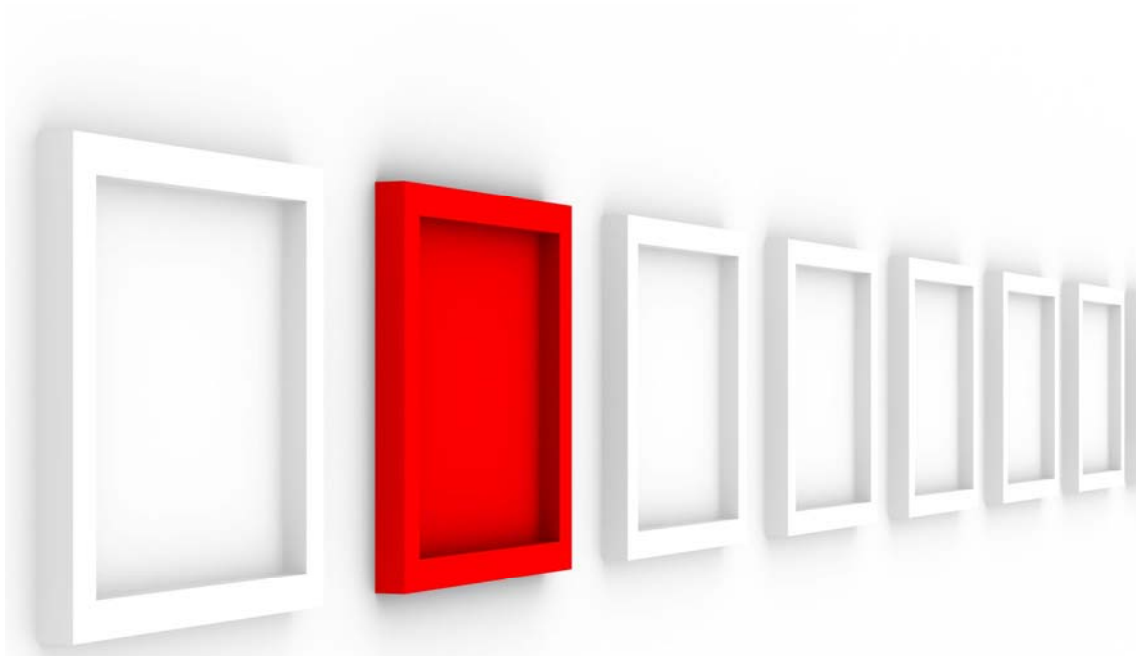


Public policy dialogue & advocacy



Identifying & framing issues

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Public policy dialogue & advocacy

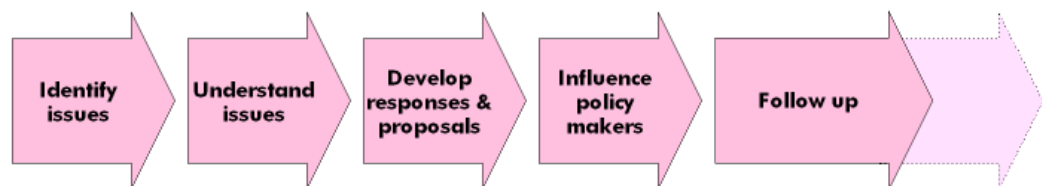
Identifying, understanding & framing issues

1. The five step approach

The process of identifying and framing issues can be split into five steps:

- Identifying the issues – which may come from business, from government, from other stakeholders (such as consumers, employees and NGOs) and may require effort before a BMO has an idea of the real issues and their priority;
- Understanding the issues – which requires deep research, including a systematic gathering of views, the ability to draw logical conclusions and a process for developing consensus internally;
- Formulating 'evidence based policy' – which requires the distillation of objective evidence from reliable sources, the consideration of policy options and the preparation of a compelling argument for the chosen option;
- Reaching appropriate people in Government – to influence public policy; and
- Monitoring progress – to ensure that, when the public sector agrees changes, they are put into practice.

Figure 1: Steps in the advocacy process



Source: Irwin Grayson Associates

Now let us look at each of these steps in a little more detail:

2. Introduction to identifying issues

Business associations do not have the resources to try to influence everything governments do, so you need to prioritise and focus your time and effort on a few important issues. If you get this stage wrong, you could find that:

- You are trying to do too much at once and your team is over-stretched
- Your efforts go unrewarded because there is no decision making window and government is not interested in your issue
- You have low credibility because the issue is perceived as driven by a small number of members who are not concerned with the good of the whole sector
- Your activities are going around in circles because your issue is not clear to you or to others you try to involve

- Any success in advocacy might have limited impact because the issue pursued is not the root cause of the problem businesses are experiencing

You cannot just guess what is important; rather you need to adopt a systematic approach so that you discover what is important to your members or what would be important if they knew about it. This is especially important for associations with just one or two members of staff or associations that rely on volunteers from amongst their members.

This handbook covers

- Developing a portfolio of possible issues
- Clarifying what the issues actually are
- Identifying a short list of prioritised issues
- Specifying practical opportunities and constraints

3. Identifying possible issues

Issues can be identified in a number of ways. Association members may raise a particular issue because they want help and support to address it and many will be possible issues to take further. Some businesses will identify issues specific to them, which the BMO may feel appropriate to address as part of its services, but are unlikely to lead to proposals for change in public policy. A good way to identify issues is to ask members – informally, say when they come to meetings, and formally, say through surveys.

Hopefully, when the Government is considering introducing new laws and regulations, it will want to consult. Sometimes, the Government may not consult, or may not believe that a policy proposal has implications for the private sector, but the BMO discovers it anyway, and then consults with its members to determine whether it is likely to be an issue.

Communicating with members and issue identification are closely linked. Communication can be relatively low level and informal; it might be more regular but mainly one way – generally providing information to members; or it can be regular and two way – obtaining views and priorities from members. The latter is often the best way of discovering the issues that are currently worrying your members, though it does not identify issues of which they are so far unaware.

You should ensure therefore that as far as possible, you put in place processes to seek members' views such as:

- Informal feedback from talking to members or gathered from members at association meetings;
- Contact from member(s) who have identified an issue and need association support;
- Formal survey of participants at meetings;
- Formal survey of all members and, possibly, non-members working in the same sector.

In addition, you need to be proactive in identifying issues that are not yet widely known, so that you can seek feedback from members about whether there really

is an issue and the seriousness of the issue, as well as being able to undertake research and start influencing from an early stage. You should therefore:

- Follow the press and media;
- Build relationships with other trade associations and keep in touch with them;
- Monitor the activities of key public sector organisations;
- Forge relationships and talk regularly to officials in relevant MDAs;

Searching for issues is not a one-off activity, but something the BMO should be doing regularly. However, an association will not be able to handle too many issues at once, so will need to prioritise.

There will always be some issues that crop up unexpectedly and which require immediate attention. In general, however, associations should not take on too many issues at the same time. The danger is that none will get the attention that they deserve and all will fail. Undertaking research and preparing compelling policy proposals, and meeting with and influencing public officials and politicians requires time, energy and resources. So be sure to research the:

- Issues that are important to members, as well as to non-members;
- Scale of impact of the issues (number of businesses affected);
- Depth of impact of the issues (the financial impact on businesses).

Prioritisation will not require detailed research, but knowing the likely impact can help you to choose between issues. BMOs may prioritise issues reflecting the views of a small number of members, or staff preferences. It is better to take into account the preferences of most members in the association and better still, if possible, to consider the preferences of businesses in the sector, irrespective of whether they are members or not. Indeed, this might be a way of promoting yourself to potential members.

It is also sensible to take into account which issues are most timely for the Government. If they are considering a new law or regulation, they will be more interested in your views on that than on an existing issue which could wait.

If you are new to advocacy, first pick issues that you regard as easier. This will provide an opportunity to learn about dialogue and advocacy. As you gain experience and confidence, then you can begin to tackle the bigger, more complex issues.

3.1 Principles

To identify the 'long list' of issues to investigate you need to be:

- **Proactive.** Do not wait for members to tell you about issues. Being systematic in your search for possible advocacy issues will give you a broader perspective and the time required to take action.
- **Vigilant.** Searching for issues should be a continuous process, not a one-off activity.
- **Systematic.** If you are to choose between issues then you need to have comparable information on each.

- **Impact-oriented.** Your aim should be to create the most long-term benefit for the sector.
- **Transparent.** You will need to explain to members and other stakeholders why you have prioritised some issues over others.
- **Flexible.** Timing is important.

3.2 Ways of identifying issues

You can identify a long list of possible issues through several different means:

- **Members.** It is likely that association members, given the opportunity, will raise issues of concern. Some of these will be individual rather than advocacy issues, for example securing a trading permit or access to finance or local harassment. Individual issues are unlikely to lead to proposals for change in public policy, but supporting members in this way may encourage businesses to become members.
- **Member meetings.** If you have regular meetings with members then you can reserve a slot to ask about the issues that are most important to them. When someone raises an issue, try to assess how important it is by asking whether other businesses have the same issue. Ensure that the person chairing the meeting makes a note of the issues and feeds it back to the staff person responsible for advocacy.
- **Surveying members.** Surveying members will give a broader view rather than relying solely on the active members who turn up to meetings or those who have felt sufficiently moved to tell you about an issue. This can be helpful in explaining the significance of the issues to government: something along the lines of: "we have 20,000 members responsible for 100,000 employees representing more than half the sector; 95 per cent report that they have a problem with...".
- **Surveying businesses in your sector.** If your members only represent a small part of the sector, it can be helpful to survey a rather wider cross-section of businesses, so that you can argue that you are actually speaking on behalf of the whole sector. If there is more than one association active in the sector, or if there are associations with similar interests, then you may wish to do this together. Or you may see it as a way of attempting to recruit additional members to join your association in which case some effort may be required to track down businesses operating in the sector who are not already members. You could try asking your members all to introduce you to other businesses in the sector who they know, or you could use the telephone directory for formal businesses.
- **Newsletters.** Newsletters are a good way of telling your members what you are doing and asking them to provide feedback to you about their needs and about the issues they face as they go about their business. If you cannot afford to print and circulate a hard copy newsletter, then think about doing it via e-mail. This is a very cost effective way of keeping in touch and most businesses now have at least occasional access to e-mail.
- **Internet.** You can use your website to communicate with your members, to offer information to all of your stakeholders and, importantly, to share your

policy positions. You can ask visitors to your website to share their issues – and, when they do, use other tools, such as e-mail or SMS or Twitter to seek further feedback and assess the scale of the problem.

- **Monitor government.** Once you have identified which Ministries, Departments and Agencies (MDA) are relevant to you, you should check their websites regularly or use a programme which will do the hard work for you such as Website watcher (www.aignes.com) or (www.ChangeDetection.com) or (www.InternetOwl.com). There is really no substitute for personal relationships, so while you are doing all this, aim to develop those relationships as well in order to establish good channels of communication.
- **Monitor statistics.** Governments and other organisations publish a wide range of statistics. These may give an indication of areas that ought to be taken up as issues: too many people being killed or injured at work may point to health and safety issues; too few people starting in business may suggest difficulties in the start-up process; low levels of cross border trade may be due to too much red tape.
- **Monitor pressure groups.** Pressure groups, civil society organisations and non-governmental organisations often campaign for changes in legislation and this can impact on business. So monitor their activities – in much the same way that you might monitor government – by signing up for newsletters and monitoring their websites. If you discover an issue that is being pursued, irrespective of whether it has come from a mainstream or a fringe group, you will need to decide whether the issue is likely to gain a foothold. Clearly some issues taken up by NGOs are likely quickly to become urgent for you, but others may help develop your longer-term thinking.

How to... monitor pressure groups

It is likely that there will be pressure groups who are themselves lobbying for public policy changes which will affect your sector.

 - Identify those pressure groups and then ensure that you keep up to date with their activities.
 - Ask to be put on their mailing list.
 - Monitor the press to follow their activities.
 - Consider whether someone – a member of the board or a member of staff – should join the group as a member in order to receive all their communications and so to receive advance notice of their plans.
- **The press and media.** The first clue that many people have about changes to government policy is when the story appears in the press or on the television or radio. So monitor the press and media systematically. You may want to sign up to a cuttings service, which will make the monitoring much easier for you, but there will be a charge and they don't spot everything.
- **Networking.** Networking can be an effective way of discovering proposals for changes to public policy – and forming alliances can improve credibility when associations seek modification to those proposals, so it is in the interests of every business and trade association to network widely.

The effort spent in finding issues is likely to result in a number of possibilities, so you will need to undertake some basic research to clarify whether an issue is sufficiently important to take up. The purpose at this stage is just to learn enough

about the issue to understand the real cause, to decide whether it should be on your list and to assign a priority. You are not aiming to learn everything that you can – that comes later, if the issue is prioritised for action.

4. Understand the issues

The next step is to research the issue, to ensure that the association has a thorough understanding of the implications. This might include assessing the regulatory costs (for example, the cost of a licence or levy) and compliance costs (the administrative cost of compliance, including staff time, et cetera).

You might cover the following as part of improving your understanding of the issue:

- Research the history and rationale for the public policy and understand the cause of the issue(s);
- Consider the breadth and depth of the impact on the private sector and on other stakeholders;
- Consider possible solutions to the issue(s) and research the implications (including considering whether it is the policy itself that is 'at fault' or whether the best way to ameliorate the problem is through 'better' regulation);
- Research the decision making processes for the specific issue;
- Research the current opinions and attitudes of policy makers;
- Identify who else is, or should be, interested in the issue and, potentially, in changing the policy or regulatory requirement;
- Consider how to frame the issue in language that is clear and appealing to the target audiences and that many encourage the formation of coalitions.

For existing regulation, it can be sensible to consider the potential implications if it didn't exist (especially if can be measured in financial terms and better yet if it can increase the tax take for government because businesses are more profitable).

For proposals for new regulations, it is important to think about the unintended consequences.¹

The effort spent in finding issues is likely to result in a number of possible issues, so you will need to undertake some basic research to clarify whether an issue is sufficiently important to take up. The purpose at this stage is just to learn enough about the issue to understand the real cause, to decide whether it should be on your list and to assign a priority. You are not aiming to learn everything that you can – that comes later, if the issue is prioritised for action.

5. Frame the issues

Having identified your key issue or set of issues, you need to frame them in a way that secures sympathy from politicians and policy makers. Framing means

¹ For guidance on techniques to measure regulatory costs, see "Thinking about regulating: the better regulation guide", KIPPR special report no. 1, May 2002

situating your issue in a context that the main stakeholders can grasp and with which hopefully they can identify. The basis of framing an issue is contingent on the specifics of the issue in question. Framing may stress commitment to official policies and economic development, tax contribution, export earnings, and so on; it may aspire to promote the welfare of significant numbers of producers or consumers; or appeal to concerns with public health, environmental concerns, and the welfare of vulnerable groups, including women, youth and children. In all cases, framing justifies your advocacy role and provides the ideological and moral basis for your lobbying activities. Depending on the issue, your initial framing can invoke any of the following interests:

- *Public.* Your sector provides a vital product or service to the public, including the less wealthy citizens. It accounts for considerable employment for local skilled and unskilled labour, including youth and women.
- *Government/state.* Your sector generates tax revenues, foreign exchange earnings/savings and stimulates other productive sectors ('linkages'). It is part of the official economic development strategy, five-year plan, et cetera. You contribute to agricultural development, agro-processing or industrialisation efforts. You provide a key link in one or more important value chains.
- *Social and environmental.* Your sector aspires to environmentally sustainability, creates minimal atmospheric or terrestrial pollution, respects local populations' land rights, and promotes corporate social responsibility among members.

PSOs in some sectors and sub-sectors will find it easier to frame their activities in terms of these interests than others. Some productive activities are controversial on various grounds, giving rise to

alternative framing strategies. People may disagree, for example, on issues of land rights, particularly when they involve large-scale foreign investments. Investments in sectors such as tobacco control, game trophy hunting, and coal production are controversial on social, conservation and atmospheric pollution grounds, while mining in some fragile ecosystems is challenged by local and external NGO lobbyists. If the issue you identify falls into any of these categories, then your framing exercise should not ignore the likely challenges.

Your framing strategy should aim to avoid unnecessary confrontations with policymakers and regulators, without whose cooperation your advocacy and lobbying activities are likely to fail. Avoid at all costs getting into political or ideological arguments. Presenting your issues as minor and technical rather than major and political may help you avoid unnecessary conflicts.

If your framing strategy leads to a hostile reaction from officials and regulators, or other interests and lobbyists, keep your cool and respond only if absolutely

How big is your frame?

Your framing exercise could include an international dimension. Countries sign up to international agreements on many issues, including global warming/ climate change, abolishing child labour and human trafficking, and free trade. The *Sustainable Development Goals (SDGs)* cover 17 sets of issues with 169 targets and 230 indicators! Goal 8 is 'inclusive and sustainable economic growth, full and productive employment, and decent work for all.'

necessary, for example, if you are misquoted or bogus data are presented as 'facts'. Framing that contains explicit or implicit criticisms of official policy is less likely to have traction than framing that takes policy as given in the short-term while perhaps aspiring to encourage changes in the medium- to longer-term. While it is smart to cultivate officials at different levels of government, do not seek support from politicians. It can be dangerous for your lobby to be seen as part of a political project. Do not let your own political preferences and connections get in the way of clear thinking and objectivity on this!

In support of your framing strategy, you should quote figures if they are available. If there are no reliable figures, an estimate is better than nothing, but do not make up numbers or exaggerate your importance to society!

Your main pitch is laid out in the rationale for deeper analysis, where you give the best account of why your issue is of strategic importance to your sector, the nation and the government. Without overdoing it, you should refer to your basic frame in the empirical chapters of your report and in the conclusions, stressing employment, welfare, taxes, and foreign exchange earnings as appropriate.

If your issue is of a technical nature, it should be framed in simple terms (avoid jargon!) and its importance stressed for the efficient functioning of your sector.

Your framing strategy must be incorporated into your communications strategy so that journalists reporting your lobbying activities present the image and messages you are trying to put across to the government and the public. Both government and public will interpret the framing of your sector and the merits of its issues through their pre-existing perceptions and ideologies. Politicians, decision-makers and officials are more or less open and receptive to private-sector advocacy and lobbying. They may harbour long-held ideological reservations about the private sector and the benefits to be derived from private investment, for example, in agriculture. No matter how well you have framed your policy proposal, you are likely to encounter numerous unco-operative stakeholders in government. But you are also likely to meet officials with more positive attitudes to private sector advocacy and these are the ones with whom you need to engage!

Your priority issues may be of deep concern to a few or to many people. For various reasons, the few are usually better placed to defend and advance their interests than the many. When your association's priority issue has direct implications for the cost of living of the urban poor, the trader has an inherent advantage over the local producer or would-be producer, in that imported products are often cheaper and of better quality than the locally produced equivalent. If tariffs are too high, smuggling is incentivised. Such issues can undermine import-substitution and industrial policies, with widespread implications for key productive sectors and their lobbies. It is difficult to incorporate such fundamental issues into a short-term lobbying framework. Similarly, a sector lobby is not well placed to highlight issues related to the degree of state intervention in the micro-economy, which is an issue for business in general and certain sectors in particular, for example, agriculture. Arguably,

such common issues are part of the framing of private sector lobbies' long-term vision and mission.

You need to frame the issue before commissioning research on it. If the issue is framed too narrowly then possible solutions will be unintentionally omitted. If it is framed too widely, or too vaguely, then the research effort will be less focused and the argument weakened.

As well as describing the issue, you need to describe your ideal future position. Be realistic. If you are fighting proposals for new regulation, then your desired future may simply be that the regulation is not enacted. But if you are lobbying about existing regulation, consider carefully where you are aiming. It is unrealistic, for example, to expect the government to abolish taxation – but you might argue that there are too many taxes, all of which take too much time and paperwork, and argue that they should be replaced by one or two taxes with simplified paperwork.

How to... frame the issue

- The Kenya Association of Hotel Keepers and Caterers (KAHC), together with the Pubs and Restaurants Association (PERAK) had been engaging with the Kenya Copyright Board (KECOBO) to review the mechanism of collection of royalties from the industry.
- Progress was slow until KAHC and PERAK reframed the issue from a concern with copyright to a concern with equitable and efficient taxation.
- Consequently, KECOBO gazetted a single payment system and KAHC and PERAK are now implementing a single payment royalties system.

Do not be afraid to spend considerable time thinking about framing the advocacy issue. A common reason for weak research is a vague or unfocused brief.

Framing and exploring is an iterative process – the exploration that you undertake will help you to define the issue more tightly. Exploring the issue is intended to help you build your understanding of the issue, the possible impact and the likely implications. You should be able to answer these questions:

- **What is the harm or risk that the public policy is intended to avoid?**
- **Why is the policy a problem and what are the specific causes of the problem?** Can the policy be implemented in a way that will not cause significant problems? Why is the issue important to business?
- **What is the scale of the impact?** Who, and how many businesses, are affected? How are they affected, what is the cost or benefit?.

You should consider carefully whether the issue is the policy itself or the way in which it is proposed to implement the policy (regulation). This will determine whether you advocate at the policy level or the implementation level. The Government may be totally committed to introducing a new regulation. It may have a choice about the way in which the regulation is framed and enforced. So you may choose to accept the policy but to advocate its introduction in a way that minimises the additional burden imposed on business. Introducing a regulation over a longer period may allow businesses to adapt.

6. Summarising the issue

Once you have framed and defined the issue, you should set it out clearly, on no more than a single page. Ideally, the one-page brief should answer the questions above and outline your initial policy response, recognising that this may need to be refined if the issue is prioritised for more work.

Your policy proposals should not disadvantage other businesses – or you will encourage them to lobby against you. In general, proposals should not be anti-competitive, since monopolies and cartels serve to increase prices at the expense of the consumer. Banning or overtaxing imports of widely consumed products in the absence of a viable import substitution strategy only encourages smuggling.²

The brief needs to be written in language that is clear and appealing:

- **Your members**, who want reassurance that you have understood their needs
- **Policy makers**, who want you to make their lives easier
- **Other private sector and civil society organisations**, who could become your allies for the particular issue
- **And, possibly, the media**, who could publicise the issue widely, helping you to build larger alliances and encouraging others also to lobby policy makers.

7. Selecting the priority issues

There will always be some issues that crop up unexpectedly and which require immediate attention. In general, however, business associations should not take on too many issues at a time. The danger is that none will get the attention that they deserve and all will fail. Undertaking research and preparing policy positions on issues require effort and resources, not to mention the effort required to meet with and influence public officials and politicians.

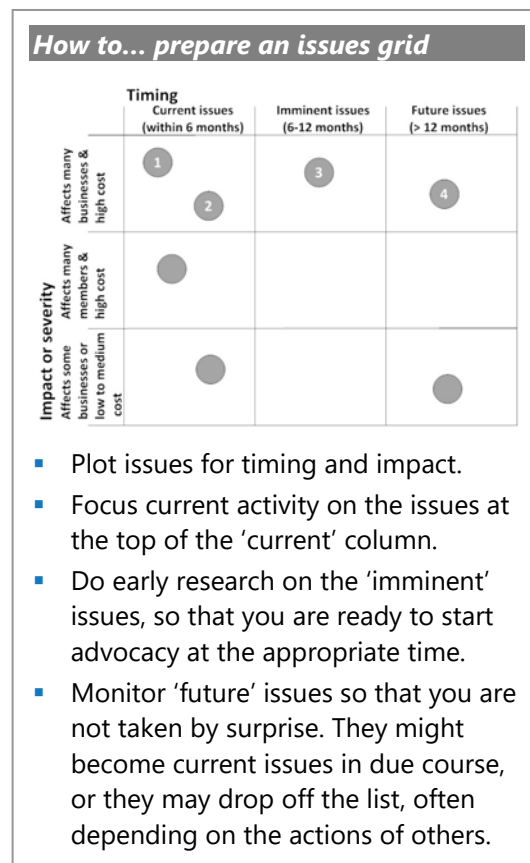
You may need to have policy positions on a much wider range of issues so that you can convey the appropriate messages if you find yourself in dialogue with the government. You may decide, therefore, to run with one or two issues now, to be gathering basic information on several in order to have a basic position, and to be starting the process for the next one or two prioritised issues. You could however identify issues that will need to be investigated when further resources are available, and start gathering data as and when the opportunity arises.

It is likely that some of your members will feel strongly about some of the possible issues, so you need to have a clear and transparent mechanism for prioritisation. Factors might include:

- **Focus.** It will be easier to advocate change if you are focused on just one or two requirements, rather than trying to take on a broad issue – if necessary, split broad requirements into smaller, more focused issues.

² How to make local producers competitive with imported goods such as sugar, wheatflour, edible oils, and rice is a key policy issue for members of the East African Community (EAC). The EAC is currently planning to ban imports of second-hand clothes within three years as part of joint efforts to resurrect local textile industries. These are key long-term policy issues for BMOs' to research and lobby on.

- **Relevance to members.** If all or most of your members are affected, then the issue is likely to be more important than if there are only a few members who have a problem
- **Likelihood of achieving consensus.** The more homogenous your membership, the easier it should be to reach consensus. Difficulties may arise where there are a few big players and/ or membership is divided by race or local versus foreign ownership.
- **Impact on and cost to members.** Often the biggest driver of whether to pursue an issue, measured in terms of both the actual cost (e.g., obtaining a licence, paying more for something etc) and the administrative cost (e.g., in increased paperwork etc).



- **Salience of the issue.** Does the issue apply to significant numbers of businesses outside of your members, or outside of your sector, or indeed to significant numbers of other stakeholders?
- **Controversy.** If different stakeholders take a range of competing positions, you may find it more difficult to convey your message. This is not to say that you should not be involved in controversial issues, but rather to recognise that they may need more effort and that you may be taking on more than just the government. Tight framing is also essential for such issues.
- **Political feasibility.** It might be difficult or impossible for the government to deal with some issues, say because they are covered by international treaty, so do not waste time lobbying for these to be changed.
- **Timeliness for policy makers.** Consider where the government is in the political and policy cycle. If they are considering a new regulation, they will be more interested in your views on that than on an existing regulation which could wait.
- **Complexity.** If you are new to advocacy, start with the issues that you regard as easier so that you can learn about dialogue and advocacy. As you gain experience – and confidence – then you can begin to tackle the bigger, more complex issues.

Overall, you need to balance the importance (relevance, impact) against the likelihood of success (political feasibility, controversy, complexity, and timeliness). Many organisations involved in advocacy use an *issues grid* to monitor and prioritise issues.

The grid will help you remember the issues that are current, important, and urgent.

You should use it, too, to monitor issues that you have not prioritised, or perhaps are relying on others to pursue, to remind you that there may still be merit in gathering and sharing information about the issue.

You should plot issues that are imminent and further into the future, to remind you that they need to be tracked and that it would be sensible to undertake preliminary work now so that you are in a position quickly to commission detailed research and develop a policy position if and when the need arises.

Don't forget to look ahead. All too often, associations pick up issues when it is too late. So ensure that you have good intelligence-gathering systems in place. Use a matrix, or develop your own tool, to monitor issues and gather information on the issues that are not yet urgent or important so that when they do become urgent, you are ready.

8. Summary and conclusion

It is very easy to identify interesting issues. The trick is to identify those that will make the biggest impact, on your members and on the economy, and to focus on those. As you develop confidence in your advocacy skills and as your relationship with the public sector improves, you will be able to pick up more of the smaller issues and feed them back into the public sector thinking process.

Framing issues in the public interest will enhance the likelihood that your lobbying strategy will succeed by convincing key decision-makers and citizens that you are not merely promoting the interests of a small or already privileged group for selfish gain. Your frame should therefore present your issue as being:

- In the public interest, since you provide a vital good or service to large numbers of consumers while protecting the environment;
- In the sector's interest, since you create so many jobs with multiplier effects on other producers;
- In the state's interest since you pay taxes, earn foreign exchange, support local development, and address the employment problem.

It is not acceptable to exaggerate your claims to a fair hearing of your issue in terms of the above framing criteria, since public watchdogs will make a meal of you if you go too far.

Sector-specific and technical issues are easier to identify and frame than cross-sectoral, broader policy issues, which are better dealt with by the larger BMOs. Be realistic and pick the fights you think you have a good chance of winning.

While identifying and framing issues requires some research and analysis, the tasks of refining your issues, researching them thoroughly and writing up your findings in a way that suggests actionable solutions are much more time-consuming and demanding!

Further reading

Here are a few reading suggestions. They are based on European and North American experience. As yet, there are no academic studies of the themes discussed above in the African context.



- Iskander De Bruycker 2016. 'Framing and advocacy: a research agenda for interest group studies', *Journal of European Public Policy*, April, <http://goo.gl/Us2XvL>
- Benedetta Voltolini 2016. 'Framing processes and lobbying in EU foreign policy: case study and process-tracing methods', Symposium, *European Consortium for Political Research*, www.palgrave-journals.com/eps
- Conor McGrath 2007. 'Commentary Framing lobbying messages: defining and communicating political issues persuasively', *Journal of Public Affairs* 7: 269–280, www.interscience.wiley.com
- Frank R. Baumgartner & Christine Mahoney. 2008. 'The Two Faces of Framing: Individual-Level Framing and Collective Issue Definition in the European Union', *European Union Politics*, Vol 9 (3): 435–449, eup.sagepub.com/cgi/content/abstract/9/3/435



This series of advocacy competence handbooks – divided into modules and units – is intended to support business member organisations (BMOs) to engage in public private dialogue and to advocate improvements to the business environment. You are free to use the units and other materials provided that the source is acknowledged.

Foundation Unit

0. Introduction to advocacy & dialogue

Module 1: The policy process

1.1 Understanding policy and regulation

1.2 Policy analysis

1.3 The process of formulating and reforming policy

Module 2: Policy positions

2.1 Identifying, understanding & framing issues

2.2 Preparing policy positions

2.3 Influence & argumentation

Module 3: Communications

3.1 Communications & public relations

3.2 Media relations & use of social media

3.3 Interview skills

Module 4: Written communications

4.1 Branding & house styles

4.2 Writing press releases

4.3 Preparing written documents

Module 5: Managing advocacy projects

5.1 Planning an advocacy project

5.2 Budgeting & financial management

5.3 Evaluation of advocacy

Module 6: Managing a BMO

6.1 Leadership, strategy & business planning

6.2 Governance and ethics

6.3 Members and member services

Module 7: Research

7. Research methods



The Business Advocacy Network is an initiative of Irwin Grayson Associates and can be found at businessadvocacy.net. IGA can be found at irwingrayson.com and contacted at david@irwin.org. You can follow David Irwin on twitter at [@drdaavidirwin](https://twitter.com/drdaavidirwin).
