

STEP 2.1 – MONITORING REPORT

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My name is Paul Shotton and on behalf of Advocacy Strategy I would like to present a short video on Monitoring Reports from Step 2: **Intelligence Gathering** of the 7-Step Advocacy Method.

As an advocacy professional you might ask yourself: How do I create high-value monitoring reports?

Advocacy success requires you to regularly communicate the latest state of affairs (what happened) on your core issues back to colleagues, management and/or clients. This strengthens buy-in and mobilises your organisation in support of your advocacy. This should notably cover what is happening, how this affects you and what are the next steps? Monitoring reports must rapidly update the reader with key insights on what happened, what impact and what next? The first rule is to keep it short; very short.



A monitoring report is often a document or email that provides a regular update on intelligence and analysis on a (priority) issue (what happened). The monitoring report communicates information used in numerous advocacy tasks, including prioritization (identifying the right issues), stakeholder mapping (identifying the right persons), legislative tracking (the right time), providing feedback on advocacy messaging (the right information) and advocacy activities (the right tools).

As a crucial deliverable, the monitoring report requires thorough structuring as well as tailoring to its audience. The monitoring report should be developed in collaboration with the audience. Start by determining the best format (i.e. email, PDF, video), the number of issues covered within each report as well as the frequency of delivery and mailing list. It is also crucial to agree a process for gathering feedback on, amongst others, the structure, clarity, frequency and relevance of the monitoring report.

Once the content, format, delivery and feedback are agreed, it is time to identify the development(s) that will be included within the report. Content is determined by whether the report will cover a specific milestone or event (i.e. a policy debate or vote) and/or if it will cover developments over a specific timeframe (i.e. the previous month, week or day).

When writing the monitoring report, balance the use of public information collected from institutional websites, the (social) media, and attending public meetings with the more valuable non-public information gathered for informal interactions with key stakeholders. Try to triangulate the data.

When translating the intelligence into your monitoring report consider the 5Ws and 1H:

1. Who was involved? Who is in charge? Who does it impact?
2. What happened? What was the decision? What should I know?
3. Where did it take place? Where is affected? Where can I get more info?
4. When did it take place?
5. Why did that happen?
6. How did it happen? How was the decision made? How does it impact me? How will we communicate internally / externally?

When structuring your monitoring report please consider including the following sections:

- Title and headings
- Background of the legislative proposal
- Objectives of the legislator
- Information on the type of legislative procedure
- Timeline including the current stage in the legislative process
- Campaign action-plan and schedule
- Upcoming events related to the issue
- Key decision-makers in each institution and key stakeholders
- Links to key documents
- Contact information

When reviewing your monitoring report please consider the following points:

1. Have you included branding, logo and color scheme?
2. Does your title clearly identify the issue and the development?
3. Does your first paragraph summarize the key development?
4. Does your body text cover the 5W and 1 H?
5. Have you discussed the impact of the development?
6. Have you included recommendations for intelligence and advocacy follow-up?
7. Have you included links to the key documents, for example, agenda, policy papers, amendments, minutes etc.?

To further explore our 7-steps of advocacy method as well as our free advocacy tools, including our free 7-step snapshot report, please visit our website: www.advocacystrategy.com and send us an email (hello@advocacystrategy.com) so that we can work with you to understand your needs.

Step 3 of the 7-step advocacy method concerns **positioning**.

