Training - MODULE 2

ADVOCACY IN EYE CARE AND PUBLIC HEALTH: PLAN & CAMPAIGN

Version: November 2020

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ADVOCACY

COURSE DESCRIPTION

Welcome to MODULE #2

Video ▶

Module #1

Module #2
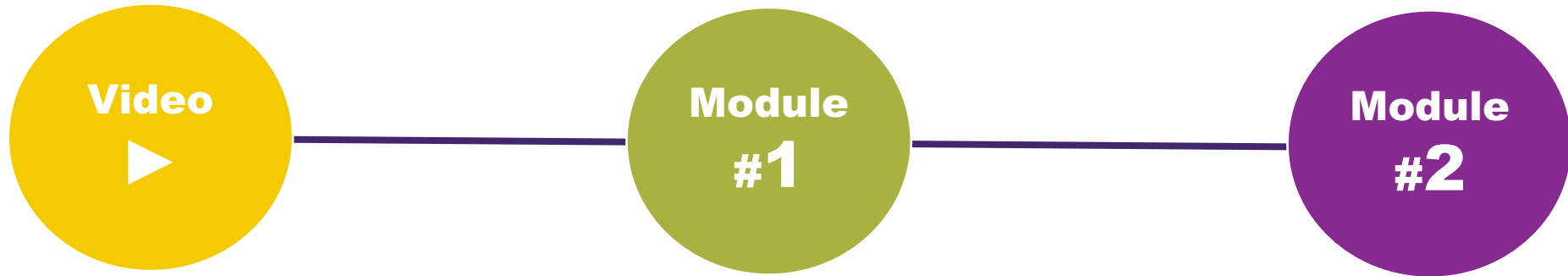
	The VIDEO "About the Vision Impact Institute"	INTRODUCTION TO ADVOCACY	ADVOCACY PLAN & CAMPAIGN
Course Description	**The VIDEO "About the Vision Impact Institute"**	**Module 1** is about the **CONCEPT**. It introduces the basics of Advocacy in the field of vision care. It illustrates the examples of key issues with facts, figures, and messaging to help you grow awareness.	Module 2 is about the **PROCESS**. When shaping the advocacy strategy with providers or advisors, you need to know about the method and tools. It will help you to integrate the advocacy into your own strategy.
Learning SKILLS	Know about: # your Internal Advocacy Partner # how you can introduce the Vision Impact Institute to your audiences	**Be able to:** # **Understand** what's advocacy for Good Vision # **Know** key topics and relevant evidence # **Create** / use evidence-based messaging	**Know how to:** # **Build** an Advocacy Plan # **Implement** the Advocacy Campaign # **Evaluate** the progress
AUDIENCE	Video is designed for: • Everyone, any employee of EssilorLuxottica and external audience	Module 1 is designed for: • Any employee of EssilorLuxottica who wants to know more about advocacy and play a proactive role at his/her level to grow awareness on key vision issues • Teams engaging with external connections (Communications, Marketing, Sales, Education and Professional Services)	Module 2 is designed for: • Any employee of EssilorLuxottica who wants to know more about advocacy processing and planning • Leaders who want to integrate the advocacy plan into their multi-stakeholder strategies
Duration	1'30"	15'	15'

SKILL #1
Build an Advocacy Plan

What is an Advocacy Plan and Campaign?

Advocacy?
See Definition [Module 1]

Advocacy Plan and Campaign?

❑ An **Advocacy Plan is a process** defined to achieve a specific advocacy goal.

❑ An **Advocacy Campaign** is a dynamic project over a given period of time.

❑ **Campaigning** refers to the execution of the plan.

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Advocacy Plan is a Process...

1 **ISSUE**

2 **GOAL**

3 **OBJECTIVES**

4 **STRATEGY**

5 **IMPLEMENTATION**

6 **EVALUATION**

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Advocacy Issue

1

ISSUE

❑ You need to **identify** **the issue you want to address**.

❑ You need to **analyze** the problem (its nature, extend, causes, short term effects, and long term impacts)

❑ You need to **define** your position and agree on recommendations to solve the problem

Issue Examples:
- 2.7 Bio people worldwide (X in your country) live with Uncorrected Refractive Errors
- 20% of school-aged children present undetected refractive errors unable to access services
- The prevalence of Myopia is expanding in the context of COVID-19

Tools to analyse the issue:
- Problem-Solution Tree
- Force-Field Analysis
- Fish-bone analysis

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Advocacy Goal

2

Goal

❑ An Goal (or aim) describes **the change you want to see**, the ultimate impact you want to achieve.

❑ It is the **long-term** result of your advocacy effort to change people's lives or the world they live in.

❑ A goal is broader and longer term measure (**ultimate outcome**) than an objective (**activity outputs**).

Examples:
- We envision a world free from Uncorrected Refractive Error
- Our goal is to have a classroom where each child benefit from good vision

Advocacy Objectives

3

OBJECTIVES

❏ To achieve the goal you need to set **SMART objectives** (Specific, Measurable, Achievable, Relevant, Timely).

❏ They can be set at any level, **people** or **institutions** (see chart below). Each of them can be local, national or regional. Objectives can be long or short term.

❏ Each objective should focus on a specific **ACTIONS** such as Educating, Engaging or Mobilizing to achieve a particular **CHANGE** (output) you want to see by the end of your intervention.
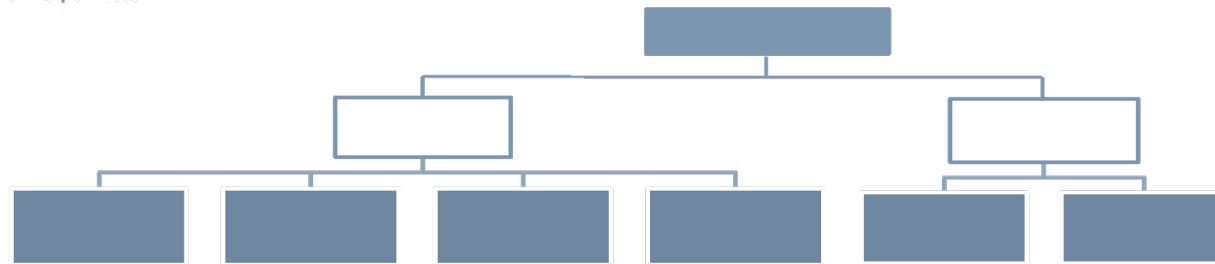
Example
- By 2025, 90% of primary school children in [Region] undergo the eye health screening program and those in need benefit from eye care services (referral, treatment, provision of eyeglasses)

Tools to set objectives:
- SMART objectives
- Objective Chart:

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Advocacy Strategy

4

STRATEGY

❑ For each advocacy objective, you need to understand the overall process of change (analyze social and political context, assess your capacity to influence stakeholders) and select **target audiences**

❑ For each target audience (public, influencers, policymakers), you need to **define your best strategy approach** (messaging, activities, resources/capabilities, timeframe...) to influence the decisions

❑ Your strategy will often involve selected **partners**, **influential stakeholders**, targeted segments of the **public**, and/or **concerned/ affected communities**.

Tools:
- Advocacy Strategy Framework
- ToC model (Theory of Change)
- Force-Field Analysis
- SWOT analysis
- PESTEL analysis
- Stakeholder Mapping / influence Map
- Other: Events, political calendar, Market Data, Situational Analysis

Advocacy Strategy Framework

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Advocacy Action Plan and Implementation

5

IMPLEMENTATION

❑ Once you have defined your strategy, you can prepare the implementation of your Action Plan:
  ❑ Define Management / coordination process
  ❑ Approve budget, resources, and M&E (monitoring and evaluation plan)
  ❑ Start campaigning (Lobbying, Influencing, Media, etc.)
❑ When you have a unique action plan for each audience, you can create an integrated plan and timeline
❑ Remember that you need to be flexible and agile along the process. You can influence only individuals (not institutions) and each campaign should be personalized and targeted.

Tools:
• M&E
• Risk Management Model
• AIDA model

CHECKLIST (Action Plan implementation°:
Goal   Objectives   indicators
Audiences   Messaging   Activities (who, when...)
Budget   Resources
Risks assumptions
M&E (Monitoring & Evaluation)

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Advocacy Monitoring & Evaluation

6

EVALUATION

❑ As for any project dynamics, you need to **monitor and evaluate your campaign progress** towards achieving results and meeting specific targets
  ❑ Document activities and indicators
  ❑ Monitor audience reactions
  ❑ Evaluate progress and impact against plans
  ❑ Revise, Adjust, Report
  ❑ End the project. Measure final Outcomes, Impacts, Effectiveness, Efficiency.

Tools:
• M&E (Monitoring & Evaluation) matrix
• Impact Evaluation
• Formative Evaluation

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SKILL #2
Implement the Campaign
[Case Study]

Advocacy Campaign

- **Advocacy Campaign** refers to the execution of an **advocacy plan.**
- While external or internal advisors such as the **Vision Impact Institute can help you with setting the advocacy strategy,** to implement an advocacy campaign you will probably need the support from implementing partners and/or specialized providers (advocacy agencies, etc.)
- **Why would you need a support from partners?** To raise awareness and educate targeted audiences you need to maximize your share of voice and influence power. Advocacy campaigns co-signed by several partners create greater impact with higher credibility.

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Case Study: "Kids: See Success" campaign, USA

Let's illustrate with an example:
The Vision Impact Institute created the Kids See: Success initiative in 2017:
A USA advocacy campaign to promote the importance of **comprehensive eye exam** for children before starting Kindergarten. **The campaign process consisted of:**

EVIDENCE
Research evidence-based information for decision-makers to make change for children's vision care

AWARENESS
Change people behavior and build the case for proper vision for children, for their success

INFLUENCE
Promote policy change at the local, state and federal level

PARNTERSHIPS
Forge new collaborations and engage partners to ensure our message is heard
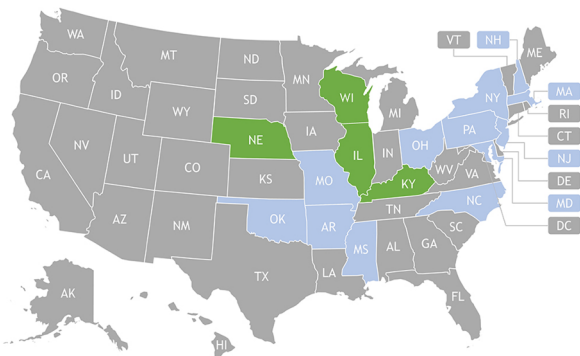
Example of State Mapping :
- 🟢 States Onboard (already have eye exam legislation)
- 🔵 States proposing Children's Vision Policies for Eye Exam Legislation or with mandates/ recommendations for eye exams after failed vision screenings
- ⚫ States without policies/proposals for comprehensive eye exam
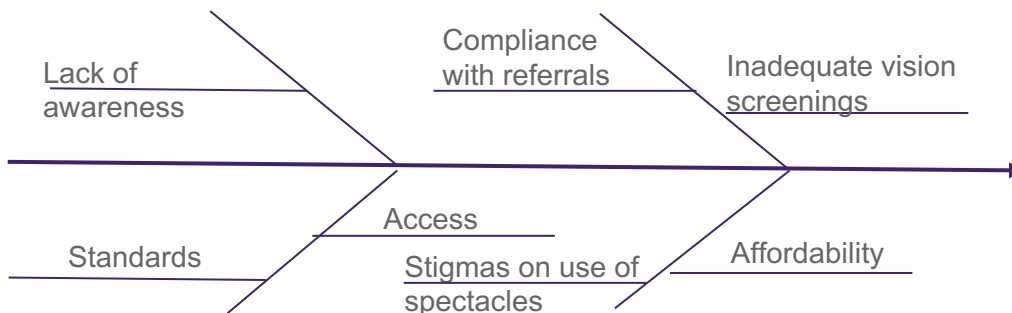
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Advocacy Issue

- **Identify:** **1 in 4** children in the USA have a vision problem
- **Analyze:** Many vision disorders can be prevented if detected and treated early. Academic performance could be affected by poor vision and school-age children can be left at a major disadvantage
- **Define:** Requiring Children Eye exams before school is important to ensure good vision in the classroom and future success

Fishbone Tool
In this example, the root causes of the issue are:

Lack of awareness

Compliance with referrals

Inadequate vision screenings

Standards

Access

Stigmas on use of spectacles

Affordability

Children eye exams are needed to ensure success in AND out of the classroom

1 IN 4 children have an undetected vision condition

Prevent Blindness of America, The Children's Vision and Eye Health Report, 2016

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Kids See Success

A classroom where each child benefits from good vision and ensures social and academic

New Jersey

GOOD EDUCATION REQUIRES GOOD VISION IN THE CLASSROOM

- There is a unique opportunity in the United States to pursue policy change at the state level around children's vision requirements in schools while advocating for comprehensive eye exams for children entering the public school system.
- **Why New Jersey?** The state of New Jersey currently has a strong vision screening program in place. Children in Pre-K and students up to 10th grade are required biannual vision screening in schools.
- The existing advocates (mainly AOA affiliates) have a strong strategy for Children's Vision Care, but lack access to a partner with a global perspective, which VII as a non-profit and its Essilor counterparts could bring.
- Help improving the quality of every child's experience in school as they will be better equipped to learn.

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Advocacy Objectives

Objectives

KSS objectives were focused on specific actions on changing people and institutions behaviour and practices

PEOPLE

- **Knowledge** - Educate policymakers, KOLs, parents, teachers, nurses, and school administrators on the importance of eye exams for children before admission to school (awareness)

- **Behavior** - Engage parents to have children receive comprehensive eye exams to detect and treat visual problems early

- **Action** - Mobilizing all stakeholders to support our cause

INSTITUTIONS

- **Policy** – Influencing policymakers to introduce legislation on the requirement for eye exams before admission to school and in school-age children

- **Practice** – Supporting and regulating the mandates of eye exams, deficiencies of vision screening techniques and the socio-economic impact associated to undetected vision problems while enhancing the role of optometrists

Kids See Success

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Advocacy Strategy (New Jersey case)

Define your Audience	Know your Competition, Opponents and Interests	Research and Analyze Existing Evidence	Map Stakeholders	Put Evidence into Action
❏ Key Opinion Leaders ❏ Legislators ❏ Associations ❏ Vision Councils ❏ Decision-makers ❏ Local and National NGOs	❏ Understand/Analyze Stakeholders Policy position ❏ Establish Linkages from different Interest groups ❏ Ophthalmology ❏ Other priorities (e.g. myopia, scope of profession, etc.)	❏ Gather impactful data on the issue ❏ Know past/current legislation e.g. Children's vision, Vision and Drivers ❏ Vision Impact Institute Research section <Link Here> ❏ Analyze existing evidence using relevant sources ❏ Develop clear messages with well-documented research and specific stats ❏ Use examples as persuasive and reliable information	❏ Optometry Giving Sight ❏ National Parent-Teacher Association ❏ NJ Board of Education ❏ Learning Disabilities Association of NJ ❏ NJ Society of Optometric Physicians ❏ Optical Academy ❏ Essilor Vision Foundation ❏ Other players	❏ Gather Support ❏ Build a Coalition ❏ Engage government leaders to implement specific vision health actions ❏ Introduce legislation in the House or the Senate

- Conducting a stakeholder analysis is important to maximize influence to all audiences on the specific issue, gather support and respond to anticipated opposition arguments.
- Advocacy strategies balance internal and external factors.
- We looked at existing and potential relationships to execute our strategy and engage partners

Advocacy Implementation: Campaigning

We planned Actions and Activities to Influence targeted Audiences using Effective Communication Tools and Resources:
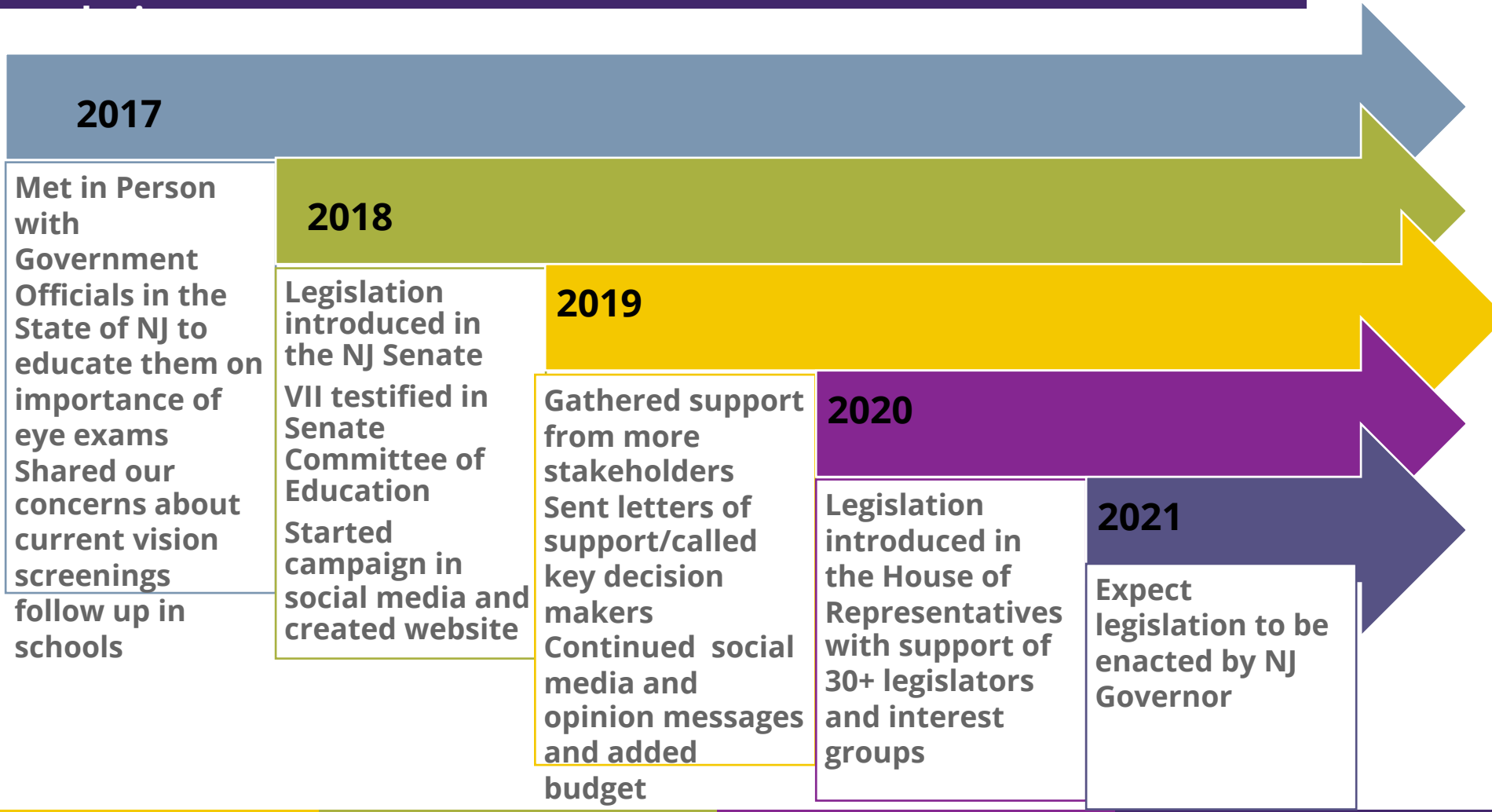
- **Created the campaign logo (Kids: See Success), messaging** supported by **Stats and Reports** from the Vision Impact Institute platform <u><Link Here></u>
- **Met in Person** with Government Officials to discuss evidence
- **Sent Letters/Email** to Local Officials to support targeted policy
- **Called Decision Makers** to discuss facts and concerns
- **Gathered ideas** from other relevant industry organizations
- Used **Social Media Channels** to Convey Key Messages
- **Followed-up** with all stakeholders

MORE THAN **12.1 MILLION** U.S. schoolchildren have some form of vision problem

40% of U.S. schoolchildren with **LEARNING DISABILITIES** also have vision issues

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Advocacy Implementation: Campaign timeline

We built an action plan with realistic activities and actionable tactics based on our capacity and resources AND monitored the

2017

Met in Person with Government Officials in the State of NJ to educate them on importance of eye exams
Shared our concerns about current vision screenings follow up in schools

2018

Legislation introduced in the NJ Senate
VII testified in Senate Committee of Education
Started campaign in social media and created website

2019

Gathered support from more stakeholders
Sent letters of support/called key decision makers
Continued social media and opinion messages and added budget

2020

Legislation introduced in the House of Representatives with support of 30+ legislators and interest groups

2021

Expect legislation to be enacted by NJ Governor

Kids See Success

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SKILL #3

Monitor and Evaluate

Monitoring, Evaluation, and Adjusting

MONITOR

EVALUATE

ADJUST

Review and Evaluate your Progress, Impact and Outcomes, Adjust Strategy as Needed

Tracking and assessing the results of your intervention is important:

- ❑ **Collect and use information** to learn about the changes taken place during your campaign
- ❑ Look at **engagement levels** (e.g. # of people you informed or # of people promoting the issue)
- ❑ Recognize that change takes time therefore it is important to set **intermediate steps** to change
- ❑ Understand if approaches are the **correct one or your strategy needs to be updated**
- ❑ Learn about the contribution to change you and others have made how this might **influence behavior or practice**
- ❑ **Document** the information collected, progress and achievements
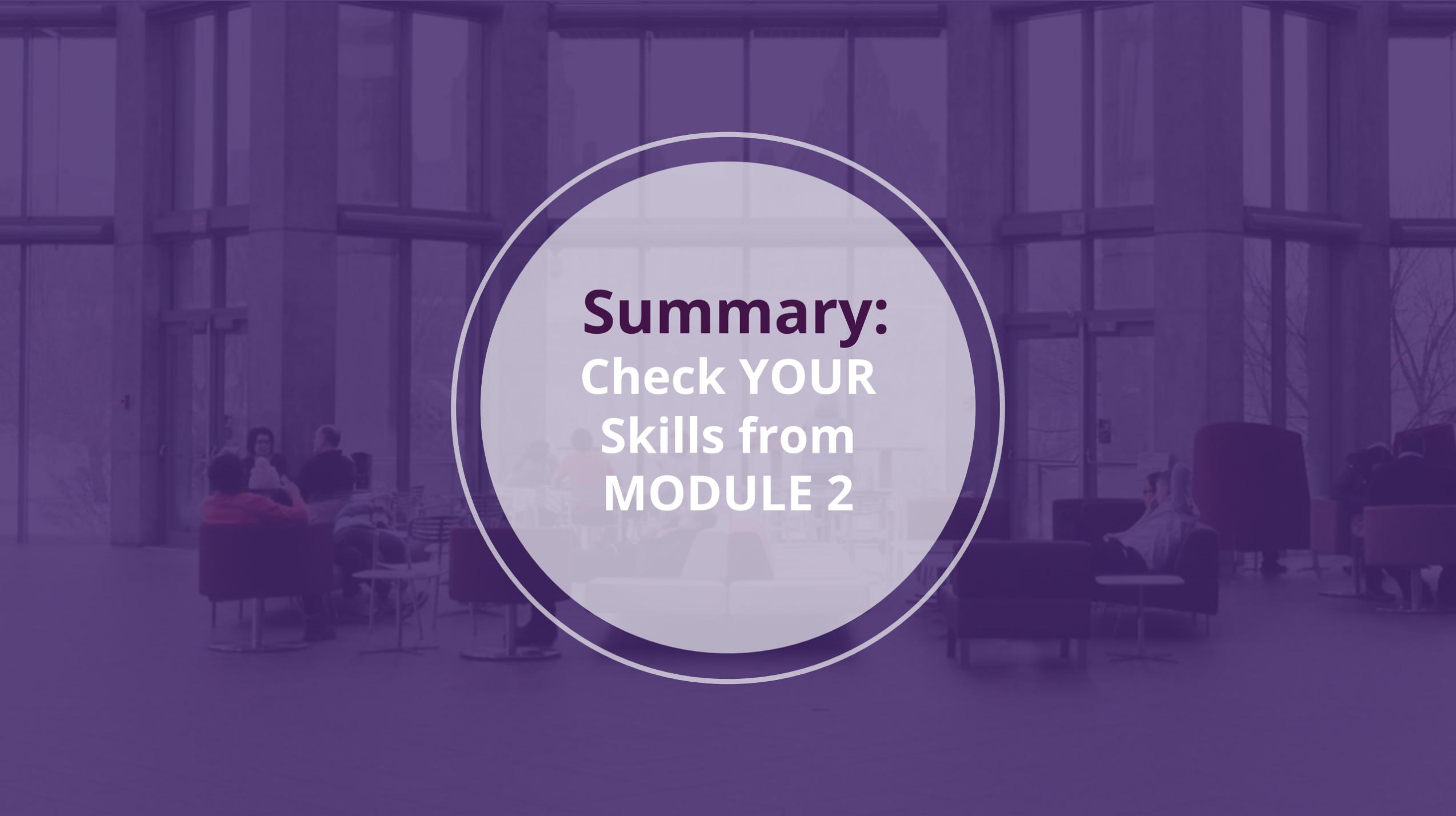
Summary:
Check YOUR Skills from MODULE 2

Key Takeaways

SKILL #1: Build an Advocacy Plan
   Advocacy Plan is an enabling PROCESS to achieve a specific advocacy goal.
   Each step of the PROCESS is equally important and needs an in-depth groundwork
   Quality planning can be advised by specialized partners (Vision Impact Institute or external) with dedicated methods and tools

SKILL #2: Implement the Advocacy Campaign
   Never jump to implementation (Step 5) if unprepared (Steps1-4)
   Understand the full landscape of stakeholder to engage the allies and influence the opponents
   Maximize your impact and campaign effectiveness through partnerships and alliances

SKILL #3: Monitor & Evaluate the progress
   Assess if campaign approach is working or needs adjusting
   Change takes time ...especially sustained behavior and social change
   Understand your contribution and impact of your campaign

References (further reading)

- Advocacy Hub, IAPB
- Advocacy for Eye Health: A Practical Guide, Part 1: The Advocacy & Campaigning Cycle, IAPB, 2013
- Advocacy for Eye Health: A Practical Guide, Part 2: The Toolkit, IAPB, 2013
- Enhancing Advocacy for Eye Care at National Levels: What Steps to Take for the Next Decade?, 2012
- Advocacy Toolkit, UNICEF, 2010
- Policy & Advocacy: Tool Kit Planning & monitoring, 2017
- **Seven steps to effective advocacy, 2013**

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ABOUT

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INSTITUTE**

YOUR Internal
Advocacy Partner

Vision Impact Institute

About

01

Vision Impact Institute is a **global non-profit** Organization established in 2013, focusing on the **impact of poor vision.**

Mission

02

The mission of the Vision Impact Institute is to raise awareness about the **importance of vision correction and protection** to make good vision a global priority.

Assets

03

We provide evidence-based Awareness and **Advocacy resources**. We empower and engage global and local change-makers. We offer direct support, advocacy tools and unique database of **600+ scientific studies** and reports at **visionimpactinstitute.org**

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Giving Vision a Voice®

Vision Impact Institute

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