

## CFASMD1.2V3.0

# Engage with policy and decision makers in government and organisations to influence policy decisions



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### Overview

This unit is about engaging with policy and decision makers in government and organisations to influence policy decisions. Clearly, even if rigorous research has been carried out, it is impossible to predict fully the results of engaging with policy and decision makers; engagement activities need to remain flexible and responsive to emerging results. It should not be expected, therefore, that the performance standards will necessarily be carried out in a chronological order; indeed it is anticipated that there will be many iterative loops before objectives are achieved.

This unit is for people in managerial or operational roles who engage directly and/or indirectly with policy and/or decision makers in government and organisations to influence policy decisions as part of a planned social marketing programme

A distinction is made between policy makers (i.e. those who formulate policy) and decision makers (i.e. those who decide whether formulated policies should be implemented). In some contexts these may be the same person, but in government contexts the policy maker may be a civil servant or local government officer, while the decision maker may be a minister or elected member (or a group of ministers or elected members – e.g. cabinet, parliament or council). As used in the standards, "social marketing programme" encompasses longer-term (3 years) programmes, medium-term (1-3 years) campaigns and short-term (<1 year) targeted initiatives.

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#### Performance criteria

- You must be able to:*
- P1 develop a clear understanding of the objectives of the social marketing programme and how engagement with policy and decision makers is expected to complement other activities in contributing to these objectives
  - P2 identify and resolve with key stakeholders any ethical or legal issues regarding engagement with policy and decision makers
  - P3 identify any risks to engagement with policy and decision makers and determine how these issues and risks are to be managed
  - P4 identify existing or innovative methods, tools and techniques and evaluate their suitability and reliability for engaging with policy and decision makers
  - P5 show your commitment to a sustained and mutually-beneficial relationship with policy and decision makers by taking time to build trust and empathy with them
  - P6 evaluate the research evidence and engage with policy and decision makers to develop insight into, and understanding of:
    - P6.1 their current position in relation to the policy issue
    - P6.2 their respective roles in, and the nature and extent of their influence on, policy decisions
    - P6.3 their own and their constituents' interests in policy decisions
    - P6.4 evidence, factors and arguments that have the potential to influence their contributions to policy decisions
    - P6.5 interventions and combinations of interventions which have the potential to succeed in influencing policy and decision makers' contributions to policy decisions
  - P7 work collaboratively with policy and decision makers, partners and other key stakeholders in designing, developing and testing interventions to influence policy decisions
  - P8 use suitable, reliable and legitimate means to engage with the policy and decision makers to influence their contributions to policy decisions; these may include:
    - P8.1 direct communication through informal conversations, structured discussions, specially-organised events or participation in the policy and decision makers' own events
    - P8.2 indirect communication via credible intermediaries such as: peers, champions, community leaders, experts, journalists, celebrities etc
    - P8.3 mobilising public opinion and community action
  - P9 select means of engagement with policy and decision makers which:

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- P9.1 are cost-effective
- P9.2 are measurable
- P9.3 minimise any adverse impact on the environment
- P10 make effective use of technology to communicate and manage relationships with policy and decision makers
- P11 keep colleagues and other key stakeholders appropriately informed about engagement activities and their outcomes
- P12 monitor engagement activities with policy and decision makers and take prompt action:
  - P12.1 if engagement activities are not making their expected contribution to achievement of the objectives of the social marketing programme,
  - P12.2 in response to identified risks materialising, or
  - P12.3 in response to emerging opportunities or threats

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#### Knowledge and understanding

*You need to know and understand:*

#### **General Knowledge and Understanding**

- K1 communication principles, methods, tools and techniques
- K2 consultation principles, methods, tools and techniques
- K3 creative-thinking principles, methods, tools and techniques
- K4 decision-making principles, methods, tools and techniques
- K5 examples of effective and ineffective social marketing practice relevant to the activity
- K6 influencing principles, methods, tools and techniques
- K7 leadership principles, methods, styles and techniques
- K8 legal and organisational/partnership requirements relevant to social marketing
- K9 motivation principles, methods, tools and techniques
- K10 objective setting principles, methods, tools and techniques
- K11 partnership working principles, methods, tools and techniques
- K12 principles, methods, tools and techniques for addressing ethical issues
- K13 principles, methods, tools and techniques for effective meetings
- K14 principles, methods, tools and techniques for engaging effectively with policy/decision makers
- K15 principles, methods, tools and techniques for using public opinion and community action to influence public opinion
- K16 questioning principles, methods, tools and techniques
- K17 reporting principles, methods, tools and techniques
- K18 research findings relevant to the activity
- K19 risk management principles, methods, tools and techniques
- K20 social marketing principles, methods, tools and techniques

#### **Industry/Sector Specific Knowledge & Understanding**

- K21 current and emerging trends and developments in the sector internationally, nationally and locally
- K22 industry/sector, organisational/partnership and professional codes of practice
- K23 legal, regulatory and ethical requirements in the industry/sector

#### **Context Specific Knowledge & Understanding**

- K24 key political, economic, social, technological and legal factors relevant to the context
- K25 organisational/partnership policies and procedures relevant to the activity
- K26 organisational/partnership vision, mission and strategic objectives
- K27 sources of advice, guidance and support

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- K28 stakeholders and their diverse interests, needs, abilities and preferences
- K29 target groups, their diverse interests, needs, abilities and preferences

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### Additional Information

#### Behaviours

1. identify people's information needs and preferred communication media and styles
2. present difficult ideas and problems in ways that promote understanding
3. show empathy with others' needs, feelings and motivations and take an active interest in their concerns
4. show respect for the views and actions of others
5. identify and raise ethical concerns
6. seek to understand people's needs and motivations
7. identify clearly the value and benefits to people of a proposed course of action
8. present information and arguments convincingly and in ways which gain the commitment and support of others
9. use factual evidence to support arguments
10. deploy a range of legitimate strategies and tactics to influence people
11. show sensitivity to internal and external politics that impact on your own area of work
12. identify and work with people and organisations who can provide support for own work
13. show your commitment to a sustained relationship by taking time to build trust
14. show sensitivity to the needs and interests of all parties involved, and manage these effectively
15. demonstrate a clear understanding of the organisation's target and stakeholder groups and their requirements

#### Glossary

##### Stakeholders

These include all those involved in, or affected by, the social marketing strategy and the issues it is seeking to address. "Key stakeholders" are those with the greatest interest in or influence on the issues; they will always include the target groups or intended beneficiaries of the social marketing activity.

##### Risk

This means the chances of an event happening and the seriousness of the consequences of that event. **Risk** does not of itself have a negative connotation; there can be both positive and negative consequences of an event. One of the key risks in carrying out a test marketing activity is that the results become contaminated by changes in other environmental factors

##### Risk management

This includes: assessing the risks; taking action to avoid events that have

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negative consequences; planning to minimise the negative consequences and maximise the opportunities if events do occur

#### **Constituents**

This refers to the people they represent. For a politician, constituents may be voters or party members, for government officials constituents may be ministers or senior civil servants, for someone in business, constituents may be shareholders, senior management, staff or customers

It is recognised that social marketing programmes usually involve a number of "partner" organisations working together in close collaboration

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**Suite** Social Marketing

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