

DIGITAL ADVOCACY

DIDACTIC MANUAL



**A GUIDE TO LEARNING, DESIGNING, AND
IMPLEMENTING DIGITALLY**

PRESENTATION

The PACT is a global coalition of more than 180 organizations led by young activists from all over the world that advocate for access to sexual and reproductive rights, promoting sexual and reproductive health as part of the AIDS response strategy, with the support of REDJUAMUGEN, which has a presence in nine Latin American countries and whose mission is to ensure gender equity. They created this handbook to help more young people learn how to use digital tools to become change agents.

This tool was created in response to the need to assist more young people around the world in designing and implementing a digital advocacy strategy.

The context of COVID-19 changed the way we live, work, and communicate. Experiencing a digital transformation was both mandatory and chaotic, particularly in organizations of young activists around the world, raising the critical question: "How to continue advocating for human rights?"

Fieldwork, research, mobilization, key event mapping, and so on are critical components of advocacy strategies that have had a positive impact on the world, but given that many people still have little knowledge and experience in the digital field, this tool was created to mitigate this weakness that exists and has limited having a digital transformation at the time of incidence.

In this manual, we will explain strategies that have been successfully implemented by young leaders from around the world, and you will learn how to implement them in a diverse range of situations using real-life examples. We will use Guatemala as an example of a real-world context in which HIV is prevalent.

01



What is advocacy?

1. cycle of advocacy
2. Ways to advocate
 - a. Digital Advocacy
 - b. Phases of digital advocacy
 - i. Preparation
 - ii. Volunteer recruitment
 - iii. Implementation
 - iv. Monitoring and evaluation
 - v. Community Building

X

E

D

N

I

02



Preparation

- SWOT
- Identify the problem.
 - Context analysis
 - Identification of the problem's causes
 - Problem recognition
 - Objective Development
 - SMART Goal
 - Stakeholders mapping
 - digital marketing strategy
 - SEO
 - SEM
- Aim Development
 - Activity plan

03



Volunteer recruitment

04



Implementation

05



Monitoring and evaluation

1. KPIs

06



5. Community Building

- Inbound Marketing
 - Leads

Conclusions

08



References

**X
E
D
N
I**

INTRODUCTION

Advocacy seeks to transform the realities that a group of people or a country directly affected by a problem are experiencing through dialogue and the negotiation of solutions to defend the affected group's rights directly with decision-makers or a group of people with influence to solve the problem.

This is a flexible tool that can be implemented in different ways and in different contexts, managing to generate a change in the communities when implemented at different levels, but it is advisable to focus on a single problem so as not to lose the objective of the solution that is being negotiated or sought with the decision makers in the various sectors mapped previously in the preparation phase of the advocacy.

It has a cycle that goes hand in hand with monitoring to identify the failures of the strategy that is being implemented and mitigate the errors in time.

"Digital advocacy" is the effort to mobilize our target audience to participate in advocacy through the use of technology. Digital campaigns are the primary tool of digital advocacy, allowing for a SMART strategy that focuses on one issue at a time.

Digital marketing plays a critical role in developing a digital advocacy strategy because it allows us to use our digital resources, such as social networks, applications, web pages, and so on, to ensure that the proposed solution has resulted in the desired change.



What is advocacy?

Advocacy is a deliberate and systematic process that involves the implementation of a set of political actions by an organized community with the goal of influencing people who make policy decisions by developing and presenting proposals that provide effective solutions to social problems in order to achieve specific changes in the public sphere that benefit broad sectors of the population or more specific groups involved in the process.¹

Advocacy has the following characteristics:


- Give people a voice on issues that affect them.
- It builds evidence about what needs to be changed and how that change can occur.
- Positive change in society towards greater social justice and equality.
- Influence people with power and change the way they think and act.

Why do we advocate?

We'll go over some of the reasons why we take the initiative to advocate for a problem we want to see resolved.



Takes your work to scale




Protect and Promote People's rights



Increases access to services and programs



Provides a voice for groups and promotes inclusion



Reaches a larger audience



Commits Government to implement

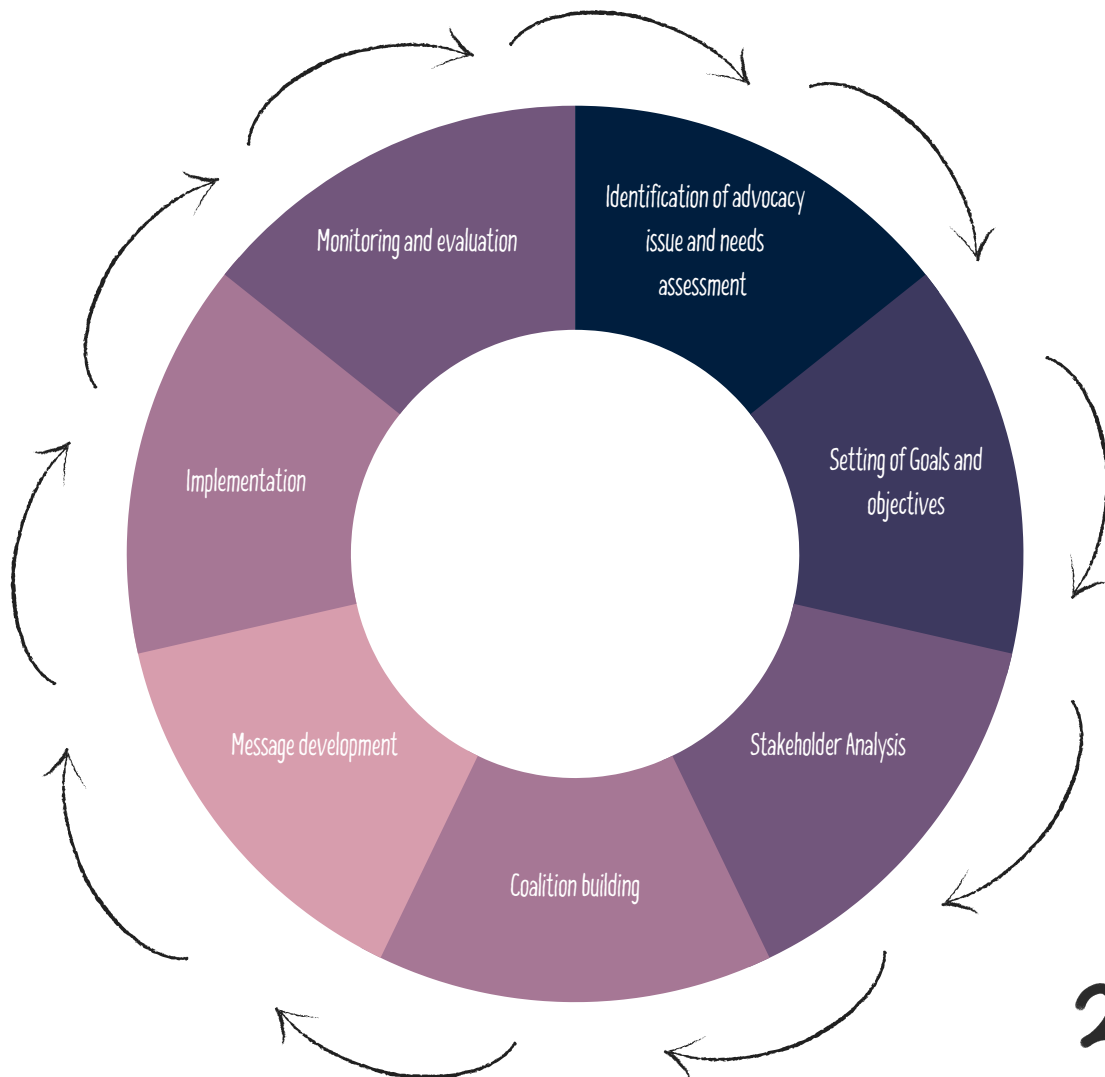
1. This definition was adapted from the Movement for Peace's guide to political advocacy and strategic litigation against violations of indigenous peoples' human rights.


Cycle of advocacy

The advocacy cycle is a conceptual tool that allows us to visualize if our process is developing in an optimal way. This process is not linear, meaning that you can return to a phase in the event that something is not going right to fix it and continue with the route to follow until it becomes the result we expect, either a state policy or the implementation of the proposed action.



Note: This cycle also applies when implementing digital advocacy.



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1. **Identification of advocacy issues and needs assessment** : This phase examines the context in which the directly affected population is living, including the legal, social, and other determining factors that have led us to advocate for this particular issue.
 2. **Setting of Goals and objectives**: Objectives and goals are two different things. Examine what each is:
 - a. **Objectives**: Are the specific and measurable actions that must be taken in order to achieve the overall goal. It instructs us and has a clever format.
 - b. **Goal**: It is a result that we want to achieve, and it is usually broad and long-term. The goal can be understood as the expected impact of the collaborative advocacy process.
 3. **Stakeholder analysis**: Is an effective management tool because it raises strategic questions such as who should be considered and what strategy is best for managing a specific stakeholder.
 4. **Coalition building**: It is a diverse group of individuals who have similar positions and share common interests to achieve a goal.
 5. **Message development**: This has to be aligned with the objective of our advocacy strategy: it must be clear and concise.
 6. **Implementation**: Implement the strategy developed together.
 7. **Monitoring and evaluation**: The process of analyzing and systematizing each step taken, monitoring should be done during the planning phase and during implementation to identify which phase of the advocacy cycle we have failed in and repair it in a timely manner.

Why do we advocate?

There are several ways to advocate, and this is where innovation and creativity come in: to defend a specific cause and generate change in our community or country.

We can advocate in the following ways:

- **Mobilization**: Urging a group to action for a cause (Castañeda. n.d) "It is a means to contribute to social transformation as well as to make visible the possibility of being a protagonist of change" (para. 7).
- **Multisectoral dialogues**: Spaces where representatives of various sectors meet to discuss a specific problem and reach an agreement on the creation of a solution to the problem.
- **Bulletin**: It aims to inform readers about the latest news on a topic. An effective strategy for establishing a relationship and increasing web traffic, but also stylized to inform your audience or target about a specific complaint made by an organization or individual.
- **Artivism**: (Art Madrid 2020) "It is defined as a hybridization between art and activism. "Art becomes a means of communication focused on change and transformation, a language that moves from academic or museum artistic creation to social spaces, becoming an educational tool" (para. 1).
- **Digital Advocacy**: These are efforts to use technology to mobilise people (targets) to participate in political advocacy. These complement a good digital marketing strategy.

Digital Advocacy



Living in the era of digital transformation...



Digital Advocacy

"Digital advocacy" refers to advocacy strategies that are implemented through the use of digital tools aligned with ICTs (information and communication technologies), and their main tool is the design of digital campaigns.

- What are ICTs? They are the set of technologies developed today for more efficient information and communication: they are recognized as innovative products where science and engineering work together to develop devices and systems that solve daily problems.
 - ICT Categories:
 - **Networks:** It refers to both radio and television networks, fixed and mobile telephone networks, as well as bandwidth.
 - **Terminals and equipment:** It covers all types of devices through which information and communication networks operate. For example: computers, tablets, cell phones, audio and video devices, televisions, game consoles, etc.
 - **Services:** It refers to the broad spectrum of services offered through the above resources. For example: email services, cloud storage, distance education, electronic banking, online games, entertainment services, virtual communities, and blogs.



Another characteristic it has is that we must set our target, but do you know what that means?

- The target: It is a representative and ideal consumer to whom a campaign is directed, or the buyer whom a product or service aspires to persuade.



Digital Promotion Campaigns

The purpose of digital promotion campaigns is to impact a specific target with a message or value proposition, generating an action that contributes directly to the achievement of the stipulated objectives. They take advantage of promotional platforms and interact with our target to keep us organized and simplify key promotional activities.

The following steps must be taken to develop a digital advocacy strategy:

1. Preparation
2. Volunteer recruitment
3. Implementation
4. Monitoring and Evaluation
5. Community Building



Preparation

This phase is important because we analyze our target and objective as well as other inputs such as:

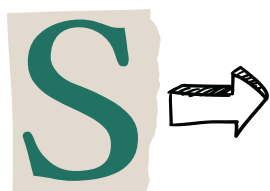
- SWOT
- Analyze the issue we'll be addressing.
- Digital marketing strategy
- Your campaign timeline
- Material creation
- Identification of platforms.

SWOT

It is a tool for understanding a company's or organization's situation by creating a comprehensive list of its strengths, opportunities, weaknesses, and threats. It is necessary for both current and future decision-making. SWOT is an acronym that stands for «Strengths, Opportunities, Weaknesses, and Threats.»

A thorough SWOT analysis allows you to plan for future growth. While similar to a competitiveness analysis, a SWOT analysis takes into account both internal and external factors. By analysing key areas based on opportunities and threats, you'll gain the insights you need to set your team up for success.

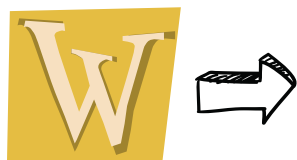
After having developed our SWOT as a personal organization, it is time to start identifying our problems.



Strength: These are the strengths, capabilities, resources, and advantages of an organization.

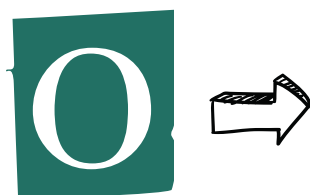
Answer the following questions:

- What do we do well?
- What makes us special?



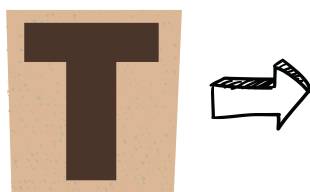
Opportunities are the factors of the environment that are positive and favorable for the organization. Answer the following questions:

- Are there market gaps in our services?
- What are our goals for this year?



Weaknesses: These are an organization's flaws and negative aspects. Answer the following questions:

- What could be improved?
- What resources could improve our performance?



Threats: These are the environmental factors that put our organisation at risk. Answer the following questions:

- Have there been any changes or reforms that have an impact on my organization?
- What are the new strategies to implement?



Note: The SWOT analysis tool can be used at the individual level as well as at the organisational level. If you are an activist who does not belong to an organisation, you can analyse your situation using a SWOT analysis. Would you try?

Problem

Analysis of the problem:

A problem can be defined as a specific situation that, if overcome, would benefit society or a portion of it. When implementing a digital advocacy strategy, we must choose only one problem: if we choose multiple problems, creating a goal will be difficult because it will be unclear what we want to solve. What factors should be considered when selecting a problem?

- Analyze the context: What is our current context?
- Is there qualitative and quantitative data?
- Who is the population that is affected by this issue?

Our starting point is the problem.

Example:

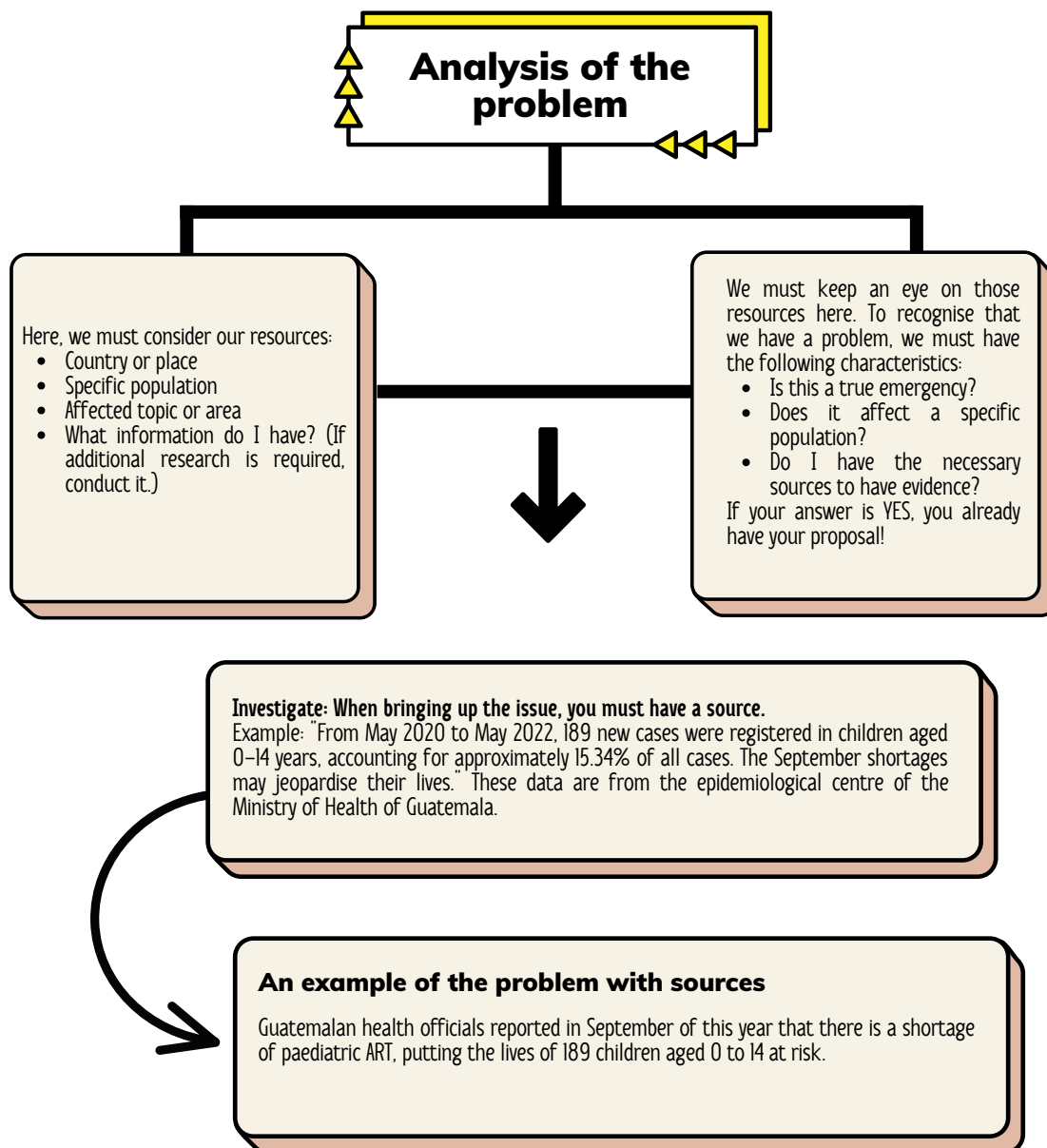


Context: Guatemala, a Central American country with a population of more than 17.4 million people, has approximately 31,000 HIV-positive people, but epidemiological data are inconsistent as of 2018. While the data was being analyzed, a national newspaper published an article titled "No medicine for children with HIV: Paediatric patients are at risk of dying" on September 7th.



Note: Many times, when we find a problem, another one arises that is related to the one we were analysing, but in order to create an advocacy strategy, we must delve into the causes and examine the landscape through data to have evidence that this problem is real, as this will allow us to give it a more tangible approach. We will explain how to identify a problem in the table below.

Problem



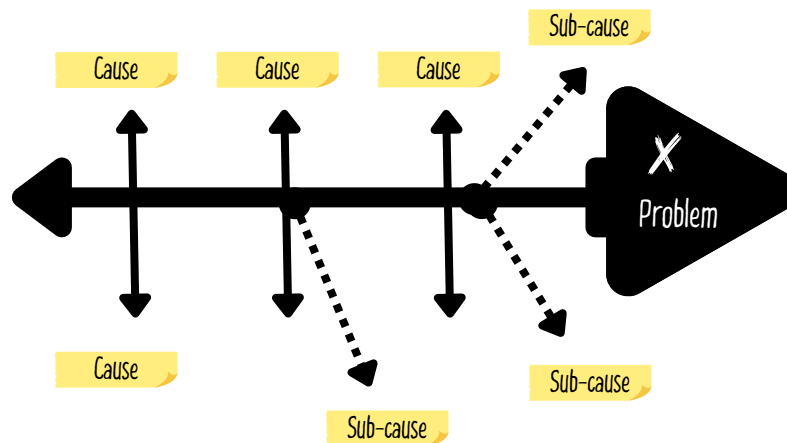
Since we have defined our problem, we must analyse what the causes are that have caused it to exist. The Ishikawa Diagram, or "fishbone," can be used to accomplish this.

The Ishikawa Diagram or "Fishbone"



It is a graphical representation of the root causes of a particular problem or situation. It is especially useful in group settings or when there is not enough quantitative data.

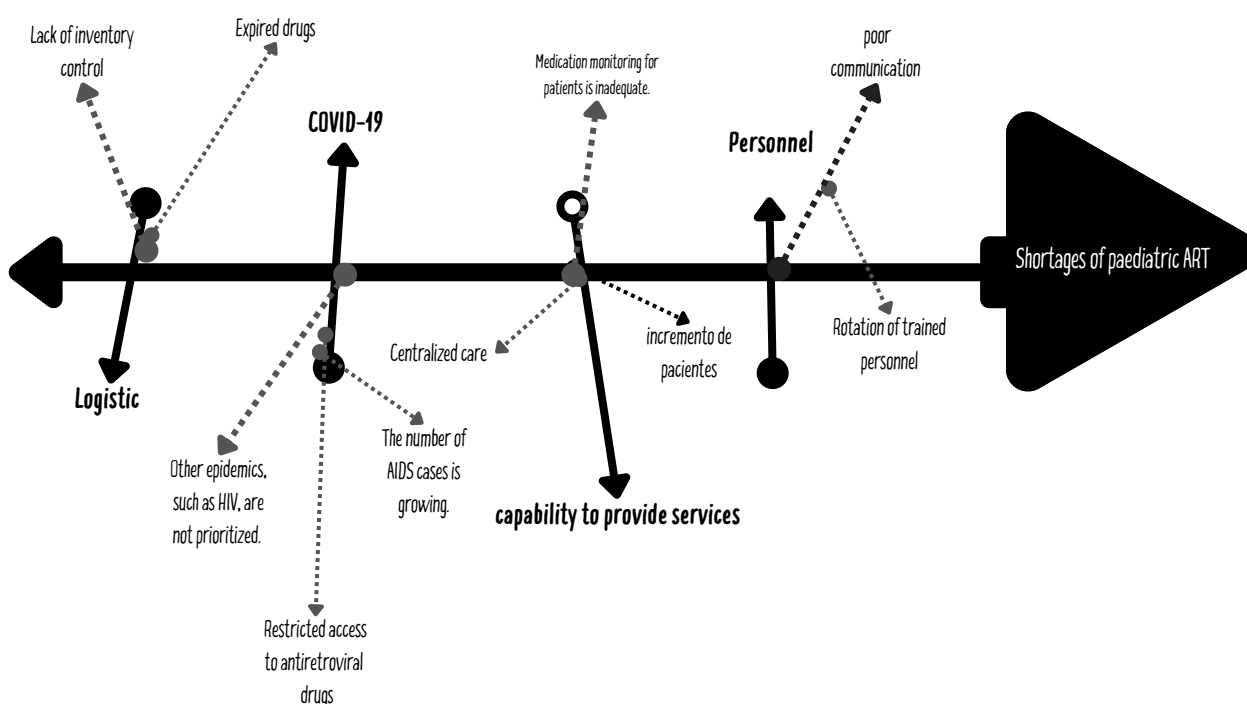
It is a tool for visually **representing a central problem** or approach and its causes, with the problem representing the "fish head" from which a central thorn emerges. The major causes or large spines are derived from there. In turn, large spines may be made up of smaller spines, also called minor causes.



Note: Because this process involves brainstorming, it is best done in a group. The goal of this exercise is to identify our context so that we can develop a solution or a set of solutions. These are our goals.

Implementation of the Ishikawa Diagram

An example of how to implement the Ishikawa diagram in the context of Guatemala



After we've examined the causes of our problem, it's time to reconsider.

Problem recognition

Source Problem

Guatemalan health officials reported in September of this year that there is a shortage of paediatric ART, putting the lives of 189 children aged 0 to 14 at risk.

Final Problem

"Due to the COVID-19 health emergency, the Ministry of Health of Guatemala has delayed in the purchase of paediatric antiretroviral medication, putting at risk the lives of exposed children and children living with HIV between the ages of 10 and 14."



Note: This is where we will begin designing our digital advocacy strategy. If you're wondering why I didn't put a population number now, it's because we don't have exact data on how many children are living with HIV, and the Ishikawa diagram allowed us to take a more tangible approach, making it easier to develop the goal of our digital campaign.

Goals

Goals are defined as the sum of specific and measurable actions to achieve a goal or desired state, indicating what to do.

A goal is essential in any planning process because it serves as a guidepost. When creating a goal, it must follow the SMART format, but have you heard of SMART goals?.



(Specific) A specific goal focuses on a single aspect, task, or action: it tells us exactly what we want to achieve and provides an answer to the question. **WHAT?**

- It is limited to a certain aspect or action. Use only action verbs.



(Measurable) A measurable goal tells us whether or not the results are within expectations: it answers the question **HOW MUCH?**



(Achievable) An achievable goal is one that is perfectly achievable given the circumstances: this answers the question **HOW?**



(Relevant) A relevant objective is one that is aligned with the overall goal of the organisation or business. It answers the question, **"WITH WHAT?"**



(Time-bound) A goal with a specific time is needed to determine when it has been completed. It answers the question, **"When?"**

GOAL

Example: Between a goal that is not SMART and another that is.

Incorrect

Advocate for the Guatemalan government, through the Ministry of Health, to purchase paediatric HIV medication for exposed children and children living with HIV by 2023.

Correct

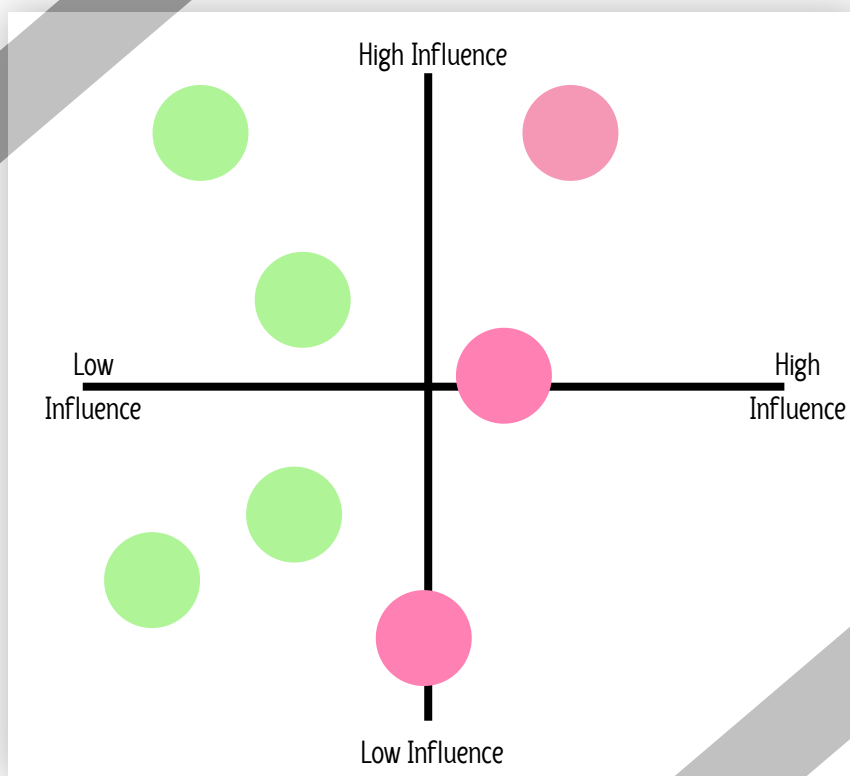
Create a multi-sectoral online dialogue recommending that the Ministry of Health monitor the purchase of medicines every six months to prevent a shortage from occurring again and advocating for more than 85% of children exposed to and living with HIV between the ages of 0 and 14 to have access to antiretroviral medication in 2023.



Note: Remember that when creating a SMART goal, you must consider whether it is relevant and achievable for you or your organization. After all, you will be doing it, and it is not advisable to set goals that you know you will not be able to achieve. Remember that the SWOT analysis can be used as a guide.

Stakeholders mapping

It entails determining who the stakeholders and decision-makers are, as well as the level of influence required to effect change. You must examine your supporters and detractors in this section.



- Detractors
- Allies



Note: Probing the level not only of your allies but also that of your detractors will allow you to create improvements in the advocacy strategy you are going to implement.



Digital Marketing

The use of digital media to carry out marketing strategies is known as “digital marketing.” All offline techniques are imitated and translated into a new world, the online world. New features emerge in the digital field, such as immediacy, the emergence of social networks, and tools that allow us to make real-time measurements.

Philip Kotler provided this definition as “**the father of marketing**.”

“
Individuals and groups of people satisfy their wants and needs by creating, offering, and freely negotiating valuable products and services with others.
”

-Philip Kotler

Digital marketing strategy

A digital marketing strategy is the planning of specific steps to achieve defined objectives through online means, such as content creation and dissemination via websites and social networks, as well as email and blog management, among other things.

Elisa Hudson defines it as

“
The set of actions that contribute to achieving a company's goals through carefully selected online marketing channels
”

Elisa Hudson

Steps to develop a digital marketing strategy

- **Develop my goal:** These have a SMART format, and this objective will assist me in determining the reach I want for my digital campaign. Do you recall how to set a smart goal?
- **Identify our target**
 - **Target:** It is the audience we wish to address, and we have chosen it with care in order to make them aware of our brand.
- **Identificar nuestros canales**
 - **Channels:** It is to be able to identify the ecosystem of my brand, and in order to do so, we must answer the following questions:
 - i. Where are we? Here 's an example.
 1. Websites and blogs
 2. Social networks (Facebook, Instagram, Twitter, etc.)
 3. Email
 4. SEO
 5. SEM



Note: Remember that you should only have the ones you need; having too many channels can be dangerous.

- **Formats:** It refers to the form of communication we use for each channel. That is, the content we will create in order to capture our target's attention.
 - Photos
 - Quotes
 - Video
 - infographics, etc.
- **Editorial Calendar:** It has a comprehensive view of all channels.
 - Everything that you are going to publish
 - when and what kind of content (It is not recommended to go beyond two weeks.)

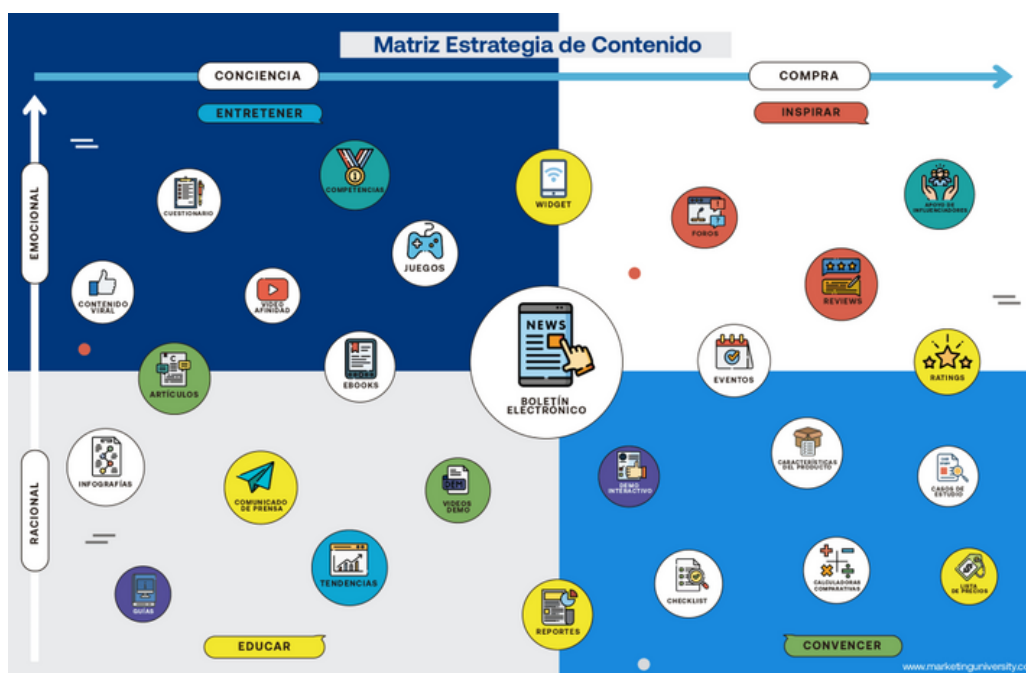


Note: Keep in mind that any content you create must be related to your marketing goal. What are your plans for that post?

Content Matrix

The matrix is structured to help you think through the dimensions of the different contents based on how your audience could think and what you are trying to achieve as a business. It depends on which quadrants you believe your audience falls into, and we will discuss the alternatives here.

- Entertain
- Inspire
- Educate
- Convince





SEO (Search Engine Optimization)

It is the work done on a website to ensure that it appears in the first organic positions of search engines (without having to pay).

SEO is useful for the following:

- **Optimize your content:** This means improving the experience for both the user who reads it and for search engines.
- **Increase organic traffic to your website:** which means more visitors who can become customers.
- **Gain authority:** by positioning yourself as an expert in your field and gaining the trust of both Google and people.
- **Capture leads:** attract people who do not know you exist and convert them into customers.

To understand how SEO works, three key factors must be considered:

- I. Technical factors: they are the fundamental basis for search engines to understand the hierarchy of your website, what the content is about, and what it relates to. In the technical factors, you find:
 - a. Loading speed
 - b. XML sitemap: It is a list of URLs that you want to be publicly available; this allows you to improve crawlability.
 - c. HTML Semantics: Refers to the meaning or additional information provided by the language's elements or tags, information that defines or describes the content, function, or section it contains.

This information is what allows a document to be tracked more effectively. It aids in the consistent display of content across multiple applications and contexts, and it is critical in providing accessibility and functionality with assistive technology such as content readers.



SEM (Search Engine Marketing)

It is also known as search engine marketing, and it is a method of increasing the visibility of web pages in search engines by paying directly for advertising to the search engine itself via ADS.

The SEM allows you to accomplish the following:

- Get highly qualified traffic to your page
- Make your brand or company known worldwide.
- Drive conversions
- Go far on a small budget
- Take advantage of the data and parameters you have to place contextual advertising on other websites.



Note: Combining SEO and SEM is recommended because SEM can meet short-term goals while SEO can meet long-term goals. The most important thing is to carefully craft your "keywords" so that they have an impact in both directions.

What do you need to have a good marketing strategy?

1. The organization's SWOT analysis focused on their channels and the services or products they offer.
2. **Having a marketing goal in a SMART format**
3. **Budget:** In this case, whenever you implement your action plan, try to allocate a portion of your budget to marketing.
4. **Suitable Team:** Human resources are vital, and teamwork is necessary to ensure compliance with our objectives.

Aim Development

It is a broad, broad-scale concept or definition that describes what a group or organisation hopes to accomplish in the long run. That is, it is a broad statement of the program's purpose, describing the anticipated long-term effect. These are typically broad and intangible in nature, involving how to do something.

The most significant difference between an objective and a goal is that the first is an overview on a larger scale, and the second is referred to as an expected impact. In conclusion, a goal and an aim are not the same.

Example of an aim:

Put HIV on the public agenda in order to increase the national budget and ensure that 20% of the budget is spent on advocacy and dissemination, thereby reducing stigma and discrimination for people living with HIV and ensuring that the HIV rate in Guatemala does not rise.

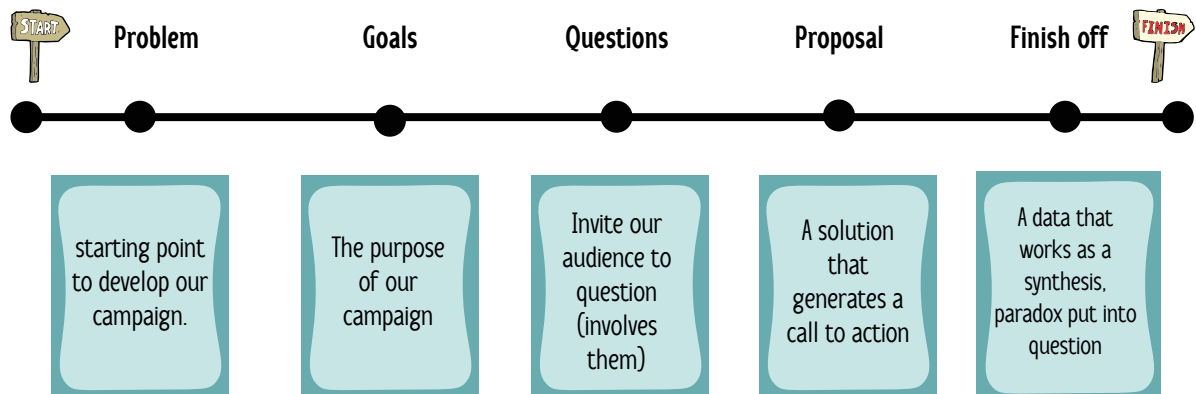


Volunteer Recruitment

Preparation is impossible without the assistance of a team. During this process, you analyze your weak points, but you know that you will find volunteers in your organization who have the strengths. Remember that teamwork is essential, and you can ensure this by communicating clearly and demonstrating your leadership abilities.

Now that we know what the problem is that we will address and how we will achieve a SMART goal, we have a team and the channels that we will use, so it is time to determine whether or not our digital campaign will be successful. Do we already have a successful digital campaign?

To answer this question, we must check if we have the following:



Note: If your campaign is aligned with a marketing strategy (SEO and SEM), it is very likely that it will succeed.



Implementation

The time has come to launch our digital campaign, and you already know that you must segment the following:

- Target
- Channels
- Formats (content type)
 - Photo
 - meme
 - infographic, etc.
- Schedule the campaign.
 - Inspire
 - Educate
 - Entertain
 - Convince
- Marketing strategy
 - SEO
 - SEM
 - Both
- Monitoring and Evaluation



Monitoring and Evaluation

It is the process of collecting and analyzing data to provide information that tells us if our campaign is progressing well and quickly identifies where the problem is so that it can be fixed as soon as possible. That is, **they are necessary processes for the proper operation of programmes and projects because they allow us to achieve our goals.**

- **Monitoring:** Is the continuous and systematic process of verifying a project's efficiency and effectiveness by identifying its achievements and weaknesses and then recommending corrective measures to optimize the project's expected results.
- **Evaluation:** Is the integral and ongoing process of researching and analyzing the more or less permanent changes that occur in the medium and long term as a direct or indirect result of the work of a policy or project in the context, population, and participating organizations.

The process of monitoring our reach for a digital campaign or job that involves digital marketing is easier and more quantifiable thanks to a tool called KPIs.

KPI (Key Performance Indicators)

It is a way of measuring whether an action or a set of initiatives is effectively meeting the objectives proposed by the organization.

KPIs are key elements of performance measurement and have no other function than to guide actions towards the fulfillment of a strategy. Thanks to the improvement of new information technologies (Big Data: databases, automation, data computerization systems, etc.), they facilitate the process of quantifying information.

"A KPI is a key indicator of business performance that helps us measure the success or failure of our marketing actions." "A metric, however, is a measurement that is not key to the business, but it helps us track the action it measures." Some examples of KPIs are:

- Traffic (number of visits to my website)
- Engagement: The number of reactions, as well as how many times they shared or commented on the post.
- Brand recall: measure the effectiveness of your marketing actions to position your brand in the minds of your customers. Ex: Attend the AIDS Conference to promote your organization.
- New followers

Community Building

This is achieved through a good marketing strategy. Remember the following:

- **Listen to your target:** Pay attention to what your followers want or suggest, thus ensuring improved communication in both directions.
- **Create a content strategy.** Remember that previously in the marketing strategy we mentioned the scheduling of your content and the content matrix?
- **Search for and participate in conversations:** Even if your digital campaign is already over, let them understand that you are there and that for you, your target is very important.
- **Monitor your activity:** Since you learned what KPIs are, it's time for you to develop yours, and these also have to have a SMART format. Some platforms already include tools that will make it easier for you to monitor your metrics.
- **Social media community management plan:** Generate engagement (pay attention to reactions, comments, and the number of times they share your content).
- Inbound Marketing

What is inbound marketing?

Inbound marketing is a methodology that combines non-intrusive marketing and advertising techniques in order to contact a user at the beginning of their purchase process and accompany them until the final transaction.

Inbound marketing helps you:

- Increase the number of visitors to your website.
- Get these visitors to become leads for your company.

Inbound marketing has five pillars. These are:

1. **Traffic attraction:** Through content marketing techniques, social networks, or SEO, you lead the user to your website or that of your organization.
2. **Conversion:** The user finds content of interest and leaves their data to continue receiving information, so you automatically generate your own database.
3. **Marketing automation:** delivering information to the user according to their needs in an automated way and taking into account their responses.
4. **Loyalty:** get true ambassadors of your brand: here you can have the support of influencers.
5. **Analysis:** KPI analyzes the data to determine if it is necessary to improve your strategy.



Note: A lead is a user who has delivered their data to a company and, as a consequence, becomes a record in its database with which the organisation can interact.
Have you been a lead before for a company?

CONCLUSIONS

To create a digital advocacy strategy, we must first understand the digital tools we will use and the channels we will use to reach our target audience and create our final product, a digital campaign.

There are specific steps to take in this case, which are as follows:

1. Preparation
2. Volunteer recruitment
3. Implementation
4. Monitoring and evaluation
5. Building a community

The preparation phase is the most time-consuming because it must be well defined for our digital campaign to be successful. It includes the following:

1. A SWOT analysis will help you understand our reach.
2. Determine the issues that will be addressed.
 - a. Investigate the root causes of our problem.
 - b. Recognizing the true context allows us to reformulate our problem.
 - c. Stakeholder mapping (allies and detractors)
3. Using the SMART format to develop our goal
 - a. Specific
 - b. Measurable
 - c. Attainable
 - d. Relevant
 - e. Time bound
4. Align our digital marketing campaign with an effective digital marketing strategy.
 - a. Taking into consideration the following:
 - i. My campaign and marketing objectives must be smart, and they must both have a common target.
 - ii. The problem is that it will reveal the purpose of my campaign.
 - iii. Content planning: Determine the key dates on which I want to launch my campaign. e.g., as commemorative dates
 - iv. Have a diverse team
 - v. Monitor and evaluate our engagement through KPIs.
 - vi. Building a community

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GRATITUDE

From the PACT, we believe in youth leadership and the impact it has on the world to ensure a fairer change in which inequalities, stigma, and discrimination for living with or affected by HIV, or belonging to key populations, are eliminated.

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Thank you for reading our manual. We know that wherever you are, you are an agent of change who fights to achieve a world free of inequalities, stigma, and discrimination, mainly to end AIDS by 2030.





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