A. Overview of the Policy Bridging Initiative

The Policy Bridging Initiative (PBI) is a capacity development programme designed and implemented by the International Centre for Policy Advocacy (ICPA) to support the current 21 regional research projects being funded by the Regional Research Promotion Programme in the Western Balkans (Autumn 2014 – Autumn 2016). Like many other research supporting organizations, RRPP and their partners in this initiative would like that the research produced feeds into on-going policy discussions in the region and this is where the idea for the PBI originated.

As the name suggests, the aim of the Policy Bridging Initiative is:

<table>
<thead>
<tr>
<th>Stream</th>
<th>Description</th>
<th>Level of support provided by PBI</th>
<th>Products/Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Independent/ Unsupported research stream</td>
<td>Teams who want to pursue a purely academic approach Or those who want to do policy research but don’t need PBI support.</td>
<td>No direct support Access to online resources and discussion forum</td>
<td>Research Papers /Presentations for academia Or Policy Products</td>
</tr>
<tr>
<td>2. Policy Link stream</td>
<td>Teams who want to produce primarily academic research, but also want to feed the findings into a policy discussion</td>
<td>Light support One training workshop Mentoring and feedback on one draft paper Mentoring support for stakeholder case testing meetings Online resources and discussion forum</td>
<td>Research Papers Academic presentations Policy Brief Making a link to the policy process</td>
</tr>
<tr>
<td>3. Policy Development stream</td>
<td>Teams who want to produce primarily policy research products from longer research based studies and shorter briefs with a central focus on advocacy and policy change.</td>
<td>Intensive support Three training workshops Mentoring and feedback on 3 draft papers Online resources and discussion forum</td>
<td>Primarily policy products (research proposals, policy studies and briefs) Advocacy plans</td>
</tr>
</tbody>
</table>

Table 1: Overview of the three PBI streams

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8. The three PBI streams in detail

In this section, we provide more details of the specific elements of each stream, as well as the level of commitment required for each.

1. Unsupported/independent research stream

This stream is ultimately a choice to not participate in the capacity development programme. It is designed for:

- Those who are choosing a purely academic path, with no particular interest in focusing on a policy outcome, or;
- Those who have advanced policy skills and capacity and feel that they don’t need further support from PBI.

However, it should be noted that those who choose this stream will have access to online resources and the PBI discussion boards. While the resources will be primarily policy focused, the discussion forum is also designed for broader sharing of insights and resources in all topic areas.

Even if you choose this stream, you will still be invited to attend an opening meeting focused on the linking research and policymaking in the region. The opening meeting is intended to provide a broader space for reflection on this challenge, networking among other RRPP research teams, as well as an introduction to the PBI for those who choose the Link or Development streams.

2. The Policy Link Stream – Academic approach with a clear policy dimension

Focus & principles of the policy link stream:

Teams who choose this stream will produce social science research, but will also have a policy line though the project work, produce a policy brief and also consider how to place their insights into the right policy influencing hands by the end. The principles that have driven the design of the policy link stream are as follows:

- **Policy/linking from the start** – it is well recognized that the policy link or bridging part cannot be tagged on at the end of such a project. Basically, the right questions will not have been asked to address the policy design and application part of the thinking. So, the lesson is: the earlier the better in terms of engaging in the policy aspect of the project.

- **Assigning a policy broker** – in the team, we will assign an institution in the team to ‘represent’ the policy aspect of the project. This broker should push the team to ask the questions of policy relevance throughout the project. The broker has to be one of the main players in the project that is involved throughout – not an additional author!

- **Case testing the analysis with stakeholders** – to check if the analysis and thinking is still on track half way though the project, each team will be required to organize a case testing meeting in which they will bring together a group of stakeholders from across the NGO and governmental sectors engaged in the issue being researched and get feedback on their analysis to date, i.e. test the analytical case they are making.

- **A focus on finding a suitable messenger for the brief and research evidence** – as academics in general are not normally the ones who push and lobby for policy change, the focus of the later workshop will be on finding an organization or person who would be interested and willing to take forward the message and insights from the study.

- **Practical resources to support the development of skills** – ICP will provide targeted hardcopy and online resources intended to support independent work. In addition, we will also manage and moderate an online discussion forum designed to be a space to share resources and ask questions though the project.

Aim & objectives of the policy link stream:

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Building on these core elements, the aim of the stream will be to:

**Equip participants with the requisite policy literacy and skills to bridge the relevant evidence and insights from their research into the target policy dialogue.**

To achieve this broader aim, the stream will specifically target the following:

- Build the capacity and insight of the policy brokers in the production of usable policy-relevant evidence;
- Facilitate the input of a broad range of stakeholders into the analysis to enhance the policy relevance;
- Facilitate the preparation of an evidence-informed policy brief to act as the main conduit for research evidence to the policy dialogue;
- Assist teams in finding a suitable messenger or pathway into the target policy dialogue.

**Elements of the policy link stream**

<table>
<thead>
<tr>
<th>STAGE</th>
<th>ELEMENT</th>
<th>DURATION</th>
<th>PEOPLE INVOLVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>PL-1</td>
<td>PBI Orientation meeting: Introducing PBI, self-assessment of the team and planning of the project, final decision on PBI stream (2nd day of broader policy linking conference).</td>
<td>1 day (2nd day of a 2 day meeting)</td>
<td>Members from teams selected that select link or development stream. ICPO trainers RRPP staff</td>
</tr>
</tbody>
</table>
| PL-2  | Workshop on bridging to policy making process and policy brief writing  
- 2 days training  
- 1 tutorial with mentor for the team on policy brief and stakeholder meeting plans | 3 days | Policy brokers and/or policy brief writers from teams 2 ICPO trainers |
| PL-3  | Skype discussion to help set up case testing meeting  
- Trying to help you understand the requirements and best approaches to set up and run the meeting | 1 hour during a month period | The research team ICPO mentors |
| PL-4  | Case testing with stakeholders  
- Team presents initial findings to stakeholder group  
- Gets input on questions they want to be answered | 0.5 day | Invited group of stakeholders from across NGO and government sectors, and media  
The research team |
| PL-5  | Submit and get feedback from ICPO on draft policy brief  
- Written feedback  
- Skype conversation on the feedback | During a 1 month period | Team members and authors leading the policy link part  
ICPO mentors |

Table 3: Detail of Policy Link Stream

**Team commitment required in the policy link stream:**

In choosing the policy link stream, your research team is also making a commitment. You are committing to the following:

- Accept and support the development of a policy line in your project;
- Assigning one team member institution as the policy broker in your team (this can be more than one person from the chosen institution);
- The team members from the policy broker institution will attend the workshop and engage with the feedback process;
- The policy broker will be the point of contact for the PBI;
The policy broker will defend and support the policy line through the project; The team will arrange country level stakeholder meetings to get input from a broad stakeholder group.

The breakdown of the numbers for the stream quantifies the commitment and the support provided:

| Team commitment | 1 main policy broker institution to take responsibility for PBI  
|                 | 2 members of the assigned institution to commit to PBI  
|                 | 1 Orientation meeting to attend (2 days)  
|                 | 1 Workshop on policy bridging & policy briefs to attend (2 days)  
|                 | 1 day of planning with peers & 1 team tutorial to attend  
|                 | 1 Stakeholder case testing meeting to set up and run  
|                 | 1 Skype on planning the stakeholder Ccse testing meeting to participate in  
|                 | 1 draft policy brief to produce  
|                 | 1 policy bridging/advocacy plan to produce  
| PBI support provided | 1 Orientation meeting  
|                   | 1 Workshop on policy bridging & policy briefs  
|                   | 1 day of planning and 1 team tutorial  
|                   | 1 Skype discussion on planning the stakeholder case testing meeting  
|                   | 1 written feedback on draft policy brief  
|                   | 1 Skype discussions on draft policy brief and bridging plan  

Table 4: Policy Link Stream commitment and support in numbers

3. The Policy Development Stream – a primarily policy-focused approach

Focus & principles of the policy development stream:

The Policy Development Stream is for those who wish to go deeply into the policy direction, conduct applied research, produce mainly policy papers and advocacy-focused outcomes and be supported each step of the way. Choosing this stream does not prevent you from producing academic products in parallel, but we will support the policy side of your work. Based on the needs identified and ICPA past experience of providing such support, the outlined design for this stream is built on the following principles:

- **Linking learning/training to the ongoing tasks** – Drawing on the principles of adult learning⁵, the most effective path of skill development is to directly link the learning input in parallel with the next challenge in your work. So, we designed the stream in this fashion.

- **Learning by doing through the feedback/drafting process** – following each training workshop, the teams will produce a draft of the genre that was the focus of the workshop e.g. a research proposal. Linking the learning to the doing and then providing feedback provides teams with multiple opportunities for development through a structured and evolving process.

- **Working on the needs of the participants** – Through the team tutorials and feedback, there will be opportunities to address the specific and ongoing needs of the team as you develop the project and provide support when it makes most sense.

- **Collaborative peer learning** – we will foster this in the broader group workshops through the interactive methodology used, as well as through moderated online discussion boards.

- **Practical policy & advocacy focus throughout** – Through the workshops and support we provide, the focus from the beginning will be on the practical challenges of policy research/analysis and achieving policy influence in the target policy processes. In addition, by getting researchers to share insights with stakeholders in the middle of the process, this should provide strong input to keep you on a policy relevant track.

- **Practical resources to support the development of skills** – ICPA will provide targeted hardcopy and online resources to ensure independent work is adequately supported. In addition, we will also develop and moderate an online discussion forum which will be a place to share resources and ask questions though the project.

**Aim & objectives of the policy link stream:**

Building on these core elements, the aim of the development stream will be to:

*Equip participants with the requisite policy literacy and skills to critically engage in applied research, analysis and advocacy that will be a strong foundation for policy influence.*

To achieve these broader aims, the stream will specifically target the following:

- Build the capacity and insight of researchers to understand the challenges of producing usable policy-relevant advice and evidence;
- Develop the skills and knowledge of teams to conduct applied research that asks as much about the policy context as the phenomenon;
- Facilitate the preparation of in-depth and evidence-informed policy genres (studies and briefs) to support an advocacy campaign;
- Develop plans and tools to produce a targeted policy advocacy campaign built on the research evidence.

**Elements of the policy link stream**

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<td>1 day (2nd day of a 2 day meeting)</td>
<td>Members from teams selected that select link or development stream, ICPA trainers, RRPP staff</td>
</tr>
</tbody>
</table>
| PD-2  | Policy research design workshop  
- 2 days training  
- 1 day planning and input from peers  
- 1 tutorial with mentor for the team on designing and focusing the research | 3 days | 3 members from each team on policy dev track (one person each from each institution on the team), 2 ICPA trainers |
| PD-3  | Submit and get feedback from ICPA on draft policy research proposal  
- Written feedback  
- Skype conversation on the feedback | During a 1 month period | Team members designing the research, ICPA mentors |
| PD-4  | Training on policy paper writing & analysis  
- 3 days training  
- 1 day planning and input from peers  
- 1 tutorial with mentor for the team on writing and analysis challenges | 4 days | 3 members from each team on policy dev track (one person each from each institution on the team), 2 ICPA trainers |
| PD-5  | Feedback on draft policy study  
- Written feedback  
- Skype conversation on the feedback | During a 1 month period | Team members developing the draft study, ICPA facilitators |
| PD-6  | Case testing with stakeholders  
- Team presents initial findings to stakeholder group  
- Gets input on questions they want to be answered | 0.5 day | Invited group of stakeholders from across NGO and government sectors, and media, The research team |
| PD-7  | Training on policy brief writing & | 4 days | 3 members from each team on policy |

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<tr>
<td></td>
<td>advocacy</td>
<td></td>
<td>dev track (one person each from institution on the team)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>2 ICPA trainers</td>
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<td></td>
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<td>2 days training</td>
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<td>1 day presenting draft advocacy plans</td>
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<td></td>
<td>1 day planning and Input from peers</td>
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<td></td>
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<td></td>
<td>1 tutorial with mentor for the team on policy advocacy plan</td>
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<tr>
<td>PD-8</td>
<td>Feedback on draft policy brief</td>
<td>During a 1 month period</td>
<td>Team members developing the draft brief</td>
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<td></td>
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<td>ICPA facilitators</td>
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</table>

Table 4: Detail of Policy Development Stream

Team commitment required in the policy development stream:

In choosing the policy development stream, your research team is also making a commitment. You are committing to the following:

- Accept and support a mainly policy focused approach in your project;
- Assigning one team member from each institution to participate on the PBI, up to a maximum of 3 people per research team;
- These same 3 people will attend all the workshops and engage in each stage of the feedback process;
- The 3 people will be the point of contact for the PBI;
- The 3 people will share insight from the PBI with others on the team;
- The team will arrange country level stakeholder meetings to get input from a broad stakeholder group.

The breakdown of the numbers for the stream quantifies the commitment required and the support provided:

| Team commitment | 3 members of the team (1 from each participating institution) to take main responsibility for PBI |
|                 | 1 Orientation meeting (2 days) to attend |
|                 | 3 Workshops (8 days in total) on policy research, writing, analysis and advocacy to attend |
|                 | 3 days of planning with peers & 3 team tutorials to attend |
|                 | 1 Stakeholder Case testing meeting to set up and run |
|                 | 3 draft papers to produce – a policy research proposal, a longer research driven policy paper (or policy study) and an advocacy driven policy brief |
|                 | 1 policy advocacy plan to produce |
| PBI support provided | 1 Orientation meeting |
|                     | 3 Workshops (8 days in total) on policy research, writing, analysis and advocacy |
|                     | 3 days of planning with peers & 3 team tutorials |
|                     | 3 written feedback on draft papers – a policy research proposal, a longer research driven policy paper (or policy study) and an advocacy driven policy brief |
|                     | 3 Skype discussions on each of the draft papers and advocacy plan |

Table 4: Policy Development Stream commitment and support in numbers

C. ICPA CAPACITY & EXPERIENCE

ICPA directors and team of certified trainers have been working in the field of policy communication and advocacy capacity development since 2002. We bring a strong pedagogical and practical focus to our capacity development initiatives, and have been involved in both the design and delivery of numerous policy capacity development initiatives over a decade of operation, designed to support policy actors through the research, writing and advocacy planning process.
We have experience in designing and providing training and mentoring in 14 different policy fellowship programmes in transition and developing regions over a decade, including many in the Western Balkans:

1. Policy Development Fellowship, Bosnia and Herzegovina\(^6\) (2003 – 2014)
2. Policy Fellowship Programme, Kosovo\(^7\) (2005-2006)
4. European Fund for the Balkans - Think and Link\(^9\) (2013)
5. Regional Research Promotion Programme in the Western Balkans\(^10\) (2012 – present)

We also have a proven track record of developing and providing market leading policy development resources. The expansive use and recognition of our guidebooks is evidence of our experience in this area:

2. Making research-evidence matter\(^12\) (2012)

For more on us, see our website - [www.icpolicyadvocacy.org](http://www.icpolicyadvocacy.org)

**D. PBI CONTACTS**

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\(^7\) [http://kfos.org/](http://kfos.org/)  
\(^10\) [http://www.rrpp-westernbalkans.net/en.html](http://www.rrpp-westernbalkans.net/en.html)  
The Regional Research Promotion Programme in the Western Balkans (RRPP) is run by the University of Fribourg upon mandate of the Swiss Agency for Development and Cooperation SDC, Federal Department of Foreign Affairs.

www.rrpp-westernbalkans.net