

EUROPEAN PATIENT ADVOCACY SUMMIT 2022

Your public affairs blueprint

PP-UNP-DNK-0305 (January 2023)

THANK YOU FOR PARTICIPATING!



Dear participants,

On behalf of Pfizer, I would like to thank you for participating in our European Patient Advocacy Summit 2022. **We were delighted to welcome you**, for the fourth year in a row, to share your best practices, insights, questions and advice on how to best contribute to health policymaking, both at the national and EU levels. We hope you found this years' sessions useful. As promised, **we are sharing the key messages and templates presented during the Summit** to support, as much as possible, your future advocacy activities in 2023.

Thank you again for your time!

Gary Surmay

Senior Director, Corporate Affairs, Internal Medicine at Pfizer

OVERVIEW OF OUR 2022 EDITION

- Following the success of its Patient Advocacy Summits in 2019, 2020 and 2021, **Pfizer delivered a fourth capability strengthening workshop in 2022**. The goal of this program is to address a common challenge identified across Europe – **patient advocacy groups (PAGs) are not systematically involved in health policymaking**, including Health Technology Assessment (HTA).
- **Tailored sessions put forward content to raise awareness of the importance of the patient voice in health policymaking** and provide participants with **tools and tactics needed to participate**.
- In November 2022, **63 patient representatives from 18 different countries** attended two hybrid Advocacy Summit sessions. **They heard from 15 speakers over the two days**, coming from the European Commission, EU-level and national patient organizations, HTA experts and public affairs specialists.
- This toolkit contains the **main information shared during the sessions**, as well as the key templates presented to support you to build your own public affairs plan and develop campaigns. The use of these tools aims to facilitate your participation in future health policymaking opportunities.

KEY TAKEAWAYS



1. European policymakers are beginning to understand the value of the patient voice in healthcare policymaking.
2. Opportunities for patient involvement are still fragmented and nascent, differing across European countries.
3. PAGs must advocate for their systematic inclusion in legislative processes.
4. The perspective of patient experience is important for policymakers drafting health policies. Involvement allows the legislative drafting process to be more democratic, and to be best representative of patient needs.
5. Public affairs is a type of communication that seeks to influence the opinion and/or actions of policy stakeholders. Patient organizations should consider building a public affair plan to ensure interests are best represented in government initiatives and future legislation.
6. Public affairs plans should be based on an analysis of the existing policy environment, defined policy objectives, messaging that will resonate with policymakers and tactics. A plan ensures activities are as impactful as possible.
7. There are many ways to engage with policymakers. Efficient tactics include the presentation of data, collaboration with other third-parties and aligning advocacy goals to both the EU and national policy context.
8. Messages should put forward solutions to policymakers. To capture their attention, policy recommendations should focus on the societal and economic impact of action on a disease. This includes improving an individual's quality of life and healthcare system sustainability.

A person wearing a light blue denim jacket is shown from the chest down, holding a smartphone with both hands. The image is overlaid with a semi-transparent blue shape that tapers from the top left towards the center. The text 'DEVELOPING YOUR PUBLIC AFFAIRS PLAN' is written in large, bold, white, sans-serif capital letters across the middle-right portion of the image.

DEVELOPING YOUR PUBLIC AFFAIRS PLAN

BACK TO BASICS: WHAT IS A PUBLIC AFFAIRS PLAN AND WHY DO WE NEED ONE?

- A public affairs plan is a **strategic roadmap** following a specific set of steps, that will support your organization's goals by **influencing policy change**.
- Without a plan, **tactics will be deployed without being rooted in a strategy**, and instead driven by the moment: diminishing your chances of success.



WHY IS INFLUENCING POLICY CHANGE SO CHALLENGING?



Some **disease areas** are **prioritized by policymakers** over others leading to lack of understanding of the impact on individuals and society.



Opportunities to participate in healthcare policymaking can be **unclear and complex** meaning organisations are unsure where to insert influence.



Policymakers are overwhelmed with content and messages from a range of organisations across a variety of issues.

BUSY AND CHALLENGING EUROPEAN HEALTHCARE ENVIRONMENT POST PANDEMIC

KEY STEPS TO BUILDING A STRONG PUBLIC AFFAIRS PLAN

1. ANALYZE



Research and insights into the policies you would like to change or gaps in the current landscape

2. DEFINE



Define your objectives to reflect the changes that you want to see

3. STRATEGIZE



- 1) Map out your target audience
- 2) Develop your messages

4. ENGAGE



Define your tactics and share messages on channels that reach your key audience

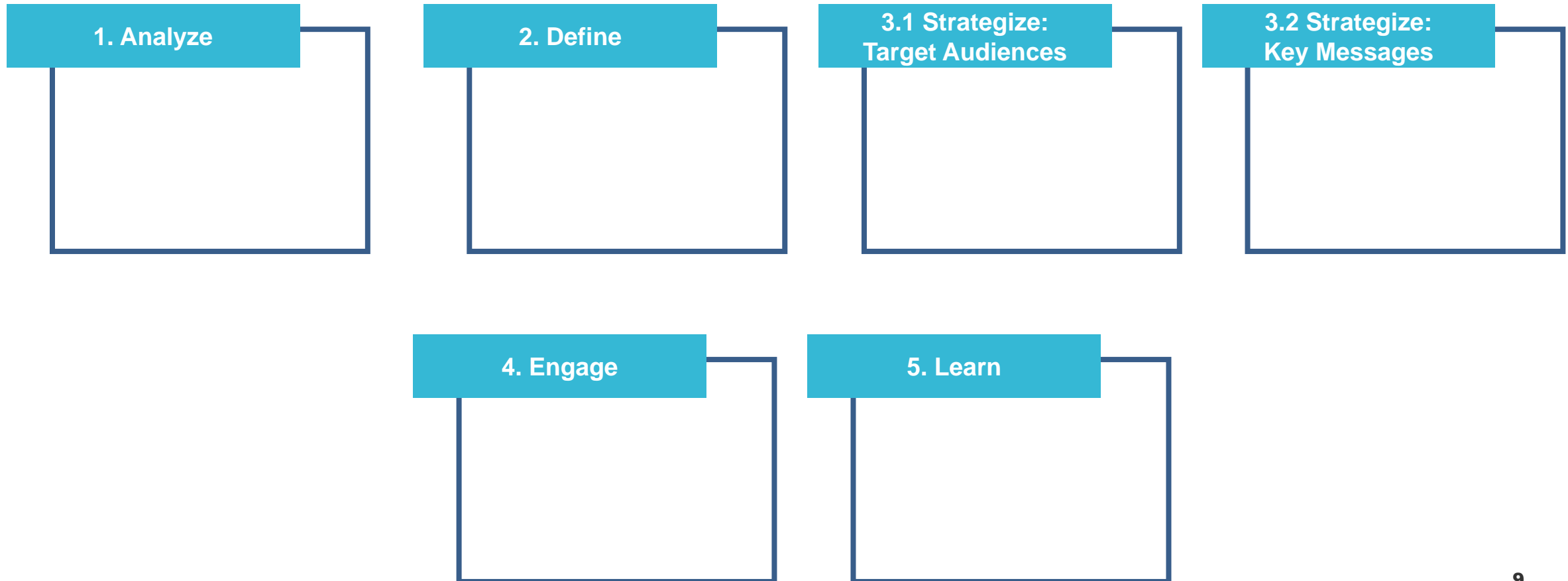
5. LEARN

Measure the success of your strategy and optimise for future plans



TEMPLATE: BUILDING YOUR OWN PUBLIC AFFAIRS PLAN

Here is a template to support you to create a strong public affairs plan. Throughout the next slides, you will receive *advice and practical exercises to support you to fill-in the key steps*, as identified on page 8.



GUIDANCE FOR BUILDING YOUR PLAN

1. **Building a public affairs strategy takes time.** Invest time in researching your policy space, defining your objectives and understanding what motivates your audience before deploying tactics.
2. **Prioritize the issues you would like to focus on.** Among all your policy challenges, prioritize which issues you should focus on.
3. **To choose the type of story you want to tell,** you should analyze where your organization fits in the debate, and the type of persona you would like to adopt.
4. **Your messages should be as simple as possible,** backed up by relevant proof points such as facts, data or testimonials.
5. **Consider social media to disseminate your messages.** They can help you gain visibility and reach out to your targeted audience.
6. **Evaluate your advocacy campaign, including on social media.** This will help see what works and what does not, thus adapting for the future.

STEP 1: ANALYZE



1. Analyze

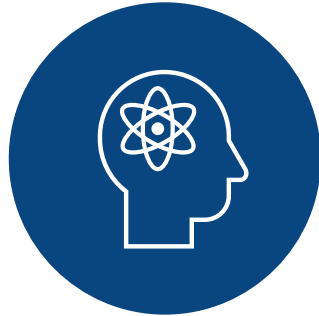
STEP 1: ANALYZE

CONDUCT RESEARCH TO UNDERSTAND WHAT YOU WANT TO CHANGE



Map your policy landscape

- What are the existing or future policy initiatives/legislation that impact or could impact your disease area?
- Who is responsible?



Identify your policy challenge

- What is missing from existing initiatives and legislation?
- What are the threats/opportunities from upcoming legislation?
- What is the timeline?



Understand the broader picture

- What is being said about your policy challenge by policymakers
- What about the media and other organisations?



Analyze why policies are missing

- Why do you think the existing policy landscape falls short of expectations?

When this is complete, analyze the information that you have gathered and determine what might have the biggest impact on your organizations overarching goals and why.

STEP 2: DEFINE



2. Define

STEP 2: DEFINE

SET YOUR OBJECTIVES

Based on your analysis, you can define the objectives of your public affairs plan. They should follow these principles:

1) Based on identified policy challenges that has the most immediate or impact

- Identify 2-3 key policy files or issues that have the most impact – prioritization is key.

2) Align your objectives to your overarching organizational mission and values

- If that is to improve the lives of people experiencing X disease area, then the policy change you seek must achieve just that.

3) Make your objectives SMART (specific, measurable, achievable, relevant and time bond)

- Vague objectives will hinder your chances of success.

4) Anticipate risk and how to overcome it

- What are the risks and how likely they are to occur.

STEP 3.1: STRATEGIZE

3.1 Strategize:
Target Audiences



STEP 3.1 : STRATEGIZE

MAP YOUR TARGET AUDIENCE

Once you have identified your advocacy objectives, you can map your **'target audience'**, meaning the persons/groups that you would like to influence. In public affairs, they are generally **national or European policymakers**. This will ensure you focus efforts on people that are most relevant to advance your goals and can then create messages that specifically resonate with them.

1. **Map your audience.** Identify who is responsible for your file, and other key stakeholders in the health policy arena. Remember policymakers are influenced by the environment around them. This means that to be successful, your **public affairs plan must target the full health policy influence ecosystem.**
2. **Understand your audience.** To create messages that will resonate most with them, strive to understand **what they care about**, how you would like them to feel when reading your messages, and what you would want them to do for you. You can find a **template to guide you in this process on the next slide.**



STEP 3.1: STRATEGIZE UNDERSTAND YOUR TARGET AUDIENCE

ILLUSTRATIVE

	What motivates the audience?	What do we want them to think?	How do we want them to feel?	What do we want them to do?
National policymakers	<ul style="list-style-type: none"> • Budgets, the economy • Elected stakeholders 	<ul style="list-style-type: none"> • That investment in a disease area will support the long term • They are aligned with our interests • A good basic understanding of X disease area 	<ul style="list-style-type: none"> • Feeling direct impact (e.g. on children) and being able to talk about that. • As an important stakeholder in the disease debate 	<ul style="list-style-type: none"> • Champion for people with X disease (ask parliamentary questions, take legislative actions). • Talk with patient advocacy groups & healthcare professionals, truly understanding their position • Prioritize actions that facilitate access to care for patients
European policymakers				
NGOs / Patient groups				
Healthcare professionals				
Media				

STEP 3.2: STRATEGIZE

3.2 Strategize:
Key Messages



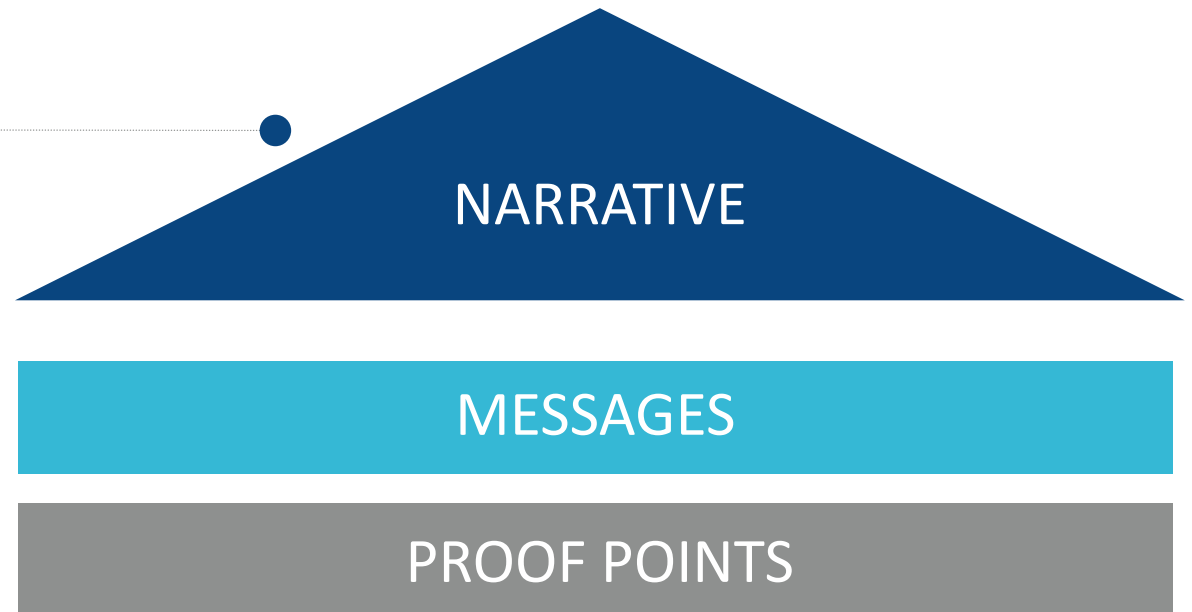
STEP 3.2 : STRATEGIZE BUILD YOUR MESSAGING HOUSE

A messaging house is a concept that helps organizations *shape advocacy messages*. Its three components will allow you to draft, step-by-step, impactful messages that resonate with your audience.

The narrative will **help you remain consistent** in your advocacy activities.

The messages will **help you own the policy space** you would like to influence.

The proof points will help you gain credibility and trust among your audience, **increasing their engagement rates.**



3) A. UNDERSTANDING THE EXTERNAL ENVIRONMENT

Before building the messaging house, the first step is to research what your external policy audience is saying about your issue. This will support you to understand the environment that you need to communicate to.



What is being said about your issue in the media?

Can your issue be linked to another issue that may be getting more coverage?



What is said online?

What type of content gets shared? Are the right people talking about your issue?



How are people searching around your issue?

What keywords are associated with your issue? Who owns the online real estate on Google?



What are the milestones coming up?

What events or existing conversations can our messaging be linked to?

3) B. CHOOSE A PERSONA

Then, understanding *you can be perceived in various ways by your audience*, it is up to you to choose your persona. Ultimately, this will help make your organization easily recognizable in your policy field, helping differentiate yourself from others in the debate.



Thought - leader

You want to be considered a leader in your field of expertise



Knowledge Centre

You want to be considered an expert in scientific and technical questions



Expert collaborator

You want to act as a platform for other NGOs and partners to work together



Quick reactor

You want to provide constructive solutions in decision making processes



NARRATIVE

MESSAGES

PROOF POINTS

3) C. START FILLING YOUR MESSAGING HOUSE TEMPLATE

Then, you can start to **create your own messaging house**. This is your template.

The next slides D,E and F will help you fill-in the boxes.

Always start with your narrative, then work your way through the key messages and finally the proof points.

This order will ensure each layer of messaging supports each other.

3) D. HOW TO WRITE YOUR NARRATIVE

What is a narrative?

A narrative is a way of presenting or understanding a situation or series of events. It **reflects and promotes a particular point of view or set of values**. Concretely, it's a few sentences that describe **what you want and why what you want is important**.

I want **YOU** to do **SOMETHING** specific. I'll give you a reason for you to care based on what **YOU** find important. I'll say briefly how my work supports this very important issue. I'll conclude by telling you what happens if **YOU** do the **THING**.

Tips to write an impactful narrative

Your narrative should be three key sentences summarizing the following:

- 1) What does your organization do and why does it matter?
- 2) What is your key policy objective in the upcoming years?
- 3) What could be gained if you policy challenge is tackled?

We would advise **working on this exercise collectively as an organization to ensure everyone agrees with the narrative**.

NARRATIVE

MESSAGES

PROOF POINTS 23

3) E. HOW TO DRAFT YOUR MESSAGES

What are your messages?

Your messages add precision to your narrative. They explain, in more detail, **how your organization and your activities can make a difference** in each policy field.

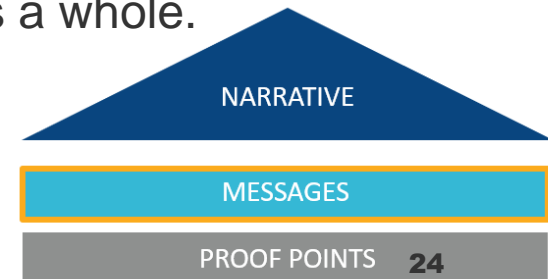


Tips to write impactful messages

You can think about three to five messages that will back-up your narrative. **Imagine that you are meeting with a policymaker**: what would be your key talking points to convince them to act?

To ensure your messages resonate among your audience:

- **Keep them simple.** They must be easily understandable and go straight to the point.
- **They must be aligned with your audience agenda.** This will help them relate to you.
- **Highlight how your activities are beneficial** to individuals and societies as a whole.



3) F. HOW TO FIND PROOF POINTS

What are your proof points?

Your proof points are key data points, statistics, or testimonials that provide credibility to your messages. They should add new information to your drafted messages, providing new arguments to support them.

Tips to find your proof points

We advise to select any data, testimonial or statistic that is most likely to have an **impact on your audience, triggering emotions**. It could be data about mortality, about cost related to your disease, or on quality of life.

To ensure your messages resonate among your audience, your proof points should be:

- Recent
- Specific
- Well-referenced
- Offering a new perspective/angle on the impact of the disease



STEP 4: ENGAGE

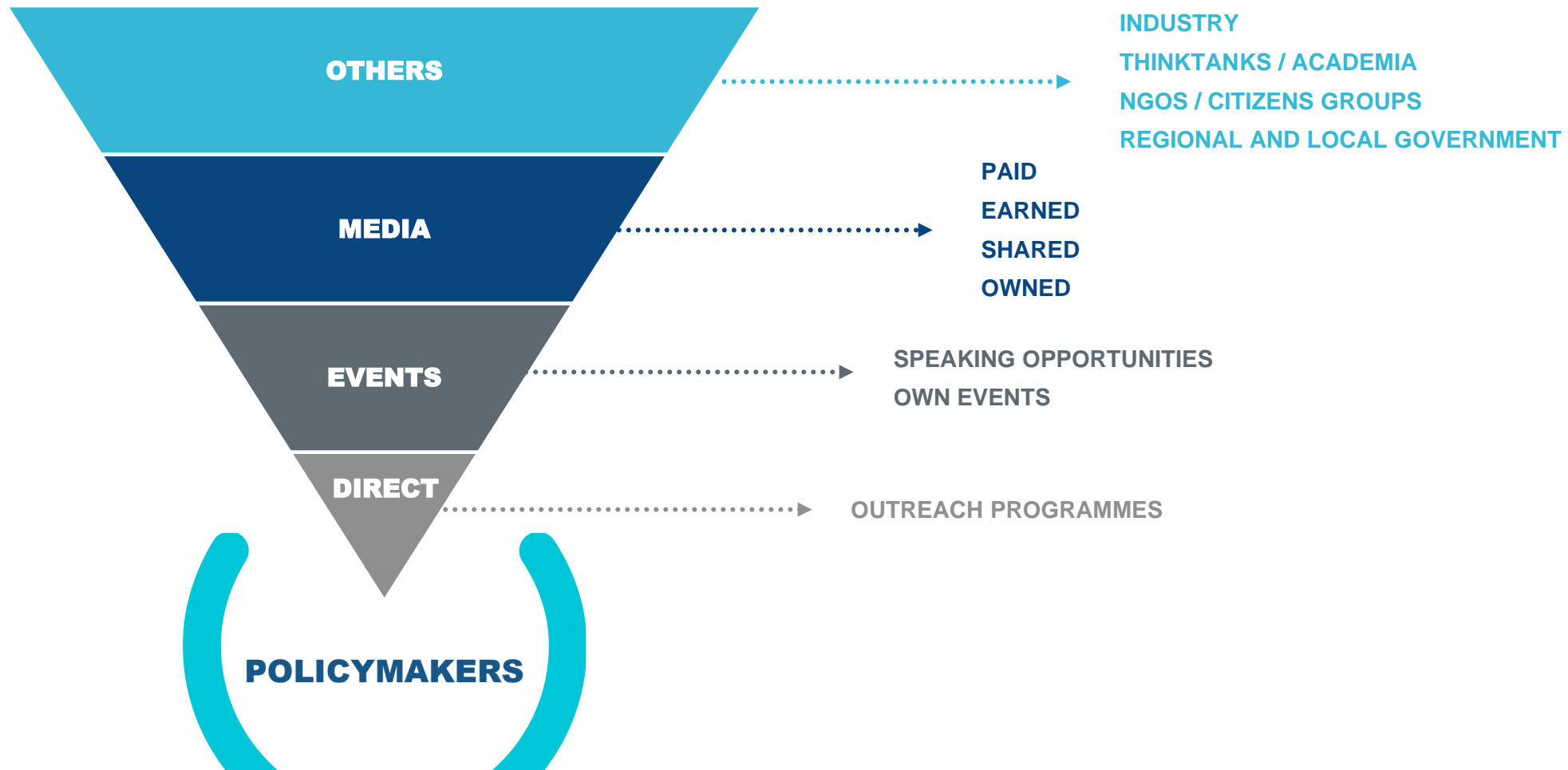
4. Engage

A diagram consisting of a teal rectangular box at the top containing the text '4. Engage'. A dark blue line extends from the bottom of this box, forming a larger, empty rectangular frame below it.

STEP 4: ENGAGE

SHARE YOUR MESSAGES VIA KEY CHANNELS

Once you have drafted your narrative, key messages and found your proof points, you can start sharing them with your audience. There are many **different channels you can choose to elevate your voice:**



4) A. CHOOSE A FEW TACTICS

However, they are not all relevant to your organization depending on your **time constraints, budget, or overall advocacy goals**. Choose a few tactics that you think would be most impactful to you and prioritize them to see which one you should focus on first.



Meeting programme



Position Paper



Own Event



**Key Opinion Leader/
Influencer**



Social Media



Petition



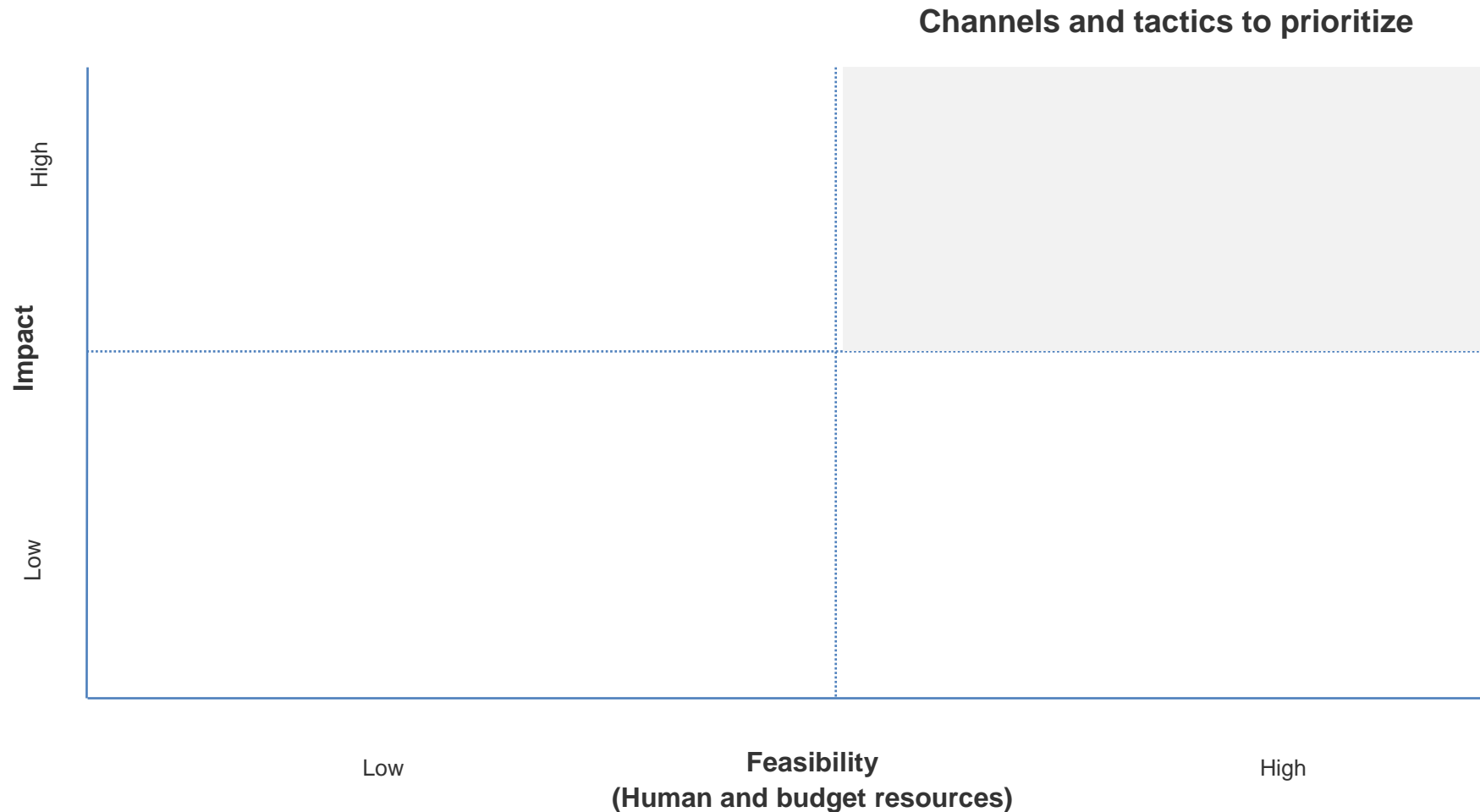
Leave behind



Something else?

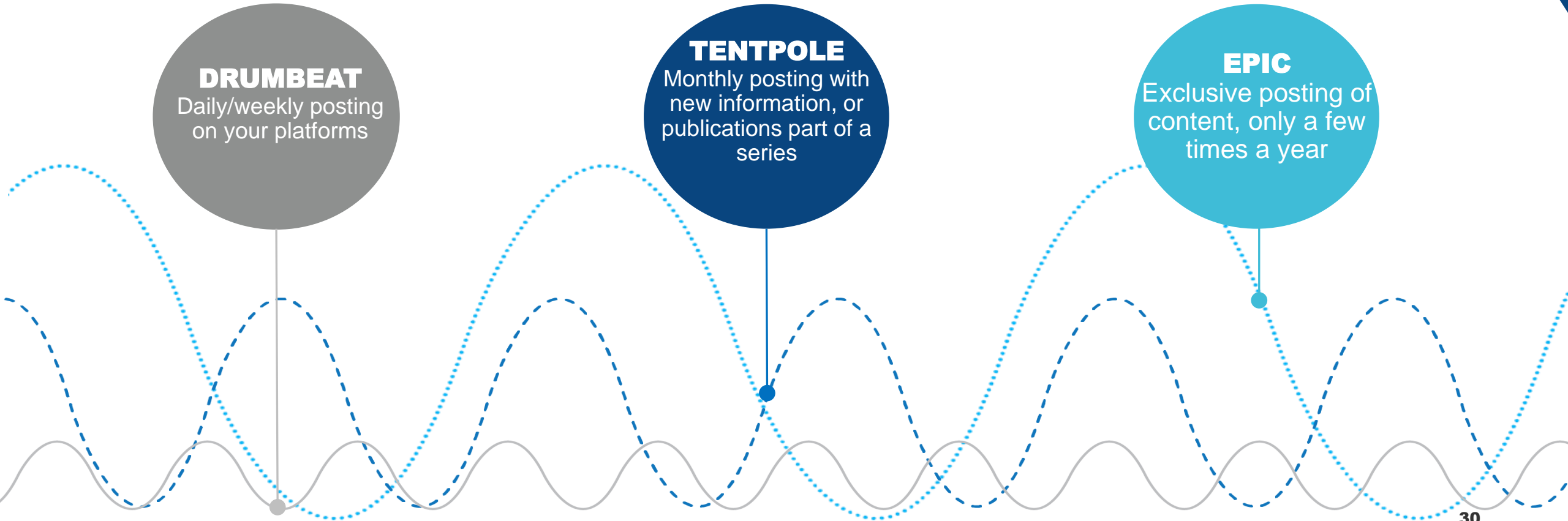
4. B. INVEST IN TACTICS MOST IMPACTFUL TO YOU

This template will help you **prioritize your tactics**: you can rate your ideas depending on how much they could support your policy objective (impact) and how they could be executed with your current human and budget resources (feasibility). All ideas in the grey box should be considered most impactful to you.



4.C. WHAT ABOUT SOCIAL MEDIA?

Building a presence on social media is a tactic that can be very impactful, especially if you are **trying to gain visibility and connect with policymakers**. For a social media strategy to be effective, the key is to post consistently, with a clear plan in mind. You can post at various frequencies, as highlighted below, to attract visitors to your platforms and build a community.



DRUMBEAT

Daily/weekly posting on your platforms

TENTPOLE

Monthly posting with new information, or publications part of a series

EPIC

Exclusive posting of content, only a few times a year

4.D. DECIDE WHAT SOCIAL MEDIA STRATEGIES YOU WANT TO DO

Organic

Definition

Organic social media content is **any free content shared** including posts, videos, and more.

Who can see organic posts?

This content can be seen by a **portion of your followers**, people who are **following any hashtags** you use and the followers of anyone who shares your post.

Paid

Definition

Paid social media refers to **advertising**. It can either be a “boost” to your organic content already posted, or a unique post that you create solely for advertising.

Who can see organic posts?

You can **target specific audiences** to try and reach more people than is possible organically.

CONSIDER A SOCIAL MEDIA STRATEGY?

A social media strategy is a key **overarching document that will help you plan your posts ahead of time**. It sets out all major events and milestones relevant to you, content copy, and what platforms you will be posting on. We advise you to invest time early in the year to create this document – **this will help you remain consistent**, especially if the posts are already drafted in advance.

Editorial Calendar
Social activity

												Dec-12																	
		21-Nov	22-Nov	23-Nov	24-Nov	25-Nov	26-Nov	27-Nov	28-Nov	29-Nov	30-Nov	1-Dec	2-Dec	3-Dec	4-Dec	5-Dec	6-Dec	7-Dec	8-Dec	9-Dec	10-Dec	11-Dec	12-Dec	13-Dec	14-Dec	15-Dec	16-Dec		
Event																			Event										
Policy milestones																													
Organic social media	LinkedIn		Speakers announcement (panel #1)						Members talkit (pre-event)	Speakers announcement (panel #2)		Speakers announcement (panel #3)				Members talkit (during/part event)	Event last call			Thank you part				Key takeaways					
	Creative		Speaker card							Speaker card		Speaker card					Last call event card			Event's picture				Carousel					
	Twitter				Twitter poll							Twitter space (introducing an event topic)					Event announcement			Live Tweeting (8-10 tweets)				Key takeaways thread		TBD - Media quarter		Twitter space (key takeaways)	
	Creative																			Event's pictures									
Paid social media	LinkedIn	Pre-event Baur attendees														Media plan & targeting (part-event)	Ad creative & copy (part-event)										Part-event Key messages		
	Creative	Event announcement card																											Carousel
	Twitter	Pre-event Baur attendees																											
	Creative	Event announcement card																											

STEP 5: LEARN

5. Learn



STEP 5: LEARN MEASURE YOUR SUCCESS

OUTPUT OBJECTIVE



EXPOSURE

To what degree has your organization created exposure to content and message?

- Number of key policy makers reached with messaging (policy papers, information, research shared)
- Active participation in coalition and stakeholder forums



ENGAGEMENT

Who is engaging and interacting with your organization?

- Number of relevant policymakers met
- Number of policy makers requesting further information
- Number of mentions on social channels of target audience
- Event attendance

OUTCOME OBJECTIVE



INFLUENCE

Have you influenced perceptions and attitudes of policy makers?

- Policy makers repeating message across their channels
- Amount of questions regarding defined objectives
- Amount of champions, actively advocating for global health



ACTION

What actions, if any, have been taken?

- Legislation/policy changed in line with ambition
- You brought in as a valued voice in decision-making processes

WHAT DOES IT MEAN?



How well is our campaign reaching and engaging audiences? Are we reaching them with content that should be shifting perceptions around key challenges?



As a result, are target audiences changing their perspectives and taking the actions we want them to take? And, how likely would they advocate in line with our objectives