



Developing an Effective Advocacy Plan

(Adapted from Washing Nonprofits, "The Board Advocacy Project" and The Center for Lobbying in the Public Interest)

Ten Steps to an Effective Advocacy Plan

Step	Activity
1.	Assess your organization's readiness for public policy and advocacy work
2.	Look at your programs & identify existing relationships with policymakers
3.	Articulate your organization's policy framework – vision, mission and goals
4.	Establish criteria for selecting and identifying issues
5.	Identify and prioritize your issues
6.	Choose your target area and consider which target area represents your best chance for success and best matches the available resources
7.	Choose your strategies
8.	Logistics – identify how you will organize, communicate, mobilize, track, evaluate and report
9.	Identify roles and responsibilities and build organizational capacity
10.	Always remember that a plan is just a plan – make sure it's salient, flexible & comprehensive

Going through these steps will help you determine:

- **What** you are going to advocate for
- **How** you are going to conduct your approach
- **Who** is going to play what roles within the board, agency & partners
- **When** specific steps will occur
- **How much** you think it will cost, and what non-cash resources need to be secured
- ... and then to **pull it all together into a cohesive plan of action**

Establish criteria for selecting and identifying issues:

- What impacts our clients' lives and their chances for advancement/improvement/success?
- What affects how we do business?
- What do we see coming down the pike?
- Which must we address?
- Which do we want to address?

Identify and prioritize your issues:

- Develop a comprehensive list of legislative issues that impact your organization
- Identify which issues you must address and those you want to address
- Categorize issues in terms of short-term and long-term endeavors (they can be of equal importance)

- Set priorities based on: (1) importance/impact, (2) how they fit with where your organization is today in terms of history and capacity, and (3) internally defined issues' relationship to other housing and homeless legislative agendas already developed by advocacy groups
- Clearly demonstrate the links between your advocacy agenda and the organization's mission

Choose your strategies:

- **Direct lobbying** – Do we have the contacts? Friends? Clout? How do we get all or more of the above?
- **Grassroots lobbying** – Who comprises our base? Are they ready? Do we have a management strategy? Is this our best avenue?
- **Media advocacy** – Is our issue “media ready”? Can we portray it as urgent? Do we have a compelling message? Do we have mediagenic spokespersons? Where will our story play best?

Logistics/management – identify how you will organize, communicate, mobilize, track, evaluate, and report on progress:

- **Timeline** – How long will our advocacy effort take. What should we do when? How should we begin?
- **Resources** – Will we need additional staff or volunteers? How much will it cost? How will we fund our advocacy efforts? If resources are limited, what should we focus on?
- **Logistics** – Who will carry out our advocacy plan? How will we make decisions as we proceed? What internal problems do we need to solve?
- **Roles** – Who will be responsible for which piece? What should be the roles of the board, special committees, staff, members and constituents and others?
- **Communications** – What person/group will be the liaison between advocacy efforts and the board, coalition partners, community, etc.?
- **Monitoring/reporting** – Who will track efforts? How do advocates communicate with them? And how will they communicate back to the agency (and community) regarding progress?

Identify roles and responsibilities and build organizational capacity

- **Board** – What roles do board members play in advocacy now? How can board members' time and resources be best utilized in pursuing these strategies? If you haven't yet established a policy/advocacy committee, how soon can you do it?
- **Staff** – What are their talents and strengths? There is a role for everyone, think bottom up.
- **Clients, residents, friends, family and those with “like minds”** – Figure out which among your board, key staff and core supporters know the people that you need to reach. Whom do your target policymakers listen to? Do you know people who are already active on this issue?
- **Who else?** – Here's your chance to cast your net widely and include both “likely” and “unlikely” allies. Which other elected officials might be willing to assist your efforts! Who might be willing to help if asked? Who should you get to know now so that you can ask for their help in the future? Remember that advocacy is a long-haul effort.

Analyze the Issue

- **Context** – what are the political, economic and social trends surrounding the issue? What constraints and opportunities exist? What is the level of public awareness? Is the issue on the public agenda? Is it on the policy agenda?
- **Process** – What process should we use to analyze the problem? How will our constituents be involved? Whom else should we involve?
- **Problem** – What is public problem (s) we want to tackle? What are its components of the problem and which are most important?
- **Strategies** – What concrete solutions will address key aspects of the problem or achieve the outcomes we desire? What criteria should we use to evaluate these options? What will be the consequences of implementing each one? Which strategy(ies) should we advocate?
- **Proposal** – What policies are currently in place? What policy alternatives are being discussed or considered? What specific policy (laws, rules or other policies) do we want to adopt, change, maintain, or repeal?

Analyze the Power

- **Policymakers** – Which policymaking forums make decisions in this area? Which forums should we focus on, and why? What is the timeline and process for making the decisions we care about?
- **Constituents** – How can we effectively represent the interests of our constituents in the policymaking process? How can we assist them in becoming directly involved?
- **Stakeholders and interests** – Who else will benefit from our advocacy and how should they be involved? Who stands to lose? Who else does the issue affect? Who is interested? Who can influence those with formal authority? Who ought to care? What are their interests and objectives?
- **Knowledge-holders** – Who has valuable knowledge regarding this issue?

Identify Strategies and Tactics

- **Coalitions & collaborations** – Can we do this alone? If not, who else should work with us? When should they be involved, and what kind of relationship is appropriate? What processes, conditions, skills, tools, and resources are required to ensure that our relationships are successful?
- **Audiences** – Which people and groups do we need to influence in order to be successful?

Legislators	Allies
Executives	Opponents
Administrators	Undecided
Other policymakers	Board members and staff
Policy implementers	Volunteers and donors
Constituents and members	The media
Community leaders	The general public

- **Messaging** – What arguments and strategies will we use to persuade each audience? How should we use the Internet, studies, research polls and other tools?
 - **Messengers** – Who is the right person(s) to deliver the messages? When should we use experts and authentic voices? When and how should we supplement staff with Board members, volunteers, and/or clients/residents?

- **Colleagues & Allies** – How will we enlist our allies and disarm our opponents? How can we appeal to their interests? How can we build common ground among diverse stakeholders?
- **Style** – What advocacy style should we use to deliver our message? Who needs to understand the issue? Who might engage in public deliberation? Who might be our partners? Where are we likely to encounter conflict? How will we manage it?

Become a Voice for Your Cause

- **Become a reliable source of information** – Building credibility is vital to the long-term strength of your public policy efforts. Know your issues, be able to demonstrate their impact on your constituents and the community and share your information widely.
- **Build and nurture relationships with policymakers:**
 - **Meet face-to-face** when possible – send information in advance of your meeting and follow up with phone calls and/or emails afterwards.
 - **Develop relationships with staff** – often they are the most knowledgeable person on your issue in the legislator’s office.
 - When an issue being discussed is relevant to your policy agenda, **be sure to let them know your perspective** and the impacts potential outcomes would have on your constituents/community.
 - **Invite them** (and or their staff) **to visit your program** and meet with agency staff and clients. There is nothing like a face-to-face meeting with clients to draw in your legislator and communicate the human side of the issue.
- **Build a public policy presence** – Join a coalition of other nonprofits working on similar policy issues. Your presence will send a strong signal that your organization cares about the issues. Other coalition members are potential allies who can reiterate and reinforce your messages.
- **Develop relationships with information media** – The media (radio, television, blogs and print & online newspapers) can be powerful allies in your public policy work. The media also play a role in educating the public and influencing public opinion. Get to know the reporters/writers who cover the issues that concern you and invite them to visit your program and clients. Figure out how you can help them with their stories when they’re on deadline, get them accurate information and clients to interview. Send letters to the editor and even request an editorial board meeting on your key issue. Your perspective is needed to fill out the community dialogue.
- **Use existing agency communications** (newsletter, annual report, etc.) to educate your donors, members and connected community members. Be sure to let your readership know how they can receive more information and be supportive.
- **Give public thanks** when an elected official or other community leader acts in a way that is helpful to your cause. Letters to the editor commending good decisions/actions go a long way to both building your reputation in the community and strengthening your ties to leaders.

Looking Inward

- **Information** – What information do we need, and where will we get it?
- **Management** – Who will carry out our advocacy plan? What should be the roles of the board, special committees, staff, members and constituents and others? How will we make decisions as we proceed? What internal problems do we need to solve?
- **Timeline** – How long will our advocacy effort take. What should we do when? How should we begin?
- **Resources** – Will we need additional staff or volunteers? How much will it cost? How will we fund our advocacy efforts? If resources are limited, what should we focus on?
- **Lobbying limits** – Are there IRS or other restrictions on our proposed activities, and how will we deal with them?
- **Political feasibility** – What are the chances of getting our proposal adopted? What are our strengths (past successes, experienced staff, key contacts, information, political insight, etc.)? What are the major obstacles to our success (inexperience, lack of time/resources, political baggage, etc.)? What are the strengths and weaknesses of our allies and opponents? Are we being realistic about what we can accomplish?