



# Advocacy Progress Planner User's Guide

**A tool for advocacy planning and evaluation**

The Advocacy Progress Planner is a tool to help you develop your advocacy plan. It is designed to cover the major ingredients of advocacy efforts, guiding you to clarify the goal, audience, and tactics of your campaign. It also helps you identify the advocacy capacities you have or need in order to launch a successful campaign, as well as appropriate benchmarks for tracking your progress over time.

This User's Guide accompanies the Advocacy Progress Planner tool. In this guide, we offer some overall suggestions for how to use the tool. And then we walk you through descriptions of each of the tool's eight sections, including handy definitions, tips, and examples to help you flesh out your strategy.

If you have any questions or wish to share your experience using the tool, we are always glad to hear from you! You can contact us by visiting our website or sending us an email.

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# Tips for How to Use the Advocacy Progress Planner

## Set aside some time

Advocates are very busy people. It can be hard to find time to sit down and strategize. But we believe that investing some time in careful planning upfront pays off later. It can help ensure you have the capacities needed to implement your strategy and reach your policy goal, and assist you in anticipating contextual challenges. And you will be able to more systematically track your progress – which can be important for maintaining internal morale and funders’ confidence. We suggest setting aside at least **three hours** to work through the Advocacy Progress Planner and develop a completed Plan. Once you’ve launched your campaign, schedule timely reviews so you and other stakeholders can review progress to date and make any needed adjustments to your strategy.

## Involve multiple stakeholders in the planning process

In our experience helping advocates develop their strategies, it can be really helpful for key stakeholders to participate in the process of working through the Advocacy Progress Planner. For example, if you are working in a coalition, try to get representatives from each member organization to participate. If a funder supporting your work is ready and willing to participate, even better. And if important stakeholders are unable to participate in the planning process, we encourage you to share the completed advocacy plan afterwards.

Getting these stakeholders involved in the development of your advocacy strategy can build buy-in and help ensure that your plans reflect the perspectives of those with a stake in achieving your policy goal. The tool can help establish a shared understanding of what you are doing and why – and how to appropriately measure your progress toward the policy goal. Just as important, participating in this planning process helps remind everyone that things don’t always go according to plan. Unforeseen challenges and opportunities will arise, and the strategy sometimes needs to adjust accordingly.

Ideally, the Advocacy Progress Planner enables everyone to emerge from the planning process agreeing that: *this is our best collective effort to design a strategy that will achieve our policy goal, but we recognize that we may need to course-correct if and when unexpected developments occur.* Establishing this shared understanding upfront can make it easier for you and other stakeholders to navigate any strategic adjustments needed later on.

## Treat your advocacy plan like a living document

The “end product” of working your way through the Advocacy Progress Planner is a completed advocacy plan or strategy – in the form of a Microsoft Word document. But your use of the document should not end there. As you begin implementing your strategy, we encourage you to update the document so that it stays relevant and useful to you. For example, if you achieve a specific benchmark you set for yourself, update the document to reflect that accomplishment. If a significant development occurs and you need to adjust your strategy, record those changes in the document.

In the tool, you’ll notice each of the eight sections has a space for updates. You can use this space on an ongoing basis to record any updates you make to the document and the reasons for those changes. This will help you keep track of your progress and any adjustments you’ve made along the way. This can be helpful not only for your own internal tracking purposes, but also for reporting to funders.

# Tips for Completing Your Plan, Section by Section

As you go through each section of the tool, you'll see a text box where you can write your advocacy campaign's specific example of each advocacy ingredient: your policy goal, your audiences, your tactics, etc. We encourage you to be as specific as you can!

## Section 1. Impact

The tool starts by asking you to define the intended impact of your advocacy campaign. The tool offers two broad kinds of impacts to choose from:

### 1. Improved Services and Systems

This refers to programs and services that are higher-quality, more accessible, affordable, comprehensive, or coordinated. Your policy work is meant to improve the services and systems through which government serves the public interest.

### 2. Positive Social and Physical Conditions

This refers to better circumstances and surroundings for people, communities, and the larger web of life of which we are a part. Your policy work is meant to improve conditions such as poverty, health, air quality, etc.

Remember that your intended impact is different from the goals of your specific advocacy campaign. Think of your intended impact as a statement of the broader mission of your organization or coalition.

## Section 2. Preparation: Knowing Your Issue

The second section of the tool asks you to consider how well you "know your issue." What do we mean by that? In order to launch a successful advocacy effort, you need a strong grasp of the policy issue and the political landscape you are trying to influence. So take a moment to assess how strong your knowledge is in each of the following three categories.

### 1. Problem Assessment

You know why you are in business: to have a positive impact on society, and in particular to achieve change in your issue area. But to have that positive impact, you need a clear, specific understanding of the problem so that you can identify workable solutions. For example, how many people are affected? How are they affected? How many will be helped by the solutions you are considering?

### 2. Policy Assessment

You need to know where your issue is on the policy agenda or in the policy process – and what needs to change. Your analysis may lead you to identify a policy or regulation that needs funding, improving, or defending. Is current policy the problem? Are there better policy options available to be implemented? Is current policy good but poorly implemented? Are you working to prevent the enactment of bad policy? Are legislators currently debating a relevant policy or bill? Is your issue a high priority on political leaders' policy agenda?

You also need to know the benefits and disadvantages of different policy solutions. Will changing the tax code, for example, affect more lives and be more sustainable than another policy solution that will be vulnerable to budget cuts every year? Do your policy solutions have a plausible chance of being adopted?

### **3. Landscape and Power Mapping**

You need to have strong knowledge of the policy and advocacy environment that surrounds your issue and campaign. Most issues worth addressing are complex. A “mapping” process can help you articulate how your advocacy goal fits in the landscape of current policy debates and help you identify the powerful players for and against the change you hope to bring about.

For example, if the possible solution is legislative, which committees are responsible for your issue? What do you know about the specific committee members? Are other organizations working on the same or related issues? Do they support your solutions or propose competing ideas? Are other issues on the horizon likely to knock yours out of the minds of the public or policymakers? What results from past efforts – by your own and other organizations – are worth building on? (Note: Later in the tool, we will help you fine-tune your assessment of these kinds of relevant contextual factors.)

You should have some way of addressing each of these three categories. If you feel you need additional knowledge, but do not have the capacity to gather the relevant information yourself, consider whether there are others you can turn to for help, such as other advocacy groups, think tanks, researchers at a local university, or journalists.

## **Section 3. Policy Goals**

This is where you articulate the specific policy goal you are seeking to achieve. Your goal should be tightly focused and specific – for example, a law, regulation, or practice that needs to be designed, implemented, blocked, protected, or measured.

The tool allows you to select from seven different types of policy goals:

### **1. Policy Development**

Your goal is to create a new policy proposal or policy guidelines. Perhaps the issue requires a new policy approach. You need to articulate it in a form ready for decision makers to consider. This may involve building consensus among key issue experts, advocates, interest groups, potential opponents, decision makers, and those affected by the issue.

### **2. Placement on the Policy Agenda**

Your goal is to get your issue or policy proposal on the list of issues that policymakers give serious attention. You need to increase the salience of your issue with constituents and decision makers who can place your issue on the policy agenda, or move it higher on that agenda.

### **3. Policy Adoption**

Your goal is to get your policy proposal passed through an ordinance, ballot measure, legislation, or legal agreement. This means your policy solution is ready for prime-time: it’s well considered, it’s moving up the agenda, and the political stars are aligned.

### **4. Policy Implementation**

Your goal is to ensure that a policy is properly implemented. This means there is a policy in place, but you want to make sure it has proper funding, resources, quality assurance, etc. This implementation stage might also provide opportunities for creating new regulations or policies.

## **5. Policy Monitoring and Evaluation**

Your goal is to track a policy in order to evaluate whether it is being implemented properly and achieving its intended impacts. Your focus is on putting effective monitoring in place to clarify how well a policy is being implemented, and whether its intended impacts are being realized.

## **6. Policy Maintenance**

Your goal is to prevent cuts or other negative changes to a policy. You seek to protect a good policy from threats or attacks motivated by budgetary, ideological, or programmatic reasons.

## **7. Policy Blocking**

Your goal is to successfully oppose a policy proposal you do not support. Perhaps that is your role – to block something with which you strongly disagree or think would have negative impacts.

## **Section 4. Audiences**

In this section, we ask you to define the audiences for your advocacy campaign. Who needs to hear your message? Understanding the target for your message is critical. And this is perhaps the greatest challenge to an advocacy campaign: narrowing down your audience.

Choose as your audience(s) the kinds of people who make the decision about your policy goal – or who directly influence people who make that decision. Who has the authority to make the changes that need to be made? Who influences them? The more precisely you define your target audience, the better. Ask yourself: What is the smallest audience that I need to engage in order to spur change on my issue?

Here are some major categories of audiences to choose from:

### **1. Elected officials**

These are individuals elected to public office. Many – though not all – policy decisions lie with current elected officials. Incumbents may need some convincing that the status quo is not as things should be. Or you may want to encourage officials to support or oppose a particular policy. Try to determine as specifically as you can which officials are the key decision makers and which groups can best influence their actions.

### **2. Candidates**

These are individuals running for public office. For example, if current elected officials are a problem, perhaps it makes sense to concentrate on candidates for office who might bring a fresh perspective to the issues. You may want to reach out to candidates or their staff to discuss your issue and proposed solutions, potentially helping to inform their views and the positions they take. If you plan to engage candidates in this way, be aware of any relevant tax code restrictions in your country.

### **3. Public Administrators**

These are individuals in government agencies who administer, oversee, and manage public programs or funds. If administering or implementing a policy is your focus, you may need to target appointed or career officials rather than elected politicians. Understand the pressures they work under and the solutions they might find appealing.

#### **4. Voters**

These are individuals who are registered to vote – or more specifically, individuals with an established voting record. You may be able to influence candidates or elected officials if your audience includes voters – especially voters whom candidates and elected officials see as important or valuable. Like you, politicians won't waste time trying to persuade the “un-persuadables.” Can you bring valued voters to them?

#### **5. Political Donors**

These are individuals and groups that donate to candidates, campaigns, and PACs. Donors can have influence with elected officials and candidates. See if you can work with them to help win support for your issues and solutions.

#### **6. Media**

These are individuals who generate news coverage for newspapers, radio, television, or websites. Reporters, bloggers, editors, and other media gatekeepers are a means to reach the audiences to whom they speak. They are in a position to include your issue in their coverage. A good understanding of how the media portrays your issue will help you decide what to “pitch” and whom to pitch it to. Can you develop relationships with particular gatekeepers? Can you take advantage of social networks to spread your messages? Remember to assess how media coverage connects to your overall advocacy strategy. Unpaid and paid media placements can support your other media tactics by, for instance, bringing more people to your website right when you have an urgent action for them to take. News media will be more receptive to your issue if they know members of the public are interested, so be ready with evidence and a local contact they can talk to.

#### **7. Business**

These are private sector organizations or enterprises. You may wish to target them as an audience if your issue bears on core business interests in a specific sector. For instance, advocates on poverty, the environment, health care, and migration issues can articulate how each of these issues affects the bottom line. Is your issue affecting their business's competitive advantage? Are they addressing it as part of their corporate social responsibility efforts? Can their participation increase your impact on decision makers by providing the clout and prestige of business organizations?

#### **8. Community Leaders**

These are individuals who are influential in their communities, such as clergy, police chiefs, local political party officials, etc. How does your issue affect these kinds of local leaders and organizers? Has it changed the community in concrete ways? Often the most compelling stories and actors – even for global issues – are found at the local level. The right local story can take an abstract issue and make it tangible and more credible. If you are working on a statewide or national campaign, your local story may propel the issue onto the national stage through strategic media placement.

#### **9. Courts**

These are the local, state, or national forums where legal disputes are adjudicated. Perhaps your issue would be best served by enforcing or clarifying laws or rights that need firmer legal grounding, or simply legal defense, rather than a new law. Taking the issue to court can lend authority (and even publicity) to your cause.

## **10. Popular Culture Artists and Gatekeepers**

These are individuals who contribute to popular culture. Writers (song, screenplay, television), producers, directors, agents, and performers often are open to working with advocates – and can be effective spokespeople for your issue. If this area is less familiar to you, consultants can work with you to gain access to this audience.

## **11. Specific Constituencies**

This refers to groups of people with shared interests, characteristics, or qualities. We preach specificity for a good reason: to help advocates use their resources as effectively as possible. You don't have the funds to persuade the general public to agree with you – and you don't need to. Which constituencies can help you achieve your policy goal? Who will carry the most weight? For example, religious groups may respond most readily to human rights issues. Union members or public health workers may be especially attuned to workplace health and safety issues. You can tailor your outreach to them. Or there may be other specific groups that your key decision-maker is especially responsive to – including and especially the communities or constituencies most directly affected by the issue.

## **12. Other Audiences?**

Are there any other, even more specific groups or even individuals that will be key agents of change, or have some specific influence with key decision makers?

## **Section 5. Contextual Factors**

There are many contextual factors that may affect the success of your advocacy campaign. It may be the noisy distraction of an unrelated political battle or a more pressing advocacy issue that comes up. Or it could be that economic conditions or people's perceptions of economic instability affect the chances that your proposed policy will win support. The state of play between potential partners, competitors, and opponents can also affect your success. It's easy to overlook these kinds of contextual factors. But they can derail even a strong campaign. Acknowledging these factors – and figuring out how best to navigate them – can contribute to the success of your strategy.

Here are six types of contextual factors for you to consider:

### **1. Political Climate**

These are aspects of the policy process and current policy and political environment that can affect the success of your campaign. Advocacy groups focus on their issue, as they should. But before launching a new campaign, we hope you have stepped back and considered the broader political context: are key decision makers likely to be distracted by election battles? Are they recovering from a particularly bitter partisan battle or enjoying a moment of relative peace? Will your issue be visible in the next election? Will your proposal offer an opportunity for compromise and success? Should you be gearing your advocacy efforts to candidates, current incumbents, or both?

### **2. Economic Climate**

The economic climate includes the current or future economic environment as well as aspects of the budget process that might affect the availability of funds to support your policy proposal. Some issues are especially sensitive to voters' economic prospects, or to perceptions about the economy and the budget. Can your policy proposal be cast as promoting sacrifice (via higher taxes or fees) at a time when constituents may already be squeezed? Have you suggested reasonable ways to raise revenues or create savings? Does the current climate favor budget-neutral policies? Will your issue face challenges within the budget process or intensify a budget fight within the government?

### **3. Social Climate**

Current events, crises, tensions, or social movements can positively or negatively affect your policy proposal's success. For example, are there big social tensions around inter-group relations, class, or regional rivalries that your policy solution might exacerbate or alleviate? How are you planning to address these tensions? Understanding this can help you frame your proposal more effectively.

### **4. Prior Experience**

Consider your previous experience as well as decision makers' prior experience with advocacy on this issue. Will your experience prepare you for this work? Will a lack of experience have a potentially negative affect on your success? What kinds of prior experiences have your target decision makers had with this issue?

### **5. Issue Competition**

Issue competition refers to the various other issues that are competing with yours for a place on the policy agenda. As a famous pollster said: "Most people don't think about most things most of the time." Your issue is competing for your audiences' attention: in addition to their daily lives, of course, there will be many other issues advanced by advocates just as passionate as you. Take a moment to consider what else is out there. Can you time your effort to catch a moment when there may be less competition?

### **6. Potential Partners, Competitors, and Opponents**

Consider the non-partner organizations or individuals who also are advocating on your issue, either for or against your position. Few organizations are the sole players in a field. With a clear sense of your organization or coalition's capacity, consider who else is out there. Are there potential partners who might complement your strengths? Are there competitors or opponents whose actions you need to account for or reach out to as you shape your strategy? (Hint: you might consider re-running this strategy planning exercise from your opponent's perspective.)

## **Section 6. Activities and Tactics**

In this section, we ask you to identify the specific activities and tactics you plan to use in your campaign. Thinking this through carefully in the planning stage will make every other stage easier. And you'll be better positioned to assess what's working and what needs to be adjusted as you go about implementing your campaign.

We've divided activities and tactics into two categories: (1) policy and politics; and (2) communications and outreach. Some organizations and coalitions will make more selections from one category than the other.

### **Policy and Politics**

#### **1. Issue/Policy Analysis and Research**

This entails systematically investigating your issue or problem to better define it or identify possible solutions. For example, landscape mapping provides baseline information about the policy environment for your issue. It also helps you identify any needed policy changes. Gathering "political intelligence" or analysis and research during your campaign – whether by your organization or a partner – allows you to stay current or anticipate opportunities for positive policy change.

## **2. Candidate Education**

Candidate education involves telling candidates about your issue or position – and about its broad or impassioned support. The purpose is to make the issue part of the election debate and to inform candidates’ future decisions about it if they are elected. Candidates may be open to learning about new issues and perspectives, especially if they think that supporting your position could help their election prospects. Providing background information and opportunities for open dialogue and debate are often appropriate roles for nonprofit advocates. In the US context, there are organizations like Alliance for Justice that offer guidance on what is permissible, given your tax status of your organization and the state of play on your issue.

## **3. Relationship Building with Decision Makers**

Relationships take time, honesty, and active listening. Getting your message to key decision makers requires patiently building up your access to them, either directly or via their trusted advisors. If you can’t get in the door, try to learn who can: this may be a time when “grassroots” groups need “grasstops” groups or other influential partners to help them be heard. If you can’t make financial contributions to campaigns and political action committees, you may want to create partnerships with organizations that can, as they often have access to elected officials. Again, in the US context, organizations like Alliance for Justice offer guidance on what is permissible given your organization’s tax status.

## **4. Policy Proposal Development**

You may need to develop a new proposal where policy does not already exist. Or if your goals include changing prevailing policies, your tactical toolkit will include the ability to develop alternatives. Your policy development process should determine who your proposal will help (and potentially harm), how much it costs, and how it compares with other proposals and the status quo.

## **5. Litigation or Legal Advocacy**

For some issues and organizations, the courts are the appropriate battleground: class action suits may help those harmed by a policy; lawsuits may block or speed implementation of new regulations; the threat of legal action may hasten change. Assess what court(s) might be receptive to your arguments. Consider the risks of litigation, including that a higher court’s rulings could reverse past progress.

## **6. Lobbying**

Lobbying involves attempting to influence legislation by communicating with a member or employee of a legislative body or with a government official or employee who may participate in forming legislation. In the US context, the Internal Revenue Service distinguishes between direct lobbying vs. “grassroots lobbying,” which means attempting to influence legislation by affecting the opinions of the general public or any segment of it. Direct lobbying is subject to legal limits, but remains a useful – and perhaps an essential – tool in the advocacy toolbox. Nonprofit groups may sometimes decide to count on coalition partners to lobby. Be clear about how lobbying limitations affect you and your partners.

## **Communications and Outreach**

### **1. Earned Media**

Earned media is positive news coverage that you work to get. It involves getting print, broadcast, or electronic media to cover your issue or advocacy efforts, thereby helping you reach your target audiences. It includes coverage of your events, research, or even “stunts” like a campaign slogan projected on the State House walls. Placing op-eds, letters to the editor, or editorials on your issue costs you nothing but hard work. You might also generate earned media if journalists or other media gatekeepers pick up on a compelling piece of content you’ve posted on your website or social media.

## **2. Paid Media**

Another way to get media coverage is to pay for it. This includes things like paid advertisements and “open letters.” The advantage of paid media is that you can craft your own messages and place them where your audience is most likely to be watching, reading, or listening. The downside is cost.

## **3. Public Service Announcements (PSAs)**

A PSA is a non-commercial advertisement to promote social causes. Many media will place PSAs for free. For example, local network or public TV stations may be willing to run your video ads. One disadvantage of PSAs is that you can’t select when they will run or how often. PSAs tend to be most effective when they are part of a larger integrated communications campaign.

## **4. Media Partnerships**

In some cases, a media company may agree to promote a cause through its communications channels and programming. The media company’s programming, PSAs, and digital media platforms (website, social media) can all support the same goal. For example, a network might have media partnerships with advocates trying to ensure all eligible children are enrolled in preventive health programs or kindergarten.

## **5. Digital Media**

As more and more people get their news and information online and on their phones, advocates may want to include digital activities in their communications strategy. This can include using websites, social media, emails, and other digital media to increase visibility, raise awareness, promote action, and leverage social networks. But don’t “do digital” just for the sake of doing digital. Digital platforms (e.g., websites, social media accounts, phone apps) are often a significant investment. To be successful, they require considerable time, thoughtful planning, digital savvy, and sometimes technical expertise. Make sure you’re clear about why digital activities are needed in order to reach your policy goal.

## **6. Public Opinion Research**

Polling and other public opinion research like focus groups or in-depth interviews can reveal important information about how your target audience feels – and talks – about your issue. You can use this information to help build your case in your advocacy messages. If solid public opinion research is not available, you may decide to commission or conduct it. If you plan to publicize the results as part of your advocacy strategy, make sure your audience will perceive the research as credible.

## **7. Briefings/Presentations**

Say you have crafted an excellent policy proposal, or a report documenting the failings of current policy or practices. Now you want to make your advocacy case through one-on-one or group meetings. Determine who needs to see it and find ways to effectively convey your findings. Remember that webcasts, video conferencing, and even conference calls can extend your reach beyond print and in-person formats.

## **8. Rallies and Marches**

Gathering a large group of people for symbolic events can arouse enthusiasm and generate visibility, particularly in the media. Rallies, marches, and other forms of direct action are not for everyone and not for every organization. Depending on the scale, rallies can require intensive logistical support and communications. Done well, they can earn the kind of media attention that few organizations can afford to buy. The challenge: sustaining energy and activity after the event.

## 9. Coalition and Network Building

You may need to complement your organization's skills and expertise by forming a partnership or coalition with others who bring capacities you lack. You may be able to realize the promise of network-centric advocacy – drawing flexibly and rapidly on the collective intelligence and assets of many more groups and individuals. Sometimes you will forge coalitions with likeminded groups who share your values and general issue positions. Other times you may want “unlikely partners” who disagree with you on some issues but agree with you on your specific advocacy goal. Working with unlikely partners can sometimes strengthen your credibility with elected officials. Remember to assess the reliability of potential coalition partners and to identify point persons for each partner.

## 10. Grassroots Organizing and Mobilization

Decision makers often respond to home-grown demand. So you may want to create or build on a community-based groundswell of support for your issue or position, typically by helping people affected by policies to advocate on their own behalf. Grassroots organizing may mean reaching millions; or it may mean reaching the right smaller group of hundreds or even dozens of people during a well-timed community meeting.

## 11. Demonstration Projects or Pilots

A pilot involves implementing a policy proposal on a small scale in one or several sites to show how it can work. Organizations may conduct small demonstration projects to show the feasibility of their proposed change in policy or practice. And advocacy groups may monitor results and trumpet them in their communications with constituencies and decision makers.

## Section 7. Inputs and Capacities

Earlier, under Section 2 on “Preparation,” we asked you to think about what you need to know about your issue as you plan your effort. Section 7 is a reminder to think further about specific aspects of your preparation and planning. Every organization or coalition brings strengths to a campaign. But you also need to be clear about what else you need in order to successfully reach your goal. This section is designed to help you define what it will take to implement your strategy effectively.

We divided inputs and capacities into two categories. **Organizational Capacity** focuses on the capacity of your organization or coalition to implement your advocacy strategy. **Planning and Preparation** covers a few final strategic pieces that need to be in place before you launch your campaign.

### Organizational Capacity

#### 1. Funding

Have you generated the public or private dollars you need to carry out your advocacy strategy? Calculate the cost of advocacy activities carefully so that you aren't caught short. Make sure that your donors are informed of and comfortable with use of their contributions for this activity. If you expect that your policy goal requires a long-term strategy, how long until you will need additional resources to sustain your efforts?

#### 2. Staffing and Leadership

Do you have the people needed to implement your strategy? Have you established a clear understanding of who is doing what? Identify your leadership and staffing strengths and gaps. Do you have good leaders, both at the top and on the ground? Is there a functional gap in staffing that a coalition partner can fill? Would it make sense to hire a consultant to fill skill deficits?

### **3. Skills**

Do you have the up-to-date knowledge and abilities needed to implement your advocacy strategy? For example, do you know how to build and run a coalition? Do you know how to draft legislative language? Do volunteer coordinators know how to organize visits to legislators? Do campaign managers know how to record feedback in your new database software? Adding new advocacy tools or refining your use of current tools may require new skills. You can either get these skills through training or by engaging partners or consultants who already have them.

### **4. Infrastructure**

Do you have the equipment, systems, and other nuts-and-bolts supports you need to advocate? Consider whether you have the operational supports you need. If achieving your policy goal will be a long-term process, think ahead to what you might need later. For example, will your plans stretch the capacity of your e-advocacy database? Will your volunteer chapter leaders be able to handle additional phone traffic? Does everyone have the software they need to work with campaign documents?

### **5. Visibility**

Do you have the name recognition or credibility to persuade decision-makers or new allies? You don't need everyone to know your name. You just need to be visible and credible among those you hope to persuade. If your organization doesn't get its phone calls returned, you may need to join forces with other groups that are better positioned, or think about how to boost your own visibility.

## **Planning and Preparation**

### **1. Data Collection**

What data do you need upfront to plan, implement, or evaluate your strategy? Think carefully about any baseline information you need to measure your progress in achieving your policy goals and building your organization's capacity. For example, let's say you hope to sway public opinion on your issue by introducing a more persuasive way to frame the issue. If you identified useful opinion research, that should give you sufficient information to determine a baseline. Do you know how you can track the changes in public opinion that might result from your efforts? If not, this is the time to decide whether it needs to be part of your plans, or whether you can get that information from other sources. Or you might want to know how many of your members or chapters are currently active on this issue, or where your work is likely to be most effective.

### **2. Message and Materials Development**

What do you want to say, how do you want to say it, whom do you want to say it to, and which messenger should say it? Carefully targeted research with your audience(s) can help you identify ways of talking about your issue so messages will resonate, through a medium they trust and in materials they find compelling. Your audience is more likely to absorb a consistent message, persistently delivered, using pre-tested language. Your messengers must be comfortable delivering this message, of course. And your messengers must be credible and convincing to your audience. (Do not take this for granted!)

### **3. Contingency Planning**

Plan ahead for the unexpected. The Advocacy Progress Planner is meant to help you decide when you need to change course as circumstances change. As an organization or as a coalition, develop a plan or process for making quick strategic decisions. Committing time and effort to this process will pay off later; you'll be glad you did.

## Section 8. Benchmarks

Benchmarks are the major mileposts along the road to your policy goal. They let you know that you are making progress and give you early cues if you are getting off track. Be sure to choose benchmarks that are measurable and meaningful for your campaign. Try to articulate benchmarks that are SMART: Specific, Measurable, Attainable, Relevant, and Time-bound. Different kinds of benchmarks require different kinds of methodologies – for example, surveys, media analysis, case studies, or interviews.

The tool includes two categories of benchmarks to help you track progress: advocacy capacity benchmarks and policy benchmarks. We describe each of these categories more fully below, along with some sample benchmarks. When you get to this section in the tool, you'll see a text box where you can write in your own specific benchmarks, as well as a separate text box for recording progress you make towards those benchmarks as you implement your campaign.

### Advocacy Capacity Benchmarks

These benchmarks focus on ways in which you are building the capacities needed to effectively advocate and achieve your policy goal. To help identify appropriate capacity-building benchmarks, think back to the “inputs” section above: Where are the gaps in funding, staffing, skills, and infrastructure? What capacities do you need to build? Are you building the partnerships, developing the skills, and gaining the visibility that will put your policy goal within reach?

#### More or Diversified Funding

This is the amount of dollars raised and the variety of funding sources generated. More funding or funding from more diverse sources allows the organization to build its capacity to achieve its policy goals. Recording new donors attracted by a campaign or other advocacy effort will help staff make the case internally for its continuation. As important, it can serve as evidence to policy decision makers of a serious constituency for policy change.

*Sample benchmark: Within six months, increase the number of individual donors to the advocacy campaign by 25%.*

#### Staffing, Skills, and Infrastructure

This refers to the ability of your organization or coalition to manage, implement, and adapt the advocacy strategy. You can't control the policy environment, but you can decide how to strengthen the internal assets necessary to react effectively and flexibly to setbacks and opportunities. You may want to build certain capabilities that will help you achieve your policy objective – this time or the next time the policy window opens and conditions are right. Set interim benchmarks for those changes in your capacity.

*Sample benchmark: Within one year, research and acquire new database software to track our engagement with our grassroots membership.*

*Sample benchmark: Within six months, hire and train an advocacy associate responsible for all social media outreach and database management.*

### **Organizational Visibility or Recognition**

Increasing your organization's visibility won't change bad policy. But it may be a legitimate benchmark if you are championing a new issue or new approach to policy. If that's the case, be sure to gather information about your visibility before you launch your advocacy efforts and then track it over time with the same audiences and measures. Media coverage of your campaign or mentions of your organization in influential media outlets can provide a useful measure. Invitations from decision-makers to brief them can also demonstrate your credibility.

*Sample benchmark: Between the campaign's launch (baseline) and the campaign's expected conclusion (two years from now), double the number of times our research is cited in legislative debates.*

*Sample benchmark: Document 25 media citations during the campaign's first year naming our coalition as a source of demographic data.*

### **Partnerships or Alliances**

These are mutually-beneficial relationships with other organizations or individuals who support or participate in your advocacy strategy. Tracking the health of your partnerships or coalition will help you head off potential trouble: watch for active participation in coalition meetings; a clear understanding of the division of labor among coalition members; and reasonably comfortable agreement over who puts in what, and who receives what. Does the group have a mechanism for working through tough issues? Is the coalition more than the sum of its parts?

*Sample benchmark: Develop and sign a Memorandum of Understanding concerning responsibilities for campaign activities with our principal coalition partners by the end of the first quarter of the year.*

### **Collaboration and Alignment**

Are you and your partners collaborating effectively by sharing information and staying on a common message? Are you coordinating actions well? Tracking instances where this is occurring can help you make the case for continued funding. Identifying shortfalls can help you address problems early.

*Sample benchmark: Issue two statements per quarter concerning issue progress that are signed by all coalition members and include message points consistent with the campaign's strategy document.*

### **Constituency or Support Base Growth**

This refers to an increase in the number of individuals you can count on for sustained advocacy or action on your issue. Growth in the support base for a policy change can be a measure of increased advocacy capacity for the group that nurtured this growth. A specified increase in the constituency for an issue is a significant benchmark along the way to meeting your policy goals. Or your advocacy message may have added impact when it comes from an unexpected messenger or new constituency.

*Sample benchmark: By the end of year two, increase by 50% the number of constituents who have engaged in at least one of our calls to action (e.g., signed our petition, called a US Senator).*

## Policy Benchmarks

These benchmarks focus on interim outcomes – that is, steps along the path toward achieving your policy goal. Pick the one(s) most relevant to your advocacy objective and activities. You'll be looking for evidence of how you are contributing to progress. Be aware: claiming attribution – “we did it all ourselves” – is very likely untrue and can be harmful to your relationships with other advocates.

### Knowledge and Awareness

Sometimes increasing knowledge about or awareness of an issue – or of your proposed solution – is a significant contribution. Be sure to establish a baseline beforehand, and to gauge your impact on levels of awareness over time among your audiences.

*Sample benchmark: Using credible surveys of eligible voters in the state before the campaign and at the end of the project year, demonstrate a 25 percentage-point increase in awareness of our proposed bill.*

### Salience

How does your issue stack up against the general noise of everyday life or even other issues in the same broad category in the minds of your audience? Even if your audience is aware that a problem exists, you won't get movement on your issue unless they also think it is important enough to address. If you are tracking this with public opinion research, be sure to pose your questions consistently over time, starting with before you begin your advocacy effort.

*Sample benchmark: Over the course of the election campaign, document a doubling in the number of times the candidates publicly name your target issue as a priority.*

### Issue Reframing

What's the big story that your issue evokes? If you are advocating for a community-based solution, but your audience has seen the community portrayed only as helpless victims or somehow responsible for its own problems, some reframing is in order. The right messaging can combat negative or false beliefs about the issue or solution. Tracking your progress in telling a different story may require some specialized media content analysis. And it requires gathering careful baseline information in advance so you can track these changes in how the story is told.

*Sample benchmark: During the next legislative session, document a 25% increase the number of news media articles using the desired message framing.*

### Public Will

This refers to the willingness of your target audience (non-policymakers) to act in support of your issue or policy proposal. Measuring “public will” precisely is difficult, but organizations can track progress using benchmarks such as participation in public hearings; questions to candidates for elected office; turnout at rallies and public meetings; and number of letters and emails sent to elected officials in response to a call to action.

*Sample benchmark: Record an increase of 25% from last year's participation in our annual advocacy day at the Capitol.*

### **New High-Profile Champions**

These are high-profile individuals who adopt your issue and publicly advocate for it. People are drawn to causes that have the support of people who are admired, respected, and/or influential. Develop policymaker champions with a track record for successfully drafting, amending, and passing bills. Or add celebrity champions with demonstrated credibility on the issue and sufficient message discipline to advance the story you want to tell and the solutions you want to offer.

*Sample benchmark: Identify two persuadable members of the city council and obtain their support for our bill by the end of the third quarter of the year.*

*Sample benchmark: Obtain a pro-bono endorsement video for our campaign from prominent musicians for use during youth outreach prior to elections.*