

Advocacy Progress Planner Definitions



GOALS & IMPACTS

IMPACTS

Improved Services And Systems

Definition: Programs and services that are higher-quality and more accessible, affordable, comprehensive, or coordinated.

Tips: When all is said and done, our work on policy is meant to improve the quality of services and systems through which government serves the public interest.

Positive Social And Physical Conditions

Definition: Better circumstances and surroundings for people, communities, and the larger web of life of which we are a part.

Tips: These conditions may include reduced poverty, improved health, higher air quality, etc.

POLICY GOALS

Policy Development

Definition: Creating a new policy proposal or policy guidelines.

Tips: This may involve building consensus among key issue experts, advocates, interest groups, potential opponents, decision makers, and those affected by the issue.

Placement on the Policy Agenda

Definition: The appearance of your issue or policy proposal on the list of issues that policymakers give serious attention.

Tips: Increasing your issue's salience with constituents and decision makers can place your issue on the agenda, or move it higher on that agenda.

Policy Adoption

Definition: Successful passing of your policy proposal through an ordinance, ballot measure, regulatory change, legislation, or legal agreement.

Tips: Your policy solution is ready for prime-time: it is well considered; it's moving up the agenda; the political stars are aligned. Going for policy adoption is the right goal.

Policy Implementation

Definition: Putting a policy into practice, with the funding, resources, or quality assurance to ensure it.

Tips: The policy is in place, but it's not being implemented well. Your goal is to provide the needed resources or to fix what's wrong.

Policy Monitoring and Evaluation

Definition: Tracking a policy to ensure it is implemented properly and achieves its intended impacts.

Tips: The policy is being implemented, but you aren't sure that it's being implemented fully. Your goal is to put effective monitoring in place.

Policy Maintenance

Definition: Preventing cuts or other negative changes to a policy.

Tips: A good policy is under attack – whether for budgetary or ideological or programmatic reasons. Your goal is to protect it.

Policy Blocking

Definition: Successful opposition to a policy proposal you oppose.

Tips: A former policymaker remarked: "My job was to ensure that government did fewer stupid things on my watch." Perhaps that is your role as an advocate.



AUDIENCES

Elected Officials

Definition: *Individuals elected to public office.*

Tips: Try to determine as specifically as you can which officials are the key decision makers.

Candidates

Definition: *Individuals running for public office.*

Tips: If current elected officials are the problem, perhaps it makes sense to bring your issue to candidates for office who might bring a fresh perspective.

Public Administrators

Definition: *Individuals in government agencies who administer, oversee, and manage public programs or funds.*

Tips: If administering or implementing a policy is the problem, you may need to focus on appointed or career officials rather than on elected politicians. Choose as specifically as you can the key decisionmakers.

Voters

Definition: *Individuals who are registered to vote, especially individuals with an established voting record.*

Tips: Influencing candidates and elected officials is easier if your audience includes voters – and especially those engaged voters that incumbents and candidates need to persuade.

Political Donors

Definition: *Individuals and groups that donate to candidates and campaigns.*

Tips: Donors can have influence with elected officials and candidates. They could help win support for your issues and solutions.

Specific Constituencies

Definition: *Groups of people with shared interests, characteristics, or qualities, often because of where they live or what they do.*

Tips: You don't have the funds to persuade the general public to agree with you. Fortunately, you don't need to. Which "publics" or constituencies can help you achieve your policy goal?

Journalists

Definition: *Individuals who generate content for newspapers, radio, television, or websites.*

Tips: Reporters, bloggers, editors and other media gatekeepers are usually a means to your end: they can help get your ideas before their audiences. But include journalists as one of your audiences if you are specifically trying to change the way they portray your issue.

Popular Culture Artists and Gatekeepers

Definition: *Individuals who contribute to popular culture.*

Tips: Writers (song, screenplay, television), producers, directors, agents, and performers often are open to working with advocates. But choose wisely!

Business

Definition: *Private-sector, for-profit organizations or enterprises.*

Tips: Does your issue bear on core business interests in a specific sector? For instance, advocates on poverty, environmental, health care, and migration issues can articulate how each of these issues affects the bottom line.

Community Leaders

Definition: *Individuals who are influential in their communities, such as mayors, school board members, clergy, police chiefs, etc.*

Tips: Often the most compelling stories and actors -- even for global issues -- are found at the local level. If you are working on a statewide or national campaign, your local story may propel the issue onto a larger stage through strategic media placement.

Judges and Legal Officials

Definition: *The judges, prosecutors and other legal professionals who interpret or enforce laws.*

Tips: Perhaps your issue would be best served by helping legal officials enforce or clarify laws or rights that need firmer legal grounding, or simply legal defense, rather than a new law.

Other Audiences?

Tips: Once more: Ask yourself: "What is the smallest audience that I need to engage in order to spur change on my issue?"



CONTEXT

Political Climate

Definition: Factors about the policy process and current policy and political environment that can affect your policy proposal's success.

Tips: Consider 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?

Economic Climate

Definition: Factors about the current or future economic environment or about the budget process that might affect the availability of funds to support your policy proposal.

Tips: Can your policy proposal be cast as promoting sacrifice (via higher taxes or fees or prices) at a time when constituents may already be squeezed? 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?

Social Climate

Definition: Current events, crises, tensions, or social movements that might positively or negatively affect your policy proposal's success.

Tips: Another big-picture question: are there big social tensions that your policy solution might increase or reduce? Understanding this can help you frame your proposal more effectively.

Prior Experience

Definition: Your audiences' previous experience with advocacy generally or with advocacy on this particular issue.

Tips: As you consider how you will address the issue, assess candidly your audience's prior experience with the issue, with your organization, and with the tactics you plan to employ. How will their experience affect your success?

Issue Competition

Definition: Other issues that are competing with yours for positioning on the policy agenda.

Tips: 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.

Potential Partners/ Competitors/ Opponents

Definition: Organizations or individuals who also are advocating on your issue, either for or against your position.

Tips: With a clear sense of your organization's capacity, consider who else is out there. Are there potential coalition partners that might complement your strengths? Are there competitors or opponents whose actions you need to account for as you shape your strategy?



ACTIVITIES/TACTICS

POLICY AND POLITICS

Issue/Policy Analysis and Research

Definition: Systematically investigating your issue or problem to better define it or identify possible solutions.

Tips: Gathering "political intelligence" or analysis and research during your campaign allows you to stay current or anticipate opportunities for positive policy change. Continuing analysis also permits you to define and track indicators of progress towards your policy goals.

Candidate Education

Definition: Telling candidates about your issue or position - and about its broad or impassioned support.

Tips: 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 and opportunities for open dialogue and debate are appropriate roles for nonprofit advocates.

Relationship Building with Decision Makers

Definition: Interacting with the policymakers or others who have the authority to act on your issue and put change in motion.

Tips: Getting your message to key decision makers requires patiently building up your access to them, 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" or other influential partners to help them be heard.

Policy Proposal Development

Definition: Developing a specific policy solution for the issue or problem you are addressing.

Tips: Your policy development process should determine who your proposal will help (and potentially harm), how much it costs, and how it compares to other proposals and to the status quo.

Litigation or Legal Advocacy

Definition: Using the judicial system to move policy by filing lawsuits or civil actions.

Tips: Determine what court(s) or legal authorities might be receptive to your arguments. Consider the risks of litigation, including that a higher court's rulings could reverse past progress.

Lobbying

Definition: 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.

Tips: Tax authorities in the U.S. and other countries limit how much lobbying nonprofit organizations can do, but it remains a useful tool in the advocacy toolbox. Nonprofit groups may sometimes decide to count on other kinds of coalition partners to lobby. Be clear about how lobbying limitations affect you and your partners.

Opinion Research

Definition: Surveying key audiences to collect data for use in advocacy messages.

Tips: Polling and other public opinion research like focus groups or in-depth interviews can reveal important baseline information about how your target audience feels – and talks - about your issue.

COMMUNICATIONS AND OUTREACH

Earned Media

Definition: “Pitching” the print, broadcast, or electronic media to get visibility for your issue or advocacy efforts with the specific audiences you wish to reach.

Tips: Earned media is positive news coverage that you generate. It includes coverage of your events or research, including “stunts” like a slogan projected at midnight on the State House walls. Placing op-eds, letters to the editor, or editorials on your issue costs you nothing but hard work.

Social Media

Definition: Web-based technologies that encourage users to interact with each other and create content.

Tips: Blogging, a snappy piece of member-generated video, and other “social web” applications that encourage interaction among advocates can be another way to engage your constituents or advocacy networks – and perhaps even generate some earned media.

Paid Media

Definition: Paying for media coverage through, for example, advertisements and “open letters.”

Tips: The advantage of paid media is that you can craft your own messages and place them where your audience is most likely to see them. The downside: cost.

Public Service Announcements

Definition: Placing a non-commercial advertisement to promote social causes.

Tips: Many media will place PSAs for free. One disadvantage of PSAs: 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.

Media Partnerships

Definition: Getting a media company to agree to promote a cause through its communications channels and programming.

Tips: The media company's programming, PSAs, and web content can all support the same goal and convey consistent messaging about the issue to all its audiences.

Voter Education

Definition: Conveying your issue or position to specific groups of voters in advance of an election.

Tips: Electoral campaigns provide opportunities to reach voters as well as candidates at a time when policy issues may have unusually high visibility and salience. As with lobbying, voter education by nonprofit or civil society groups may be regulated under tax law. Make sure you understand any restrictions that may apply.

Coalition and Network Building

Definition: Unifying advocacy voices by bringing together individuals, groups, or organizations who agree on a particular issue or goal.

Tips: Network-centric advocacy can draw on the collective intelligence and assets of many more groups and individuals. Sometimes you will forge coalitions with groups that share your general issue positions; other times you may want “unlikely partners” that disagree with you on some issues but agree with you on your specific advocacy goal.

Grassroots Organizing and Mobilization

Definition: *Creating or building on a community-based groundswell of support for your issue or position, often by helping people affected by policies to advocate on their own behalf.*

Tips: Decision makers often respond to home-grown demand. Grassroots organizing may mean reaching millions, or reaching the right hundreds – or even dozens – at the right time.

Rallies and Marches

Definition: *Gathering a large group of people for symbolic events that arouse enthusiasm and generate visibility (particularly in the media).*

Tips: Depending on the scale, of course, 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 most influential rallies and marches project consistent messages.

Dialogue and Negotiations

Definition: *Bringing parties together to reach an agreement about how to address a problem*

Tips: Advocacy does not have to be antagonistic; sometimes, you can develop a new policy or move one forward by bringing stakeholders together to identify their points of agreement or common ground. Or you may be able to help negotiate a way forward among competing interests.

Conferences

Definition: *Convening groups of individuals to exchange ideas and perspectives*

Tips: If you are developing a new policy, trying to place it higher on the policy agenda, or advocating for smarter implementation, a conference may help.

Briefings/ Presentations

Definition: *Making your advocacy case in person through one-on-one or group meetings.*

Tips: You have crafted an excellent policy proposal, or a report documenting the failings of current policy and practices. Determine who needs to see it and find ways to convey your findings; remember that webcasts, video-conferencing, and even conference calls can extend your reach beyond print and in-person formats.

Demonstration Projects or Pilots

Definition: *Implementing a policy proposal on a small scale in one or several sites to show how it can work*

Tips: 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.



INPUTS

ORGANIZATIONAL CAPACITY BUILDING

Fund Raising

Definition: *Generating the public or private dollars you need to carry out your advocacy strategy.*

Tips: Cost out the 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.

Staffing and Leadership Development

Definition: *Hiring or developing the people to implement your strategy and establishing a clear understanding of who is doing what.*

Tips: Identify your leadership and staffing strengths and gaps. 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?

Skills Development

Definition: *Getting the up-to-date knowledge and abilities needed to implement your advocacy strategy.*

Tips: Adding new advocacy tools or refining your use of current tools may require new skills. You can get these skills through training or by engaging partners or consultants who already have them.

Infrastructure Development

Definition: *Setting up the equipment, systems, and other nuts-and-bolts supports you need to advocate.*

Tips: 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.

PREPARATION/PLANNING

Data Collection

Definition: *Gathering data you need upfront to plan, implement, or evaluate your strategy.*

Tips: Think carefully about any “baseline” information you will need to measure your progress both in achieving your policy goals and building your organization’s capacity.

Problem Assessment

Definition: *Understanding the nature of the problem you’re addressing and how best to address it.*

Tips: To increase your impact, you need a clear, specific understanding of the problem so that you can identify workable solutions. You also need to know the benefits and disadvantages of different policy solutions.

Policy Assessment

Definition: *Assessing where your issue is on the policy agenda or in the policy process and what about it needs to change.*

Tips: Who has influence on your issue—the courts, legislative branch, or executive branch? Others? Which committees are responsible for your issue? Your analysis may help you narrow your target audience or clarify your policy “ask.”

Landscape Mapping

Definition: *Reviewing the policy and advocacy environment that surrounds and will affect your strategy.*

Tips: 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 it can help you weigh different advocacy options for reaching that goal.

Goal Setting

Definition: *Developing a clear understanding of what success will be and what it will look like.*

Tips: Your goals should meet the **SMART test**: specific, measurable, attainable, realistic and time-limited. Do you have a **theory of change** that articulates your major goals, the benchmarks you hope to reach along the way, and your underlying assumptions?

Strategy Development

Definition: *Planning systematically for how to position and maneuver in order to reach your goal.*

Tips: You need a clear goal and an honest assessment of the current landscape and of what resources are available to you. Do you know how to get where you’re going based on where you are now? Do you have a contingency plan if circumstances change? Are you ready to act quickly if you must?

Partner Development

Definition: *Building formal or informal relationships with strategy collaborators and contributors.*

Tips: Do you need to add capacity by developing partnerships either informally or via an organized coalition? Do you have specific “asks” for new partners? Even if you don’t share a broad agenda, where do you share common ground with potential partners?

Message Development

Definition: *Framing what you want to say, who you want to say it to, how you want to say it, and who you want to deliver it.*

Tips: Carefully targeted research with your audience(s) can help you identify ways of talking about your issue so messages will resonate. Your audience is more likely to absorb a consistent message, persistently delivered, using pre-tested language.

Materials Development

Definition: *Creating publications, brochures, websites, or other “communications collateral” to deliver advocacy messages.*

Tips: It’s not what you say that matters; it’s what your audience hears. Develop materials with tested language that your audience can hear. The medium you choose matters as well; put your resources into formats your audience will find accessible and appealing.



INTERIM OUTCOMES & BENCHMARKS

ADVOCACY CAPACITY BENCHMARKS

Organizational Capacity

Definition: *The ability of your organization or coalition to lead, adapt, manage, and technically implement the advocacy strategy.*

Tips: You can't control the policy environment, but you can decide how to strengthen your organization or coalition so you have the assets you need to react effectively to setbacks and opportunities.

Example: Over 60% of coalition members report positive reviews of our technical assistance to coalition members (4 or higher on a scale of 1-5)

Partnerships or Alliances

Definition: *Mutually-beneficial relationships with other organizations or individuals who support or participate in your advocacy strategy.*

Tips: Watch for active participation in coalition meetings; clear understanding of the division of labor among coalition members; and reasonably comfortable agreement over who puts in what, and who receives what. Remember that trying to attribute policy change directly to the work of your individual organization could cause tension within your coalition.

Example: Incorporate five faith-based groups into Energy Campaign steering committee over next 12 months, with at least two sending out Campaign materials to their members by June 30th.

Collaboration and Alignment (including messaging)

Definition: *Individuals or groups coordinating their work and acting together.*

Tips: Are you and your partners collaborating effectively by sharing information and staying on a common message?

Example: Issue a statement by March 15th consistent with coalition message guidelines and signed by all participants at think tank/ advocacy network event.

New Advocates (including unlikely or nontraditional)

Definition: *Previously unengaged individuals who take action in support of your issue or position.*

Tips: Your advocacy message will have added impact when it comes from an unexpected messenger or an influential one with high credibility in your target audience. Stretching your membership by engaging new constituents can get the attention of decision makers.

Example: Ten new CEOs from Fortune 1000 firms sign statement of good-employment practices by June.

New Champions

Definition: *Policymakers who can actually move your issue..*

Tips: Champions are the decisionmakers and policymakers who can move your policy objective forward. They might be elected or appointed officials. Concentrate on developing policymaker champions with a track record for successfully drafting, amending, and passing bills.

Example: Obtain three additional co-sponsors for the bill by June, including at least one committee chairperson.

New Donors

Definition: *New public or private funders or individuals who contribute funds or other resources for your cause.*

Tips: 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 decisionmakers of a serious constituency for policy change.

Example: Add 300 additional individual donors at a minimum \$50 level by July

More or Diversified Funding

Definition: *The amount of dollars raised and variety of funding sources generated.*

Tips: As with new donors, more funding or funding from more diverse sources allows the organization to build its capacity to achieve its policy goals. And it helps demonstrate to decision makers that the issue or campaign has "legs."

Example: Attract ten charter members to new business sponsors circle by June

Organizational Visibility or Recognition

Definition: *Identification of your organization or campaign as a credible source on your issue.*

Tips: 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.

Example: By December, identify five citations in websites or publications that name our campaign as primary source for critique of peacekeeping processes in the Democratic Republic of the Congo.

POLICY CHANGE BENCHMARKS

Media Coverage

Definition: *Quantity and/or quality of coverage generated in print, broadcast, or electronic media.*

Tips: In addition to counting media impressions and your presence on various social media, remember to assess the quality of coverage. Are your talking points appearing where they did not before? Are you (or the issue) mentioned in media that reach your target audience? Is your perspective dominating or framing news coverage or the talk on key blogs or social networks?

Example: Place total of three op-eds in Washington Post and in designated foreign-policy or professional journals by May

Issue Reframing

Definition: *Changes in how your issue is presented, discussed, or perceived.*

Tips: 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.

Example: Track at least five examples by November of reframed language in legislative debate (eg, inclusion of “promoting healthy activity” in discussion of response to obesity).

Awareness

Definition: *Audience recognition that a problem exists or familiarity with your policy proposal.*

Tips: Sometimes increasing awareness of an issue – or of your proposed solution – is a significant contribution. It is reasonably easy to establish a baseline beforehand, and to gauge your impact on levels of awareness over time among your audiences.

Example: Reach 25,000 new views of human trafficking video on website by March

Attitudes or Beliefs

Definition: *Your target audiences’ emotional response to your issue or policy proposal.*

Tips: For many issues, your advocacy needs to shape underlying attitudes, perhaps combating false or negative beliefs that may block your audience from understanding the issue and your proposal.

Example: Support for funding ARV provision has increased by 10% among key decision makers, as measured by phone survey and focus group among legislative staff

Saliency

Definition: *The importance your target audience assigns your issue or policy proposal.*

Tips: 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.

Example: Twenty public references by Ministry of Health officials by November to meeting the Millennium Development Goals; this would represent quadrupling of level prior to campaign, as measured through end of May.

Public Will

Definition: *Willingness of your target audience(s) among the public to act in support of your issue or policy proposal.*

Tips: 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; number of letters and emails sent to elected officials in response to a call to action, etc.

Example: 5,000 letters sent by December to elected officials in response to a call to action on genocide

Political Will

Definition: *Willingness of policymakers to act in support of your issue or policy proposal.*

Tips: Policymakers may become more supportive for many reasons. Your policy brief or budget analysis may help convince them. So might a rally that demonstrates desire for change from voters. Increased political will is our objective in most cases, but remember it can be difficult to tease out your precise contribution.

Example: The Minister of Health and Minister of Finance issue joint call for funding improved training for midwives by mid-December.