



Assessing Effectiveness of Advocacy Efforts

Process indicators

You know the buzz phrases: ‘*evidence-based*’... ‘*data-driven*’... ‘*return on investment*’. Every day, organizations are called to defend the ways in which they direct people, time, and resources. Stewardship and common sense compel us to quantify impact, yet measuring the effectiveness of advocacy is not the same as evaluating fundraising or service delivery efforts. It is insufficient and short-sighted for non-profits to define advocacy success only as the passage of public policy, a budget measure, or a systems change. Sure, winning is our ultimate goal, but it can take years of planning, building, and recalibrating before you ever get to attend a bill-signing or benefit from a new stream of public funding in support of your mission.

Managing funder expectations and keeping staff, volunteers, and coalition partners energized and motivated throughout a sustained effort means establishing, tracking (and celebrating) benchmarks that reflect the various inputs that go into a successful advocacy campaign. Below are some characteristics of successful advocacy efforts. You may use these to establish benchmarks for your effectiveness over time. To assess growth over time, establish a rating scale to apply at key points in time for each of the selected benchmarks. It is up to you to set the actual specific goals and timelines for the benchmarks that best suit your purposes. An example is provided on the last page of this document.

Characteristics of highly effective advocacy campaigns:

What follows is a laundry list of possible advocacy campaign assets for you to both measure and plan for throughout your advocacy effort. From this list, select a set of criteria that you will measure (and rate) at the beginning of the campaign and throughout, to assess and describe the important elements of advocacy power-building.

Don’t feel constrained by this list! Come up with others that best fit your work.

For the sake of simplicity, rate each of the criteria you decide to track over time at designated benchmarking points on a scale of 1-5, such as:

1=Very Poor

2= Fair

3=Good

4=Very Good

5=Outstanding

CAMPAIGN PLANNING, GOAL-SETTING, AND LEADERSHIP INFRASTRUCTURE

- ✓ A clear and measurable goal
- ✓ A core set of stakeholder groups for whom this campaign will be a top priority

- ✓ Strong, trusted, and experienced leadership team for campaign representing key stakeholder groups
- ✓ Strong day-to-day campaign oversight and management
- ✓ Legal expertise to advise your policy work and assess related policies
- ✓ Effective decision-making structure, oversight, and accountability

RESEARCH & DATA COLLECTION

- ✓ Compelling data that describes the problem you're seeking to address
- ✓ Compelling data to make your case (science, public opinion, focus groups, evidence-based practices, fiscal analysis, etc.)
- ✓ Analysis of whom or what will be affected by your proposed policy/systems change
- ✓ Analysis of the person or agency that will be responsible for implementing the policy/system change, if adopted
- ✓ Analysis of the person or agency that will be responsible for enforcing the policy/systems change if adopted
- ✓ "Intelligence" on legislative/administrative targets (promising pathways of influence)
- ✓ Analysis of similar campaigns in other places and how they have fared to identify and leverage lessons learned

COALITION BUILDING AND MAINTENANCE

- ✓ Infrastructure and capacity for member prospecting, recruitment, mobilization and hero opportunities
- ✓ Base of organizations officially signed on to participate in campaign
- ✓ Systems and capacity for identifying and recruiting prospective coalition partners that prioritize relevance to decision-makers and ability to bring assets (time, people, connections, money, passion) to campaign
- ✓ Effective collateral material to explain campaign, invite membership, and describe different levels of involvement
- ✓ Clearly articulated and effective operating guidelines for developing campaign strategy, communications, and rapid response decisions (bylaws, statement of principle, etc.)
- ✓ Accessible and well utilized hub for sharing campaign-related materials such as meeting minutes, draft and final policy papers, facts sheets, talking points, media clippings, etc. (Website, Google docs, SharePoint, etc.)
- ✓ Inclusion of organizations/leaders that represent the affected constituency you seek to help
- ✓ Campaign name and goals that are mutually shared and prioritized by coalition partners

FUNDRAISING & DEVELOPMENT

- ✓ Infrastructure and capacity to ensure campaign has necessary resources to succeed
- ✓ Realistic budgeting, including a bare-bones budget and a fantasy budget as well as fundraising goals and plans as needed
- ✓ Adequate financial resources for current campaign expenditures

- ✓ In-kind donations from member organizations (i.e. staff time, printing, mailing, meeting space, food for meetings/events, lobbyist time, etc.)
- ✓ Adequate sources of unrestricted funding if money is needed for lobbying
- ✓ Analysis of financial supports of coalition organizations (individuals, companies, foundations, etc.) AND ability to enlist any of those financial supporters as advocates for campaign
- ✓ Analysis of decision-makers you seek to influence and their relationships with any of the funders of coalition member organizations AND if those funders might be enlisted as advocates
- ✓ Opportunities for grassroots advocates, member organizations, companies, foundations, and others to financially support the campaign

GRASSROOTS AND KEY CONTACTS (GRASSTOPS)

- ✓ Infrastructure and capacity for execution of grassroots recruitment, mobilization, and retention
- ✓ Broad-based network of grassroots advocates identified with current home/voting address
- ✓ Online action alert system that can separate advocates by legislative districts
- ✓ Sufficient number of advocates in key legislative districts
- ✓ Sufficient number of key contacts (grasstops) advocates for each decision-maker (describe what makes them a key contact)
- ✓ Sufficient number of (self-identified) affected constituencies in database
- ✓ Sufficient number and quality of relevant personal stories from affected constituencies/grasstops/donors that live in key legislative districts
- ✓ Comprehensive plan and ability to execute consistent communications with grassroots advocates based on industry benchmarks
- ✓ Response rates to action alerts that meet or exceed nonprofit industry benchmarks
- ✓ District captains for key decision-makers and capacity for targeted district-level organizing
- ✓ Training and learning opportunities provided to grassroots advocates
- ✓ Coalition partner organizations' shared investment in campaign's grassroots organizing, evidenced by activities such as forwarding action alerts to their members, organizing their own volunteers as campaign advocates, etc.
- ✓ Opportunities for offline action (i.e. opportunities for advocates to meet each other; to meet their lawmakers; to tour city hall or the state house; to attend a public hearing, etc.)

MEDIA ADVOCACY

- ✓ Infrastructure and capacity for media advocacy and communications (including social media if that is an identified strategy)
- ✓ Analysis of the media relied upon and trusted by your key decision-makers Effective key messages that have been tested to support your campaign goals
- ✓ Effective key messages that have been tested to reframe opposition arguments
- ✓ A written plan and collateral materials for training spokespersons (including decision-maker allies) and the capacity to execute
- ✓ Trained spokespeople on key issues such as:

- Affected constituencies (survivors, family members, caregivers....people your campaign seeks to help)
- Content experts
- Authorities on public support for issue and/or solution
- Economic impact of proposed policy
- ✓ Story bank from people with various perspectives to illustrate need for change with permission to use stories with media
- ✓ Strong relationships with key media (political reporters, health reporters, editors, etc.)
- ✓ Capacity of grassroots activists and coalition members to engage in media advocacy (writing press releases, personal story-telling, editorial board meetings, events, etc.)
- ✓ Coalition partner organizations with expertise and staffing for communications that will be shared with campaign
- ✓ Specific goals for and the capacity to execute social media if social media is integrated

DECISION-MAKER ADVOCACY

- ✓ Clear identification and analysis all key decision-maker targets at each step of the campaign
- ✓ Inventory of coalition partner organizations relationships with key decision-maker targets
- ✓ Inventory of individual grassroots and grassroots advocates for each key decision-maker
- ✓ Infrastructure and capacity within campaign coalition to serve maintain effective communications with each key decision-maker target
- ✓ Analysis on promising pathways of influence for each key decision-maker target (best messages, messengers, and means of influence)
- ✓ For known decision-maker opponents – understanding of rationale for opposition
- ✓ For legislative campaigns – access to registered lobbyist(s) assigned to work on issue
- ✓ Plan for maintaining regular communication with decision-maker allies
- ✓ Consistent and effective communications with all key decision-makers
- ✓ Demonstrated support for issue from colleagues of key decision-makers (may be evidenced by number of bill sponsors, petition signatures, letters of support, public testimony, media presence, etc.)
- ✓ Infrastructure and capacity to execute online and offline events designed to engage key decision-makers throughout campaign

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Advocacy assets to benchmark	Baseline measurement <i>As of Feb. 2013</i>	Short-term goal <i>(What? By when?)</i>	Long-term goal <i>(What? By when?)</i>	Outcome as of January 1 , 2014
Grassroots advocates in key legislative districts willing to take online and offline actions	2 - House Speaker 3 – Senate President 0 – Health Care Cmte Chair	5 grassroots advocates in each of the three priority districts by May 2013	10 grassroots advocates in each of the three priority districts by October 2013	House Speaker indicted in April - so needed to shift recruitment to new Speaker and found 6 grassroots so far; 14 constituents participated in in-district mtg. with Senate President and have taken action; 9 online and offline grassroots advocates found for Health Care Cmte Chair.
Inclusion of affected constituencies in grassroots membership and coalition membership	0 = cancer survivor organizations 2 personal stories collected from cancer survivors 0 = self identified cancer survivors in grassroots database	by June 2013: Meet with leaders of 4 cancer survivor organizations to describe campaign goals; Add “survivor” field to grassroots network sign-up form; Attend support group at hospital in Senate President’s district to begin identifying personal testimonials	by September 2013: Enlist 3 cancer survivor organizations to formally join coalition; Recruit and reach out to 20 self-identified survivors to hear their personal stories	Held a ‘cancer survivors lobby day’ on October 15 th that included 48 survivors recruited through 5 cancer survivor coalition partner organizations that had signed on to campaign; Had survivor meetings with every members of Health Care Cmte and House Speaker; Collected 30 personal stories with photos from survivors and wove them into calendar of weekly communications to lawmaker and media. Of those, 60% were from people living in target legislative districts