# **Advocacy Progress Planner**

**A tool for advocacy planning and evaluation**

Welcome to the Advocacy Progress Planner!

The purpose of this tool is to help you develop your advocacy plan, guiding you to clarify the goal, audience, and tactics of your advocacy campaign. It can also help you identify appropriate benchmarks for tracking your progress over time. Here’s a quick introduction to the tool:

**⯈ Meaningful and measurable advocacy:**The Advocacy Progress Planner is designed to cover the major ingredients of advocacy efforts. The tool has **eight** **sections**. As you go through each section, you will identify the key components that are relevant to your strategy. In each section, you’ll find a text box where you can provide your advocacy campaign’s specific example of that advocacy ingredient: your policy goal, your audience, your tactics, etc. Be as specific as you can!

**⯈ Tough questions:**As you move through the tool, we’ll ask some tough questions to help you check your assumptions about how change will happen. You’ll see your campaign strategy come into focus. And we’ll help you set some benchmarks to gauge your progress.

**⯈ Helpful tips:** The tool includes some handy definitions and tips that can help you be more precise about what you are trying to accomplish, and how you hope to do it. To see these tips, look for this icon: 🡵 (tip)

When you hover your cursor over that icon, a pop-up box should appear. But if you run into any technical problems viewing these pop-up boxes, have no fear! The accompanying **User’s Guide** contains a full set of tips and suggestions to help you navigate the tool.

**⯈ An ongoing process:**Advocacy rarely goes the way we think it will. You can use your completed Plan over the life of your campaign to guide periodic reviews. Use what you learn to adjust course towards your goals, editing the Plan as needed.Each section of the tool includes a text box where you can write **updates** so you can keep a running record of any strategy adjustments you make along the way. This allows you to update your Plan, while maintaining notes about what changes you made and why.

Happy campaign trails!

**1. Impact**

**Impact is the big change in the big picture that your policy advocacy helps achieve.**

Think of your impact as a statement of the broader mission of your coalition or organization. Keep that impact in mind as you set your goals for this particular campaign. But remember that impact and policy goals are not the same.

Check off one or both boxes below to indicate your intended impact.

Improved Services and Systems 🡵 (tip)

Positive Social and Physical Conditions 🡵 (tip)

**Write your intended impact here:**

Click here to enter text.

**Updates on your intended impact:**

Click here to enter text.

**2. Preparation: Knowing Your Issue**

**What preparation do you need to do to make sure you really know your policy issue?**

Before you start defining your strategy, pause a moment to assess your understanding of the policy issue and the political landscape you are trying to influence. Consider the three categories below and ask yourself how strong your knowledge is:

1. Problem Assessment 🡵 (tip)
2. Policy Assessment 🡵 (tip)
3. Landscape and Power Mapping 🡵 (tip)

You should have some way of addressing each of these. 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.

**Write your notes about any preparatory work you plan to do:**

Click here to enter text.

**Updates on your preparation:**

Click here to enter text.

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**3. Policy Goals**

**Your policy goal should be the tight focus of your current advocacy campaign.**

For example: a law, regulation, or practice that needs to be designed, implemented, blocked, protected, or measured.

Check off one or more boxes below to indicate your policy goal.

Policy Development 🡵 (tip)

Placement on the Policy Agenda 🡵 (tip)

Policy Adoption 🡵 (tip)

Policy Implementation 🡵 (tip)

Policy Monitoring and Evaluation 🡵 (tip)

Policy Maintenance 🡵 (tip)

Policy Blocking 🡵 (tip)

**Write your policy goal here:**

Click here to enter text.

**Updates on your policy goal:**

Click here to enter text.

**4. Audiences**

**Who needs to hear your message?**

Focus on the kinds of people who make the decision – or directly influence people who make the decision – about your policy goal. Understanding the target for your message is critical. 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?”

Check off one or more boxes below to indicate your audiences.

Elected Officials 🡵 (tip)

Candidates for Public Office 🡵 (tip)

Public Administrators 🡵 (tip)

Voters 🡵 (tip)

Political Donors 🡵 (tip)

Media 🡵 (tip)

Business 🡵 (tip)

Community Leaders 🡵 (tip)

Courts 🡵 (tip)

Popular Culture Artists and Gatekeepers 🡵 (tip)

Specific Constituencies 🡵 (tip)

Other Audiences? 🡵 (tip)

**Write your specific target audiences here:**

Click here to enter text.

**Updates on your target audiences:**

Click here to enter text.

**5. Contextual Factors**

**Which contextual factors may affect your success?**

It’s easy – but risky – to overlook contextual factors that may affect your success. Anything from the noisy distraction of an unrelated political battle to a more pressing advocacy issue can knock you off track. The state of play between potential partners, competitors, and opponents can also affect your success. Acknowledging these factors – and figuring out how best to navigate them – can contribute to the success of your strategy.

Check off one or more boxes below to indicate the contextual factors relevant to your campaign.

Political Climate 🡵 (tip)

Economic Climate 🡵 (tip)

Social Climate 🡵 (tip)

Prior Experience 🡵 (tip)

Issue Competition 🡵 (tip)

Partners, Competitors, and Opponents 🡵 (tip)

**Write the specific contextual factors relevant to your campaign here:**

Click here to enter text.

**Updates on contextual factors:**

Click here to enter text.

**6. Activities and Tactics**

# **Which activities will enable you to reach your audience and goals?**

# Knowing what you hope to do throughout the life of your campaign is very important.Thinking it through in the planning stage makes every other stage easier – and will help you learn as you go and evaluate your progress.

Check off one or more boxes below to indicate which activities you intend to use.

**Policy and Politics**

Issue/Policy Analysis and Research 🡵 (tip)

Candidate Education 🡵 (tip)

Policy Proposal Development 🡵 (tip)

Relationship Building with Decision Makers 🡵 (tip)

Litigation or Legal Advocacy 🡵 (tip)

Lobbying 🡵 (tip)

**Communications and Outreach**

Earned Media 🡵 (tip)

Paid Media 🡵 (tip)

Public Service Announcements (PSAs) 🡵 (tip)

Media Partnerships 🡵 (tip)

Digital Media 🡵 (tip)

Public Opinion Research 🡵 (tip)

Briefings/Presentations 🡵 (tip)

Rallies and Marches 🡵 (tip)

Coalition and Network Building 🡵 (tip)

Grassroots Organizing and Mobilization 🡵 (tip)

Demonstration Projects or Pilots 🡵 (tip)

**Write your activities and tactics here:**

Click here to enter text.

**Updates on your activities and tactics:**

Click here to enter text.

**7. Inputs and Capacities**

# **What will it take to implement your strategy effectively? What strengths do you have? What else do you need to make your campaign a success?**

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. The **Organizational Capacity** inputs listed below focus on the capacity of your organization or coalition to implement your advocacy strategy. The **Planning and Preparation** inputs cover a final few strategic pieces that need to be in place before you launch your campaign.

Check off one or more boxes below to indicate which inputs and capacities are needed for your campaign.

### **Organizational Capacity**

Funding 🡵 (tip)

Staffing and Leadership 🡵 (tip)

Skills 🡵 (tip)

Infrastructure 🡵 (tip)

Visibility 🡵 (tip)

### **Planning and Preparation**

Data Collection 🡵 (tip)

Message and Materials Development 🡵 (tip)

Contingency Planning 🡵 (tip)

**Write your inputs and capacities here:**

Click here to enter text.

**Updates on your inputs and capacities:**

Click here to enter text.

**8. Benchmarks**

**What benchmarks would signal that you are making progress toward your advocacy capacity building and policy goals?**

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. **Check out the User’s Guide for some sample benchmarks!**

Below you’ll see two categories of benchmarks to help you track progress: advocacy capacity benchmarks and policy benchmarks.

**1. Advocacy Capacity Benchmarks**

Advocacy capacity 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?

Check off one or more boxes below to indicate which advocacy capacity benchmarks you are currently working toward. Then use space provided to write in the specific benchmarks you are setting.

More or Diversified Funding 🡵 (tip)

Staffing, Skills, and Infrastructure 🡵 (tip)

Organizational Visibility or Recognition 🡵 (tip)

Partnerships or Alliances 🡵 (tip)

Collaboration and Alignment 🡵 (tip)

Constituency or Support Base Growth 🡵 (tip)

**Write your capacity benchmarks here:**

Click here to enter text.

**Progress or updates on capacity benchmarks:**

Use this section to record your progress to date on reaching the benchmarks you set. If you have not reached a benchmark, consider adding some notes discussing why – and what you are doing or plan to do differently.

Click here to enter text.

**2. Policy Benchmarks**

Policy 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.

Check off one or more boxes below to indicate which policy benchmarks you are currently working toward. Then use space provided to write in the specific benchmarks you are setting.

Knowledge and Awareness 🡵 (tip)

Salience 🡵 (tip)

Issue Reframing 🡵 (tip)

Public Will 🡵 (tip)

New High-Profile Champions 🡵 (tip)

**Write your policy benchmarks here:**

Click here to enter text.

**Progress or updates on policy benchmarks:**

Use this section to record your progress to date on reaching the benchmarks you set. If you have not reached a benchmark, consider adding some notes discussing why – and what you are doing or plan to do differently.

Click here to enter text.

**Summary View of Your Strategy (Optional)**

If you need a summary view of your strategy for reference, you can use the table below to check off the key components in your strategy.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Impact** | Improved services and systems | | | | | Positive social and physical conditions | | | | |
| **Goals** | Policy development | Placement on policy agenda | | Policy adoption | Policy implementation | | | Policy monitoring and evaluation | Policy maintenance | Policy blocking |
| **Audiences** | **Contextual Factors** | | **Activities and Tactics** | | | | | | **Benchmarks** | |
| Elected officials | Political climate | | **Policy and Politics** | | | | **Communications and Outreach** | | **Advocacy Capacity** | |
| Candidates for public office | Economic climate | | Issue/policy analysis and research | | | | Earned media | | More or diversified funding | |
| Public administrators | Social climate | | Candidate education | | | | Paid media | | Staffing, skills, infrastructure | |
| Voters | Prior experience | | Relationship building with decision makers | | | | Public service announcements | | Organizational visibility or recognition | |
| Political donors | Issue competition | | Policy proposal development | | | | Media partnerships | | Partnerships or alliances | |
| Media | Potential partners, competitors, opponents | | Litigation or legal advocacy | | | | Digital media | | Collaboration and alignment | |
| Business |  | | Lobbying | | | | Polling | | Constituency or support base growth | |
| Community leaders | **Inputs and Capacities** | | | | | | Briefings/presentations | | **Policy** | |
| Courts | **Organizational Capacity** | | **Planning and Preparation** | | | | Rallies and marches | | Knowledge and awareness | |
| Popular culture artists and gatekeepers | Funding | | Data collection | | | | Coalition and network building | | Salience | |
| Specific constituencies | Staffing and leadership | | Message and materials development | | | | Grassroots organizing and mobilization | | Issue reframing | |
| Other audiences | Skills | | Contingency planning | | | | Demonstration projects or pilots | | Public will | |
|  | Infrastructure | |  | | | |  | | New high-profile champions | |
| Visibility | |  | |