

**THE  
CAMPAIGN  
WORKSHOP**

# COMPLETE GUIDE TO ADVOCACY


Key strategies to craft and implement  
a winning advocacy plan

NEW FOR  
2024



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# INTRODUCTION

At The Campaign Workshop, we have been lucky to work with clients for 15 years as they craft strategies to achieve advocacy wins both big and small. We love helping people learn advocacy strategies to create meaningful impact. That's why we've collected our advocacy knowledge and created this eBook to provide key advocacy tips and strategies to build on.

In a world where ideas, causes, and social change are constantly evolving, the power of advocacy has never been more vital. Advocacy is the art and science of championing a cause, raising awareness, and creating change through strategic communication and action. Advocacy serves as the driving force behind movements, policies, and initiatives that shape our world.

This eBook lays out a clear path for creating a robust advocacy plan from start to finish, as well as the latest tactics and digital tips and tools for modern campaigns. Whether you are launching your first advocacy campaign or looking to freshen up your next campaign, we're here to help. From the foundational elements of creating an advocacy plan to the intricacies of digital advocacy campaigns and program evaluation, each chapter delves into essential aspects of advocacy strategy and execution. We'll explore the dynamic landscape of advocacy, equipping you with the knowledge and tools needed to navigate it effectively.

Seeing our clients achieve major wins is always a highlight for us. But because advocacy can often be a long road, we'll show your team how to break down your big goals into smaller milestones, which means more victories along the way. Whether you are launching your first advocacy campaign or looking to freshen up your next one, we're here to help. Reach out to us.

These eBooks take a lot of time to put together and are a team effort. We would like to thank the current staff at The Campaign Workshop as well as past employees who have contributed to this content work over the years. We would also like to thank our clients, from whom we have learned a lot and who have encouraged us to continue to work on and refine our content.

**For questions or comments, reach out to [jfuld@thecampaignworkshop.com](mailto:jfuld@thecampaignworkshop.com)**





In the ever-evolving landscape of nonprofits and advocacy, success hinges on one vital factor: a well-crafted advocacy plan. Organizations that put energy into writing a clear and comprehensive advocacy plan will tell you a thoughtful strategy is critical to campaign success as well as organizational growth.

An advocacy plan is different from a strategic plan for your organization. An advocacy plan is more situational and focused on a specific goal. A strategic plan has a longer-term vision for the organization in general. Whether you're a pro at advocacy plans or are writing your first one, this guide will help focus your planning around a clear strategy and measurable outcomes.

Below are components of an advocacy plan as well as tips to help you develop your own clear and comprehensive plan. Note that there is no magic formula but rather entry points that allow you to create a clear strategic vision, tactics to achieve your goals, and a timeline to measure success.

## **START WITH AN ORGANIZATIONAL VISION**

The best advocacy leaders can articulate a vision and use successes and failures to grow their organizations. What does the world, as it relates to your core issue(s), need to look like for your work to no longer be required?



Having a real vision gives your team a north star to guide them through their daily work and decision-making. It allows them to check and see if the energy spent is moving the organization in the right direction. It also keeps them on track when making critical decisions regarding organizational resources.

Visioning exercises are a great way to lay out your future. These exercises can be done verbally, through whiteboarding, or even by drawing a picture of what you want your organization to look like.

## DEFINE CLEAR GOALS

Having clear, articulated, and achievable goals with metrics for your organization's advocacy work is key to success. Everyone in your organization should know what objectives the organization is trying to achieve at any given point. There will be long-term and short-term goals attached to each project. We'll explore goal-setting later in this chapter.

Let's say your organization wants to increase online visibility for your issue. Achievable goals might include posting three times a week across social media platforms, publishing one blog post a week, and sending out a monthly newsletter that focuses on an aspect of your issue. To achieve this goal, you might tap folks across your organization to contribute to this effort.

## INTEGRATE YOUR ADVOCACY WORK

Whether your organization focuses strictly on advocacy or advocacy is just one of its arms you should think about your work holistically. When planning your advocacy, remember that other legislative, electoral, and community-building efforts are also happening. Keep those in mind, whether they are internal or external efforts.

One mistake organizations make is having all their department plans developed separately versus working to complement each other. For advocacy efforts to succeed, they must happen as part of the larger picture. Understanding each piece helps grow the others. This includes fundraising—donors can be great advocates, and advocates make great donors.

## BUDGETING AND FUNDRAISING FOR ADVOCACY

A defined budget allows you to explain to donors exactly where their support will be going and how it directly translates into reaching your organizational goals. Understanding what your advocacy efforts need will help increase your fundraising by allowing you to be transparent with donors.

We recommend building fundraising into your secondary goals for advocacy. The best advocacy strategies to grow your organization include a mix of fundraising, whether it is low dollar or high dollar, or grants. Often, you can build a new group of donors and advocates simultaneously.

## KNOW YOUR ADVOCACY AUDIENCE

Your advocacy plans should always be audience focused. Determining who your audiences are will help you decide on the best messages and tactics to implement. You may start with just one audience and expand over time.



## DO YOUR RESEARCH

Before you launch a campaign, look back on what has (and has not) worked for your organization previously. Make sure the issues you are working on fit your organizational goals and your audience.

While your organization can turn to professional research tools, like focus groups, we encourage folks to start with DIY tools, like the Tully message box (**see Chapter 4 for more info**) and the Midwest Academy Strategy Chart (**more on this in Chapter 10**). These DIY tools can help focus your efforts.



## CREATING A MESSAGE FOR ADVOCACY

Every campaign needs a clear and compelling message that contrasts your vision and your opposition. Utilizing a message box exercise, performing focus groups, or conducting polling can help you home in on a compelling message and theme for your target audiences. **We've devoted all of Chapter 4 to messaging for advocacy.**

## KNOW YOUR ORGANIZATIONAL LIMITS

All organizations have limits; make sure you know what they are and work to decide if they are a pattern to overcome or bylaws you need to work within.

## PLAN YOUR ORGANIZING EFFORTS

Building relationships with your communities is a core part of organizing. It's the most effective way to get your message to the public while also building trust. Advocacy organizing can help build a following for your organization and even grow membership.

**We explore community advocacy in Chapter 5.**



## PLAN YOUR LEGISLATIVE EFFORTS

If policy and legislative efforts are part of your advocacy plan, understand that these efforts take time and intentional relationship building. The legislative goals may evolve, but understanding and communicating them with your team will help keep everyone focused.

## UNDERSTAND YOUR LEGISLATIVE TARGETS

Your landscape analysis with power mapping will help you determine your best legislative targets. Although legislative targets may change based on issues or policy, knowing a handful of ongoing targets will enable you to make long-term progress.



## BUILD AN ENGAGED COALITION

Working in a coalition can significantly increase your impact and reach, but it also comes with its own challenges. A clear direction and vision for your coalition efforts is key to building power together and staying on course.

Don't just engage the same folks your organization always has. Plan for the coalition you need to build based on the coalition you have. **We've devoted a portion of Chapter 5 to coalition building.**

## MAKE YOUR WORK TIME-BOUND

Instituting a timeline for benchmarks and deadlines will help keep your organization, as well as your coalition, on track. If there are no benchmarks or deadlines, there is no way of tracking progress or holding your team(s) accountable. Consider breaking everything into tasks and compiling them in a spreadsheet where someone is responsible for tracking them.

## END WITH TACTICS

Once you have a clear strategy, think about the tactics to achieve your goals. **You can find more information about tactics in Chapters 3 and 6.**

## PLAN TO EVALUATE

Plans get better with time, but they only improve if you look at what worked and what did not. **Chapter 9 focuses on creating successful evaluations.**



# THE IMPORTANCE OF BEGINNING WITH A BUDGET

When developing an advocacy program, your budget should always come first, especially if you plan to bring in outside help. This may seem counterintuitive (like you're tipping your hand and about to get taken for a ride), but getting everyone, both internally and externally, on the same page about finances at the start is essential.

When bringing on a consultant or outside support, it's important to do some research and find people you trust when it comes to the people and the proposal. The world of advocacy is small—if you don't have an existing relationship, chances are you know someone who knows someone who can provide some insight when it comes to a consultant's methods and reputation. Your organization has worked hard for those resources, so you want a consultant who will treat them that way and get you the most for your money.

Here are a few ways being upfront about your budget can ensure a smoother process from start to finish.

## SHARE REALISTIC NUMBERS

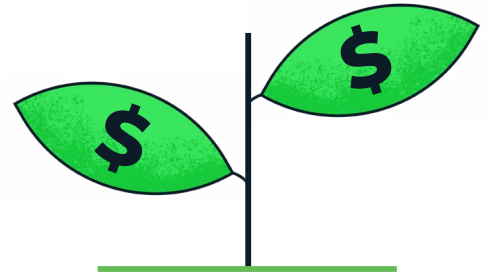
It is important to know the level of resources you have to spend on a given program and that they are broken down for internal expenses and external expenses. Providing a ballpark budget for a consultant allows them to provide you with a realistic proposal of services and support. Since every organization's idea of a "large budget" is relative to their size, it helps to know the numbers up front. For your organization, a large budget might be \$30,000, but for a different organization, a large budget might be \$500,000. A consultant should always work to stretch your dollar, but what they can realistically do for each of these budgets is very different and will impact the overall strategy.

If your consultant doesn't have information about your finances, they may offer you strategies that are well outside of your budget. Give them the information they need to build you an amazing budget that fits your circumstances and is achievable.



## AN ACCURATE BUDGET SAVES TIME

Time is at a premium, and wasted time may mean lost votes, missed opportunities to sway decision-makers, or increasing costs (e.g., cost-per-point increases as you near an important collection point). Getting clear on the budget numbers with your team early on will reduce your back-and-forth (and who doesn't love less emailing?) and help you get to the vital work of implementing your program.



## THE RIGHT BUDGET LEADS TO THE RIGHT TACTICS

Some tactics only make sense at larger or smaller budget levels. Knowing your advocacy budget level as planning begins will help ensure that the tactics that are built into your budget make sense within the context of your particular circumstances. TV might be the best way to reach a broad audience very quickly, but it might also be out of reach with your budget. However, that same budget might be able to run targeted digital and radio advertising that still helps get your message to the right people.

## A CLEAR BUDGET CAN MEAN CLEAR GOALS

Goals and budgets are also closely linked. As consultants, we see part of our job as working with clients to refine their goals and to make sure they are achievable within the context of any given program based on their budgets. Understanding the likely budget allocation is a critical element to fulfilling that part of our role and ensuring you have the resources to achieve your goals.

### REMEMBER: BUDGETS CAN CHANGE

The budget number you give doesn't have to be the be-all and end-all in the program—it can change or be a range. It may also be that you're not sure what it will cost to achieve your goals, and you're trying to figure out what makes sense.

If you're talking to people you trust (and talking to enough people), you should be able to have those conversations openly. What's really needed is a bottom line, an amount that you know you can (and likely will) spend on a particular project. This will help get you off on the right foot and save a lot of time in the initial planning phase.

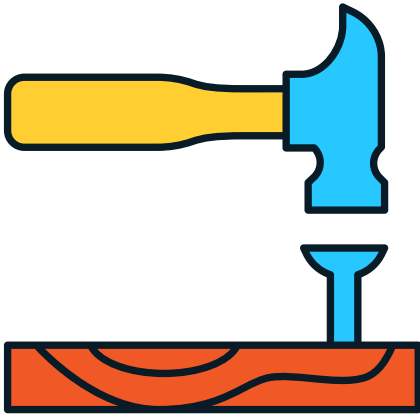
## KEY TAKEAWAYS

Setting aside time to craft your advocacy budget and plan at the start of your project will be enormously beneficial to your organization. It will help everyone on your team, as well as your consultants, get on the same page in terms of goals, scope, and timing. Things might change or you might hit stumbling blocks, but successful outcomes are more likely when you're clear on what you're trying to achieve and how you'll get there.



# CHAPTER 2:

## CRAFTING WINNING ADVOCACY CAMPAIGNS



Executing a successful and impactful advocacy campaign requires time, dedication, and organization. These days, there is intense competition from various advocacy issues fighting for attention. Being prepared from the start is essential. We have compiled several tips to help you run an effective and winning advocacy campaign.

### CREATE MEASURABLE GOALS

Frequently, organizations that wish to run advocacy campaigns have goals that are hard to measure, making success hard to measure in turn. For example, how would an advocacy campaign determine if a goal such as “raising awareness” was impactful? Choosing the right quantifiable metrics to judge this goal is challenging.

Rather than having a goal that is hard to assess, try to find goals for your advocacy campaign that can be measured. Some common advocacy goals include:

**Gaining a specific number of new supporters**

**Raising donations to your organization by a specific percentage**

**Receiving a specific number of signatures on a petition**

One way to measure if your advocacy campaign has raised awareness is to run a paid digital ad campaign with a target number of impressions or views.

## **PRIORITIZE ONE GOAL**

As mentioned, the success of advocacy campaigns can be challenging to measure. Focusing on multiple things as your primary goals can make it hard to evaluate your campaign's success accurately. We recommend prioritizing one goal and having others be secondary or tertiary. Having a singular main objective can help you and your supporters focus and be more effective.

## **PLAN AHEAD**

While it's common to run rapid-response campaigns these days, do your best to plan and organize as much as you can ahead of time to make sure you get the most out of your advocacy campaign. After you've determined your primary goal, take time to map out exactly what steps you will need to take to reach it.

For example, if you're trying to get a bill passed, consider which legislators you need to influence and which people and organizations can act as advocates to help you persuade them. In this example, there would likely be key lawmakers you would target and people like their constituents, your activists, or members of the press to whom they might listen. Then you'll have to work on organizing the people who would persuade those legislators as efficiently as possible.

If there are any assets you need to create or gather, such as supporter testimonials, planning ahead can allow you to start pulling them together well in advance to avoid delays. Determine any important dates, like the day the bill will be voted on, and work backward to allot how much time you can give yourself for each piece of your campaign plan. Then, let everyone else involved in your campaign know what that schedule is so you can stick to it.

This type of planning is possible for other types of advocacy campaigns, too, not just ones attempting to get a bill passed. Look at your campaign's specific goals and apply similar steps, customized depending on your needs.

## **CREATE URGENCY**

Nothing creates action for an advocacy campaign like an urgent deadline, and nothing promotes procrastination like a vague one. If you are lucky enough (we use "lucky" loosely here) to be working on an advocacy campaign that has a strict timeline (e.g., you are looking to get a governor to veto a bill before the end of the legislative session), make sure your targets and advocates know what the deadlines are. Advocates tend to be more motivated to act when they see the action as a priority to them.

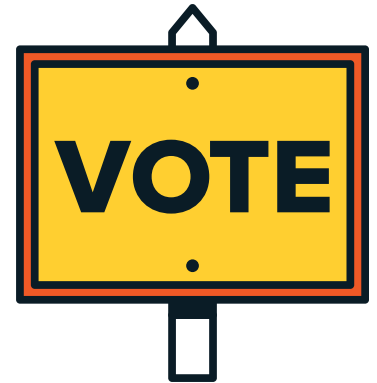
If, on the other hand, your advocacy campaign doesn't have a strict timeline—and the urgency that comes with it—create one. For example, set a specific date for when to send a petition to a legislator, file a ballot measure, or whatever else your specific campaign entails. It is helpful to do this during your planning stage while developing exact steps. Ensure your advocates and targets know and believe the urgency of your timeline.

## MAKE SURE ADVOCATES KNOW HOW THEY CAN HELP

Lay out straightforward and easy ways for your advocates and new supporters to get involved. Can they sign a petition online? Meet with their legislator? Can they collect petitions or signatures from their friends and neighbors? If there isn't an official form, can they download a PDF from your website to collect the signatures?

How can super-advocates tell their stories and get the word out about why this issue is important in their lives? Can they add their stories to a story bank, get in front of a legislator on lobby day, or maybe speak at a press event?

Once you've figured out what your asks are, make sure you communicate them clearly to your supporters. Your website should include a list of things supporters can do to help. Your team should communicate those items to them regularly via social media, email, and volunteer meetings.



## WORK WITH EXPERTS

You don't have to run your entire campaign all by yourself. Planning and managing an effective advocacy campaign isn't easy. Connect with other organizations that can act as allies to see if there are ways you can work together to divide up the work. Plan regular meetings with these allied groups so everyone can review each group's role in the larger effort. This will also give everyone a better sense of which groups are getting communicated with and about which issues.

You can also hire a consultant to help you take your campaign to the next level. They can help you plan and run your campaign or train you to manage it on your own. Trainings can teach you how to budget, build a coalition, and garner support for your issue. At The Campaign Workshop, we work on advocacy campaigns daily—big and small, federal and local, all over the country and even some around the world. **Learn more about our trainings [here](#).**



# CONDUCTING ADVOCACY RESEARCH

Advocacy research is an important step in building a public affairs campaign of any size. Advocacy campaigns come in all shapes and sizes, from multimillion-dollar public-facing campaigns to local grassroots community advocacy campaigns. The advocacy research you need to build a good campaign strategy comes in many forms and budget options as well. A big part of the answer to “What kind of advocacy research is right for me?” is based on your campaign’s overall goal and strategy. This will inform the type of research needed. In addition to strategy, your budget will determine which advocacy research options will be the most cost effective.

If you are running a campaign with a budget below \$50,000, your options for traditional research are going to be limited. However, there are some inexpensive (although more time consuming) ways to get a pulse of how your target audience will respond to your messaging. If you’re running a campaign over a \$50,000+ budget, then you might consider paid research tactics, but you’ll want to be sure they align with your goals and give you the information you need to achieve them.

Here are some advocacy research tactics that can be used at lots of different budget levels:

## 1. IN-PERSON FOCUS GROUPS

In-person focus groups are an excellent way to gauge understanding of and level of personal connection to your issue. An in-person focus group generally has 5-10 participants per group, with organizations creating 4–6 groups with different demographics and locations. For this size, the average budget range is \$15,000–\$18,000 per group plus the travel costs. We recommend organizations test issues as well as creative concepts so they can have a good understanding of how people will react to an advocacy campaign dialogue. The cost of focus groups depends on the firm you are using, the issue topic, and the participants you are recruiting. A focus group is in-depth research; you have real people talking about your issue in real-time. As such, it is also typically the most costly type of advocacy campaign research.

## 2. ONLINE FOCUS GROUPS

The price for online focus groups is similar to that of in-person groups, but the flexibility of online groups allows you to get more details because they aren’t limited by time constraints in the same way. They also help to avoid the “group think” you can sometimes get in traditional in-person groups. There are several ways to set up online groups, and they can even be designed so folks can interact with each other. For online focus groups with 5–10 participants per group and 4–6 groups, the average budget range is \$13,000–\$17,000 per group.



### 3. DIGITAL PANELS

These are like online focus groups, except more in-depth. These panels are conducted over a series of days, and you can ask multiple rounds of follow-up questions to get the necessary information. It can be useful for interaction, but the cost is not always as friendly as you might like. The average budget is \$35,000–\$50,000 for an average-size program of 800 interviews that are 15 minutes each in length.

### 4. TRIADS

Triads are smaller focus group interviews of (you guessed it) three people. They are a cheaper way of handling in-person focus groups, but they don't always allow for as rich a diversity of opinions. Be warned: Conducting too many of them would likely cost as much as traditional in-person focus groups.

### 5. BENCHMARK POLL

Benchmark polls are typically where political campaigns start, though many advocacy campaigns could use them as well. This poll is longer and more in depth. Often, pollsters will read participants' longer questions or campaign messages and ask them which is more persuasive or more likely to spur them into action. The price for benchmark polls is mostly determined by length, and they can get expensive quickly. For example, the average budget for 800 interviews that are 18 minutes each in length is between \$55,000 and \$70,000.



### 6. TRACKING POLL

A tracking poll is a short and simple survey that provides a quick and dirty look at where the participants stand on any given candidate or issue. Tracking polls are conducted with live calls. For one tracking poll program, 800 interviews at 8 minutes per interview, the average cost ranges from \$30,000 to \$40,000.

### 7. IVR POLLING

IVR polling is a “press one, press two” automated poll that's often done over the phone. It is a beefed-up robocall, essentially. It's a very low-budget option, and you can get some basic information on your issue. There are limitations on length, and your results may have an inherent bias depending on length, but we have seen good results on these to get a quick if limited picture of what is going on with an issue.

## 8. A/B TESTING

A/B testing can be a quick and cost-effective way to test different messages and be creative about your issue. You give one message to one small subset of your targeted group and another message to a different subset of your targets. Whichever message spurs the most direct action is the winner. If you have competing ideas with multiple pieces of creative but need to decide which works better, an A/B testing program might be what you need. A/B testing can be done easily with digital advertising and as part of an experiment-informed program.

## 9. EXPERIMENT-INFORMED PROGRAM

An EIP tests your campaign with a subset of your overall universe and allows you to look at those results and then roll out a refined campaign to your larger universe. We have written about experiment-informed programs before and are big fans. However, whether it will work for your organization is a budget and strategic question.

## 10. ID CALLS

ID calls are your basic “Are you for or against this issue?” calls. Some advocacy campaigns use traditional political ID calls instead of a benchmark or opinion poll, but we think that’s a poor use of time and resources.

If your goal is to understand what moves people, ID calls won’t give you any information on why someone does or does not support an issue, nor what might help to change their mind. ID calls are usually not done with valid sampling or calling protocols, so your results may not be useful as a real picture of what is going on in your community.

### KEY TAKEAWAYS:

Advocacy research can help your team craft an advocacy message that resonates with your audience. No matter your organization’s size or budget, there are ways to conduct this research at all different levels. Your consultants can help you pick the best research methods for your efforts. You might also layer techniques. For example, you might begin with a benchmark poll or an online focus group and then narrow the message down further via A/B testing.



# THE IMPORTANCE OF OPPOSITION RESEARCH FOR ADVOCACY CAMPAIGNS

Opposition research is an essential component of any advocacy campaign's messaging strategy. This research is more commonly associated with political campaigns; however, articulating a contrast with the other side is equally important in the advocacy space. Understanding what your opposition is saying will allow you to create a strong message to move key audiences.

If you want to effect policy change successfully, you need a comprehensive understanding of the landscape you're operating in and how people feel about your cause. So, where do you begin?

## DOES MY ADVOCACY CAMPAIGN NEED OPPOSITION RESEARCH?

If you're running an advocacy campaign, you will inevitably need some advocacy research to reach your goal. What that research strategy looks like and how much money you spend on it will depend on the size and nature of your advocacy campaign.

Identify your campaign's primary goal before you pin down a research plan. Is your public health coalition aiming to pass a tobacco tax? Is your environmental group trying to get supporters to hold state legislators accountable for protecting rivers and streams from pollution?

Once you've identified your goal for the program, you can figure out the tactics and develop a clear message that will help achieve that goal. To craft a message that resonates, you'll want to understand the lay of the land in your environment by addressing some key questions:

- How well known is the issue?
- Do folks have a defined opinion on the issue? Are opinions divided across specific groups in your community?
- How much support is there for your issue among the public?
- How much opposition is there for your issue among the public?
- Who is the opposition (ex. legislators, organizations, funders, etc.)?
- What tactics do you expect your opposition to use to undermine your goal (ex. grassroots, grasstops organizing, paid media)?
- How much money will they spend? What is the timing of the action?
- Who are your supporters (ex. legislators, organizations, activists, community leaders, etc.)?

- How can you leverage this support (ex. resources like time, money, and people)?
- Why have previous efforts to advance this goal failed?
- How will your campaign frame its goal?
- How will your campaign frame your opponent's goal?
- What will your opposition say about their goal?
- What will your opposition say about your goal?

Conducting opposition research can help you answer these questions and strengthen your overall campaign and messaging strategy.

## WHAT ARE THE OPTIONS FOR ADVOCACY OPPOSITION RESEARCH?

The tactics you'll use to conduct opposition research for your advocacy campaign will depend on your goal and your budget, but here are a few routes you may consider:

### · **DIY Opposition Research**

The jump from no opposition research to basic research is huge. Even the smallest advocacy campaign should do basic research on what the opposition is up to and what constitutes the coalition for or against an issue. Doing basic donor research and understanding what has been tried before and who cares about an issue can push your advocacy campaign to the next level. It doesn't take much to make an impact here—a volunteer or group of volunteers with time and direction can pull together very useful opposition research reports. In fact, volunteers will often have perspectives about community viewpoints that you or your staff might not—a valuable tool for advocacy opposition research.

### · **Hire an Opposition Researcher**

Hiring a researcher is often a smart move if you are running an advocacy campaign against a well-funded opponent or multiple special interests. An opposition researcher will help you understand where funding and opposition support is coming from, what other endeavors the funders are connected to, and what public statements they have made.

A professional opposition researcher often returns with more information than you could have anticipated. Take the time to go through their reporting closely—what stands out to you might not necessarily stand out to them. An early opposition research report can be a tool you reference throughout your campaign. It's better to have the information and not need it than to need the information and not have it!





- **Impact Analysis**

Understanding a policy’s potential or ongoing impact can help sway public opinion for or against an issue. A policy or topic expert can do this kind of analysis—think economic or environmental impact analysis. Adding this professional research report to your toolkit can give you a leg up in your strategic communication and legislative lobbying efforts. Even if your issue seems obvious, having quantifiable metrics on impacts can make a big difference to potential supporters and decision-makers.

## **KEY TAKEAWAYS**

Part of research is a “know thy enemy” approach—you need to know who your opposition is, their likely strategy and tactics, and what their resources look like. But in advocacy, it’s also essential to dive deeply into similar campaigns, both winning and losing, to see what they did right, what they got wrong, and how they ultimately won.



# CHAPTER 3:

## ADVOCACY TACTICS & STRATEGIES



Whether you're planning a federal, state, or local campaign, picking the correct advocacy tactics and strategies will save your organization time and money and, hopefully, make it more likely that you'll reach your goals.

Advocacy can come in many shapes and budget sizes. No matter the size, you need a clear and detailed advocacy strategy outlining your overall goal and effective tactics to help you cross the finish line.

Let's look at a hyperlocal example. You and your neighbors love your dogs (how could you not?) and think it's sad that the dogs only get to see each other while on leash. They all want to run and play unfettered by their slow (but much loved) humans. You want to get the city to build a dog park. So, you call a meeting at the local watering hole to plan how to do that.

Your first step is to develop your advocacy strategy. This is the plan to achieve your specific goal, which, in this example, would be to get the city to build a dog park. Your strategy is a plan, including a collection of tactics that build toward your goal. Your larger strategic plan should answer questions, including (but not limited to):

- Who are the relevant decision-makers you need to target? This could be leadership, a committee chair, or a potential advocate you need to engage.
- Who among them is movable, and who is likely not? Know where you stand and look at the history around your issue to determine a path.
- What is your timeline, and what are the important dates within it? Timing and planning around timelines are key. This lets you be proactive instead of reactive. It is easy to get into a pattern of reaction unless you plan.
- How do you develop a complete advocacy strategy? Using a tool like the Midwest Academy Strategy Chart is a good place to start (See Chapter 10 for more info on the chart.) Take the time to work through this.
- What tactics should be used to advance your goal? Once you have a written strategy, you should define your tactics—but remember, you need to have set a strategy.

## Choosing Your Tactics

So, what do we mean by advocacy tactics? They are actions you take to achieve your outcome—it's how you carry out your strategy. There are many options when it comes to tactics, and part of building out your overall strategy is determining which tactics will advance your goal, which might detract from it, and how to balance it all with your available resources.

- You can send letters or emails, or call your local elected officials or the relevant decision-makers when building dog parks.
- You can make flyers to hand out (or mail) to your neighbors asking them to get involved.
- Maybe you want to really draw attention to Fido's plight with a bit of civil disobedience—hold a sit-in (walk-in) with your dogs, taking over the empty lot on your street that would be the perfect place for a dog park.
- Call the media and hand them all those fancy flyers. Everyone loves dogs, especially local news stations trying to find uplifting news stories that work well on camera.
- Create a petition on a site like Care2 to help drum up wider support for the park within your city.

You will choose your best tactic based on your target, in this case, decision-makers, based on what you know about them. In these examples, maybe the councilmember you need to move prefers to hear directly from their own constituents. In that case, you could organize people in that district to set up meetings, call in, or write letters. However, maybe you've noticed this councilmember usually only moves when there is larger public pressure, so then you might choose the sit-in to get larger media coverage to add pressure on them. There are an infinite number of tactics you could choose, but you want to choose the one that gets you the outcomes you need.



### Troubleshoot potential mistakes:

Before you move forward, check out our list of common advocacy mistakes.

- Be sure you choose tactics based on goals
- Have a clear action you want targets to take
- Ensure tactics are driving the actions you need
- Match your tactics to your target audience
- Keep an eye on budget to ensure the cost is worth the outcome

# ADVOCACY TACTICS TO BREAK THROUGH THE NOISE

Advocacy tactics have changed a lot in the past decade. We can now use targeting and analytics to find folks who could engage on an issue. Public affairs campaigns are now common, from municipal-level issues to federal ones. These campaigns use a combination of advocacy tactics and strategies, including digital ads, patch-through calls, direct mail, virtual lobby visits, and much more.

Here is a preview of some advocacy tactics we've honed to break through the noise of our current era. **We'll dive deeper into many of them in Chapter 6**, where we discuss different forms of communication for advocacy.

## LOBBYING BY MERGING OLD AND NEW TACTICS

More sophisticated advocacy tactics include integrated campaigns that use the best old-school lobbying fused with new-school targeting tactics and advocacy technology. Legislators are more accessible now than in the past, but reaching them is still hard. Getting a virtual meeting with constituents still takes planning, organization, clear messaging, and defined goals. It is more important than ever to plan lobbying efforts to fit with the legislative calendar and a public affairs campaign.

## GRASSROOTS ADVOCACY TO BRIDGE THE ENGAGEMENT GAP

Grassroots advocacy strategies are an effective and efficient way of expanding and engaging the universe of constituents who care about an issue. If you can get enough constituents to contact their lawmakers and stay active on an issue, your advocacy program's chances of success will significantly increase. Think of how you would want to be engaged if you didn't know your organization, and then build out your engagement funnel accordingly.

## MOBILE OUTREACH FOR DIGITAL ADVOCACY

Mobile outreach has become a great advocacy tool, whether it is old-school texting or cellular geofencing (creating a virtual "fence" around an area and serving ads to the folks who fall inside the zone). The flexibility and scalability of mobile technology make it a great advocacy tool. Consider whether you have the capacity to weave mobile outreach tactics into your overall plan.

## BRING PEOPLE IN WITH LIST-BUILDING AND CPA CAMPAIGNS

Building a list takes time, though digital tools make list-building and CPA (cost-per-action) campaigns easier. Many groups now use a petition publisher or organic petition tools, or gather sign-ups through digital advertising.

## CREATING CONTENT TO ENGAGE YOUR AUDIENCE

Organizations that properly organize and approach their content can drive traffic to their websites and make real connections with potential members and donors. A great way to increase engagement is by proactively answering questions about your organization and cause through digital content on your website, blog, or social channels. Not only will folks be more aware of your message, but search engines will also drive folks to your site when optimized for key search words and phrases. Mobile-friendly forms and ongoing sign-ups have made content marketing a good acquisition tactic.

## USING VIDEO TO SHARE YOUR MESSAGE

If you have video assets, pre-roll (a short ad that plays before the main event) is a great way to engage with constituents for awareness. As audiences continue to move away from cable and more toward mobile, pre-roll can be a way to get more viewers for your message.

For your advocacy strategies, the real question is: Will video content be a means to drive users into action? Video is excellent for emotionally moving folks, but it does not always close the deal or get them to act. We are now seeing user-generated content that is beginning to make inroads and engage people significantly. As we saw in 2020, user-generated content has come of age with multiple platforms, making it easier for groups and organizations to identify storytellers and create long-term engagement.



## FINDING SUPPORTERS WITH NATIVE ADVERTISING

Some of the best online publications allow organizations to buy long-form ads that connect with constituents, known as native advertising. Native advertising is a great way to find people where they already are, but it still must be part of an overall strategy. It may also yield greater connections that will become conversions for action.



## MAKING A CONNECTION THROUGH THE PHONE

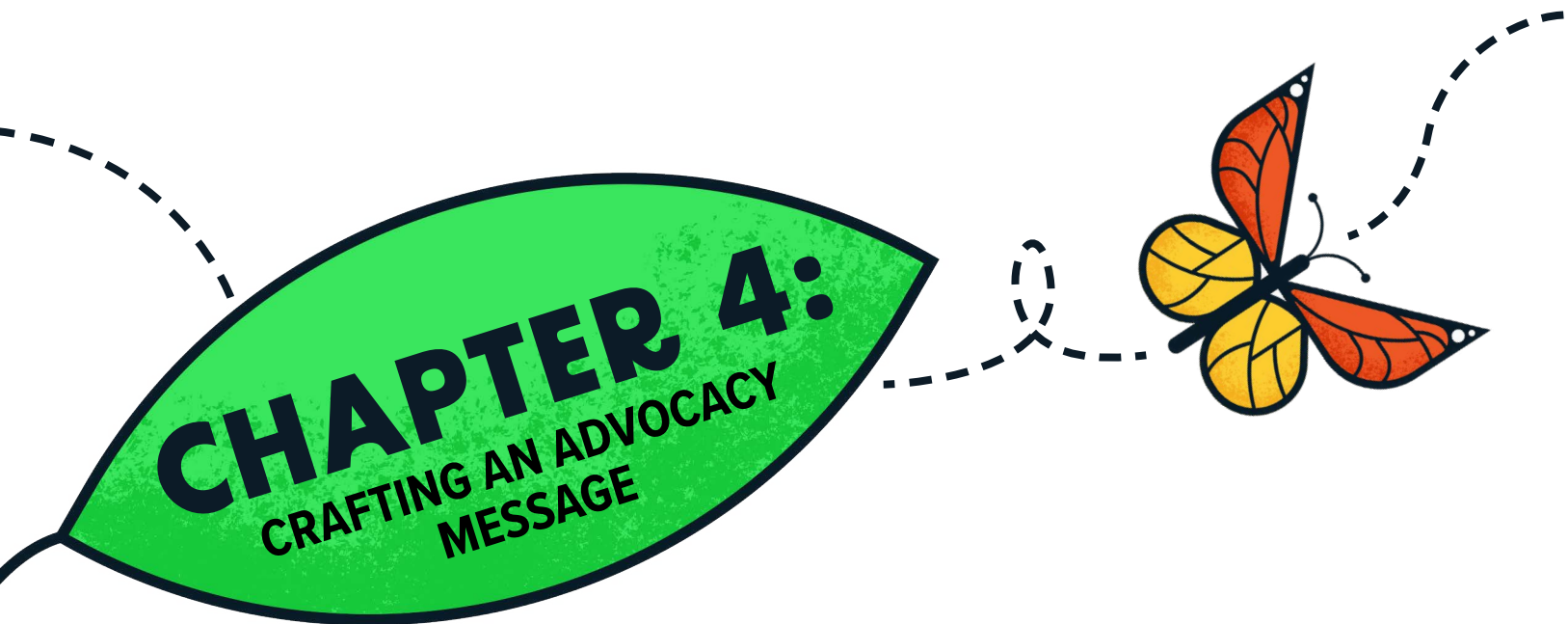
Texting is an effective way to reach supporters immediately. Peer-to-peer texting platforms have moved into the advocacy space, and they are here to stay. Broadcast texting is also built into many platforms. Building a real texting program takes time, so be sure to invest extra time to make it a success.

Patch-through calls, whether done with phone consultants or platforms like Phone2Action, can connect constituents to their lawmakers quickly and with solid results. Patch-through programs can be expensive but connecting with a lawmaker can make them worth the cost. Patch-through calls are less sustainable than other tactics, so they must be part of an overall advocacy strategy.

### KEY TAKEAWAYS

When it comes to winning advocacy tactics, relationships still matter. Whatever the tactics are, relationships are the core of good advocacy strategies. You can have 1,000 calls from constituents, but the right call from someone influential to the legislator can have an even stronger effect.





An advocacy campaign message is critical to ensuring folks understand what you are all about and what you want to accomplish. An advocacy message is a core statement defining your advocacy mission to the public. It will not be exhaustive of all the facets of your issue, but it will include the most important components.

Before getting started, answer some strategic questions to save time and avoid confusion: Who is your messaging talking to? What are you trying to get across? What goal are you trying to achieve? How will it make people's lives better?

If you're working in a coalition or alongside a diverse community, be sure to include all necessary parties from the beginning to get all perspectives and buy-in, from directly impacted communities to allies to potential donors. Ensure the key players in your organization, community, or movement are equally involved in this process. Knowing the answers to these questions can streamline your process.

Also know what lane your organization is in. If your campaign is set apart from those of other groups consider highlighting that in your messaging. Do you use a different approach or method to achieve what other groups are also trying to achieve? Do you involve unique stakeholders that would set you apart from other groups?

Here are some other things to keep in mind when you and your team develop an advocacy message.



## WORK TOGETHER ON MESSAGING

Be sure to include everyone who needs to have buy-in on the messaging in the initial development process. You will waste a ton of time if you have to keep going back to the drawing board each time a new person is added to the process. Consider using a communal document, and online Jamboard, or go old school with a big ol' whiteboard during brainstorming sessions. This will allow for ongoing access for everyone involved. It may also be helpful to spread this process over two or three meetings to give people time to reflect on the ideas. It is important to give this process time, and know that it may require patience and some compromise before you land on your strongest message.

## CONSIDER YOUR VALUES

Value-based messaging has been proven to connect with audiences and is much stronger when you need to persuade key audiences to your side. Highlight a nearly universal value and tie it to your issue. For example, let's take access to abortions as an issue and freedom as a value. Freedom could be used to argue both sides—freedom of the baby to live and freedom of the pregnant person to choose. If you lead with access to abortions, you might alienate people right away. But if you start with a value-based message of freedom and connect the dots, you might be able to persuade people who originally may have been opposed to you. It's vital to remember that your message must feel genuine and accurate to you, your campaign, and/or your organization as well. Don't use a value framework that doesn't align with your organization's history, because people will know it doesn't feel right.

## HAVE A SPECIFIC PRIMARY GOAL

Having a specific advocacy goal will go a long way in developing a strong advocacy campaign message. If you can accurately state your goal, your advocacy campaign message will be clear, concise, and direct. When your goal is too broad or ambiguous, it will make it hard to keep your message short and sweet. As always, it's important to make your primary goal straightforward so that anyone glancing over your messaging can easily (and quickly) understand what you stand for.

## KNOW YOUR SECONDARY GOALS

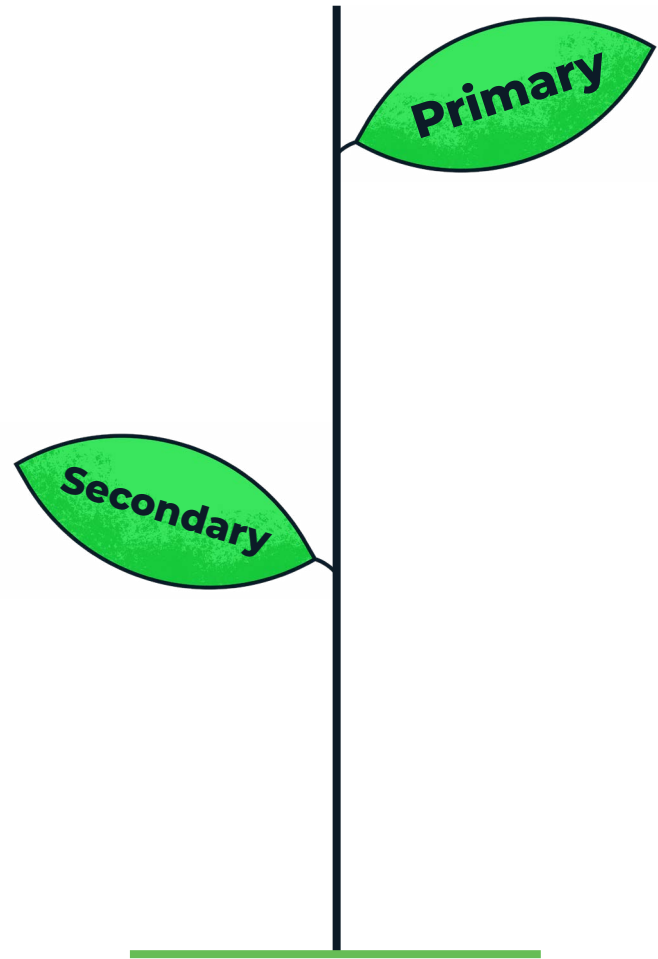
It can take a considerable amount of time to achieve your primary goal. Forming secondary goals can sometimes create checkpoints along the way to a primary goal. This helps your campaign maintain a better way to judge perceived successes and failures. Crafting secondary goals can be helpful to illustrate that success is rarely all or nothing.

Even by achieving partial or secondary wins, the campaign moves forward and builds momentum that may help clinch the larger win in the future. Knowing what these incremental wins are will allow you to include them in your messaging to show that momentum to your supporters. It will also help you clearly define what winning looks like for your campaign from the beginning.

## KNOW YOUR AUDIENCE

Who is your target audience for your message? Lawmakers? Voters? Teachers? Parents? The general public? These folks should be at the center of your message creation, because ultimately, you need them to take an action to make your goal a reality. The more you know about them, the stronger the message you will be able to develop. Who do these folks listen to? Who are the folks who could influence them? Is it other lawmakers? Members of the community? Professionals in the field? Trusted groups? Understanding who the influencers are will help you clearly define your advocacy campaign message.

An advocacy message emanates from your goals. Clearly defining these primary goals and secondary goals, and understanding your audience will help you craft your strongest message. It can take time and some deep conversations, but remember to enjoy this process!



# USING A MESSAGE BOX FOR ADVOCACY

The Tully message box, also just called a message box, is a simple tool that campaigns have used for years. A message box can be used to create a specific theme, message, and strategy. Named for Democratic strategist Paul Tully, the Tully message box helps visually break down four essential components to help any campaign craft its communications.

The beauty of the Tully message box is its simplicity. You don't have to be a highly experienced political strategist to game out the message of your campaign. Using this tool can give you an idea of what your target audience is hearing from all angles of your issue. There will be plenty of back and forth during your campaign, and this tool helps you tease it out so you're ready to respond if and when you need to.

Before we get started, here are some frequently asked questions that could be helpful:

## ***Does it take the place of polling or opposition research?***

A message box will not take the place of a poll or opposition research, but doing the message box exercise will make your polling and research better by informing what questions you should be focusing on. It is the homework you need to do before you start your polling or research.

## ***What if I can't do a poll?***

If you can't do a poll because the district is too small or polling does not make sense for your race, the discipline of a message box can be even more helpful. Without polling, the message box activity will inform which messages will likely resonate best in your race, and it will remind you which messages you want to stick with to stay on track.

## ***What type of advocacy campaign will a message box work for?***

A Tully message box is an important tool for any advocacy campaign to use, whether you are raising awareness, talking to legislators, or organizing community members.

Below, we break down the four big questions the Tully message box asks. Essentially, you want to answer each question as thoroughly as possible to get a good sense of what your target audience is hearing—the good, the bad, and the ugly. Then you can take this information to help you highlight your campaign's strengths or best talking points while also countering what your opponents might be attacking your side with. We want to define us (our side, our organization, our movement) and be prepared for what they will say (our opponents, people who will actively work against us, public narrative that counters ours). When doing this exercise with your campaign, we recommend laying your answers out in quadrants to visualize the elements that will make up your message.

### Question 1: What do we say about us?

The first quadrant of the message box asks, “What do we say about us?” This is where your main talking points come in. Include all the positive, pro-your-issue messaging about why your side should win. How will your option benefit your target audience? What evidence do you have to back it up? This is what the conversation would be if your opponent were silent. This is the message we want voters to hear about us and our side.

### Question 2: What do we say about them?

The second box asks, “What do we say about them?” This box can be tricky to complete. It’s better to use this box with an eye toward what you would say publicly. Remember to be contrastive and critical; factual, not catty. While that spirit and passion can certainly come in handy, it’s not the most productive use of this box. We want to use this box to focus on what sets us apart and how are we contrasting their message to show our option is better.

### Question 3: What do they say about us?

The third box is often the easiest to complete because it asks, “What do they say about us?” Often, we are very familiar with the content of our critics’ barbs, so use this box to enumerate them. Put yourself in their shoes and throw everything they could possibly say to counter you in here. The “them” here can be a direct opponent to your cause, like the governor, or it could be a general industry, like Big Pharma or oil and gas, or it could be a deep-seated public narrative that people are familiar with and believe to be true, like binary gender constructs.

### Question 4: What do they say about themselves?

Finally, the fourth box is what your opponents say about themselves. This is where you can parrot your opponents’ talking points and predict their response to your campaign. Use this box to really put yourself in the opposition’s shoes and take the time to anticipate the positive talking points they will say about their side.

Now that you understand the general concept, let’s talk about how to use it.





## WHEN DO I PUT TOGETHER A MESSAGE BOX?

Begin working on your message box as soon as you can when you begin to think about setting up your campaign. It will help you get on track and define a good message to start with for early communication. Think about who should be in the room. Putting together a message box is not a one-person job. Having more people helping you work through this will mean having more voices to create and define a robust campaign message. When working on messaging, it's always better to have a variety of perspectives (remember, all your audience members won't think the same way).

What we say about us:	What they say about us:
What we say about them:	What they say about themselves:

## HOW LONG DOES IT TAKE?

Don't rush it. A message box can't be done in 20 minutes. Building a solid message box that will be helpful takes a couple of hours, but it is a worthy investment.

## WHERE DO I START?

Gather the people you trust to work with you on your message box, and start with the first question. As you get into it, make sure you are being honest, and maybe even a little harsh, with each side. This will help you build a strong message. Before you begin your next campaign, take the time to run through this Tully message box exercise. It will prove helpful to your campaign's messaging and communications and to its overall success.

## KEY TAKEAWAYS

A clear advocacy message will ensure people outside your organization understand your mission and goals. Taking the time to get input from across your team (and coalition) will go a long way in creating a message that truly represents what your organization is trying to accomplish. Tools like the Tully message box can make it easier to define exactly what you're trying to say. As always, knowing your primary and secondary goals ahead of time is an important first step.





If you're a member of an organization that has spotted a need for change but doesn't know how to make a meaningful impact alone, coalition building may be the answer for you. A coalition is a formalized alliance of interested parties joining together for a specific cause or change to achieve a mutually desired outcome that they may not have accomplished on their own.

Coalitions for ballot measures and advocacy campaigns are made up of various individuals, groups, and organizations aligning themselves in support of or in opposition to a specific initiative or cause. These groups can include grassroots organizations, community leaders, impacted people, consultants, legal entities, national organizations, and many more. These groups come together for a single initiative or a series that may appear on the ballot at the local, state, or national level.

### **WHY SHOULD I BUILD A COALITION?**

As a progressive organization, you may want to effect change but need more time, money, or political power to accomplish this on your own. But odds are, you are one of many stakeholders, and other organizations want to achieve the same outcome as you. Coalition building allows you and other organizations to pool resources. Working together, groups can accomplish much more than each could alone. Coalitions allow groups to broaden their network, achieve more power, build credibility, pool and conserve resources, and share information (strategies, experiences, connections, etc.).

In addition, we all know that relationships are key to organizing and making change. The more trust you build with allied groups and organizations, the more likely they will be to join up with you on the next effort. If your organization is also playing the long game, coalition building is definitely for you. It will allow you to continually build on and increase your access to resources to help you grow your impact and achieve your larger mission and goals.

## WHO SHOULD I INCLUDE IN MY COALITION?

When coalition building, there will almost always be some obvious groups with similar interests to you that you can join forces with. Teaming up with peer organizations that are doing similar work is a natural way to build a coalition. They will have deep subject matter expertise and a network of supporters who have already bought into the task at hand. Putting aside the small differences or potential competitive feelings between similar organizations can lead to big change.

An interesting and sometimes more impactful way to build coalitions is to involve organizations with a less obvious stake in the issue at hand. Building creative coalitions broadens the scope of expertise and shows more widespread support for the issue. The key to coalition building is to recruit unexpected supporters in a way that still makes sense and reinforces the message of your campaign.

For example, you belong to an environmental organization that is pursuing a change to local zoning laws for health and safety reasons. You will naturally reach out to any other environmental groups working in the area, but who else might be interested in promoting the community's health and safety? Are there parent groups who could join you? Medical professional associations? A consistent message coming from a diverse range of organizations strengthens your campaign.

You will also want to think about who is doing what AND what needs to get done. Do you have the skills within your coalition to implement the strategy and plan? For example, your organization might have a large grassroots membership that you can activate for field tactics, but you need a coalition member to help run a strong digital program and another coalition member to help with a traditional press plan. This way, you all know your lanes but are pooling skills and resources to create a larger impact.

## WHAT IS THE KEY TO A SUCCESSFUL COALITION?

Coalition building is a challenging feat. Though everyone may be united behind a single issue or cause, if you've built a large and diverse coalition, it will not always be easy to organize the many different parties and their voices. It is important to stay focused on the common goal. All actors must be open to differing ideas and tactics and be willing to compromise. Don't get in your own way. If responsibilities, goals, decisions, and leadership roles are shared respectfully, a coalition can be incredibly powerful.

Remember that each coalition member has a personal vested interest in joining the coalition and may also be working on other efforts where you may not align. However, if you can build trust through transparency, you will be able to work alongside one another on your shared efforts in a way that mutually benefits all parties.



## WHAT ARE THE BEST PRACTICES FOR BUILDING A COALITION?

Once you've decided who will be a part of your coalition, the next step is figuring out the best way to organize all parties most efficiently and effectively. Below are three easy tips that any well-run coalition should follow.

### AGREE TO MEASURABLE GOALS

As with any campaign, all people involved should have a clear understanding of what the goals are, how they will be measured, and what their role is in achieving those goals. To start, this can be laid out by creating a memorandum of understanding (MOU) that all coalition members agree to. The MOU should lay out what each partner contributes to the coalition, who will receive any assets at the end of the campaign, and, most importantly, who will receive the data collected.

### DELEGATE THE WORK

Often, the individual or convener of the coalition takes on all the work, which is not helpful—it defeats the purpose of having a coalition. As you're writing a campaign plan, note the types of roles and activities needed. This exercise will foster a better understanding of the types of partners required for the coalition. Is there a need for boots on the ground, and does that mean you need a robust grassroots organization? Do you want to change public opinion or raise public awareness, necessitating a partner with a strong communications team? Who is responsible for the research, polling, and legal review? These questions will help you seek out the most effective partners for your coalition.

### CENTER THOSE MOST IMPACTED

The last thing to remember is that most coalitions are created to address an issue that will impact certain people and communities. Therefore, making those affected people central to all the coalition's decisions is critical. These are the stories, experiences, and, ultimately, lives that are most important in any campaign. Ensure their voices are represented and given decision-making power within your coalitions. If not for them, then why is the coalition forming at all?



# COALITION-BUILDING IN ACTION

Giffords' Gun Owners for Safety (GOS) is a great example of how to utilize the coalition-building methods outlined in this chapter. Giffords was created to help fight for safe gun laws in the United States, and the organization recognized how impactful coalition building can be in advocacy. They identified that gun owners who want sensible gun laws are an overlooked group within the gun safety advocacy space, and they built GOS to help organize those folks into a robust and effective coalition spanning nine states.

After deciding who should be a part of their coalition, GOS has successfully utilized several coalition-building tactics to expand and become impactful in their chosen advocacy space. They set up a chapter structure in which each state is a subsection of the larger coalition, with clear leadership and common goals shared among them.

This structure, importantly, allows for delegation as well, enabling sections of the coalition to focus on issues that matter most to them and their state while still working toward their shared mission. They also utilize partner organizations to expand on their expertise and delegate work, such as operating direct mail programs.

GOS has also clearly defined what their mission is, making it visible on its website and reiterating it often to members. GOS offers trainings to help members of their coalition learn more about these goals and how to message around them. Having these clearly defined goals allows its coalition members to be on the same page and be more effective when advocating to those outside of their group.





# ENGAGING WITH COMMUNITY ADVOCACY

As we have seen, both globally and locally, the best advocates for change are those who can tell a story that moves people toward action, no matter their age or walk of life. Community advocacy can make real change, and understanding that change is important. Is it getting more people to take public transportation? Preventing tobacco usage? Increasing the availability of fresh food in your neighborhood? No matter the issue, knowing what you would like to see changed and being able to articulate it is half the battle.

Many people just can't say what the problem is and how they would fix it succinctly. Try to do that in 10 words or less. Then, try to time yourself. Can you explain what the problem is and what the solution is in two minutes? What about 30 seconds? It can be incredibly challenging but helpful in distilling key components as you develop a holistic advocacy campaign. Below is some advice for enhancing your work with community advocacy.

As you make your way in this community advocacy effort, be aware of the responses you may receive. It turns out, people can tend to be quite averse to change. Think of the verbal and emotional barriers people create around change. You will hear folks say things like:

"That is a good idea, but we don't have the money to do that." Financial hurdles are big, but money is available if people really want change. Your job is to make that case.

"Someone else is already working on that." Are they really working on it, or is that an excuse? Don't take someone else's word for it; do some research for yourself.

"We have always done it this way." Yes, and this is why we still have a problem. Be respectful, but make the case for why this needs to happen differently.

"That is inconvenient." Yes, change is inconvenient. Carpooling or taking the bus is harder than driving alone, but if we don't change our behavior now, our planet will continue to pay for it. Many times, these community changes will bring benefits as well. You will need to highlight any and all benefits of your proposal to increase the chance people will buy in.

"We are already doing that." Someone may be doing something, but it may not be the way you want to do it (and it may not be the best way to do it). Find out why the problem still exists, and keep pushing for the real change you need.

## BE GENUINE

Consider who the real messengers are for the issue and why their story would resonate with people. Keep it real, honest, and to the point.



## BE CREATIVE

Poster contests, social media, video essays, and letters can all effectively capture people's attention. There is no limit to what you can imagine, and sometimes the more unique material gets noticed. Keep headlines and posts brief so people are more likely to engage with your material. You can always link to further resources for people who want to get more involved.

## DON'T TAKE NO FOR AN ANSWER

Community advocacy takes work. People will say no because something is inconvenient or different, but don't let that discourage you. This is the normal process of creating change. Anything worth doing comes with its set of challenges and setbacks.

## INVEST FOR THE LONG HAUL

A tactic for many elected officials is to wait people out and hope they will go away. If you ask for a four-way stop sign, authorities may ask you for petitions from the community to show broad support. When you show up with 50 signed petitions, they may ask you for 50 more, hoping you will give up and stop bugging them. If you keep at it, you will likely get your way sooner or later. It won't be instant, so you have to stick with it. Real change takes work.

## USE SOCIAL PRESSURE

Explain to folks how others have done similar things in the past to effect change or how great things happened elsewhere when they employed a similar strategy. The geographically closer a success story is to your hometown, the more memorable that example will be. You could even encourage your supporters to involve their friends and family.

## HOLD PEOPLE ACCOUNTABLE

A big part of advocacy is accountability. Just because someone says they will do something does not mean they will do it or do it the way you want. Hold people accountable until the change you want is made in the way you want. You may have to compromise a little, but the battle isn't over when you get a "yes" from someone; it's only over when change is made. Remember to get timelines whenever possible, which can help mitigate the "dragging feet" effect. This can be difficult to achieve especially given budget concerns, but try your best.

# WORKING WITH GRASSTOPS AND GRASSROOTS FOR ADVOCACY

Grasstops and grassroots are each an important part of any successful advocacy campaign. Maybe you've heard the terms and have asked, "What's the difference? They sure sound the same." Well, you're not the only one scratching your head.

Political and advocacy definitions need to be clarified. Too often in this work, we assume that someone knows what these things mean without offering an accurate definition. Even folks who have been around for a long time need clarification on these terms. So, in our never-ending quest to define what we do, we will explain what grassroots advocacy and grasstops advocacy are.

## WHAT IS GRASSTOPS ADVOCACY?

Grasstops advocacy is when you narrow your outreach efforts down to opinion leaders and folks with solid connections to elected officials. Grasstops is a top-down strategy that focuses on engaging with individuals with the ear of those who make decisions or have some sway or influence over public policy. You are reaching out to folks who have a connection with those in power in the hopes that they can influence policy.

For example, you may reach out to the officeholder's donors, friends, church members, alumni networks, or leaders within their political party. Effective tactics for grasstops advocacy include in-person meetings, patch-through calls, and letter writing.

## WHY DO I NEED GRASSTOPS ADVOCACY?

Since grasstops advocacy means reaching out to those in touch with decision-makers, it offers nonprofits a few key benefits for their advocacy campaigns, such as:

- *Talking to those closest to lawmakers:* Through grasstops advocacy, nonprofits can *engage with those who can shape legislation*, as such, it's less indirect than other advocacy tactics because you have, in principle at least, a more direct line to those in power.
- *More bang for your buck:* While some grasstops tactics, like patch-through calls, do cost money, tactics like in-person meetings, coffees, and letter writing are cheap or, in some cases, free. If you have the resources and ability to engage in grasstops advocacy, it can be a cost-effective way of accomplishing your goals.

- *Access to increased resources:* Opinion leaders and influencers may have access to resources and expertise your organization does not have. For instance, once you have an opinion leader on board, they may be able to tell you which legislators are persuadable and who isn't worth your time going after.

## WHAT DOES IT MEAN TO BE INVOLVED IN GRASSROOTS ADVOCACY AND ACTIVISM?

A community-based advocacy campaign is built from the ground up with volunteers and organizing. This can be on a local issue, like getting a four-way stop put in on your corner; a regional issue, like stopping the damming of a river; or a national issue, like Black Lives Matter.

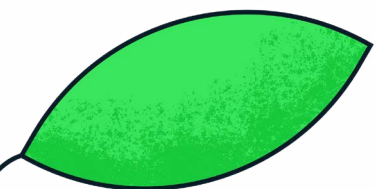
In a grassroots program, activists are the backbone of your issue and political campaigns. There is real organizing power in grassroots campaigns. Black Lives Matter, the Women's March, and the fight for marriage equality are great examples of this type of movement. These efforts began with community organizing but grew into national movements.

You must start early when you are running a grassroots advocacy campaign. While it's effective, it can take a long time for your message to really sink in and be heard by lawmakers. Also, helping your community is hard work. If grassroots advocacy work was easy, everyone would do it. Having daily, weekly, and monthly goals will help you define the timing of when you need to start the program. Often, your timing is based on when another action will happen; for instance, when there is a vote on a piece of legislation you're advocating for (or against).

Can you just do grassroots advocacy or grasstops advocacy? Do you need both? For a long time, advocacy was almost exclusively focused on grasstops advocacy (sometimes called opinion leader outreach). As advocacy campaigns have become larger, they have become more focused on the grassroots, but both are still important.

Grassroots and grasstops advocacy can and should complement one another. While grasstops advocacy focuses on influencers who use their networks to effect change, grassroots advocacy taps into the will of a community. Most successful advocacy programs fuse the authenticity of grassroots advocacy with the targeted influence and resources of grasstops advocacy.

Advocacy campaigns are always a question of resources, but often, you can target both opinion leaders and constituents at the grassroots level. This approach can result in more bang for your buck by creating change and gaining attention for your issue. Many successful advocacy campaigns use this two-pronged approach by making shrewd tactical decisions to keep the budget under control.



## GRASSTOPS ADVOCACY TACTICS

Emails and letters from opinion leaders are useful tactics for grasstops advocacy. Here, you would be focused on reaching folks who are part of the leadership in a community, whether that means corporate, appointed, elected, clergy, or community organizations. In the same way, phone calls can also be a very effective grasstops tactic. A corporate or community leader with strong relationships can get their legislator on the phone with very little effort.

User-generated content from high-level grasstops can have a positive effect on lawmakers if used in the right way. A video from a teacher, beloved former coach, or other community members can make a big difference in making a connection on an issue.

One-on-one meetings are another tactic you can use in your grasstops campaign. Finding folks with personal connections or community leaders who are willing to engage with lawmakers can give a boost to your efforts.

Lastly, op-eds and other thoughtful public-facing content can help move issues forward by giving cover to elected officials and pushing them toward a preferred outcome. Thought leaders can help by showing a clear path and getting community members on board.

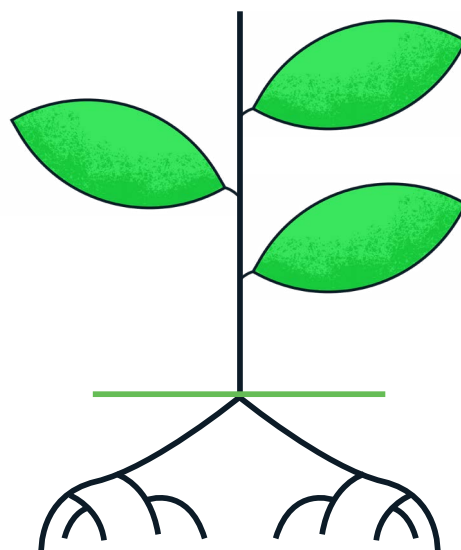
## GRASSROOTS ADVOCACY TACTICS

Patch-through phone calls, texting, virtual coffees, social media engagement, user-generated content, door-to-door canvassing, telephone town halls, signature gathering, online petitions, and relational organizing are all tactics that can help grassroots advocacy campaigns succeed.

There are a lot of important secondary benefits to engaging in grassroots and grasstops action. For instance, a campaign that harnesses the power of grasstops and grassroots advocacy can create long-term benefits, from a list of advocates in specific districts to an engaged set of donors. The benefits of community action can help propel a movement in the long term and make lasting change.

### KEY TAKEAWAYS

Creating a coalition is one way to amplify your organization's work. Whether you decide to partner with organizations with similar goals or engage in grassroots organizing, building relationships with a diverse group of interested parties will allow you to expand your reach and mission. Coalition building takes time, but it's a long game that's worth playing!





# CHAPTER 6:

## ADVOCACY COMMUNICATIONS TACTICS

Convincing a person to listen to your message can be a difficult task. Now more than ever, public opinion has become harder to shape as people tune out information more than they tune it in. As with any other part of your advocacy campaign, it's essential to create a thoughtful plan for how and why you'll communicate about your issue. Below are seven key tips that can make your advocacy communications more effective and accessible to your audience.

### 1. SET CLEAR COMMUNICATION GOALS

As with many other areas of your campaign, setting goals is an important part of advocacy communication. We all need to do a better job at setting goals and matching them with the tactics to achieve these goals.

### 2. BUILD STORYTELLING CAPACITY

By getting interested parties involved in emotional stories, you can create more conversions and actions along the way. Volunteers are a great place to look for storytellers, as they likely have a strong connection to your cause.

### 3. DEFINE A FUNNEL FOR YOUR ADVOCATES

The advocacy funnel can be a great way to move folks from online to offline actions or from advocates to donors. You can read more about creating an advocacy funnel in Chapter 10.

### 4. HAVE A CLEAR CALL TO ACTION

Defining the action for advocates and members is incredibly important. Often, leaders make the mistake of thinking that their audience knows what they want them to do without explanation. That is not the case! A strong call to action encourages advocates to call, sign up, email, or whatever other action you hope they'll take.



## 5. BE CONSISTENT IN OUTREACH

Consistently communicating with your list will help keep your folks engaged. One of the biggest blunders we see is when folks stop communicating with existing action-takers. Eventually, they will fall off your list if they don't gain value or feel valued. Building lists takes a lot of time and effort—don't make the mistake of leaving supporters behind.

## 6. BUILD STORYTELLING CAPACITY

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## 7. DEFINE A FUNNEL FOR YOUR ADVOCATES

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# CHOOSING THE BEST ADVOCACY COMMUNICATION TACTICS FOR YOUR CAMPAIGN

These days, you need a mix of digital and in-person tactics that drive your strategy and round out your advocacy engagement. Here, we're digging into print ads and patch-through calls. In the next chapter, we'll explore digital advocacy communication techniques.

## PROMOTING YOUR CAUSE VIA PRINT ADS

In all likelihood, when you're hashing through communications tactics available to you for advocacy campaigns, someone will raise the idea of running a print ad (or three). With all of the options available, it's important to determine whether print is a smart use of your dollars. At TCW, we often urge careful consideration before deploying a print ad campaign. Here are a few questions you may want to walk through before signing an IO (insertion order).

### DOES IT ACHIEVE YOUR GOAL?

Print ads are relatively limited when it comes to achievable outcomes. If your goal is to drive calls, get people to go to a website, or prompt people to sign a petition, a print ad is unlikely to help.

If, on the other hand, your goal is about visibility, it may be a good option. For instance, if your goal is to get your message in front of key decision-makers in the state capitol, running an ad in a publication with a dedicated readership there may make sense.

### IS VISIBILITY ENOUGH?

It's worth asking whether having an advocacy print ad for the sake of visibility alone is an effective use of your dollars. Print advertising is still a comparatively expensive medium. And some budgets might only allow for a single ad, which means you're only getting one chance to have eyes on your message.

### GOT FEEDBACK?

Beyond the issue of limited message exposure, there's the bigger issue of data-driven feedback. You don't get to collect additional data when you place an advocacy print ad. There's no way for you to capture additional supporter information, and there's certainly no way to determine how many people interacted with your ad the way you can with click-through data or other analytics. Digital advocacy campaign tactics also come with a much more flexible price tag and (generally speaking) an exponentially more significant potential for visibility and multiple touches.

## WILL THEY REALLY CALL?

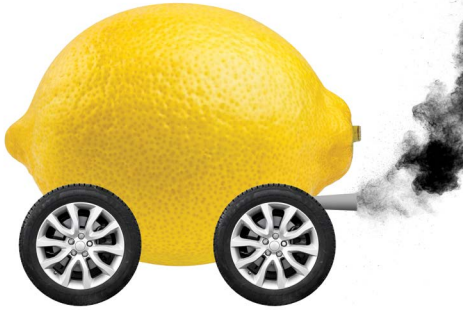
Most advocacy print ads include a phone number or a website (if not both) to engage supporters, but it's next to impossible to measure any conversion rate. What's more, it's challenging to get people to change mediums for a response, which is why so many people who run advocacy print ads will opt to run a concurrent phone bank program in an attempt to create the illusion of an organic response to their ads (P.S. You can save money by skipping the illusion, as you're probably not fooling anyone).

## CREATING ADS THAT LEAD TO ACTION

If you determine that an advocacy print ad strategy fits your goals, it's important to create ads that are clean and visually interesting. Done poorly, print ads are easily lost in a sea of other ads vying for readers' attention and will not achieve your advocacy campaign goals. Below, you'll find some samples of print ads we've produced.

### BEST PRACTICES FOR ADVOCACY PRINT ADS

- Employ arresting imagery
- Keep it concise and jargon-free (stay away from insider buzzwords and phrases)
- Make sure you have a single, clearly stated call to action



**DIRTY STEEL AND ALUMINUM ARE A LEMON FOR GM.**

**Don't give dirty steel and aluminum a free ride.**

More than half of the world's steel and aluminum is manufactured in China—most of which is produced with electricity from dirty coal. Some of these suppliers also use forced Uyghur labor. As a worldwide leader in the auto industry, GM should lead the way by pledging to only source its steel and aluminum from companies that use renewable energy and do not use forced labor.

**GM: IT'S TIME TO CLEAN UP YOUR SUPPLY CHAIN**

Learn more at [MightyEarth.org/GM](http://MightyEarth.org/GM)

PAID FOR BY MIGHTY EARTH.



**FLAVORED TOBACCO ISN'T JUST A VAIL PROBLEM, IT'S A COLORADO PROBLEM.**

**It's time to protect all Colorado kids.**

Flavored tobacco isn't just hooking Vail kids, it's hooking all our kids. It's time to protect all Colorado kids from these flavored products. More than 1 in 4 Colorado high school students use e-cigarettes, and 80% of kids who try nicotine start with kid-friendly flavors. HB22-1064 will end the sale of flavored tobacco products across Colorado. Our elected officials need to act now.

**GOV. POLIS: PROTECT OUR KIDS. END THE SALE OF FLAVORED TOBACCO PRODUCTS.**

[FlavorsHookKidsColorado.org](http://FlavorsHookKidsColorado.org)

PAID FOR BY TOBACCO-FREE KIDS ACTION FUND.

Colorado Chapter  
Average American  
NAACP  
Colorado Members' Planning Group and Conference  
American Lung Association  
COLUMBIAN ACADEMY OF FAMILY PHYSICIANS  
American Heart Association

# ADVOCACY VIA PATCH-THROUGH CALLS

Organizations and campaigns have used patch-through calls for years when they need many people to reach out to elected officials. Patch-through calls use an outbound dialer, robots, volunteers, or paid callers to contact a list of people. After speaking with the contact, they patch the call through to the concerned elected official.

In a world where lawmakers are flooded with emails, texts, and tweets, actual calls from constituents can make a difference in creating a real connection between constituents and decision-makers. This is a tried-and-true advocacy tactic that delivers tangible results. But in an era of cord-cutting and digital everything, will folks still take the time to get patched through to a lawmaker? And will lawmakers listen? The answer is maybe.

Patch-through calls can be effective, but with changes in phone usage, especially the massive reduction of landline usage, more skill is needed to get your calls right. Whether you are using traditional calling or digital patch-through calls, there are many ways to enhance your patch-through calling program.

## START WITH STRATEGY

Patch-through calls are a long-term tactic for advocacy, so they should be part of a more extensive advocacy strategy. Knowing how (and if) they fit into the larger picture can help your organization determine if they're right for you.

## TARGET THE RIGHT PEOPLE

There is a lot of data to help you target your best audience for advocacy. Patch-through works best when confined to a specific audience that works with the issue you are calling lawmakers about.

## TARGET THE RIGHT LAWMAKERS

Good targeting is important for good patch-through calls. Make strategic decisions on who your best contacts would be. There is a lot of helpful information in a voter file that will help you determine who the best callers will be for your program.

## EMPOWER CONSTITUENTS

Whether you are trying to contact local government, members of Congress, the White House, governors, or corporate leaders, patch-through calls can make a real impact with a limited budget.

## TIPS FOR GREAT PATCH-THROUGH CALLS:

### *Know your total budget*

Budgets in the world of patch-through calls can vary greatly based on the type of call, the number of calls, who your target is, who the legislator is, and any extenuating circumstances around the legislation (e.g., committee votes, floor votes, etc.).

### *Focus on timing*

There are plenty of different collection points for patch-through calls based on the legislative calendar, committee votes, and floor votes. Start with a good list with a recent phone match. Use a phone quality score if possible.

### *Use high-quality callers*

Call centers are seen as a commodity, but a high-quality caller or volunteer can get someone comfortable enough to talk to their congressional office, while a robot-sounding voice cannot. Ask to monitor calls to understand what you are really paying for.

### *Negotiate on price*

There is a high margin on consultant patch-through calls, so always get multiple bids and dig into the quality of the call. A robo patch-through can run between \$1.50 and \$3, and a traditional patch-through call can run between \$6 and \$10 dollars or more.

### *Ask where the calls are coming from*

High-quality companies will make sure that you are matching accents and are not calling nearshore or offshore, but other phone vendors are not that picky. Always get agreements in writing.

### *Agree on what a completed call is*

We have seen disagreements with consultants on what constitutes a “completed call.” As with any consulting arrangement, the more precise the agreement and conversations, the better your relationship (and outcomes) will be.

### *Get real reports*

Make sure you see a sample report before you hire a consultant. The reports consultants give you can vary greatly, and good reporting is key to giving you a real understanding of what is working and what you need to do to increase engagement. That could mean changing language or shortening a script.

### *Ask for data that you can match back to your file*

Don't just look at patch-throughs as a short-term gain, look at them as building long-term capacity for your organization. You can collect info before you patch through which means the potential to grow your list or increase engagement.

### *Keep your list organized*

When someone takes an action, it is the beginning of a longer relationship. Keep track of your action-takers, because you will need them again. Having a secondary goal of long-term capacity building can be helpful for the growth of your organization.

### *Use technology*

Patch-through calls can happen beyond traditional phone calls. Digital platforms using click-to-call via digital ads and SMS can help increase interaction with your audience. There are many platforms out there that make it easy for organizations to manage digital patch-through calls.

### *Know the law*

It is illegal to autodial cell phones. Cell numbers need to be hand-dialed. If you are calling cell numbers, make sure you are being legally compliant.

### *Test messages*

Know what drives action on your issue. Test your message with members and voters. Message matters when it comes to engagement, so don't just do one draft of a script. Take the time to refine your script and make sure you are using the right message.

### *Training matters*

Know what you want folks to ask for if they engage with a staffer. Make sure the directions are simple and you train your callers.

### *Track through an advocacy funnel*

A patch-through call is one step on an engagement ladder or advocacy funnel. Getting someone to patch through to their lawmaker can be a first step to membership, activism, and donation. Make sure you have a process to track their movement as they engage with your organization. **We'll share much more information about engagement funnels in Chapter 10.**

## **KEY TAKEAWAYS**

When it comes to communication, tailoring your message and finding the best medium will help your organization reach its goals. No matter how you decide to reach your audience, it's essential to be clear, consistent, and have a call to action!







# CHAPTER 7:

## DIGITAL ADVOCACY CAMPAIGNS



Online advocacy campaigns are a powerful way to raise awareness, mobilize supporters, and influence decision-makers on various issues and causes. Selecting the most effective types of digital media to use is essential for maximizing impact and engaging with your target audience. In this chapter, we explore some of the best kinds of digital media for online advocacy campaigns and how to use them strategically to amplify your message, mobilize supporters, and drive meaningful change.

### DISPLAY ADVERTISING

Display advertising involves placing visual ads on websites, mobile apps, and other digital platforms. It offers excellent reach and visibility, allowing campaigns to create brand awareness and disseminate their messages to a wide and targeted audience.

Display ads come in various formats, providing flexibility in aligning the creative content with the campaign's objectives. Moreover, programmatic advertising technology allows campaigns to target specific audience segments and optimize ad placements in real time, maximizing the impact and cost efficiency of the campaign.

### VIDEO ADS

Video ads are a great way to connect with your audience and tell the overarching story of your digital advocacy campaign. Video ads may have a smaller scale than static ads, but the inventory is growing daily, and there are many great online video opportunities. Video ads can be long form or as short as 6 seconds. They can be as simple as a quick video taken with a smartphone or as complex as a TV-quality production. We'll be sharing more on video ads later in this chapter.

## NATIVE ADS

Native ads take many forms, but the most common is a longer-form article or video that appears to be native to the site someone is reading. For example, if you go to The Washington Post and click on an article about climate change that is sponsored by the Sierra Club, that is a native ad.

The advertiser works with the publisher to create the content and figure out where and when it will run. Depending on the package, the native ad can also include more traditional ad types, like static and video, that are placed around the article itself. Native ads are a great way for advocacy organizations to give more context to a campaign, especially around complex issues. If you are trying to persuade an audience that fracking is bad for your community, a full-length native article gives you the room to go into detail and make your case. Native ads can be a really great addition to your digital advocacy campaign but are on the expensive side.

## SOCIAL MEDIA ADS

While both static and video ads can run on social media platforms, social media is a category in itself that should be looked at differently from other advertising platforms. Social media is a great way to reach supporters and build scale for your audience. You can harness the data that social media companies have on their users (for good and bad) to expand your audience base. This data is user generated and first party, so it often is more valuable than third-party cookie data. In addition, social media is a great way to reach legislators, if that is a primary goal for your digital advocacy campaign.

## SEARCH ENGINE ADVERTISING

Search engine advertising, commonly known as “search ads,” allows campaigns to appear at the top of search engine results pages (SERPs) when users search for relevant keywords. Platforms like Google Ads enable campaigns to target specific keywords, demographics, and geographic locations, ensuring their messages reach users actively seeking related information.

Search ads provide high visibility and are particularly effective for advocacy campaigns that educate and inform the public about specific issues or topics. Careful keyword research, ad copy optimization, and regular monitoring are essential for maximizing the campaign's effectiveness in search engine advertising.

# HOW TO USE VIDEO FOR YOUR ADVOCACY MESSAGE

We have all seen the exponential rise of short, viral videos in the last few years, so how can we garner the same popularity for advocacy videos? As social media platforms continue to expand and become more popular, creating videos for your campaign can be a worthwhile financial and creative investment. Here are some tips to help you get your advocacy video content viewed and shared.

## GRAB THE VIEWER'S ATTENTION

Believe it or not, just the first three seconds of your advocacy video are the most crucial. During this short window, the majority of viewers will decide between continuing to watch and moving on, likely to another post or video.

We recommend using something unexpected right from the start to hook your audience. Try using dynamic movement, closeups, striking imagery, or music to keep the audience engaged. You want these three seconds to be as unique as possible to boost the likelihood that people will stay around to watch the whole video, listen to your message, and be motivated to take action.

## MAKE YOUR STORY RELATABLE

The more relatable your video is, the more your audience will connect with it. Relatable content thrives on emotional connections. A storylike format could help draw in your focused audience as long as it feels authentic and stays on message for your mission. Also, remember that how you shoot the video will determine how it is perceived.

If you want your audience to immediately feel connected to the speaker, consider filming in a spot with a view of a well-known local landmark. When you use footage that includes locations immediately identifiable by your audience, you're really saying, "This video applies to you" and "You and this speaker have something in common." On the other hand, if you're trying to reach a much wider audience, using generic footage will prompt your audience to fill in the blanks with their own towns and lived experiences.

## USE VISUAL CUES TO GENERATE ACTION

If you want people to take an action, you can use movement in your video to direct your audience where you want them to go. Ideally, you will set your advocacy video in an environment where a call-to-action button is close to the video player. If you know where that button or link is in relation to the video setup, you can shoot footage of someone pointing in that direction.

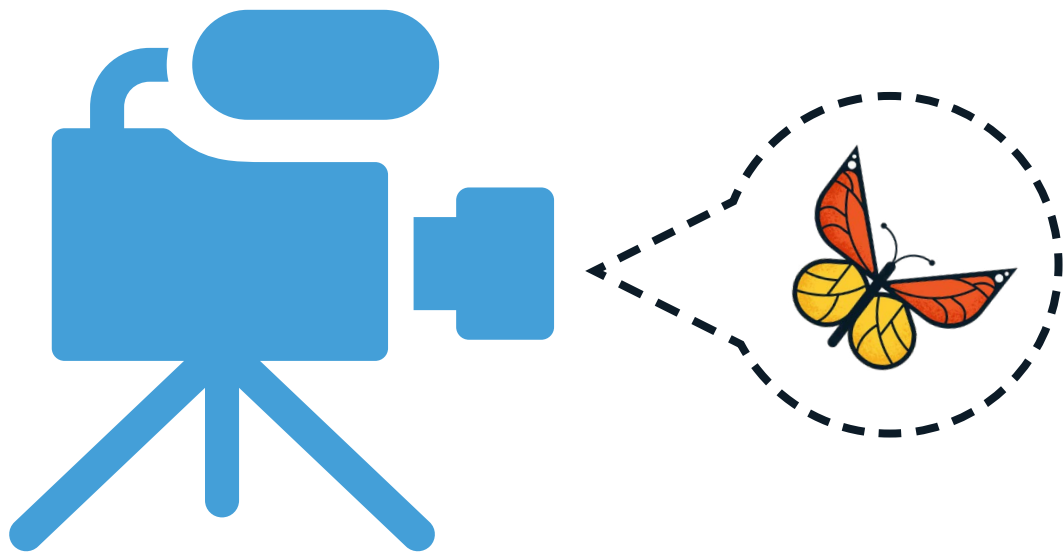
Try a simple animation of an arrow that points towards the button. Many popular content creators on YouTube use this same technique, so odds are your audience will be primed to receive these cues and potentially take the next step.

## MAKE YOUR AUDIENCE LOOK GOOD

If you're hoping to make a viral video, you need it to be shared across social media. When thinking about the advocacy video you want to make, think about what type of video will make your audience want to share it with their friends. People like to share videos that make them look good, so something that's funny, unexpected, or emotionally moving can make people want to be the first one to post it.

## MAKE VIDEOS ACCESSIBLE

Adding captions to videos is more common than ever, which goes a long way to make them more accessible to more audiences. Online platforms can autogenerate captions for just a few cents a minute. Consider providing captions in a different language as well.



# HOW TO EFFECTIVELY USE EMAIL FOR ADVOCACY

Advocacy emails are a powerful tool. For many groups and organizations, advocacy emails can amplify their message in a positive way. As you are probably well aware, most people use their email for both work and personal use, so communicating with your supporters with this medium is a logical choice. Email is fast, efficient, and relatively cheap. It's also a great way to make low- and high-bar requests from your supporters, such as making donations or sending your legislators an email in a matter of minutes.

## FOCUS ON CONVERSIONS

Your advocacy campaign will likely have two main objectives when sending emails out to your supporters: taking action and donating. For donations, it's important to keep emails simple and clear. Make the ask direct and compelling. Also, make sure the link is near the top of the email and easy to use. Nothing is worse than trying to give an organization money and discovering that the link you're sent to is broken or difficult to navigate. Or worse, you're accessing from your phone and realize it isn't mobile-friendly. Make sure to test all the aspects of your email thoroughly so your supporters have an easy time giving you money!

## MAKE IT EASY

Asking supporters to take action on your behalf is a relatively easy lift, as long as you make it seamless. Make sure you are using systems that connect constituents directly to their correct legislators. There are both free and paid options for this. Sometimes you want your supporters to rally on your behalf in person. This may be a bigger lift, but with email, you can make it as easy as possible. Include calendar links to serve as a reminder. Make it easy to share with friends and family on social media sites. All these options and tools are easy to add to an email you're sending out to your list. Better yet, it will result in a stronger turnout for your cause.

## TEST, TEST, TEST

One of the greatest aspects of using advocacy email is all the testing you can do and personalization you can include. Regardless of your list size, you can test things like subject lines, images, different hooks, and calls to action. These could easily translate into more support or more money for your organization. Testing with email can be incredibly simple and is free, so take advantage of it! Segmenting your list is a great way to make your emails more personal for your audience. If people on your list are giving \$100 or more, they might not respond as well to your asks of \$2,500. On the other hand, if people are activists, but not yet donors, you may want to craft the emails they receive to encourage them to donate. There are a ton of different ways you can segment your list through a variety of free tools.

## GET HELP

There are a variety of ways you can use email to your advantage in your advocacy campaign. Make sure you are working with trusted vendors who can help you through the process and have the systems in place to keep your email program running well. Email can be another active supporter for your cause.



# BENEFITS OF USING TEXTING FOR YOUR ADVOCACY CAMPAIGN

Texting for advocacy is an important tool for nonprofits and organizations creating an issue advocacy communications program. You may think of texting as a very personal form of communication and commonly only text your friends, family, or colleagues. However, texting can be an incredibly useful tool to incorporate into your advocacy work. People are using their phones more now than ever, and it's a great idea to meet people where they are.

Here are the top reasons to consider using texting for advocacy as a tactic in your campaign, especially if you haven't implemented it in your work already:

## PEOPLE PAY ATTENTION TO THEIR TEXT MESSAGES

As people carry their phones around with them all day, every day, they are much more likely to see texts. They also have not begun ignoring issue advocacy texts the way that they commonly ignore issue advocacy emails, with SMS having a much higher open rate. People are also much more likely to read text messages and even respond to them in comparison with other communication tactics.

## VERY FEW PEOPLE HAVE LANDLINES

As of June 2023, only about 3% of households in the United States have only a landline. This means that when you are given a phone number for your list, chances are that that number is for a mobile phone. Although building a mobile advocacy list does take significant time and effort, if you have a supporter list, you likely already have some mobile numbers ready to use. Be sure to ask people to opt in before you begin sending them regular advocacy messages. Text messages have become a much more efficient way to reach people.

## MOBILE PHONES MAKE ADVOCACY EASY TO COMPLETE

Advocacy actions from SMS messages are often very easy for people to complete. This encourages a higher conversion rate, which is the percentage of users who have completed a desired action. If you would like for people to make a phone call and they are able to simply click the phone number linked in your text message, it is much easier for them to help you out. The same is true for engaging with videos or websites, navigating to mobile-optimized sign-up pages, asking people to sign a petition, or asking for social media engagement—the format of text messaging makes it easy for supporters to do what you're asking. It's brief, constantly present in people's lives, and very easy to understand.

## TEXTING IS COST EFFECTIVE

In comparison with other tools nonprofits and organizations can use to communicate with their supporters or the general public, SMS is fairly affordable.



## SMS PROGRAMS HELP YOU ACCOMPLISH YOUR ADVOCACY GOALS QUICKLY

Because people have their mobile phones on or near them almost all of the time, they will see your text messages very quickly, especially in comparison to the time frame of other advocacy tools. Plus, text messages can include links to websites, fundraisers, petitions, and more that can lead to immediate and meaningful interactions.

### KNOW THE RULES FOR TEXTING

Texting is incredibly versatile for organizing in this day and age, but be cautious—there are different kinds of texting, such as broadcast vs. peer-to-peer (P2P), and each kind has specific rules, such as disclaimer requirements. Be sure you check with your attorney before beginning any SMS program to make sure you understand what you can and can't do with your lists and with your program in general.

### WHAT CAN WE USE TEXTING FOR?

In issue advocacy or public affairs campaigns, texting can serve many purposes—fundraising, increasing petition signatures, lobbying, patching through click-to-calls, organizing general meetings, and much more.

- 1. SMS petitions:** Signing a petition doesn't need to be difficult. Including a link in a text message to a mobile-optimized petition page can make online petitions a breeze.
- 2. Click-to-call:** Patch-through calls were a great tool when landlines were more common. Using this tool is still possible with texts—simply include the phone number and get folks to click it, which helps you connect with the target of your advocacy campaign directly. Learn more about how to utilize patch-through click-to-calls [here](#).
- 3. Meetings:** Getting folks to attend a virtual community meeting is hard, but SMS is a great tool to gather sign-ups beforehand. Additionally, texts can provide reminders on the day of the event. Getting together your supporters to lobby in person can be difficult to organize, but texting can enable them to call in to virtual meetings or interact with their lawmakers on specific days.
- 4. SMS fundraising:** A fundraising ask in a text is very easy for your supporters to respond to. It also helps you connect with audiences that are ready to give. Texts also make great fundraising reminders and can help you follow up on an ask once an action has been taken.

**5. User-generated content:** Asking your supporters to create content, whether that be a video or a social media post, can be a huge help for your issue advocacy campaign. Integrating SMS with a user-generated content tool can up your organization's advocacy game and increase the number of advocates in a specific demographic or geographic area.

**6. Multiway communication:** SMS can help you and your organization build relationships. You can become more involved with your supporters, members, lawmakers, and the general public too.

**7. Reiterating your message:** Texting can be helpful to increase the reach of your message. You want your supporters to know what you stand for and to gather new supporters, and getting your message out there can help you make that happen.



# CRAFTING A CONTENT MARKETING STRATEGY FOR YOUR ADVOCACY GOALS

Getting your issue out organically through blog posts, videos, and infographics might seem like a lift, but most organizations are publishing content all the time. The big issues organizations have with publishing material is harnessing the content they already produce. To start your organization's content marketing strategy, consider the following questions: What departments of your organization are publishing content? What kind? When? A true nonprofit content marketing strategy will help all parts of your organization come together and focus on publishing content to promote your key issues. Here are a few other tips to get you started.

## RESEARCH YOUR ISSUE

Understand how people search for issues and how they phrase those issues. The actual way people talk about an issue is more important than the way you say it.

Most of the time, how groups discuss their issue is not how people search for it. To be effective with nonprofit content marketing, you need to talk about the issue in a way that makes it easily searchable.

There are tools, like Google's Keyword Planner and YOAST, to make it easier to find keywords. The YOAST SEO plug-in is a great starter tool for anyone beginning to implement content marketing. YOAST is a simple tool for press sites that can show your writing team the basics of SEO.



## BE PROACTIVE

Plan your content in a calendar, and make sure you incorporate your keywords according to the most popular search engine returns. Content should answer folks' questions about your nonprofit, not just detail aspects of your organization that you find interesting. Understanding this dynamic is a big part of establishing a proactive strategy.

## BE REACTIVE, TOO

Posts that react to the news of the day may not use the keyword(s) you necessarily want, but embracing popular terminology will increase the paths by which online traffic is directed to your site. Reactivity can also lead to outside links to your site content by others, which can significantly boost your site's return ranking.

## GET YOUR TEAM ON BOARD

A properly trained staff is essential to content marketing. With enough people creating content following an organized calendar, your organization will have a powerful asset in the palm of its hand.

## POST CONTENT CONSISTENTLY

Posting a volume of good content that proactively answers readers' questions is a great way to show up in searches, but this strategy is not a one-time fix. You need to have a consistent amount of content that comes out over time.

## CREATE ENGAGEMENT

Think about what a good call to action for your cause would be. Is it writing a check? Calling a lawmaker? Volunteering time? Remember to create urgency and to ask for action at the beginning, middle, and end of the post.

## YOU'RE FURTHER AHEAD THAN YOU THINK

If you're reading this, chances are the amount of content your organization produces in a month is more than most blogs put out in a year. With a small amount of effort and training, you can turn your content into an asset that works for your organization long after you've posted it.

### KEY TAKEAWAYS

While it can seem more difficult than ever to break through the noise, modern technology makes it possible to target the exact audience you're seeking. You can create a communications strategy that includes anything from email to text to directly speak to folks or video or static digital ads to reach wide swaths of your audience across platforms.





When you're a part of an advocacy campaign, spotting issues and fixing them is not always easy. In the realm of advocacy, there will always be bumps in the road; that is the nature of making change. Identifying common advocacy hurdles and proactively planning for solutions can improve your campaign.

Here are some of the most challenging advocacy hurdles we have encountered and the strategies to get through them. If you have any questions, feel free to reach out.

### **CHANGES IN THE PROCESS**

You should expect the advocacy process to evolve continuously. Start with some assumptions about processes, like committees and vote dates. But be prepared for changes. We advise you to anticipate earlier votes, adjust your timeline accordingly, and use the extra time to garner more support.

### **LACK OF URGENCY**

Urgency is a powerful motivator for your supporters. If you don't have it, you are in trouble. You need to build and feed urgency—within reason. Make sure folks inside and outside your coalition understand the importance of and need to join. Know your plan, but be careful with overemphasizing urgency when it is not realistic, as this could lead to burnout.

### **LEGISLATION CHANGES**

Legislation is dynamic and can change throughout the process. Ensure your coalition is on board and understands this. A lack of engagement or understanding of how the process works can lead to unclear results or a fractured coalition.

### **SPONSOR DISENGAGED**

Just because someone sponsors your legislation does not mean they are as driven as your coalition members. Continuing to check in and engage your sponsors is key to overcoming this hurdle.

## LACK OF CLEAR LEGISLATIVE SUPPORT

Verbal support doesn't necessarily translate into sponsorship or active support for legislation. Make sure you have built relationships over time and engaged legislators to understand the urgency of your issue. This is important!

## COALITION DISTRACTED

Just because your coalition agrees on the importance of the advocacy campaign does not mean they do not have other commitments. Keeping your coalition informed and engaged is vital.

## COALITION DISAGREEMENTS

In advocacy and coalition politics, disagreements are inevitable. Make sure you develop a process to address contentious issues and foster strong bonds to work through problems. This practice will help you build your coalition's power for the long term.

## ACTIVE OPPOSITION

If you are making change, there will be factions who are against it. Get ready for this, and expect opposition. Make sure you map out what your opposition plans are and create a direct-action organizing chart to counter them.

## LACK OF PUBLIC PRESENCE

Building a public presence in specific legislative districts is crucial for engagement, but recruiting advocates, especially in specific districts, takes time.

## NO GRASSTOPS

Understanding pressure points for advocacy requires power mapping. Identifying individuals at a high level who can engage decision-makers makes a significant difference, though it takes time to build these connections. (See Chapter 5 for our full breakdown on the importance of grasstops!)

## MEAGER GRASSROOTS

Building grassroots support in key geographic areas or specific districts is a core component of modern advocacy. Whether through geofencing or identifying potential advocates near decision-makers, this process takes time.

## NO CLEAR MESSAGE

A lack of a clear message is a big problem, but it is easily solved through collaborative exercises like a message box. See Chapter 4 for our full breakdown of the Tully message box exercise.

## A MURKY PROCESS

The process is not always clear if you are doing advocacy around executive branches, corporate accountability, or a regulatory change. It gets murky. Understanding past processes and clearly defining the change you seek, along with identifying key decision-makers, is crucial. Use a direct-action organizing chart as well as a power mapping exercise to help remove all the murkiness or ambiguity of the process. This will also help develop realistic paths for engagement.

## YOUR BILL DIES

Sadly, this happens. Take it as a sign to regroup and figure out what did not work. Ask reflective questions. Is the legislation right? Is the issue relevant? What was your approach? Should you try again or try something different?

## LACK OF A PLAN

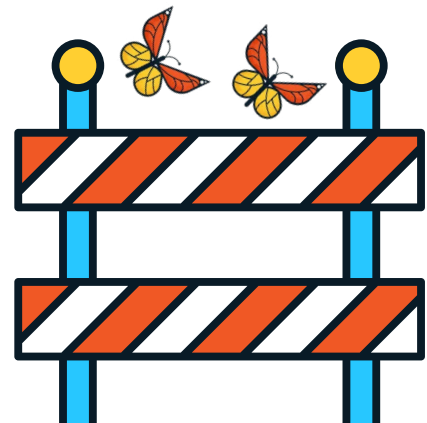
Planning sessions should be scheduled ahead of time. Don't go into session without a plan.

## NO PROCESS TO EVALUATE SUCCESS

Integrate program evaluation into your advocacy plan from the beginning. You can check out our program evaluation eBook [here](#). By being proactive, you can set goals for success ahead of time and have markers to achieve them.

### KEY TAKEAWAYS

Prepare for advocacy hurdles, plan for them, and embrace the challenges. There is power in the obstacles of an advocacy campaign. If you harness the power of the hurdles, you can make your campaign stronger.







Taking the time to evaluate your program is a necessary step to future success. Win or lose, understanding what worked and what did not is important, and it can be the beginning of real future improvements.

**For the short term:** Program evaluation can give insight into what worked and what did not. Which goals were achieved, and which were not?

**For the long term:** A program evaluation is something that should not be done just once. The benefit of a long-term program evaluation process is the more you do it, the more results you will see. Create a process and stick with it.

## OUR PROGRAM EVALUATION OVERVIEW:

### Create a Timeline

Program evaluations will take time. Don't rush it—set a timeline and stick with it. A good program evaluation will take a few weeks or longer to put together, so don't wait too long to get started.

### Define Success

Beyond winning or losing, having primary and secondary goals to judge whether you have achieved success is important. Hopefully, you had goals listed in a membership drive, campaign, or organizational plan. Goals could include increasing diversity, fundraising, increasing engagement, building capacity, list building, increasing engagement in specific areas, and/or data collection. A successful evaluation will look at all of these elements.

### Put Someone in Charge

It's important to have a designated individual overseeing the program evaluation process, whether that is a staff person in your organization or an outside consultant. Outside help can facilitate a single meeting or help build and write a detailed report.

### **Organize a Meeting**

Pull together an initial Zoom meeting or call to discuss results and information you will need to create a report. Be as inclusive as you can, and create a clear agenda. By the end of the meeting, plan a follow-up meeting to discuss the findings of your report.

### **Engage Coalition Partners**

Reach out to coalition members to find out their goals, data, and opinions. Understand what they think worked and what their concerns are. Take the time to listen and find out their real concerns.

### **Think Broadly**

Sometimes the best insights come from nontraditional allies, folks who should have been at the table but were not invited or other observers, elected officials, business owners, etc. Go beyond your inner circle to evaluate your program.

### **Field a Survey**

Work with your team to ask a series of questions to folks who have been involved in your program. Work to get input on actionable questions or tasks in the survey. Use a tool like SurveyMonkey to collect and analyze survey data (larger programs may want to engage a professional polling company).



### **Interview Partners**

Look at the survey and ask what other questions need to be answered, then create a list of folks to interview about your program. The interviews will get you more detailed answers and follow up. Consider interviewing heads of organizations, as well as staff, members, and donors (they may be a better source of information than leadership). If your program was focused on members or voters, take time to interview your targets to see how they saw the program.

### **Collect Data and Metrics**

Data will come in varying forms and at various times. It will take a while to apply election data to voter files. This will usually happen five to eight months after the election. Metrics from ad campaigns, email, and social metrics can and should be collected as soon as possible.

### **Define Your Audience for Your Findings**

Be clear on who the audience for your findings is and who it is not. Use this as a way to continue to build for the next year and future programs.

### **Keep Planning, Testing, and Evaluating**

Program evaluation is not a one-and-done kind of thing. Learn what worked, and set goals for the future to grow your program and test new tactics.



### **Share a Vision**

For the next program, based on what you achieved or did not achieve, create a vision for what the future will be. Understand in what areas you need to be more successful—maybe that is dedicating more resources, having a more defined strategy, developing new tactics, or gathering a more diverse coalition. Learn from your evaluation, create a vision, and try again.

## Get Help

Pulling together a real program evaluation will take time and planning. Depending on the scale and scope of your program, you will need dedicated staff time, and you may need outside help. There are a range of companies (and costs) for program evaluation, including us. Make sure you take time to get the help you need, from inside or outside your organization. And you can always refer to our program evaluation eBook [here](#) if your organization wants guidance.

## KEY TAKEAWAYS

Plan to evaluate your program from the start. Along the way, you'll be collecting data and notes to share with your team at the end (and, hopefully, they'll be doing the same). Having a strong evaluation plan, no matter the outcome of your campaign, will help your organization understand what happened and perhaps gain insight on how to evolve in the future.



# CHAPTER 10:

## ADVOCACY TOOLS



Using the right tools can help bring your advocacy plan to life, no matter where you are in the process. Here, we're exploring some tools to help you increase engagement, assess your organization's strengths and weaknesses, and craft a strong message.

## ADVOCACY ENGAGEMENT FUNNEL

Getting more advocacy engagement for your organization involves finding new supporters and turning them into dedicated advocates. But getting people to make the transition from giving you their email address to taking action on your organization's behalf requires a thoughtful engagement strategy. We created an advocacy funnel to show different actions you could ask your supporters to take and what value can be assigned to each action. The more personal the action is, the higher its value.



### WHAT IS THE DIFFERENCE BETWEEN A MARKETING FUNNEL AND AN ENGAGEMENT FUNNEL?

They are very similar, and they share the same core principles. With a marketing funnel, you are turning leads into customers. With an engagement funnel, you are turning supporters into activists. In both cases, the idea is to start with low-pressure asks and track who completes them, following up with progressively larger asks.

Not every lead will result in a sale, and not every supporter will become an activist. But using a funnel method like this can help you get people to take more actions on your behalf than they would if you went directly into the big asks. For example, someone who wouldn't meet with a legislator in person may be willing to tweet about your organization, which still helps!



## WHAT DO I DO WITH PEOPLE WHO DON'T SEEM ENGAGED WITH MY MESSAGE OR MY CONTENT?

If someone has never engaged with your organization, delete them from your list. Your time is better spent putting individuals who have engaged in some basic way into an engagement funnel. It's also important to know your membership so you can make sure your content is interesting to them. One easy way to do this is to send polls in your emails or post them on social asking people what they want to know more about. You also need to keep track of what content performs well so you can make more of it.

## WHAT IS THE EASIEST ENGAGEMENT?

Petitions and patch-through calls are easy advocacy engagement actions to ask people to take because they require little time and commitment. These engagements are ultimately short-lived and tend not to have as much impact as social media posts or lobby days. That said, every action can add up. If a given legislator is sent a petition with a lot of signatures, gets a lot of patch-through calls, and sees their social media blow up, that can all add up to a pretty loud message for your advocacy campaign.

## WHAT IS THE HARDEST ENGAGEMENT?

The hardest engagement for folks to take is a personal one. The more personal the action—though valuable for both the short- and long-term—the tougher it is to achieve. Legislators are inundated with easy actions, so the personal ones stand out. These actions also help solidify the relationship a volunteer has with your organization and transform a causal action taker into a real activist. Instead of thinking of engagement as a single stop, think of it as a journey. Only a thoughtful path creates real engagement.

## WHERE DO FOLKS GET STUCK?

It's important to keep track of your supporters' journey through your advocacy engagement funnel so you can see if there are places where people tend to fall off. Using a CRM will make the process easier, but even a spreadsheet can help you measure engagements. If you are seeing a place where folks seem to get stuck, it's a good time to reevaluate the way your asks progress. Is there a jump from an easier ask to a much harder one? Or do your supporters not understand the ask the way you've written it?

## HOW DO YOU RECONNECT WITH FOLKS? WHY IS THIS HARD?

For people you have had limited engagement with, start with the easiest advocacy engagement tactic in the funnel. To be successful, you need to put yourself in the mindset of that audience and slowly build the relationship with individuals who have fallen by the wayside.

Because we are plugged into our missions, we make assumptions that our members and activists know what to do for our advocacy campaign without being asked. This is a huge mistake. It is important to have a clear strategy post-acquisition. You need to establish what engagement means to you and how you're going to continually engage and acquire people to be active members of your supporter list in the long term. Many people spend too much time and money acquiring members and activists without making the proper investment in keeping these connections.

Any time you add new supporters to your list, they need to receive a timely welcome email. From there, they need to receive consistent communication that isn't all one note. Every email you send can't be an ask for them to complete you also have to help energize them to keep supporting your mission. Sharing success stories and how your supporters have contributed to those wins is a great way to motivate people. Sending polls or asking them to send you their questions can help you learn more about your audience while making them feel like valued members of your list.

## BOTTOM LINE

Set and hold yourself accountable for measurable goals and track them on a daily, weekly, and monthly basis. Take stock of your supporter list regularly, look for areas where people aren't moving through your advocacy engagement funnel, and reevaluate those asks. Engaging with your supporters can't be left up to chance or you'll be wasting a valuable asset. Treat your supporter list like the investment it is, because when it's well managed, it can pay dividends for your advocacy campaign.

# SWOT ANALYSIS

Conducting a strengths, weaknesses, opportunities, and threats (SWOT) analysis is something every advocacy campaign should do. SWOT is a quick way to assess the internal and external factors that can influence your advocacy efforts. This analysis helps identify advocacy and organizational advantages, challenges, potential chances for success, and roadblocks.

- **Benefits:** Clear understanding of where your efforts stand and what the opportunity is can be incredibly powerful.
- **Weakness:** If you don't have the right people around the table, this can lead to myopic thinking. Ensure you have expanded your coalition enough.



# THE MIDWEST ACADEMY STRATEGY CHART

Direct action organizing is a hallmark of advocacy, and the Midwest Academy has developed a framework to create a strategy around direct organizing. Started by the amazing Heather Booth, the Midwest Academy teaches individuals how to organize around strategic goals.

- **Benefits:** Good way to define goals and desired outcomes, and fosters team and coalition buy-in when used correctly.
- **Weakness:** This tool may require practice in defining tactics and messaging. Should be used in conjunction with other tools.

## VAST POWERMAPPING

Using social media listening and monitoring tools to track conversations, sentiment, and trends related to your advocacy issue can be powerful and illuminating. This information helps you understand public opinion, engage with your audience, and adapt your messaging.

- **Benefits:** Great way to define legislative targets and their connections within a community.
- **Weakness:** Not a holistic planning tool; best used with a message box and DAO tool.

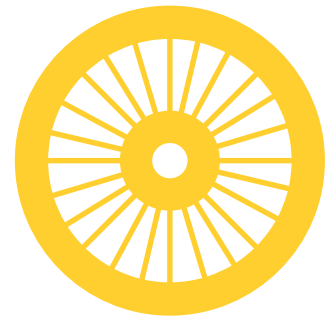
## SOCIAL MEDIA LISTENING AND MONITORING

Vast Powermapping helps identify individuals, groups, or organizations that have an interest in or influence over the issue you are advocating for. It helps in understanding different perspectives, building alliances, and tailoring your messaging accordingly.

- **Benefits:** Hearing what the public is saying can clarify the right words to use and help you understand reactions to specific messages.
- **Weakness:** Social listening tools may not accurately track sentiment on local issues, and social media may not reflect everything happening around it. Some tools also skew toward specific platforms and may overly amplify the view of a particular audience segment.



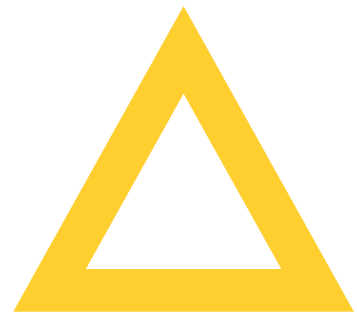
# MESSAGE WHEEL



A message wheel is a visual way of staying on message. The main argument is in the center of the wheel, with supporting details to help address potential hurdles and clearly define the problem and the solution.

- **Benefits:** When concise, a message wheel can lay out your core message. It is a great tool for staying on topic.
- **Weakness:** Many traditional message wheels can be overly dense with messages and not clearly defined. Avoid using small font sizes.

# MESSAGE TRIANGLE



A message triangle consists of three core messages: a clear message, a supporting message, and a rebuttal or bridge message to get back on track.

- **Benefits:** When kept simple, it can be an easy tool. It can also be a fun tool to develop as a team.
- **Weakness:** Depending on the context and collaboration, this tool could have a narrow point of view. There can be multiple interpretations of a message triangle, so make sure you have a clear reason for using the tool.

# PERSONA DEVELOPMENT

Developing personas that represent your target audience segments is crucial. These personas encapsulate demographic and psychographic information about your audience, helping you understand their needs, motivations, and communication preferences.

- **Benefits:** Clear understanding of your targets is essential for message development and campaign strategy. Tailoring your messages and campaign to the right people is critical.
- **Weakness:** Ensure your personas are findable and broad enough to make a real

difference in the outcome. Finding the perfect persona can be frustrating if you cannot reach those people or if there are not enough of them to make a difference.

## MESSAGE TESTING

Conduct message testing using surveys or focus groups to gather feedback on different versions of your advocacy message. This process helps you refine and optimize your messaging to ensure it resonates with your target audience.

- **Benefits:** Knowing how your message connects with different audiences can make a big difference in your campaign.
- **Weakness:** It takes a lot of work and resources to be ready to test your messages. Take the time to build out your messages using other tools before you test them.



# TOOLS TO USE ONCE YOU HAVE A STRATEGY

## DATA VISUALIZATION TOOLS

Conduct message testing using surveys or focus groups to gather feedback on different versions of your advocacy message. This process helps you refine and optimize your messaging to ensure it resonates with your target audience.

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- **Weakness:** It takes a lot of work and resources to be ready to test your messages. Take the time to build out your messages using other tools before you test them.

## STORYTELLING TOOLS

Utilize storytelling tools, like Flipgrid, Boast, or SoapBoxx, to convey your advocacy message effectively. Stories have a powerful impact on engaging emotions and inspiring action. Craft narratives using a story arc that illustrates the issue, its impact on individuals, and the desired outcomes.

- **Strengths:** Stories bring issues to life and put a human face to them. Stories combined with any campaign can deliver success.
- **Weakness:** Story collection is not an automatic or easy task. Even with the best story collection tools and narrative tools, it must have organization.

## DIGITAL ADVOCACY PLATFORMS

Leveraging digital advocacy platforms enables you to streamline your advocacy efforts. These platforms provide features such as email campaigns, petition creation, and social media amplification to help you reach some of your audience and mobilize supporters.

- **Strengths:** Using a digital advocacy platform can help streamline your digital campaign quickly.
- **Weaknesses:** Depending on your audience targets, you may miss a significant portion of your audience by assuming everyone is reachable through digital tools. Additionally, relying solely on digital outreach may overlook many parts of your coalition.

## EVALUATION AND ANALYTICS TOOLS

Measure the impact of your advocacy efforts using evaluation and analytics tools. These tools provide insights into reach, engagement, and outcomes, enabling you to refine your strategy and messaging over time.

- **Strengths:** A clear evaluation plan can benefit your organization in the long term. Good evaluation can assess all aspects of a campaign and be a resource well spent.
- **Weaknesses:** There are many options to evaluate campaign success, but some can increase your budget, limit your reach, and introduce bias. Choose the tool that is right for your goals and budget. Take the time to explore different options.

### KEY TAKEAWAYS

We're big fans of tools to streamline your work. These days, there are lots of tools for every aspect of a campaign, from creating your message to evaluating your outcomes. Remember to pick a combination of advocacy tools that align with your specific advocacy goals, target audience, and available resources. Don't rely on just one.



# CONCLUSION

We have made a commitment to writing useful information that can be used by the advocacy community to help make needed change. There is a general lack of information on how to build advocacy programs. The goal of these eBooks is to help.

This book would not have happened without the help of Elizabeth Rowe and Katie Abbodanza. We also have had a lot of great help with these eBooks from past TCW team members, clients who have given us countless insights, and readers who have written in with requests for content and other suggestions.

How can you use them? If you are just starting out or have been working in advocacy for a while, this eBook is meant to both refresh the old and provide some new ideas on how to engage in advocacy. If you want to use this eBook for a nonprofit or education purpose, please reach out to us.

## ADDITIONAL RESOURCES:

- [\*The Campaign Workshop Blogs\*](#)
- [\*Biannual Virtual Advocacy Trainings\*](#)
- [\*100+ Campaign Management Tools List\*](#)
- [\*How to Win a Campaign Podcast\*](#) (Note: Season 2 is all about advocacy!)

If you have any questions or to discuss how we can help, please contact Joe at 202-223-8884 or via email at [jfuld@thecampaignworkshop.com](mailto:jfuld@thecampaignworkshop.com).



# GLOSSARY

**A/B Testing:** This is a type of communications testing in which you divide up your targets, and give one group one treatment and another group a different treatment. Whichever treatment gets the best response is the one you want to use on your whole target list. For example, let's say you want to send a fundraising email. You have 500 people on your list. Send 100 people one version of the email, and another version to a different group of 100 people. Check which generates the most money. Then send that version to the rest of your list.

**Advocacy canvass:** Canvassing for advocacy can help achieve several different goals. By going door to door, your advocacy campaigners can fundraise, get out the vote, or engage and inform citizens.

**Banner ad:** Banner ads are digital ads that are embedded into ad pages by a server. Banner ads are connected to another webpage and are used to attract people to click on the ad and consequently visit the page, or to promote exposure through impressions.

**Content Marketing:** Content marketing is the process of making the words you write work for you. Content marketing drives traffic and engagement to your portals through the content you create (blog posts, eBooks, etc.) by focusing on keywords.

**Control group experiment:** A control group experiment tests a type of communication in which you set a small portion of your universe aside and compare the difference between who got contacted and who did not. Any campaign can do this, whether you want to test your 40-person email's efficacy or a massive statewide persuasion program.

**CPA campaign:** A CPA campaign adds people to your list by having them take an action on your behalf. People added to your list in this way are more likely to play an active role in your campaign than those who simply clicked on an online ad. Because these supporters are more valuable, the cost of a CPA campaign can often be higher than other forms of list building. However, the fact that these people have proactively opted into your campaign means the cost is often worth the return on investment.

**Experiment-informed program:** An EIP tests your campaign with a subset of your overall universe and allows you to look at those results, then roll out a refined campaign to your larger universe.

**Geofencing:** Geofencing means that an advertiser creates a virtual fence around an address and serves ads within that area. The retail market has frequently used geofencing to get people to purchase items or frequent a place of business. Within that context, it makes sense to create a geofence around your place of business and ads offering a coupon or promoting a special sale to people within that area. This technology also translates to the advocacy arena, allowing incredibly specific targeting and enabling you to run ads around an event or location that makes sense for your campaign.

**Grasstops:** Grasstops advocacy is when you focus your efforts on opinion leaders and folks who have connections to elected officials.

**Grassroots:** Grassroots advocacy is when you reach out to constituents in given legislative or congressional districts and have them connect with their legislator or member of Congress around an issue they care about.

**In-banner video:** An in-banner video is much like a basic banner ad, but with the added element of showing a video. These ads can be more visually engaging and grab a viewer's attention.

**IVR polling:** IVR polling is a “press one, press two” automated poll that's often done over the phone. It is a beefed-up robocall, essentially.

**Lobby visit day:** This is a day when members of your advocacy group serve as lobbyists and try to push your advocacy goal onto legislators.

**Lobbyist:** Lobbyists can be a good way to influence lawmakers. Although expensive, finding a lobbyist with close ties to a crucial legislator can make a difference in your advocacy campaign.

**Message triangle:** A message triangle is a template used to develop a clear message during an interview. The triangle includes a clear message or goal that you are going to highlight. It will also have key message points that will be used as evidence to support your goal. Finally, the triangle calls for transitions so you can avoid being caught off guard by a tricky question.

**Message box:** A message box is a way for you to distinguish your position from the that of your opposition by highlighting the difference between the two viewpoints.

**Native advertising:** Native ads have become the latest trend in the world of digital advertising. They are a type of advertising that fits into the content of the media where the ads are being placed. An example of this is when you are reading an article about the tech industry—let's say on your favorite newspaper's website—and you see another article below it about IBM's innovations in the tech world. That article about IBM is actually sponsored by IBM, making it a native advertisement.

**Patch-through call:** This is a phone call that patches a constituent through to their legislator or a relevant individual so that they can voice their opinion on a topic and take part in an advocacy effort.

**Powermapping:** Powermapping helps identify individuals, groups, or organizations that have an interest in or influence over the issue you are advocating for.



**Pre-roll:** Pre-roll ads are video ads that are played before a user can view the video they are trying to watch. These ads are usually 15-30 seconds long. They are currently one of the most popular forms of video advertisement.

**Splash page:** A splash page or a sign-up field to your Facebook page is a simple and free way to give your followers the option to sign up for your email list when they visit your page. These people are already taking the initiative to get information about you, so it should be no surprise that they are also more than likely to sign up if prompted.

