

2018 Advocacy Capacity Tool for organizational assessment

Please Note:

- Key terms throughout the survey are bold and underlined the first time they're used, and are defined on the terminology page on the Alliance for Justice Bolder Advocacy website

Introductory Questions: About Your Organization

The questions below ask for basic information about your group or organization.

Name of organization or group: _____

Your title at organization or group: _____

Intro 1: Who is the primary source of information for your survey answers?

- Volunteer Staff
- Board Member(s)
- Executive Director
- Program Staff
- Administrative Staff
- It is a group effort
- Other:

Intro 2: What kind of organization are you?

Select all that apply

- 501(c)(3) tax-exempt organization**
- 501(c)(4) tax-exempt organization**
- An informal association or **coalition**
- Other:

See "Comparison of 501(c)(3) and 501(c)(4) Permissible Activities" at bolderadvocacy.org for activities not included in this tool.

Intro 3: What is your organization's approximate annual budget?

- <\$100,000
- \$100,000-\$500,000
- \$500,000-\$2 million
- \$2 million - \$5 million
- >\$5 million

Intro 4: What issues do you work on? (Select all that apply)

- Arts
- Budget
- Campaign Finance Reform
- Child Welfare
- Civil Rights
- Consumer Rights
- Criminal Justice
- Defense Spending
- Disabilities
- Education
- Employment
- Environment
- Government Accountability
- Housing
- Healthcare
- Immigration/Immigrants' Rights
- Income Maintenance
- International
- Reproductive Rights
- Transportation
- Worker Rights
- Youth
- Other:

Intro 5: What best describes the primary work of your organization?

- Service Delivery
- Advocacy**
- Community Building / Community Development / Community Organizing**
- Think Tank
- Other:

Intro 6: At what levels do you engage in advocacy? (Select all that apply)

- Local
- State
- Federal
- Regional/Multi-State
- Tribal
- Other:

Intro 7: In which geographical areas are you engaging in advocacy? (Select all that apply)

- International
- North America
- South America
- Europe
- Asia
- Australia
- All US States
- Select US State(s):

As you begin this survey, keep these two questions in mind:

- **What are your long-term and short-term advocacy goals?**
 - For example: a housing advocacy group may have a long-term goal of obtaining policy to provide enough public housing for all of the state’s homeless, and a short-term goal of stopping proposed legislation to decrease funding in the state budget for public housing.
- **How can your organization uniquely contribute to accomplishing these goals?**
 - Factors to consider: This includes the type of role (mobilizer of networks, legislative strategy leader for a coalition, lone advocate on a narrow issue, public leader versus behind the scenes player, etc.) your organization wants to play, what other groups are doing, where your expertise lies, etc.

Section 1: Advocacy Goals, Plans, & Strategies

There are 18 capacity indicators in this survey. Each has 4 basic and 1-4 advanced measures.

Please select the response for each measure that best fits your organization.

Advanced questions are optional. For more information on advanced questions, please click [here](#).

This section includes: Preparation, Agenda, and Plans, Strategies and Adaptability.

S1.1 Preparation Introduces key elements of basic preparation for engaging in advocacy.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization identifies and articulates its mission and goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has basic knowledge about its subject matter, including how its issues affect constituents .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization understands the overall policy environment related to its issues, including trends, possible allies and opponents , and other organizations working towards the same goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies its existing advocacy capacities, including staffing, skills and knowledge, and strength of field operation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S1.1 Preparation: Advanced (Optional)				
The organization has a long-term vision or plan for its advocacy goals and for increasing its advocacy over time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S1.2 Agenda Introduces the importance of having a clear, written <u>agenda</u> that defines advocacy goals and prioritizes activities				
The organization has a written advocacy agenda approved by the organization’s leadership that identifies its goals and priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization gathers information and recommendations from constituents and other stakeholders in the development of its agenda.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization shares its agenda or segments thereof, with decision-makers , constituents, partners, and media , as appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization adjusts its focus on particular agenda items in response to internal and external changes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S1.2 Agenda: Advanced (Optional)				
The agenda includes one or more priorities that are proactive rather than reactive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has an agenda setting process that is understood throughout the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S1.3 Plans, Strategies, and Adaptability	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
Introduces the importance of developing a flexible plan to carry out the written agenda				
The organization analyzes what it will take to accomplish each written agenda item, including who has the power to make decisions in legislative , administrative , electoral , litigation , and other areas.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization develops a plan for how it will strategically advance each written agenda item. The plan identifies appropriate targets , tactics, major activities, and expected results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization monitors internal and external changes in the policy environment and adapts its strategies as needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has a plan for assessing advocacy capacity and for strengthening its capacity as needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S1.3 Plans, Strategies, and Adaptability: Advanced (Optional)				
The organization plans to test new, improved strategies and tactics, such as new methods of communication or of mobilizing networks .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 2: Conducting Advocacy

For most of the indicators in this section, you'll be asked the extent to which you rely on partners. You should use this question to assess the extent to which your organization has decided to get capacity in a particular indicator from other individuals or groups.

For more information on the "Rely on Partners" option, please click [here](#). This section includes: research and analysis, field operations, advocacy partners and coalitions, messaging, media relations, and influencing decision-makers.

S2.1 Research and Analysis	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
Assesses the extent to which the organization researches and gathers information and conducts analyses on its issues.				
The organization researches, compiles and analyzes information about specific issues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization researches and analyzes the impact of current policies, the policy environment and opportunities for advancing its goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization employs a process for verifying that its issues or issue analyses and other materials are accurate and reliable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization shares information, analyses and supporting materials with decision-makers , constituents, and partners, as appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.1 Research and Analysis: Advanced (Optional)				
The organization conducts in-depth research and produces reports or other materials related to its advocacy agenda .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.1 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S2.2 Field Operation				
Assesses how the organization communicates with, educates and engages its network and the public .	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization has a network or various networks of individuals and organizations that it can activate to advocate or collaborate on key policy issues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization communicates with its network on the status of advocacy efforts, opportunities to engage, messages and results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies segments of the public to educate about its agenda.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization conducts phone banks, informational mailings, online communications and/or canvassing to educate and mobilize their network and gain public support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.2 Field Operation: Advanced (Optional)				
The organization implements a plan to expand the size and diversity of its network.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization works to expand the issue knowledge and advocacy skills of those in its network.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization activates segments of the public to influence decision makers in support of organizational priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.2 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S2.3 Advocacy Partners and Coalitions				
Assesses the extent to which the organization has partnerships—with other nonprofits, businesses, professional associations, etc.—that advance its goals.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization identifies other stakeholders that have similar goals, including those with complementary knowledge and skills, with which it could collaborate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization participates in coalitions that share one or more of its goals and provide value to the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization actively seeks support for its priorities from its coalition partners.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization exchanges information with its partners, as appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.3 Advocacy Partners and Coalitions: Advanced (Optional)				
The organization seeks support from stakeholders who may not be traditional allies , but with whom it could partner on a particular project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization plays a leadership role in establishing and/or managing a coalition.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S2.4 Messaging Assesses how the organization develops and delivers its advocacy messages.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization develops clear, compelling and concise messages tailored to its target audiences .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization bases its messages and materials on reliable, credible and up-to-date information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies and uses effective messengers and spokespeople.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization chooses a variety of paid and/or earned media strategies to communicate its messages.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.4 Messaging: Advanced (Optional)				
The organization conducts polling and focus groups to develop and test effective messages.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.4 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S2.5 Media Relations Assesses the extent to which the organization communicates effectively with the media and uses various media to advance its policy goals.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization monitors media coverage related to its issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies, develops and maintains a list of media contacts relevant to its program issue(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization distributes information to a wide range of media outlets—including online, broadcast and print media—to communicate its messages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has a written media plan with objectives, targets, and timelines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.5 Media Relations: Advanced (Optional)				
The organization identifies, builds and maintains relationships with key personnel in online, broadcast and print media.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization maintains an active social media presence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has developed a crisis communications strategy for effectively dealing with negative press or an internal crisis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.5 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S2.6 Influencing Decision-Makers Assess the extent to which the organization builds influential relationships with targeted decision-makers.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization monitors the actions of decision-makers related to the organization's agenda.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization builds working relationships with decision-makers by providing information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization consistently nurtures relationships with decision-makers throughout the year.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization deliberately builds relationships with elected officials without regard to political affiliations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.6 Influencing Decision-Makers: Advanced (Optional)				
The organization identifies and builds relationships with influential individuals and groups who can persuade decision-makers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S2.6 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 3: Advocacy Avenues

This section includes: administrative, legislative, electoral and litigation **indicators**. Fill in the survey for the areas in which you work. You can choose to fill out one to all of these indicators. No matter how many you fill out, you will be able to view them all. While ballot measures are legally considered a type of legislation, ballot measure capacity is measured under its own ACT! indicator.

All of the indicators in this section include a question asking the extent to which you rely on partners. You should use this question to assess the extent to which your organization has decided to get capacity in a particular indicator from other individuals or groups.

For more information on the “Rely on Partners” option, please click [here](#).

S3.1 Administrative	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
Assess the organization’s skills, knowledge and actions related to administrative advocacy .				
The organization understands the regulatory and enforcement processes of the agencies that implement policies and programs, and how to influence these processes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies and works with appropriate decision-makers within the administrative agencies, including relevant commissions and advisory committees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies, monitors, and analyzes proposed rules, regulations , other administrative branch activities, and their potential impact on the organization’s priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization recommends policies or actions through comments (or endorsements of other groups’ comments) on proposed regulations or other administrative policies, through testimony at agency hearings and/or to further its priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.1 Administrative: Advanced (Optional)				
The organization proposes new regulations, executive orders , commissions, enforcement measures or other actions to further its purpose	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization is aware of planned activities by the administration related to the organization’s priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.1 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S3.2 Legislative Assess the organization's skills, knowledge and actions related to legislative advocacy.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization has knowledge of the legislative process (including budgeting and appropriations), and knows how to influence these processes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies and works with appropriate legislators, committees, staff and stakeholders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies, monitors and analyzes proposed legislation and the potential impact on its priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization promotes, opposes or helps design or amend legislation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.2 Legislative: Advanced (Optional)				
The organization is aware of planned activities by legislators and other advocates that are related to the organization's priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.2 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S3.3 Ballot Measures, Referenda, and Initiatives Assess organization's skills, knowledge, and actions related to activity on ballot measures .	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization identifies, monitors, and analyzes measures that will appear or may appear on the ballot and the potential impact on its policy priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization takes public positions on ballot measures related to its interests, its constituents' interests, or its priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization educates its constituents and other voters about its position on measures that will appear on the ballot.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization conducts get-out-the-vote efforts to promote or oppose ballot measures related to its interests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.3 Ballot Measures, Referenda, and Initiatives: Advanced (Optional)				
The organization is aware of state and local laws and processes governing the process for qualifying a measure for the ballot.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization drafts ballot measures and circulates ballot measures and petitions to further its priorities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.3 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S3.4 Electoral Assess organization's skills, knowledge, and actions related to activity to electoral activity.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization understands the primary and general election processes for candidate elections in relevant jurisdictions and the possible roles nonprofits can play.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization reminds and encourages its constituency and the public to vote.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization participates in voter and/or candidate education efforts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization educates its staff and governing body about the legal guidelines for electoral activity.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.4 Electoral: Advanced (Optional)				
The organization carries out voter and candidate education efforts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization engages in efforts to register voters and/or turn out voters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.4 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S3.5 Litigation Assess the organization's skills, knowledge and actions related to litigation and other legal activity.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization understands the role litigation plays to complement other strategies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization identifies appropriate courts and judicial trends to inform possible litigation strategies related to the organization's priorities.,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has access to competent counsel who can provide advice or pursue legal strategies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization pursues legal activities such as initiating litigation or signing on to amicus briefs , as needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.5 Litigation: Advanced (Optional)				
The organization monitors relevant court cases and decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S3.5 Relying on Partners				
To what extent do you rely on partners for this indicator?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 4: Organizational Operations to Sustain Advocacy

This section includes: organizational commitment, funding advocacy, and decision-making structure indicators.

S4.1 Organizational Commitment Assess the organization's operational commitment to its <u>advocacy</u> work.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization's <u>governing structure</u> is committed to advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has at least one staff person whose job description includes specific responsibilities for advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The executive director and relevant staff have a clear understanding of the basic federal, state, and local rules and regulations that govern lobbying, election- related work, and other advocacy activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization has investigated and decided whether or not to use the <u>501(h) expenditure test</u> .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S4.1 Organizational Commitment: Advanced (Optional)				
The organization invests in staff, board, and volunteer development to strengthen its advocacy work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization allocates increased staff time to strengthen its advocacy work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization's mission or strategic plan includes advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S4.2 Funding Advocacy Assess the extent to which the organization understands and implements practices for funding its advocacy work.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization understands how foundations can support advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization informs and educates <u>funders</u> about the legal rules for supporting advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization informs and educates funders and <u>donors</u> about the value of funding advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization fosters long-term relationships with individual donors and foundations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S4.2 Funding Advocacy: Advanced (Optional)				
The organization encourages its network to contribute financially to the organization's advocacy work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization's board and staff actively work to build a diverse base of financial support for advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S4.3 Decision-Making Structure and Process Assess the extent to which the organization has a process for making decisions.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization has a leadership structure or body that makes timely decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization's leadership and advocacy staff communicate regularly about the status of activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff identifies, for organizational leaders, potential opportunities and risks for the organization before engaging in advocacy work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization evaluates its progress and uses lessons learned to inform its decision-making.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S4.3 Decision-Making Structure and Process: Advanced (Optional)				
The leadership structure includes those that have knowledge, passion, and/or experience in advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

S4.4 Fiscal Management and Sustainability Assess the organization's fiscal management practices.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization's board treasurer, executive director, fiscal and relevant program staffs have received training and understand rules for monitoring and reporting funds for lobbying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization's financial management system tracks lobbying activities and expenses -- as well as funds not allowable for lobbying -- in keeping with appropriate federal, state, and local laws.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization budgets funds for advocacy programs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization commits a portion of general operating support to advocacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
S4.4 Fiscal Management and Sustainability: Advanced (Optional)				
The organization monitors changes to IRS rules or interpretations of rules that may affect its tax status or way of doing business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Results

Next, you can score your responses to determine the following information (please note advanced questions are not included in scoring):

- Numerical results for each of the 18 indicators, by section
- Your selections for questions asking the extent to which you rely on partners
- Numerical results for each section

For information on analyzing these results, please click [here](#).

Please review the results below then answer a few final questions

Don't get too focused on the numbers! The objective here is to identify organizational strengths and gaps, and where to build advocacy capacity – not to get the highest score. For example, when groups rely on partners, the organizational score is expected to be lower.

Numerical results for each of the 18 indicators, by section:

Question Section/Indicator	Points awarded (out of 16 possible points per indicator)	“Rely on Partners” selection
Advocacy Goals, Plans and Strategies		
1.1 Preparation		n/a
1.2 Agenda		n/a
1.3 Plans, Strategies, and Adaptability		n/a
Conducting Advocacy		
2.1 Research and Analysis		
2.2 Field Operations		
2.3 Advocacy Partners and Coalitions		n/a
2.4 Messaging		
2.5 Media Relations		
2.6 Influencing Decision-Makers		
Advocacy Avenues		
3.1 Administrative		
3.2 Legislative		
3.3 Ballot Measures, Referenda, and Initiatives		
3.4 Electoral		
3.5 Litigation		
Organizational Operations to Sustain Advocacy		
4.1 Organizational Commitment		n/a
4.2 Funding Advocacy		n/a
4.3 Decision-Making Structure and Process		n/a
4.4 Fiscal Management and Sustainability		n/a

Numerical Results for each section:

Question Section	Points Awarded	Rely on Partners Selection
Advocacy Goals, Plans, and Strategies	out of 48	
Conducting Advocacy	out of 96	Review above answers
Advocacy Avenues	out of 80	Review above answers
Organizational Operations to Sustain Advocacy	out of 64	

Strengthening

After reviewing the above results, please select two to three areas in which your organization may want to strengthen organizational advocacy capacity and/or your reliance on your partners' advocacy capacity.

For help in choosing areas to strengthen, please click [here](#).

Section 1: Advocacy Goals, Plans and Strategies

- Preparation
- Agenda
- Plans, Strategies, and Adaptability

Section 2: Conducting Advocacy

- Research and Analysis
- Field Operation
- Advocacy Partners and Coalitions
- Messaging
- Media Relations
- Influencing Decision-Makers

Section 3: Advocacy Avenues

- Administrative
- Legislative
- Ballot Measures, Referenda, and Initiatives
- Electoral
- Litigation

Section 4: Organizational Operations to Sustain Advocacy

- Organizational Commitment
- Funding Advocacy
- Decision-Making Structure and Process
- Fiscal Management and Sustainability

Thank you for using



for organizational assessment

It is recommended that you complete the entire tool again as needed, or at least every 6-18 months.