BOLDERADVOCACY
An initiative of Alliance for Justice

ACT!
ADVOCACY CAPACITY TOOL

Advocacy Capacity Tool for organizational assessment

Please Note:

- Key terms throughout the survey (in bold) are defined the terminology page on the Alliance for Justice website
- To access a number of resources on building your organization's advocacy capacity, please see Bolder Advocacy's resource list

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?

- ⭕ **501(c)(3)** tax-exempt organization
- ⭕ **501(c)(4)** tax-exempt organization
- ⭕ An informal association or **coalition** without tax exempt status
- ⭕ Other:

Intro 3: What is your organization's approximate 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 states or regions are you working to influence policy? (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 the current state appropriations 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

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**.

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.	⭘	⭘	⭘	⭘
The organization has basic knowledge about its subject matter, including how its issues affect **constituents**.	⭘	⭘	⭘	⭘
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	⭘	⭘	⭘	⭘
The organization identifies its existing advocacy capacities, including staffing, skills and knowledge, and strength of field operation.	⭘	⭘	⭘	⭘
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.	⭘	⭘	⭘	⭘

S1.2 Agenda Introduces the importance of having a clear, written agenda that defines advocacy goals and prioritizes activities	**Very Strong/ Always**	**Moderately Strong/ Usually**	**Somewhat Strong/ Sometimes**	**Not Strong/ Rarely/ Never**
The organization has a written **advocacy agenda**, approved by the organization's **leadership** that identifies its goals and priorities.	⭘	⭘	⭘	⭘
The organization gathers information and recommendations from constituents and other **stakeholders** in the development of its agenda.	⭘	⭘	⭘	⭘
The organization shares its agenda or segments thereof, with **decision-makers**, constituents, partners, and **media**, as appropriate.	⭘	⭘	⭘	⭘
The organization adjusts its focus on particular agenda items in response to internal and external changes.	⭘	⭘	⭘	⭘
S1.2 Agenda: Advanced (Optional)				
The agenda includes one or more priorities that are proactive rather than reactive.	⭘	⭘	⭘	⭘
The organization has an agenda setting process that is understood throughout the organization.	⭘	⭘	⭘	⭘

S1.3 Plans, Strategies, and Adaptability
Introduces the importance of developing a flexible plan to carry out the written agenda

	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
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.	○	○	○	○
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.	○	○	○	○
The organization monitors internal and external changes in the policy environment and adapts its strategies as needed.	○	○	○	○
The organization has a plan for assessing **advocacy capacity** and for strengthening its capacity as needed.	○	○	○	○
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.**	○	○	○	○

Section 2: Conducting Advocacy

For most of the indicators in this section, you will have the option of choosing "Rely on Partners" as your answer.
You should choose "Rely on Partners" if the organization has decided not to build capacity in a particular measure because it primarily gets that capacity from other individuals or groups.

For more information on the "Rely on Partners" option, please click **here**.

S2.1 Research and Analysis
Assesses the extent to which the organization researches and gathers information and conducts analyses on its issues.

	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never	Rely on Partners
The organization researches, compiles and analyzes information about specific issues.	○	○	○	○	○
The organization researches and analyzes the impact of current policies, the policy environment and opportunities for advancing its goals.	○	○	○	○	○
The organization employs a process for verifying that its issues or issue analyses and other materials are accurate and reliable.	○	○	○	○	○
The organization shares information, analyses and supporting materials with **decision-makers**, constituents, and partners, as appropriate.	○	○	○	○	○
S2.1 Research and Analysis: Advanced (Optional)					
The organization conducts in-depth research and produces reports or other materials related to its **advocacy agenda.**	○	○	○	○	○

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	Rely on Partners
The organization has a **network** or various networks of individuals and organizations that it can activate to advocate or collaborate on key policy issues.	○	○	○	○	○
The organization communicates with its network on the status of advocacy efforts, opportunities to engage, **messages** and results.	○	○	○	○	○
The organization identifies segments of the public to educate about its agenda.	○	○	○	○	○
The organization conducts phone banks, informational mailings, online communications and/or canvassing to educate and mobilize their network ad gain public support.	○	○	○	○	○
S2.2 Field Operation: Advanced (Optional)					
The organization implements a plan to expand the size and diversity of its network.	○	○	○	○	○
The organization works to expand the issue knowledge and advocacy skills of those in its network.	○	○	○	○	○
The organization activates segments of the public to influence decision makers in support of organizational priorities.	○	○	○	○	○

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.	○	○	○	○
The organization participates in coalitions that share one or more of its goals and provide value to the organization.	○	○	○	○
The organization actively seeks support for its priorities from its coalition partners.	○	○	○	○
The organization exchanges information with its partners, as appropriate.	○	○	○	○
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.	○	○	○	○
The organization plays a leadership role in establishing and/or managing a coalition.	○	○	○	○

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	Rely on Partners
The organization develops clear, compelling and concise messages tailored to its target audiences.	○	○	○	○	○
The organization bases its messages and materials on reliable, credible and up-to-date information.	○	○	○	○	○
The organization identifies and uses effective messengers and spokespeople.	○	○	○	○	○
The organization chooses a variety of paid and/or earned media strategies to communicate its messages.	○	○	○	○	○
S2.4 Messaging: Advanced (Optional)					
The organization conducts polling and focus groups to develop and test effective messages.	○	○	○	○	○

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	Rely on Partners
The organization monitors media coverage related to its issues	○	○	○	○	○
The organization identifies, develops and maintains a list of media contacts relevant to its program issue(s)	○	○	○	○	○
The organization distributes information to a wide range of media outlets—including online, broadcast and print media—to communicate its messages	○	○	○	○	○
The organization has a written media plan with objectives, targets, and timelines	○	○	○	○	○
S2.5 Media Relations: Advanced (Optional)					
The organization identifies, builds and maintains relationships with key personnel in online, broadcast and print media.	○	○	○	○	○
The organization maintains an active social media presence	○	○	○	○	○
The organization has developed a crisis communications strategy for effectively dealing with negative press or an internal crisis.	○	○	○	○	○

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	Rely on Partners
The organization monitors the actions of decision-makers related to the organization's agenda.	○	○	○	○	○
The organization builds working relationships with decision-makers by providing information.	○	○	○	○	○
The organization consistently nurtures relationships with decision-makers throughout the year.	○	○	○	○	○
The organization deliberately builds relationships with elected officials without regard to political affiliations.	○	○	○	○	○
S2.6 Influencing Decision-Makers: Advanced (Optional)					
The organization identifies and builds relationships with influential individuals and groups who can persuade decision-makers.	○	○	○	○	○

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. Please note, **ballot measures** are included under **legislative advocacy.**
For all of the indicators in this section, you will have the option of choosing "Rely on Partners" as your answer.
<u>You should choose "Rely on Partners"</u> if the organization has decided not to build capacity in a particular measure because it primarily gets that capacity from other individuals or groups.

For more information on the "Rely on Partners" option, please click **here**.

S3.1 Administrative Assess the organization's skills, knowledge and actions related to <u>administrative advocacy</u>.	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never	Rely on Partners
The organization understands the regulatory and enforcement processes of the agencies that implement policies and programs, and how to influence these processes.	○	○	○	○	○
The organization identifies and works with appropriate decision-makers within the administrative agencies, including related commissions and advisory committees.	○	○	○	○	○
The organization identifies monitors and analyzes proposed rules, regulations, other administrative branch activities, and their potential impact on the organization's priorities.	○	○	○	○	○
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.	○	○	○	○	○
S3.1 Administrative: Advanced (Optional)					
The organization initiates new regulations, executive orders, commissions, enforcement measures or other actions to further its purpose	○	○	○	○	○
The organization is aware of planned activities by the administration related to the organization's priorities.	○	○	○	○	○

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	Rely on Partners
The organization has knowledge of the legislative process (including budgeting and appropriations), and knows how to influence these processes.	○	○	○	○	○
The organization identifies and works with appropriate legislators, committees, staff and stakeholders.	○	○	○	○	○
The organization identifies monitors and analyzes proposed legislation and the potential impact on its priorities.	○	○	○	○	○
The organization promotes, opposes or helps design or amend legislation.	○	○	○	○	○
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.	○	○	○	○	○

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	Rely on Partners
The organization identifies, monitors, and analyzes measures that will appear or may appear on the ballot and the potential impact on its policy priorities.	○	○	○	○	○
The organization takes public positions on ballot measures related to its interests, its constituents' interests, or its priorities.	○	○	○	○	○
The organization educates its constituents and other voters about its position on measures that will appear on the ballot.	○	○	○	○	○
The organization conducts get-out-the-vote efforts to promote or oppose ballot measures related to its interests.	○	○	○	○	○

S3.3 Ballot Measures, Referenda, and Initiatives: Advanced (Optional)

	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never	Rely on Partners
The organization is aware of state laws and processes governing the process for qualifying a measure for the ballot.	○	○	○	○	○
The organization drafts and circulates ballot measures to further its priorities.	○	○	○	○	○

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	Rely on Partners
The organization understands the primary and general election processes for candidate elections in relevant jurisdictions and the possible roles nonprofits can play.	○	○	○	○	○
The organization reminds and encourages its constituency and the public to vote.	○	○	○	○	○
The organization participates in voter and/or candidate education efforts.	○	○	○	○	○
The organization educates its staff and governing body about the legal guidelines for electoral activity.	○	○	○	○	○

S3.4 Electoral: Advanced (Optional)

	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never	Rely on Partners
The organization initiates **voter** and **candidate education** efforts.	○	○	○	○	○
The organization engages in efforts to register voters and/or turn out voters.	○	○	○	○	○

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	Rely on Partners
The organization understands the role litigation plays to complement other strategies.	○	○	○	○	○
The organization identifies appropriate courts, regions and other court leanings to inform possible litigation actions related to the organization's priorities.	○	○	○	○	○
The organization has access to competent counsel who can provide advice or pursue legal strategies.	○	○	○	○	○
The organization pursues legal activities such as initiating litigation or signing on to amicus briefs, as needed.	○	○	○	○	○
S3.5 Litigation: Advanced (Optional)					
The organization monitors relevant court cases and decisions.	○	○	○	○	○

Section 4: Organizational Operations to Sustain Advocacy

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

S4.1 Organizational Commitment

Assess the organization's operational commitment to its **advocacy** work.

	Very Strong/ Always	Moderately Strong/ Usually	Somewhat Strong/ Sometimes	Not Strong/ Rarely/ Never
The organization's governing structure is committed to advocacy.	○	○	○	○
The organization has at least one staff person whose job description includes specific responsibilities for advocacy.	○	○	○	○
The executive director and relevant staff have a clear understanding of the basic federal and state rules and regulations that govern lobbying, election-related work, and other advocacy activities.	○	○	○	○
The organization has investigated and decided whether or not to use the 501(h) expenditure test.	○	○	○	○
S4.1 Organizational Commitment: Advanced (Optional)				
The organization invests in staff, board, and volunteer development to strengthen its advocacy work.	○	○	○	○
The organization allocates increased staff time to strengthen its advocacy work.	○	○	○	○
The organization's mission or strategic plan includes advocacy	○	○	○	○

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.	○	○	○	○
The organization informs and educates funders about the legal rules for supporting advocacy.	○	○	○	○
The organization informs and educates funders and donors about the value of funding advocacy.	○	○	○	○
The organization fosters long-term relationships with individual donors and foundations.	○	○	○	○
S4.2 Funding Advocacy: Advanced (Optional)				
The organization encourages its network to contribute financially to the organization's advocacy work.	○	○	○	○
The organization's board and staff actively work to build a diverse base of financial support for advocacy.	○	○	○	○

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.	○	○	○	○
The organization's leadership and advocacy staff communicate regularly about the status of activities.	○	○	○	○
Staff identifies, for organizational leaders, potential opportunities and risks for the organization before engaging in advocacy work.	○	○	○	○
The organization evaluates its progress and uses lessons learned to inform its decision-making.	○	○	○	○
S4.3 Decision-Making Structure and Process: Advanced (Optional)				
The leadership structure includes those that have knowledge, passion and/or experience in advocacy.	○	○	○	○

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.	○	○	○	○
The organization's financial management system tracks lobbying activities and expenses -- as well as funds not allowable for lobbying -- in keeping with appropriate federal and state laws.	○	○	○	○
The organization budgets funds for advocacy programs.	○	○	○	○
The organization commits a portion of general operating support to advocacy.	○	○	○	○
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.	○	○	○	○

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
- Number of times "Rely on Partners" was chosen for each indicator
- 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 weaknesses, and where to build advocacy capacity – not to get the highest score. For example, where groups choose to mostly rely on partners, the organizational score is expected to be low.

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

Question Section/Indicator	Points awarded (out of 16 possible points per indicator)	Number of Times "Rely on Partners" Selected
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	Number of Times "Rely on Partners" Selected
Advocacy Goals, Plans, and Strategies	out of 48	n/a
Conducting Advocacy	out of 96	
Advocacy Avenues	out of 80	
Organizational Operations to Sustain Advocacy	out of 64	n/a

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 capacity from partners.

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

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ADVOCACY CAPACITY TOOL

for organizational assessment

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