Developing a Strategic Advocacy Plan

Successful advocacy and lobbying efforts depend upon establishing a strong relationship with your elected officials. When congressional offices trust your organization and know that you are a credible and reliable partner, they will be more likely to respond positively to your advocacy requests.

Developing this kind of relationship takes time. To make the most of that time, you should map out a strategy for your advocacy efforts. This section of the toolkit offers some suggestions for doing so.

Important Strategies for Successful Advocacy

MAKE ADVOCACY A PRIORITY FOR YOUR ORGANIZATION

People working in homelessness assistance are extremely busy, and their jobs often do not explicitly include advocacy. As a result, advocacy efforts on issues related to homelessness may be completed at the last minute when an extremely important and timely issue arises. This kind of “ad hoc advocacy” makes it hard to build strong, long-term relationships with elected officials.

It is critical to dedicate specific staff time to advocacy and lobbying activities. It is hard to make advocacy a priority when it is not part of anyone’s job description. Setting aside a specific amount of time for advocacy activities and adding those activities to a staff member’s work plan and job description increases your organization’s dedication to these activities. This approach also will make it easier for your organization to track its time spent on lobbying so that any associated limits are not exceeded.

PRIORITIZE KEY ISSUES AND TARGETS

When developing a strategic advocacy plan, you should prioritize policy issues and congressional targets based on which will best help you achieve your mission.

Organizations that serve people experiencing homelessness must understand a wide array of cross-cutting issues—ranging from housing to reentry and from education to poverty. As a result, it can be easy for organizations to get swept up in the need to work on each and every issue related to homelessness. However, you are more likely to make progress if you spend a lot of time focusing on a few issues of the most importance.

TIP

Involve your board in advocacy. Board members generally are well-respected community leaders interested in the issue of homelessness. In addition, they often represent a cross-section of interests—including business leaders, nonprofit leaders, and other opinion leaders with wide social networks. As a result, they make great advocates.
As you develop your strategic plan, think about which issues are most important for your organization to prioritize. Consider which issues and policies most impact your mission and the population you serve, as well as which areas you are likely to be able to impact. The Alliance can help you make these assessments.

Also, consider prioritizing congressional targets. Given that you have limited time and financial resources to devote to advocacy, your organization may choose to focus its energy on a specific Member of Congress (Member). The Alliance can help you determine the best targets on which to focus based on your district and your organization’s priorities.

DEVELOP STRATEGIC PARTNERSHIPS
Partnerships should be an integral part of your organization’s advocacy plan. Working with partner organizations and coalitions can both reinforce and supplement your own efforts. The more voices that speak up about an issue, the more attention it is likely to receive. Working with partner organizations can add additional voices on important issues.

Advocacy campaigns organized among multiple partner agencies can be extremely effective when the effort is well-coordinated and all partners can agree on a common set of goals, objectives, and strategies.

Choosing an approach to your “Asks”

Advocacy requests can take two main approaches, depending on the audience. In order to build a movement, many organizations explain to the public what they would want Congress to do ideally and eventually, while other organizations make more short-term, pragmatic requests of Congress in order to make concrete advancements.
The benefit to setting an idealistic goal is that it helps to energize advocates and the homelessness assistance field. Explaining the long-term vision for advocacy activities increases individuals’ desire to participate in the movement and their understanding of how the actions that they take now can help to shape a long-term change. This kind of approach is helpful in dealing with advocates; it generally has proven to be less effective when working directly with Congress.

Your direct appeals to Members to take action are more likely to be successful if they include only pragmatic requests about what is realistically achievable in the immediate future. This way, congressional offices are more likely to view your organization as a practical, credible partner.

Creating a Year-Long Strategic Advocacy Plan

After you have considered all of the issues raised above, the next step is to put together a long-term plan for your organization’s advocacy efforts. Your organization should identify goals, objectives, and key strategies, and then pair all of these decisions with a timeline. The section below suggests strategies for creating a strategic advocacy plan. For the purposes of simplicity, this section will refer to a year-long strategic advocacy plan. While this timeframe serves as a guide, your organization should choose the timeline that makes the most sense for you.

Set Goals and Objectives

Any year-long strategic advocacy plan should include a set of goals and objectives around which the rest of the plan is based. Assess what your organization’s overall aims are for your advocacy efforts.

- A goal describes the policy advancement that you ultimately hope to achieve by your advocacy efforts.
- An objective, on the other hand, is a concrete action that you would like a Member to take in order to help you reach a goal.

Within each goal, identify the objectives that you hope your Member(s) will achieve. When setting your goals and objectives for the year, consider the issues and targets you decided to prioritize, as well as what issues your partners might cover.

Each objective you set should be very clear. It is best to be as specific as possible. Vague objectives (i.e., getting a Member to “support” a program) are hard to quantify and are less likely to result in concrete action steps by the Member.

The most common goals are increasing resources for a specific federal program or passing a specific piece of legislation. Common objectives include getting a Member to write a letter to or personally talk with a certain committee chair or ranking member, introduce legislation, co-sponsor legislation, or vote a certain way on a specific bill.

Setting a time period for achieving each objective increases the level of accountability and therefore the likelihood of successfully reaching your goals.
With advocacy efforts, the ultimate goal usually is to increase resources or pass new legislation. Unfortunately, sometimes factors beyond your control (such as the economic or political climate) may make it hard to reach those goals. As a result, it is very important to use additional measures to define success, including objectives for getting your Member to take action or specific outputs for your organization, such as sending a certain number of letters to a Member.

CHOOSE OUTPUTS (STRATEGIES)
After setting goals and identifying targets, begin to consider which actions will best help you to reach your goals and objectives. These actions, sometimes also referred to as “outputs,” really describe the specific strategies you plan to undertake to reach your objectives. Key strategies are described in this toolkit and include getting a Member to do a site visit to your program, meeting with a congressional office, sending letters, making phone calls, and working with the media, among others. Some outputs are more time-intensive, while others require less effort but may not be as impactful.

Determine how much work is needed to reach the objectives you set, and then choose which outputs will be most effective. You want to be sure to choose the right strategy for successfully achieving your objectives without expending unnecessary resources on the effort. The more time you put into an advocacy strategy, the more likely you are to be able to affect the outcome positively.

Be very specific in your strategies. Instead of aiming to “send letters” or “get media attention,” aim to “get the community to send 20 letters” to a Member or “place one op-ed and three letters to the editor in the local paper” about a certain piece of legislation.

Numerical and concrete outputs to aim for will help your organization to better structure and evaluate its efforts. Setting specific strategies will help your organization to be more goal-oriented and to focus its efforts on meeting its advocacy objectives and, ultimately, its goals. Be realistic, but ambitious. Aim high and push your organization to do its best in its efforts, but do not set yourself up for failure by choosing impossibly high outputs for your efforts.

The figure below provides an example of the relationship among goals, objectives, and outputs.
Building Internal Advocacy Capacity

Many organizations also like to set goals internally to build their organizational or network capacity to practice advocacy. These kinds of activities also should be included in a strategic advocacy plan.

Just as you would for advocacy goals, you also should identify specific objectives for each internal capacity goal. For example, you might plan to conduct a certain number of staff trainings within the next year, to get each staff member to undertake at least one advocacy or lobbying action, or to grow your email network by a certain percentage.
Add an additional level of detail by laying out each activity associated with all of the strategies you have chosen to undertake. For example, if you have chosen to try to get a Member to do a site visit, include specific activities such as sending the invitation and getting partners to send letters of support.

**PUT IT ALL TOGETHER**

After choosing targets, goals, objectives, and outputs, the next step is to **add a timeline**. As you create your timeline, consider that the appropriations process happens yearly, with most of the activity happening in the spring. The process for creating authorizing bills is usually a longer process with no set timeframe. Try to plot out chronologically when your organization would like to implement each chosen strategy.

**Assign a lead to each strategy and task.** This will increase internal accountability, thereby improving your chances of successfully completing your strategic advocacy plan.

Once you have put all of this information together into one document, you will have created a strategic advocacy plan that can guide your organization’s advocacy activities for the upcoming year. The final result will be an extremely detailed work plan that your organization can follow easily as a checklist of advocacy activities for the year.

**Remember These Five Steps for Success**

- Dedicate specific staff time to advocacy activities.
- Prioritize policy issues and congressional targets in order to make the most of limited resources.
- Set clear goals and objectives.
- Include a timeline in your plan.
- Be sure to identify lead individuals for each task.
## Strategic Advocacy Plan Exhibit 1: Example Goals and Objectives Chart

*This is an example of what a Goals and Objectives Chart within a strategic advocacy plan might look like.*

<table>
<thead>
<tr>
<th>GOAL</th>
<th>OBJECTIVES</th>
<th>OUTPUTS/STRATEGIES</th>
<th>ACTIVITIES</th>
</tr>
</thead>
</table>
| 1: Increase funding for [McKinney-Vento Homeless Assistance Grants](#) in the next fiscal year. | 1.1: Get [Representative Y](#) to sign a congressional sign-on letter about McKinney-Vento Funding. | 1.1.1: Meet with district and DC staff members who handle housing issues for [Rep. Y](#).  
1.1.2: Get [Rep. Y](#) to visit our McKinney-Vento-funded program.  
1.1.3: Get our email network to make 20 calls to his office. | 1.1.1: • Find out who handles housing issues in each office, and ask for a meeting.  
1.1.2: • Invite [Rep. Y](#) to visit our program, and ask partner agencies and board members to send letters of support urging [Rep. Y](#) to accept.  
1.1.3: • Send 3 action alerts to our email network.  
• Make personal calls/emails to 10 people with whom we have a strong relationship. Ask them to ask others to make calls, too. |
| 2: Pass the [Section 8 Voucher Reform Act (SEVRA)](#). | 2.1: Get [Representative Y](#) to co-sponsor SEVRA. | 2.1.1: • Work with 2 close partner agencies to set up a joint meeting. All agencies should ask board members to send letters of support.  
2.1.2: • Bring sample letters and contact information to a Continuum of Care meeting, and ask everyone to send a letter from their agency.  
• Send out action alert to our email network. |
| 3: Build the capacity of our email network to conduct advocacy. | 3.1: Grow the size of our email network by 20 percent. | 3.1.1: • Make the sign-up box more prominent on our website’s home page.  
• Include a link to sign up for the newsletter in conference/event brochures, handouts at presentations, and in community meetings.  
3.1.2: • Add anyone who attends our conferences/events to our email network list.  
• Add key partner contacts - especially those responsible for advocacy or federal grants.  
3.1.3: • Reach out to faith- and community-based organizations and other social service agencies that interact with people experiencing or at risk of homelessness. |

### Activities

- 1.1.1: Find out who handles housing issues in each office, and ask for a meeting.
- 1.1.2: Invite [Rep. Y](#) to visit our program, and ask partner agencies and board members to send letters of support urging [Rep. Y](#) to accept.
- 1.1.3: Send 3 action alerts to our email network.
- 1.2.1: Work with 2 close partner agencies to set up a joint meeting. All agencies should ask board members to send letters of support.
- 1.2.2: Bring sample letters and contact information to a Continuum of Care meeting, and ask everyone to send a letter from their agency.
- 1.2.3: Send out action alert to our email network.
- 2.1.1: Prepare talking points and a one-pager to send to the staff member. Call DC housing policy staff member to talk.
- 2.1.2: Draft a letter to the editor and ask our board chair to submit it. Follow up with the opinion editor.
- 3.1.1: Make the sign-up box more prominent on our website’s home page. Include a link to sign up for the newsletter in conference/event brochures, handouts at presentations, and in community meetings.
- 3.1.2: Add anyone who attends our conferences/events to our email network list.
- 3.1.3: Reach out to faith- and community-based organizations and other social service agencies that interact with people experiencing or at risk of homelessness.
- 3.2.1: Ask each staff member to make a certain number of phone calls each month. Track responses they get, and gauge interest level.
- 3.2.2: Design a survey that asks how interested recipients are in taking action and lists several specific areas where you might ask them to take action. Find out in what areas their interests lie. Follow up with respondents as appropriate. If someone indicates interest in a specific topic, be sure to personally ask them to take action on that topic at a relevant time.
- 3.2.3: Get at least 5 new people to undertake specific advocacy activities multiple times throughout the year.
<table>
<thead>
<tr>
<th>MONTH</th>
<th>ACTIVITY</th>
<th>LEAD</th>
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| July    | • Find out who handles housing issues in Rep. Y’s local and DC offices, and ask for a meeting to introduce ourselves and discuss the importance of increasing McKinney-Vento funding and passing SEVRA. Invite Rep. Y to visit our program during the next congressional recess.  
  • Divide the names on our email list among staff members, giving each of them a handful of people to call each month over the next year to introduce themselves and gauge the level of their interest in advocacy activities. |      |
| August  | • Follow up on our invitation for Rep. Y to visit our program, and ask our board members and partner agencies to send letters of support for the site visit.  
  • Connect with nontraditional partners, including faith- and community-based organizations with whom we do not work regularly but who interact with people experiencing homelessness. Gauge their interest in joining our email list or partnering on advocacy efforts with us.  
  • Host site visit to our McKinney-Vento-funded program for Rep. Y, explaining the importance of these funds and asking Rep. Y to support increased funding for the program this year. |      |
| September | • Send out action alert about McKinney-Vento funding for this federal fiscal year, which begins October 1.  
  • Follow up on action alert with about 10 people with whom we have a strong relationship. Ask them to ask others to make calls, too. |      |
| October | • Make the sign-up box on our website for joining our email list more prominent on the homepage.  
  • Design a survey that asks email list members how interested they are in taking action and identifies key areas in which they might be most interested. |      |
| November | • Include a link to sign up for our email list in brochures announcing our upcoming conference.  
  • Distribute the survey to our email list. Send out a reminder a few days before the survey deadline, asking people who have not yet filled it out to complete the survey. |      |
| December | • Analyze the survey results, and follow up individually with respondents as appropriate. |      |
| January | • Add anyone who registers for our conference to our email list.  
  • Send out action alert about McKinney-Vento funding to our email list. Ask recipients to call Rep. Y’s DC office and ask that Rep. Y sign a congressional sign-on letter in support of increased funding for the McKinney-Vento program.  
  • Follow up on action alert with about 10 people with whom we have a strong relationship. Ask them to ask others to make calls, too. |      |
| February | • Send out a reminder action alert, asking recipients to continue asking Rep. Y to sign onto the McKinney-Vento congressional sign-on letter, if Rep. Y has not already done so. |      |
| March | • Work with 1-2 close partner agencies to set up a joint meeting with Rep. Y. Each agency’s board members should send letters of support for the meeting. |      |
| April | • Hold joint meeting with Rep. Y, and share information about the importance of SEVRA and Section 8 to our community, along with the importance of McKinney-Vento funding.  
  • Follow up on the meeting with Rep. Y by sending a one-pager on SEVRA funding to the appropriate staff member. A few days later, follow up with a phone call to confirm receipt and ask if the staff member has any outstanding questions. |      |
| May | • Send action alert to email network asking recipients to write a letter thanking Rep. Y for signing the McKinney-Vento congressional sign-on letter and asking Rep. Y to further demonstrate a commitment by personally asking the HUD Appropriations Committee Chair to provide increased funding for McKinney-Vento programs in the fiscal year starting on October 1.  
  • Draft a letter to the editor about the importance of SEVRA urging Rep. Y to co-sponsor the legislation. Ask a board member if the letter can come from him/her. |      |
| June | • Bring sample letters to the Continuum of Care meeting, and ask partner agencies to send letters asking Rep. Y to personally talk with the HUD Appropriations Committee Chair about increasing McKinney-Vento funding.  
  • Submit the letter to the editor about SEVRA to the local paper, and then follow up with the opinion editor.  
  • Begin drafting next year’s strategic advocacy plan. |      |