

Large or Small, Your Organization Can Become an Advocate



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conference.

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Welcome to today's webinar – Large or Small, Your Organization Can Become an Advocate – presented by GoodWorks Connect and Donors Forum.

I'm Delia Coleman, the Public Policy Manager/Communications & Outreach at Donors Forum. I will be your presenter today.

Prior to this program you should have received a confirmation email containing information about today's program and my bio.

Immediately following the program, you will be routed to an online evaluation survey. Please take a few minutes to complete the evaluation and let us know your thoughts. We value your opinion and we use the information collected to help shape programming. A copy of this presentation will also be emailed posted on the GWC site after the webinar.

During the presentation, all lines will be muted. Please feel free to use the chat feature on the left hand side of your screen to ask me questions throughout the webinar. There will also be a Q&A session at the end at which the lines will be unmuted.

Please be aware of ambient noise in your environment; we will be able to hear typing and offline conversations. Please do not put this call on hold. You can always hang up and dial back in.

To mute your line press star 6; to unmute, press star 7.

If you have difficulties at any time, you may contact an operator by pressing star ZERO, or call the support number on the screen.



Mission: organization of grantmakers, committed to sustaining nonprofit sector

We are the only regional association in the country with both nonprofits and grantmakers as Partners and Members

We have a dual interest in being advocates for advancing policies that benefit both nonprofit and philanthropic sector.

“Neutral” refers to our direct organizational interest, but not necessarily to mode of engagement.

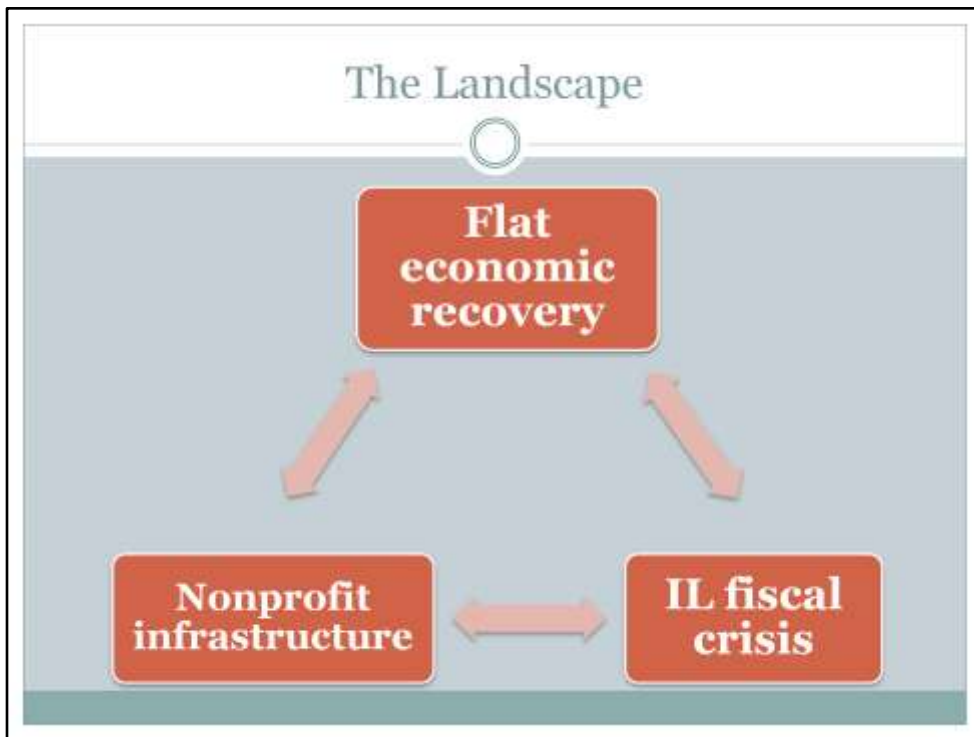
Our policy work is focused on those identifying those challenges and issues that cut across subsector and impact whole system, human services, to arts, to env’t and education.

And our approaches to developing solutions are varied, from research and information to educating gov’t officials and working to broker relationships between philanthropy, gov’t and nonprofits.

In other words, we are an association that engages in the various types of advocacy outreach on a regular basis.



Over the next 70 minutes I'd like us to cover these areas.



What are the external conditions facing the nonprofit, human services sector and creating the need for advocacy?

1. **The economy:** marked by high unemployment and flat growth; the stimulus is over but providers know the affects of the recession still remain; which has a targeted affect on vulnerable populations, increasing demand for services.
2. **Illinois' fiscal instability:** a tax increase has passed but it is nowhere big enough to deal with the size of the deficit over the long run – nor does it address the hard debt obligations the state has in Medicaid and pension responsibilities; after the tax increase sunsets, we will see our deficit return with a vengeance.
3. **Non-profit infrastructure:** the tax increase also doesn't address the 7 billion still owed to providers around the state; with additional system issues, like bad contracting practices and inefficient auditing and reporting processes, IL's capacity to deliver quality services via nonprofits is in severe disrepair.

These 3 major external factors combine to create more need, more instability and more demand for your organization's work.

TRANSITION: it also creates an advocacy imperative.

The Advocacy Imperative



These conditions combine to create the imperative for organizations to enter the public dialogue on issues affecting the populations they serve.

Transition:

(READ THE IMPERATIVE)

Really emphasize this imperative when speaking with internal stakeholders – or folks within your organizations that you’ll need to convince this type of outreach is not only necessary but possible. (Board members, Trustees, donors, staffers, volunteers)

In other words, advocacy should be treated like any other aspect of your programs. It’s not a luxury, or an extra, but a way of fulfilling your mission – which also means it needs to be strategic and measurable.

As all good programs are.



These are all **legal and allowable** activities – and are some of the ways you can advocate for your issues/organization to elected officials or policymakers

Some activities require direct lobbying and others require indirect, or grassroots, lobbying (when you ask someone to speak on your behalf – which has more leeway and you don't have to report it as direct lobbying)

There are other words for 'advocacy':

Policy engagement

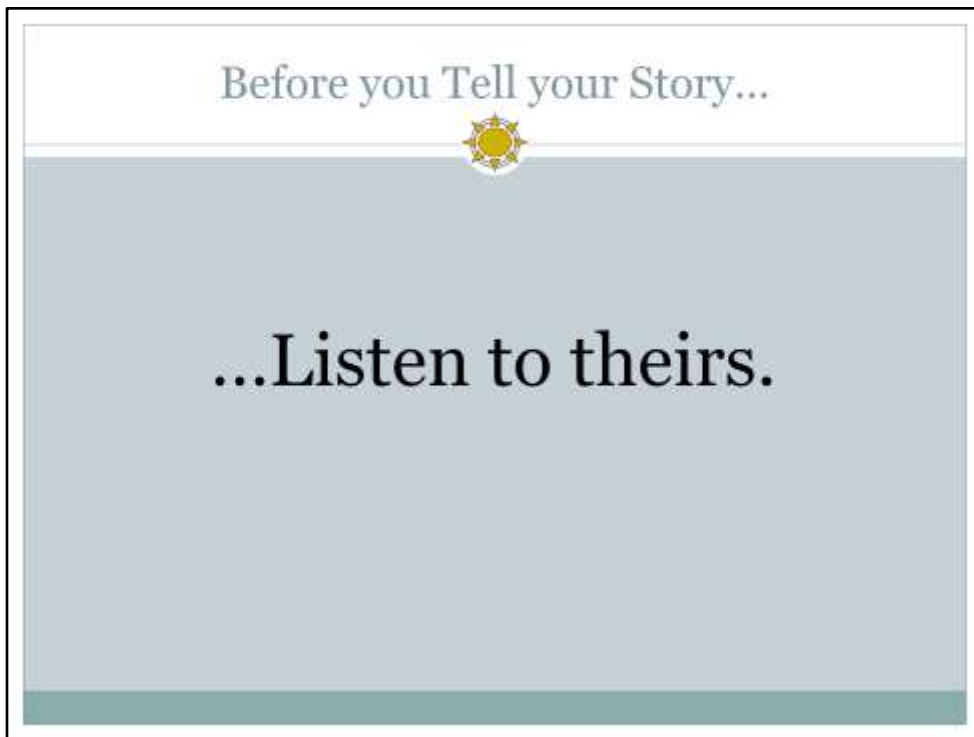
Public Strategy

Telling Your Story means...

Advocacy is ultimately grounded in your association's programs and values – domestic violence, childcare, women's economic empowerment, girls' self-esteem

You **KNOW** why you do what you do – advocacy is the way to change the social structure that creates or affects the issues you're fighting for and it provides a structure for you to fight for your issue.

Questions:



We work in nonprofits because we are passionate about our mission.

We love our work.

So we want everyone to love our work. And often we lead with what we **do** or what we **know**.

We hit them with data, facts, client stories, board member testimonials, mayoral declarations in support of our work...but why should they care about all that?

in order to know if our story is going to resonate with someone, we need to know what their story is.

ASK elected officials what their story is.

So your organization can be the bridge between what they want and what you DO.

Transition: I know we're all probably getting impatient to jump straight to tactics (the HOW of advocacy) but it's usually a very good idea to start with some strategic questions (the WHO & WHY) before creating a whole list of activities that may or may not be focused.

Strategic Questions Before You Get Started



Gut check

- Do you *really* want to do this?
- What do you want to get out of it?
- Do you have buy-in from key staffers? Where's your Board?



Organizational

- Who will help you do this?
- Where does advocacy live in your organization?
- Do you have the sufficient tools and processes?



Evaluation/Sustainability

- How will you measure success?
- How will you fund advocacy?
- What will advocacy's role be in the long-term life of your organization?

Gut check: Do you *really* want to do this? Advocacy is a long game; quick wins are rare; do you and your staff have manageable expectations?

What do you want out of it? Goal setting (large: save funding for your program, pass a bill or small: get your congressman to visit your site, increase number of grassroots supporters, increase visibility of your org) can help manage those expectations.

Organizational: Anticipate what will happen in your organization once you start getting your story out there; what other parts of your organization need to be looped in? (example: when you send an email to a congressman and she responds, where does that request travel next? How will you keep track of that contact?)

Evaluation/Sustainability: How will you fund advocacy? (Communicating with your funders; advocacy grantmaking; ncrp studies)

Will you have the stamina?

(depending on your strategy and objectives, advocacy is a long game vs. short term gains)



Once those questions have been explored within your organization (and you don't necessarily need a consultant to help you), then this is what you should be able to look forward to:

In the strategic communications business we call this **alignment**

Board engagement is worth its weight in gold (this means you need to know how to speak with your Board about advocacy and why you're doing it)

- Staffing resources
- Integration with everything

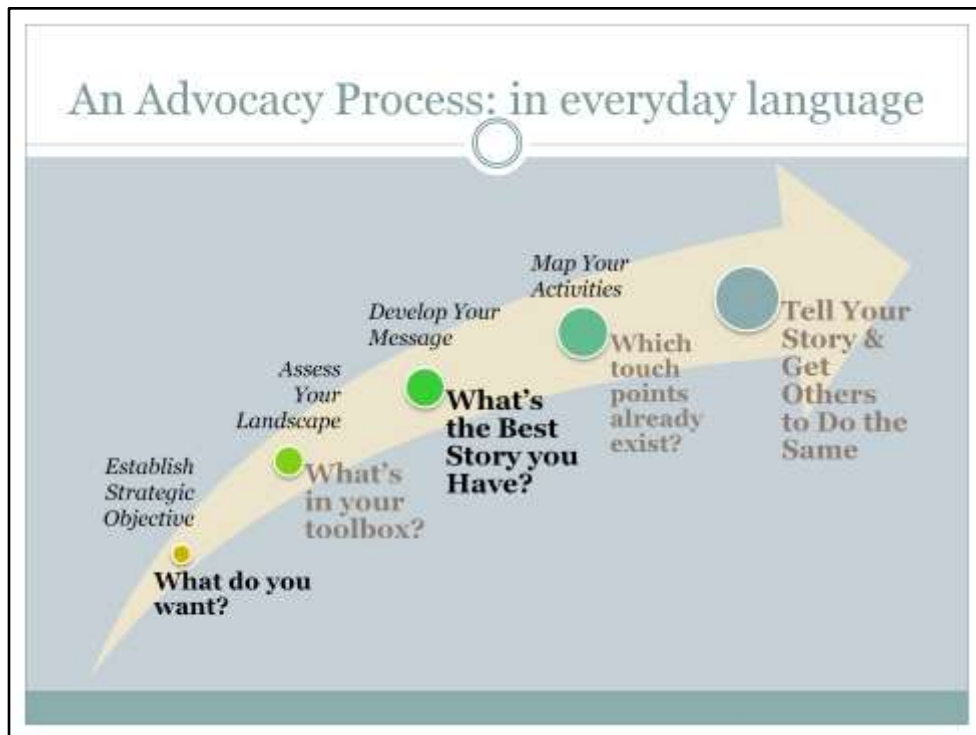
Measurement (what does success look like?) – and **success can be modest.**

Vision and Flexibility (have the vision to see what the role of advocacy could be in your org; and be flexible enough to anticipate changes in strategy and tactics as the needs of your organization shifts)

An Advocacy Process



**5 NECESSARY STEPS TO GET
YOUR STORY OUT THERE**



Communications and Policy work together in this context – and will have some organizational implications

What do you want? - this is the gut check moment. Matching mission/vision and imagining a better place in the future for both the organization and the work we did - Defining your Strategy – NOT Tactics!
people always leap to tactics first

What's in your tool box? (internally/externally; relationship, capacities, resources, etc.)

Questions to ask include: what are our strengths and weaknesses? What are we really good at? What aren't we? Where do we have gaps? (i.e., not enough staff; under the budget gun; a too small board; limited technology)

Developing & Honing your Message – (where knowing the most effective stories of impact, value and outcomes matter; having an understanding of effective communications helps)
what makes your organization different from others; what is the thing that makes people support you?
What makes your organization stand out?

(where knowing the most effective stories of impact, value and outcomes matter; having an understanding of effective communications helps)

Map your Activities – don't reinvent the wheel; what are you doing **now** that can be adjusted for gov't relations/outreach?

Leveraging your influence (sometimes, it's not YOU delivering the message; who can deliver your message on your behalf?)

Making Friends (coalitions) – you don't always have to carry the water – know your strengths. But you still need to find a way to get YOUR message heard.

Breaking Down the Process



GETTING YOUR STORY OUT THERE BOILS DOWN TO 3 AREAS:

- a) Identify what's in your toolbox
- b) Prioritize and organize which touchpoints to use
- c) Tell your story and get others to do the same

Out of that 5 step process, I'll be breaking down these three:

Your Toolbox	Ways to Use Your Tools		
	Small Org	Medium Org	Large Org
Internal Tools Staff Board Budget Relationships Marketing/PR Newsletters Events Program Outcomes	Empower Staff to be your best 'evangelist'	Empower Staff to be your best 'evangelist'	Empower Staff to be your best 'evangelist'
	Train your Board	Train your Board	Train your Board
	Leverage your BOD to tell your story with you	Map BOD relationships/ create targets	Map your BOD relationships/ create 'targets'
		Cross train programs & marketing/ development	Cross train programs & marketing/ development
	Add 1-2 advocacy stories to your newsletter	Create separate advocacy newsletter	Build marketing/PR/ outreach capacity
	Add staff knowledge base (via free trainings, etc)	Add to staff capacity and anticipate staffing reorg	Staff capacity, reorg and allocate budget for extra activities/tech

What's in your toolbox?

What are some of the **resources** that could help get your story out there? (these are not prescriptive but illustrative – these are some ways you can begin to use your strengths to get your story in front of decision makers)

1. **Train all staff:** these are your everyday story-tellers. They go more places than most other people – trainings, visits, conferences, convenings, lobby days – and have different opportunities to contact the public – i.e., clients, peers, general public.
2. **Train/leverage your BOD:** they should be your loudest evangelists; they should also leverage their social networks which create a social map of the path your story should take. Build an advocacy section into new BOD member orientations/meetings.
3. **Cross train staff:** in medium to large organizations, you might find ways to break down the walls between program and marketing/development staff. Program staff know the work and marketing/dev staff know how to reach the people who don't know about the work. These two groups should be talking/working together to find opportunities to get decisionmakers in the same room with you. Your marketing/dev folks should also know how to talk about your programs. An easy way to do this? Have your marketing/dev person sit in on program staff meetings.
4. **Maximize your external newsletters:** every org has a newsletter. Some tips: expand the mailing list to include the policymakers/officials you want to contact; include an advocacy story in each of your issues; bigger orgs can segment and create a separate advocacy newsletter specifically for elected officials/policy makers. Much bigger orgs can think about pitching stories and responding to stories in papers/online and then directing policymaker attention to them
5. **Make some capacity changes:** invest in your staff by accessing trainings on advocacy, policy work and communications; reorg staff positions to make advocacy outreach easier and faster; larger orgs can make line item decisions about a dedicated PR or public policy/gov't relations staff position (full or part time), as well as the technology needed to support it.

Stop for Questions:



Transition: After you evaluate what your tools are, you're usually in a hurry to use them. And then this is what happens:

Lobby Days: lots of time to organize; turnout is key; very small return on short conversations; this should not be your only chance to communicate with an elected official; if so, risk being drowned out by other Lobby Days/groups

Thank you notes: usually very isolated and bound to the one meeting; does it tee up a future opportunity to meet?

Annual Fundraiser/Luncheon: a great way to blast an official with your message all at once, but also usually a one-shot deal; elected officials are likely to attend if they get something in return (media, photo op, public recognition, speaking time, a check – which might be problematic); but after the luncheon, what then?

Site visit: better return on investment; face time with staff and programs; but is there a planned follow up? What do you do to build on it?

Action alert: a good way to let an official know you care about an issue, but did they know before you sent it? How will you follow up? (like, a spank/thank after the end of a legislative session?)

And how do all of these activities relate to one another? How do they relate to what your organization already does and participates in?



TRANSITION: In contrast this is what our outreach to decision/policy makers should look like – a continuous **CYCLE** of communication.

Unless you have the budget and time to start from scratch you don't have to build anything 'new.' Create a 'cultivation cycle' from your already existing calendar of activities and events.

Questions to consider:

What are your points of contact?

What are the ACTIVITIES you'll use to get in front of your targets?

(in other words, how will you integrate your contact with elected leaders or policy makers into what already exists within your organization?)

Identify your targets: based on your relationship map you've created with your BOD and staff

Qualify your targets: test how closely aligned they are with your values and work (this is when you listen to their stories); map their office and identify the most appropriate people to speak with

Cultivate your targets: repeated opportunities to put your story in front of decision/policy-makers that adhere to your internal calendar and take advantage of particular external dates (i.e., legislative session, federal budgeting calendar, or the school year)

Activate your targets (the ASK): in most meetings, we normally end with an ask – and we're constantly asking; if you have a rational cultivation cycle, you don't have to be in the ASK phase all the time; you can ask when it's more strategic for you to do so, or when you feel they have been cultivated enough to be ready for an ask.



TRANSITION: so how should you allocate your tools to the right phase in the cycle? This slide is about tool allocation:

Some things to notice:

When you're allocating your tools, face reality: advocacy outreach means staff time. If there isn't the staff capacity, then outreach will be limited, both in quality and reach. Notice that Staff are pivotal to each stage of outreach.

The quality and appropriateness of your message matters.

We haven't spoken about how to put a message together but successful outreach also depends on whether you're telling the RIGHT story – which takes some internal double checking. If you're engaging your decisionmakers but your message isn't getting traction (but you KNOW your work is good), then look at your message and whether it's being told consistently, often enough – and by the right people.

The most labor intensive part of this cycle (other than the planning stage) is the cultivation phase – and it's the one that goes the longest. Remember advocacy outreach is a long game – an effort like this is 12-18 months. Luckily, this means that you learn along the way and not everything needs to be a winner. You can tweak and modify as you go in order to address capacity or external emergencies.

But one thing is clear: you need a plan before you start reaching out, or your results will be uneven or virtually invisible to you. Work on the front end means a lot less work going forward.

Some Tools That Can Help Spread Your Message:

- Mail Chimp
- Blogger
- Cap Wiz
- Kintera
- Constant Contact
- Your Website
- Facebook
- Twitter

Your Tools are Only as Good as Your Message

Transition: It's easy to get lost in the details of how to reach out those we want to influence.

As a communicator, there's nothing I like more than figuring out the best way to reach someone.

But focusing on our Message is just as important as how you send the message.

(I'm sure there will be more webinars for nonprofits on the different ways to develop messages effectively.)

When thinking about ways that you can reach out to your policymakers, think about how **they** communicate with their constituencies (**think like a staffer**): more than ever, elected officials and policy makers are moving to social media, communicating directly with the public through their Facebook pages and twitter. Their websites are becoming more media savvy and that requires an equal response on the part of nonprofits.

Apps for phones are another way that technology is making it easier to reach out to, and find elected officials. These are usually very affordable on iTunes or other smartphone sites. Like: Illinois in Your Pocket – you can send an email directly to your legislator from your blackberry, android or iphone. No more looking on the ILGA.gov site for email addresses.

For larger organizations with a bit more budget cushion, there's Cap Wiz a group that sells different products for tracking your contacts with legislators – as well as providing tools to track legislation/regulation in our state.

Microsoft Outlook can become a tool to help you organize your contacts and keep track of your contact, if a separate tool is out of your budget.

Affordable emarketing tools can be found in Mail Chimp or Constant Contact. And, Blogger, the blogging site, is always free. (and very user friendly.)

Does an organization need a PR person? Depends on your budget and your strategic goal. If you want to get targeted stories specifically about you and your work, working with someone in strategic PR *might* be helpful. But there are affordable ways to learn how to pitch and engage media (especially social media journalists who cover your issue area).

Resources



Donors Forum (leadership, training and public policy to create a strong philanthropic and nonprofit sector)

Alliance for Justice (nuts/bolts on what's legal and allowable for advocacy outreach for nonprofits)

Spitfire Strategies (communications/planning; charting your outreach)

NCRP (for demonstrating the value of advocacy to grantmakers and research on demonstrating advocacy's impact)

Urban Institute (for research on policy issues that can add to your stories about your work)

National Council (for support to nonprofits engaging in outreach to elected officials – they have a really good website on infrastructure issues facing nonprofits today)

Community Media Workshop (for affordable and easily digestible workshops on communications – to fit any organization's budget or size)



The slide features a red header with the text "Q&A" in white. Below the header is a white section with a thin horizontal line and a small circle in the center. The text in this section reads: "DELIA COLEMAN – PUBLIC POLICY MANAGER, COMMUNICATIONS & OUTREACH" and "DCOLEMAN@DONORSFORUM.ORG". At the bottom left is the Donors Forum logo, which includes a stylized 'D' and 'F' icon and the text "DONORS FORUM" with the tagline "Strengthening African philanthropy and the nonprofit community" below it. A teal bar is at the bottom of the slide.

I'm going to unmute all lines now.

If you don't have a question, please mute your line to cut down on background noise by **pressing star 6**; to unmute when you're ready to ask a question, **press star 7**.

Thanks for Participating!



Please complete the evaluation survey that will be emailed to you.

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