



The Advocacy Capacity Tool: *A Report on 100 Users*

September 25, 2013

Sue Hoechstetter, Alliance for Justice
Katherine Hohman, YMCA



Advocacy Highest Capacity? Desire to Build?

- Administrative
- Ballot Measures
- Electoral
- Legislative
- Litigation



Agenda

- Why Advocacy Capacity Tool?
- Who is using it and how?
- Findings
- YMCA experience
- Conclusions and Moving Forward

Why Assess Advocacy Capacity?

- Evaluation
- Identify Gaps and Strengthen
- Plan Advocacy Work
- Choose Partners
- Understand Advocacy
- Common Advocacy language

Who used the tool?

- 501(c)(3)'s (60%)
- Informal Coalitions (19%)
- Budget: \$2 million & Under (73%)
- Advocacy & Service Delivery Groups (73%)
- Most frequent user: Executive Director

Alliance for Justice's Advocacy Capacity Tool

www.bolderadvocacy.org/act

[AFJ ON ADVOCACY](#)[HOW AFJ CAN HELP](#)[NAVIGATE THE RULES](#)[TOOLS FOR EFFECTIVE ADVOCACY](#)

Tools for Effective Advocacy

Evaluating Advocacy

Toolkits

- > Establishing Your Organization
- > Immigration Advocacy
- > California Advocacy Resources
- > Ballot Measures

Advocacy Capacity Tool

- > Advocacy Capacity Tool: Frequently Asked Questions
- > Terminology: Advocacy Capacity Tool & Community Organizing Capacity Assessment Tool
- > Instructions
- > Advocacy Capacity Tool: Additional Resources

Advocacy Capacity Tool

[+ Share](#)

Does your organization have what it takes to accomplish your policy goals? AFJ's free self-assessment tool can help.

The **Advocacy Capacity Tool (ACT)** helps groups measure their readiness to engage in advocacy. Groups answer questions about their organization's skills, knowledge, and resources for running issue campaigns, influencing legislation, or other **forms of advocacy**. The tool then immediately generates results.

The ACT is useful for a range of nonprofits—whether big or small groups fighting for change, a coalition of groups working together, or a foundation looking for ways to support its grantees.

[Click here to use the Advocacy Capacity Tool online](#)

[Click here to request a PDF of the tool](#)

This tool consists of:

Advocacy Capacity Tool Components

- Brief Demographics Questions*
- Survey of 18 indicators
- Responses to measures for indicators
- Identification of Areas to Strengthen
- Results

* Identifying information is confidential

Advocacy Capacity Tool: for organizational assessment

- Planning
- Conducting Advocacy
- Advocacy Avenues
- Organizational Operations



Advocacy Capacity Tool Indicators

I Advocacy Goals, Plans & Strategies

- Preparation
- Agenda
- Plans, Strategies & Adaptability

III Advocacy Avenues

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

II Conducting Advocacy

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

IV Organizational Operations to Sustain Advocacy

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

3.2 Legislative

Assess organization's skills, knowledge and actions related to legislative advocacy

	Very Strong/Always	Moderately Strong/Usually	Somewhat Strong/Sometimes	Not Strong/Rarely/Never	Relly on Partners
The organization has knowledge of the legislative process (including budgeting and appropriations), and knows how to impact these processes	<input type="radio"/>	<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"/>	<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"/>	<input type="radio"/>
The organization promotes, opposes or helps to craft or amend legislation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

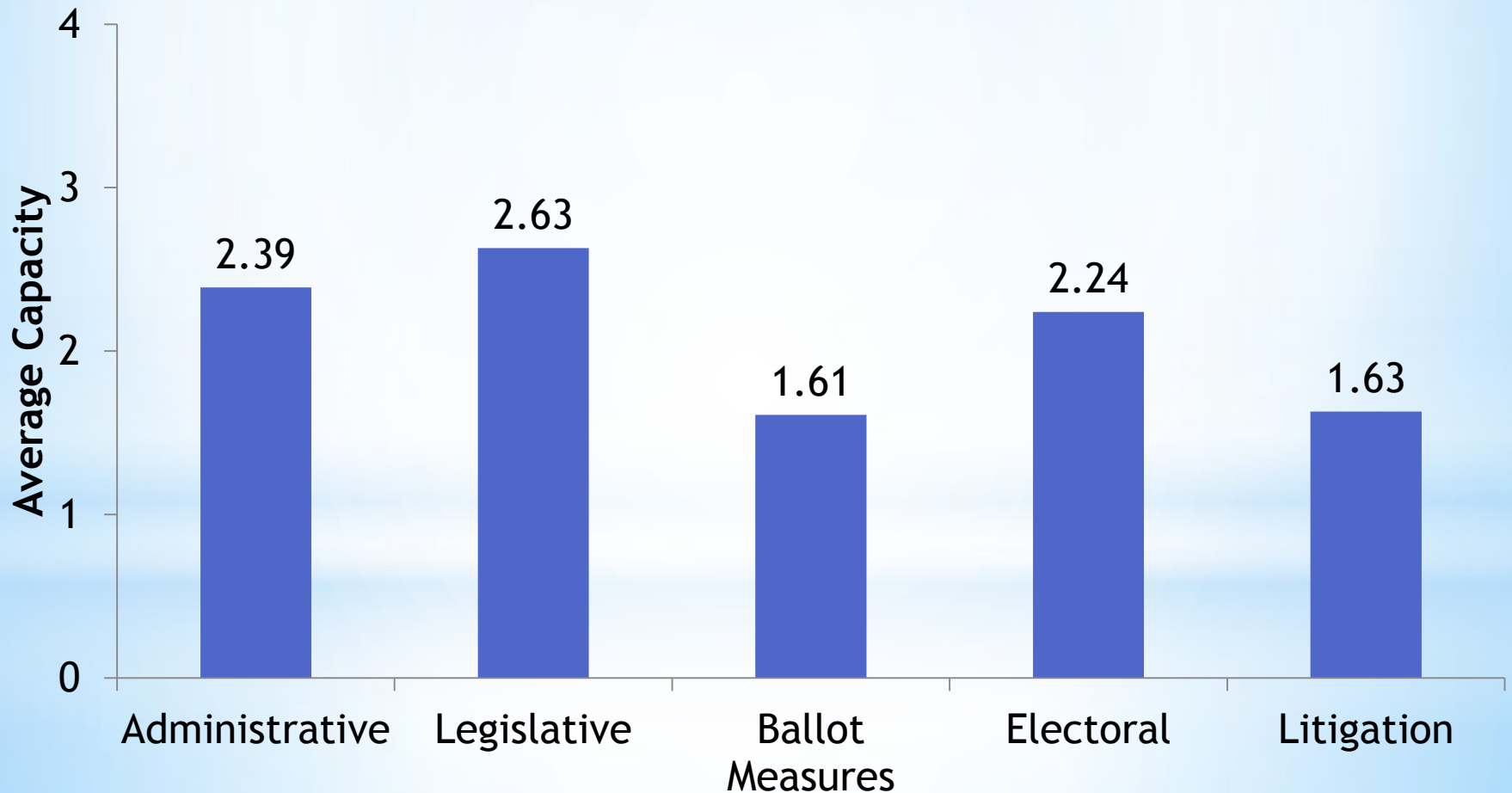
3.2 Legislative - Advanced (optional)

ACT Findings

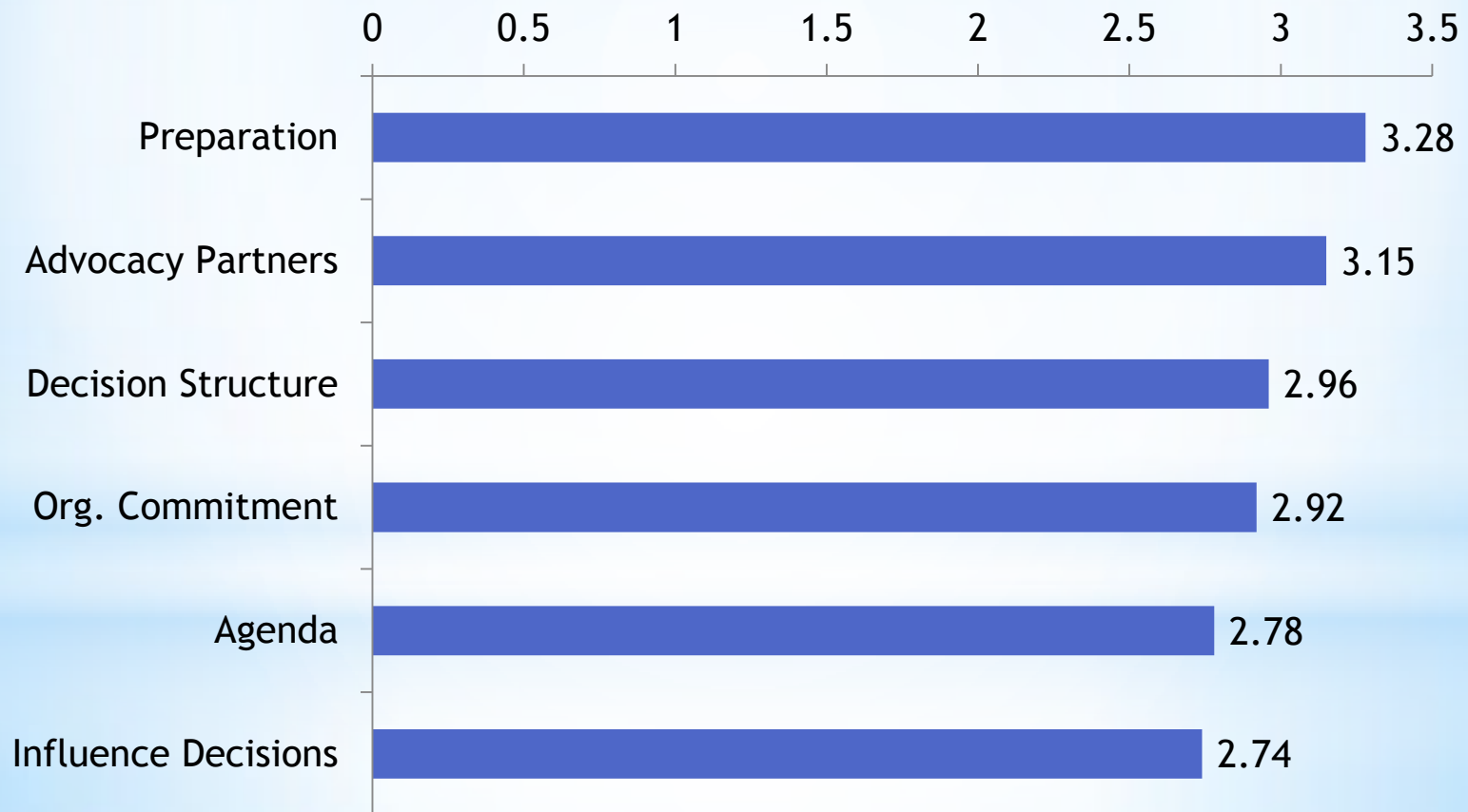


One size does not fit all!

ACT Findings: Advocacy Avenues



ACT Findings: Overall Strongest

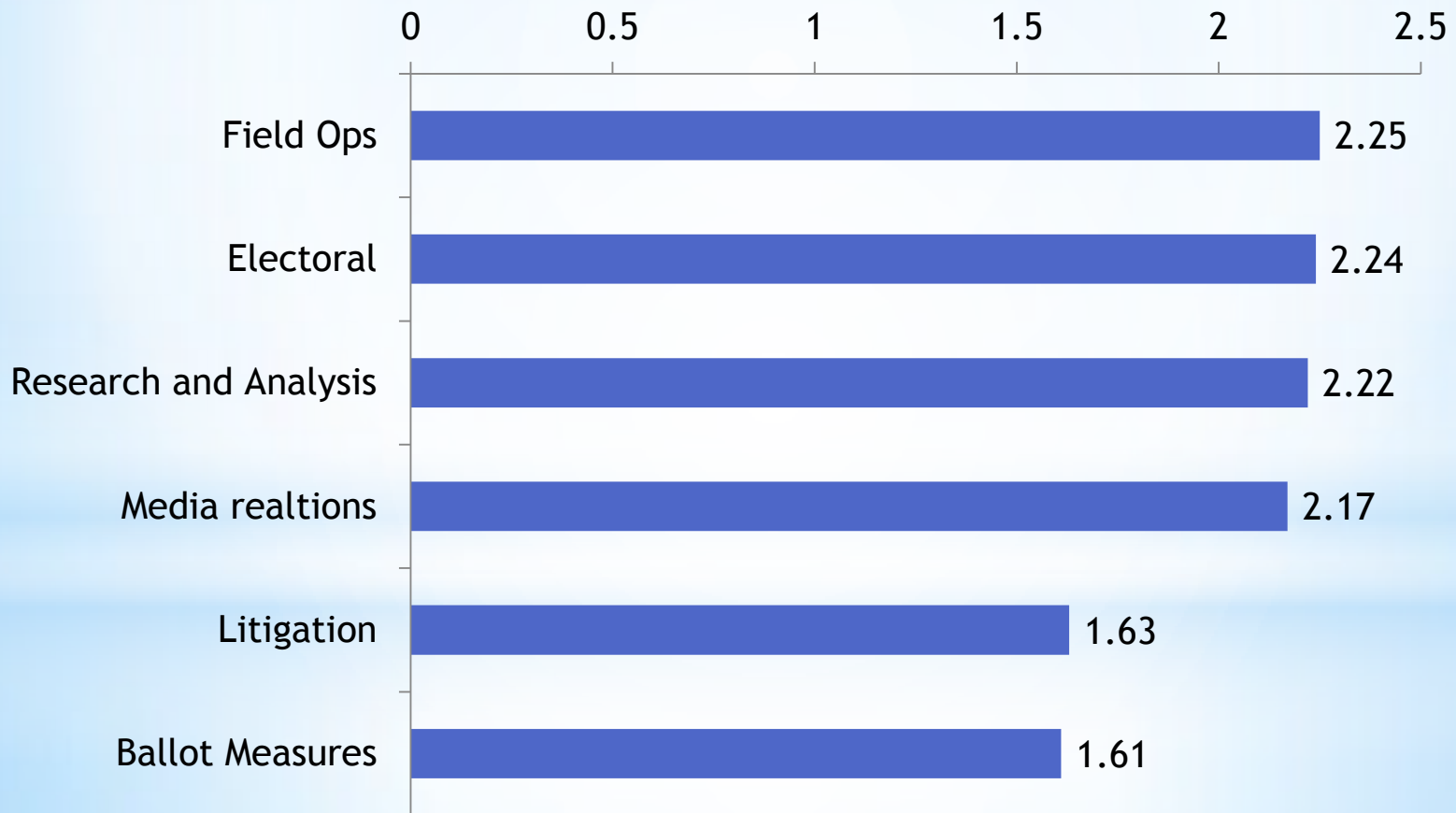


ACT Findings: Preparation→Planning

Indicator	Rating
Preparation	3.28
Agenda	2.78
Planning	2.28

Chose to Strengthen
22%
24%
61%

ACT Findings: Overall Weakest



ACT Findings: Most Want to Strengthen

- Plans, Strategies, Adaptability 61%
- Funding for Advocacy 48%
- Media Relations 35%
- Messaging 34%

ACT Findings: Budget and Level

- Budget: Size Doesn't Count
- Level: Federal Level Groups
Self-rate Higher

ACT Findings: Legal Opportunities

- 501 (h) Consideration

2.17

- General Support for Advocacy

2.61



FOR YOUTH DEVELOPMENT™
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

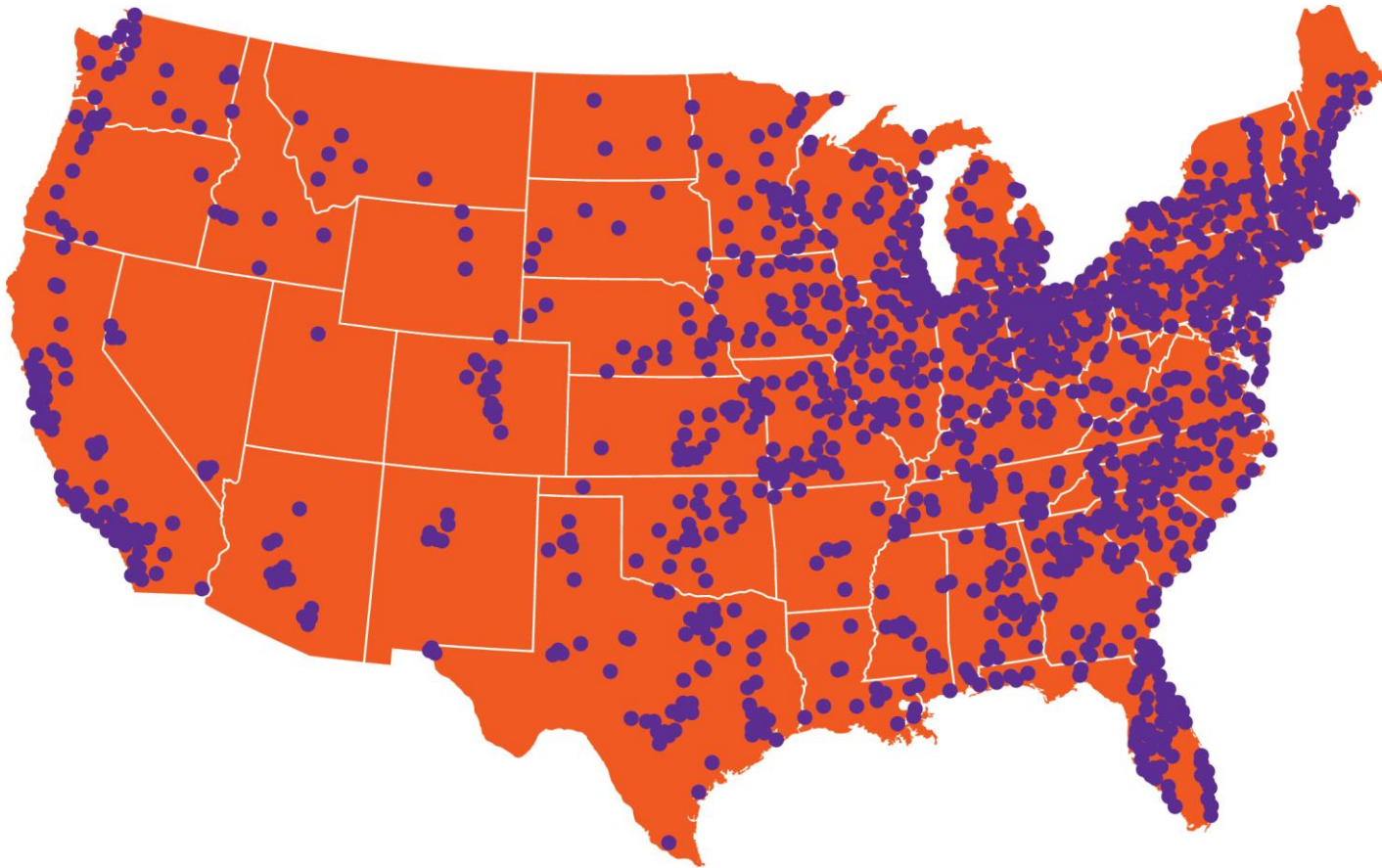
STRENGTHENING OUR VOICE

THE YMCA EXPERIENCE

September 25, 2013



THE Y MOVEMENT



OUR REACH

FACTS

YMCAs

2,700

YMCAs IN COMMUNITIES
WHERE HOUSEHOLD INCOME IS
BELOW THE NATIONAL AVERAGE

58%

COMMUNITIES SERVED

10,000

STATES

50 plus
District of Columbia
and Puerto Rico

SUPPORTED BY STATE ALLIANCES IN EACH STATE

YMCA State Alliances

Y state alliances have the power to advance the Y cause and promote healthy living, positive youth development and social responsibility. YMCA State Alliances are encouraged to follow these five best practices:

- 1. STRENGTHEN ALLIANCE OPERATIONS**
- 2. ADVOCATE AS AN ALLIANCE**
- 3. PARTNER WITH LOBBYIST**
- 4. COMMUNICATE THE Y CAUSE**
- 5. COLLABORATE WITH OTHERS**



HEALTHY LIVING AT THE Y

A Framework for Improving the Nation's Well-being



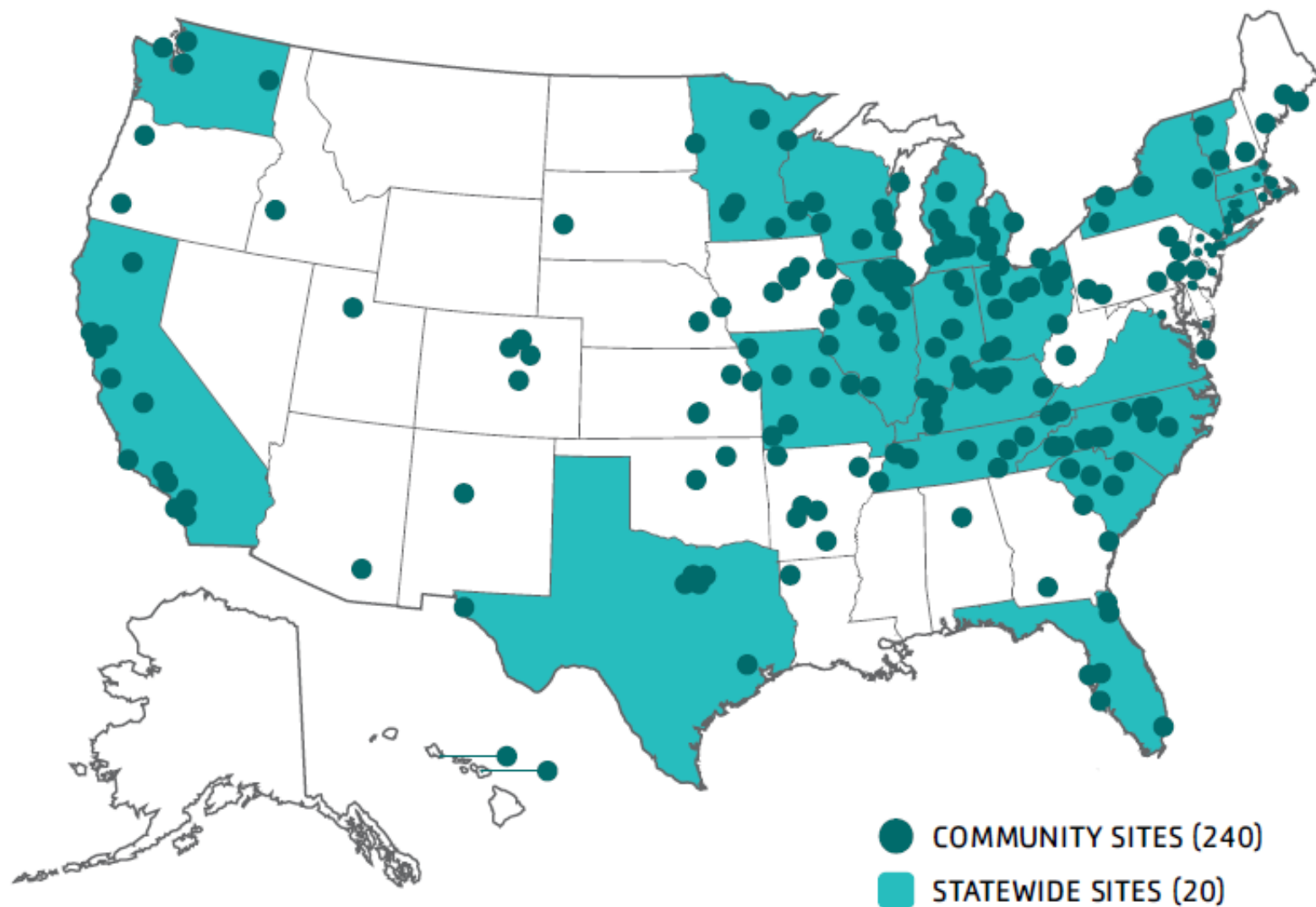
To
**PROMOTE
WELLNESS**
(Primary)

To
**REDUCE
RISK**
(Secondary)

To
**RECLAIM
HEALTH**
(Tertiary)

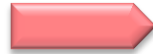
Membership		Employee Wellness Benefits		Built Environment	Economic Incentives and Disincentives (taxation or subsidies)
Group Exercise	Family Camp	Policies Promoting Healthy Eating	Policies Promoting Physical Activity	Access to Fresh Fruits & Veggies	
Youth Sports	Adventure Guides			P.E. in Schools	Smoke-free Environments
Swim Lessons					
Diabetes Prevention	Childhood Obesity		Health Insurance Benefits		
Falls Prevention	Smoking Cessation				
Cardiac Rehab	Diabetes Control		Leave of Absence Policies		
Arthritis Treatment	Cancer Survivorship				

HEALTHIER COMMUNITIES INITIATIVES



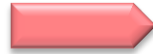
A TOOL THAT PROVIDES VALUE AT MULTIPLE LEVELS

Individual Y State Alliance



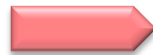
Identifies strengths as well as areas for improvement. Supports assessment of the 5 SA best practices

Groups of Y State Alliances



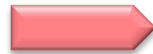
Can aggregate results to groups of states for an assessment of different regions or groupings

Y-USA National Office



Aggregate results helps to focus group technical assistance and training opportunities and individual results help with targeted TA

Funders



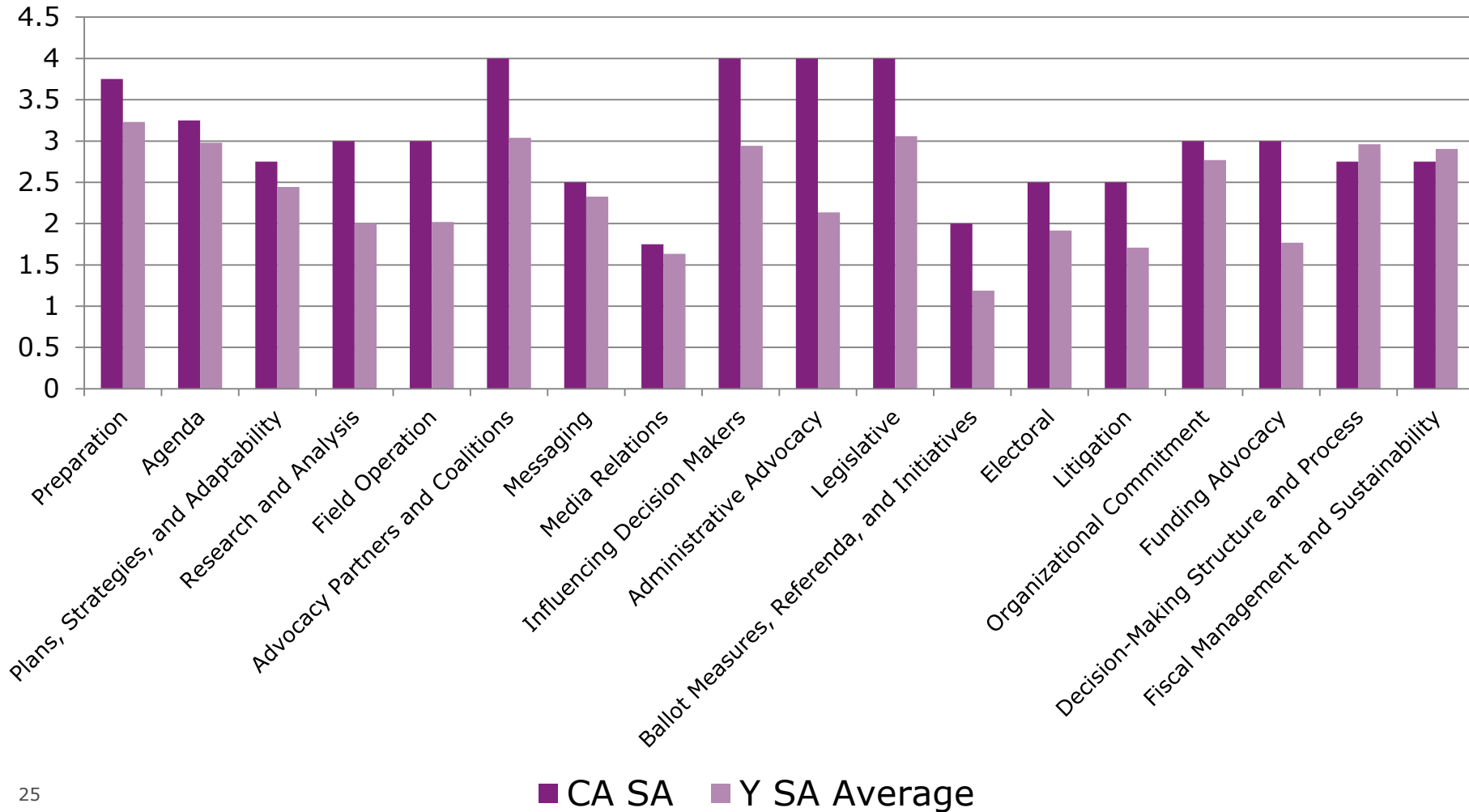
Able to demonstrate the change in advocacy capacity of those Y State Alliances who have grant funding to advance specific agendas

Y Movement

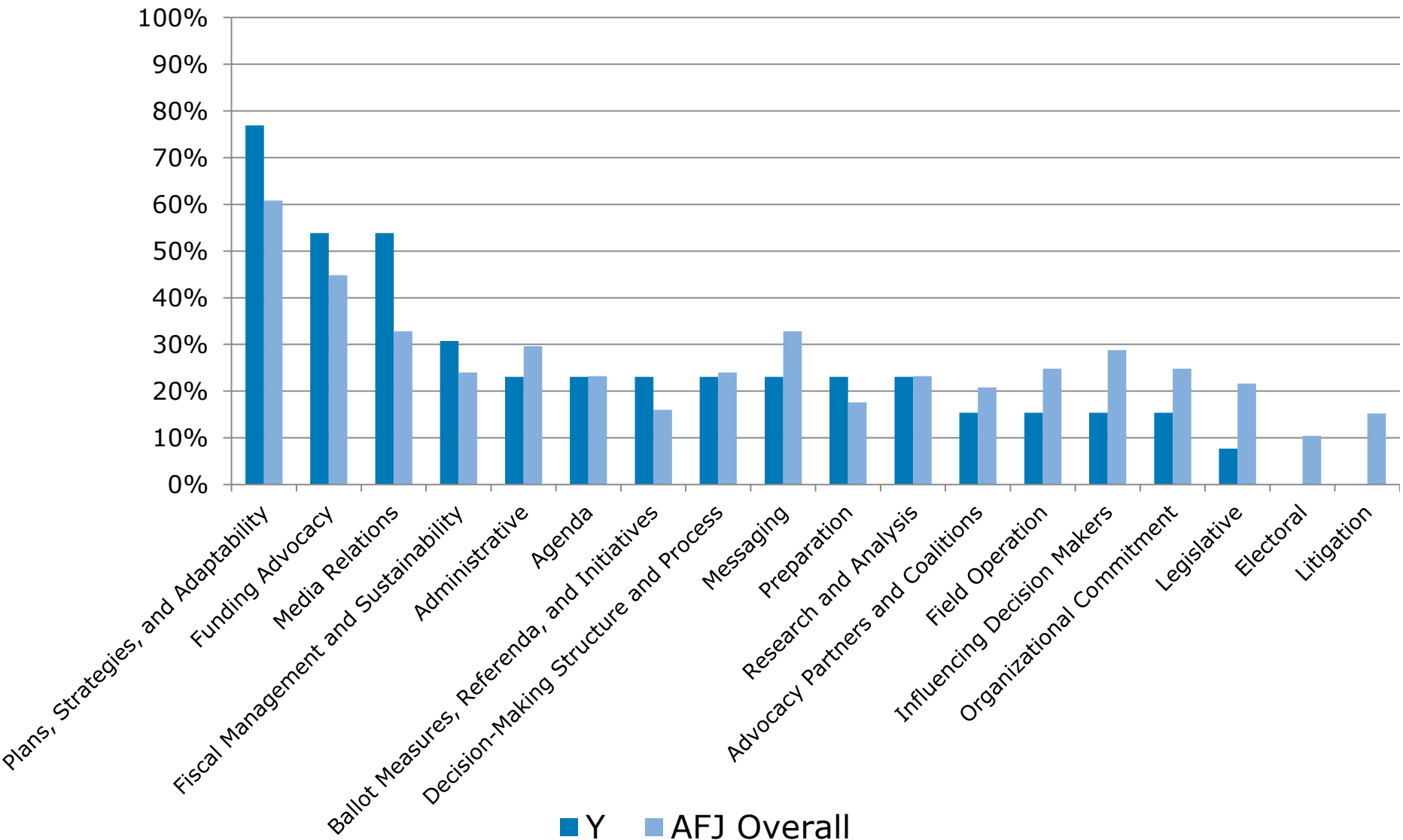


If we are effectively improving capacity as a whole it helps strengthen the entire movement

COMPARISON OF THE CALIFORNIA STATE ALLIANCE TO OTHER STATE ALLIANCES (2013)



COMPARISON OF Y AREAS TO STRENGTHEN TO AFJ RESULTS (2013)



NEXT STEPS

- Continue to use initial results to drive training and technical assistance to strengthen areas of weakness.
- Will re-assess those who have completed a baseline ACT in one years time.
- Expanding the use of the ACT tool beyond state alliances with grant funding to each all 50 states.



THANK YOU

Kate Hohman
YMCA OF THE USA
202 688 4735
kate.hohman@ymca.net

ACT Report Conclusions

- Interest: Prep & Planning
- Scoring: Don't Skip Questions
- More Work: Partnering
- Satisfying: Multiple Uses of ACT
- Moving Forward: Promote



AFJ Capacity Tools

- ***Advocacy Capacity Tool (ACT)***

www.bolderadvocacy.org/act

- ***International Advocacy Capacity Tool (IACT)***

www.bolderadvocacy.org/iact

- ***Community Organizing Capacity Tool***

Available Winter 2013/2014

sue@afj.org

<u>Question Section/Indicator</u>	<u>Points awarded (16 possible points per indicator)</u>	<u>Number of Times "Rely on Partners" was Elected</u>
Advocacy Goals, Plans and Strategies		
1.1 Preparation	15	n/a
1.2 Agenda	13	n/a
1.3 Plans, Strategies, and Adaptability	12	n/a
Conducting Advocacy		
2.1 Research and Analysis	8	1
2.2 Field Operation	10	0
2.3 Advocacy Partners and Coalitions	15	n/a
2.4 Messaging	13	0
2.5 Media Relations	16	0
2.6 Influencing Decision Makers	5	2
Advocacy Avenues		
3.1 Administrative	14	0
3.2 Legislative	9	1
3.3 Ballot Measures, Referenda, and Initiatives	12	
3.4 Electoral	12	
3.5 Litigation	0	
Organizational Operations to Sustain Advocacy		
4.1 Organizational Commitment	8	
4.2 Funding Advocacy	9	
4.3 Decision-Making Structure and Process	5	
4.4 Fiscal Management and Sustainability	9	n/a

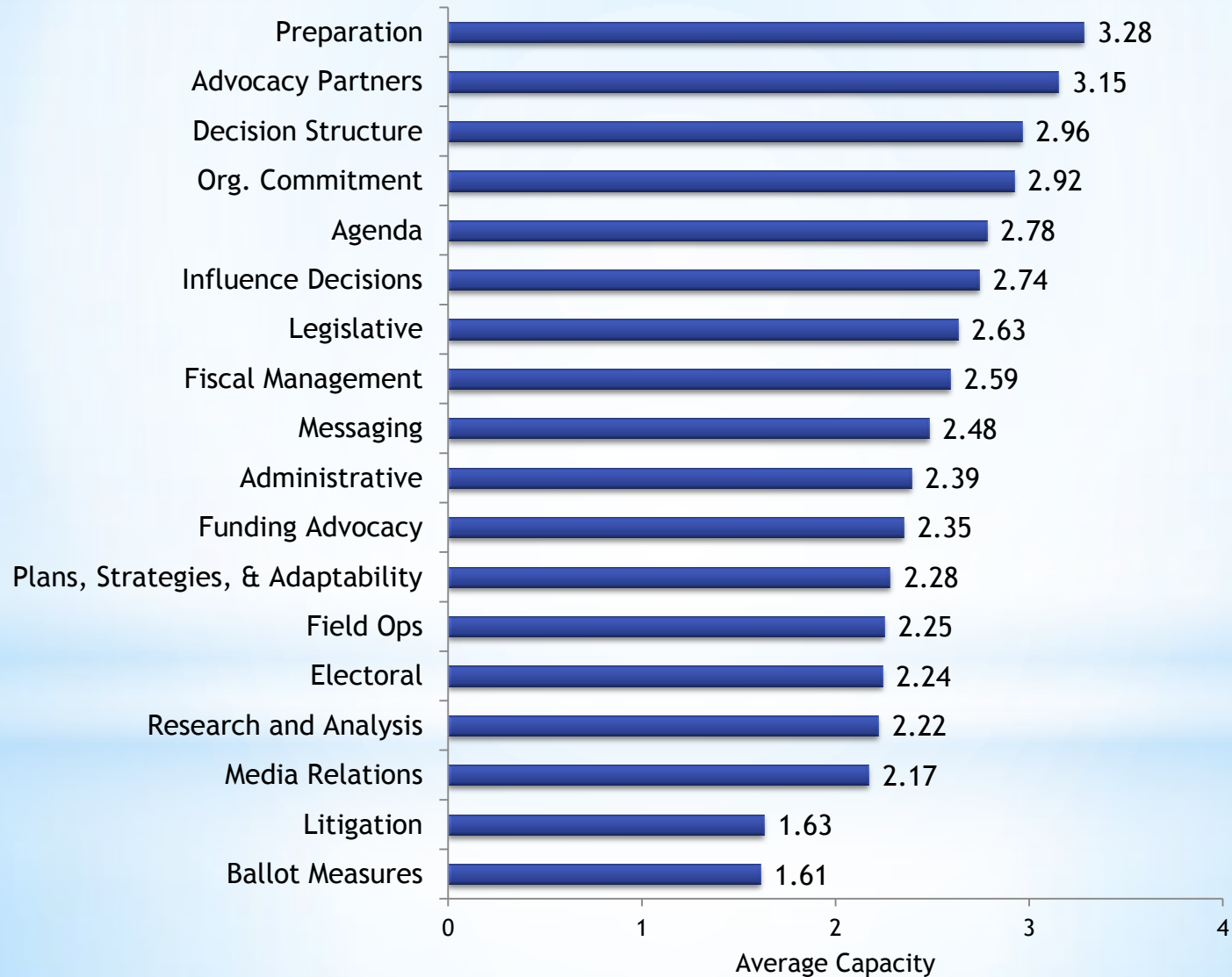
Sample Individual Scores

← By Indicator

By Section ↘

<u>Question Section</u>	<u>Points awarded</u>	<u>Number of Times "Rely on Partners" was Elected</u>
Advocacy Goals, Plans and Strategies	40 out of 48	n/a
Conducting Advocacy	67 out of 96	3
Advocacy Avenues	47 out of 80	6
Organizational Operations to Sustain Advocacy	31 out of 64	n/a

Summary of Indicator Scores



Additional information

For an electronic copy of presentation,
email: advocacycapacity@afj.org

Subject: **Aspen**