



ACT Data & Analysis: The First 280 Advocacy Capacity Tool Users

August 2015

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Bolder Advocacy

Bolder Advocacy is an initiative of the Alliance for Justice—a national association of more than 100 organizations that are united by a commitment to a fair, just, and free America where everyone has equal access to justice and can fully participate in our democracy.

Bolder Advocacy promotes active engagement in democratic processes and institutions by equipping nonprofits and foundations to engage in policy debates and by protecting their right to do so. Our goal is to demystify and decode advocacy by providing organizations with knowledge and tools. We help organizations understand the rules and be assertive participants in the policy process.

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Introduction

ACT Data & Analysis

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Bolder Advocacy compiled and analyzed the results for the first 280 unique, online users of the Advocacy Capacity Tool. The ACT informs nonprofits, funders, evaluators, and others about nonprofit advocacy capacity. ACT users (generally individuals in a single nonprofit organization or coalition) assess their various advocacy capacities including organizational resources and practices. Only one result was used per organization.

We found that these self-assessment results are overall consistent with those reported in the 2013 [ACT Report: First 100 Groups](#) ("2013 ACT Report"). This updated data aggregation and analysis further contributes to the growing literature on capacity building, particularly for advocacy initiatives. While not representative of all nonprofits, the results provide a snapshot of 280 diverse organizations.

The aggregated results provide:

- A demographic profile of the users,
- Average capacity scores for the four sections and 18 indicators,
- A sum of the number of times groups relied on other partners for specific capacities,
- The percentage of groups that chose each capacity as one of the few they planned to strengthen, and
- An advanced analysis on relationships between indicators and demographics.

The Advocacy Capacity Tool contains demographic questions about the organization, 18 core advocacy capacity indicators, and a place for users to identify capacities they would like to strengthen. Organizations rate themselves on a 0-4 point scoring scale.

The ACT helps groups identify their own strengths and gaps to prepare for strong, sustained advocacy work. No one organization is expected to have full capacity in every area. The ACT, therefore, allows organizations to identify where they rely on partners as an option in some areas. A detailed explanation of the ACT and how it is scored can be found in Appendix E on page 41.

These data can be used in the following ways:

- **Nonprofits** filling out the ACT can compare their scores in specific areas to those of a larger cohort. They can identify if they are above or below the average and factor this information into plans for their own capacity development and collaborations.
- **Foundations** can use this information to assess where more funding might be needed, as well as to compare grantees' strengths to the group average.
- **Evaluators and technical assistance providers** can use these results to gain a picture of how groups they are working with compare to the results of the 280 groups analyzed here.

Key Report Findings

Groups most often want to strengthen their advocacy through detailed planning, fundraising, and messaging, in that order.

-

Organizations rate themselves highly in their development of partnerships for their advocacy work. And where they rate their own capacity the lowest—in litigation, media relations, and ballot measures—they also most often choose to rely on partners, rather than strengthen their own capacity for that work.

-

For each geographic region, there was one capacity that the users would like to increase which was unique to that region. Those are Midwest: legislative, Northeast: field operations, Southeast: basic preparation, Southwest: organizational commitment, West: decision-making.

-

Organizational commitment to advocacy by staff, members of the board, and others appears to be key, as those organizations with strong commitment are also stronger in several other capacities. Organizations working on health issues scored higher in organizational commitment than did others.

-

Larger and smaller groups rated their advocacy capacities similarly.
Budget is not a factor.

-

There is opportunity for many groups to strengthen their advocacy by considering making the 501(h) election, or by working through or with 501(c)(4) organizations.

The University of Wisconsin – Stout Applied Research Center has independently reviewed and validated the results. Data was collected through Qualtrics software and analyzed with SPSS. Please see page 28 for an explanation of the methodology for evaluating results and page 41 for a detailed explanation of completing and scoring ACT. For all indicators and measures, see Appendix A on p. 36.

This report was compiled and written by Mary McClure and William Renderos, with Susan Hoechstetter and Abby Levine.

Advocacy Capacity Tool Sections & Indicators

I. Advocacy Goals, Plans and Strategies

1. *Preparation*

Introduces the key elements of basic preparation for engaging in advocacy

2. *Agenda*

Introduces the importance of having a clear, written agenda that defines advocacy goals and prioritizes activities.

3. *Plans, Strategies, and Adaptability*

Introduces the importance of developing a plan to carry out the written agenda.

II. Conducting Advocacy

1. *Research and Analysis*

Assess the extent to which organization researches, gathers information, and conducts analyses on its issues.

2. *Field Operation*

Assess how the organization communicates with, educates and engages its network and the public.

3. *Advocacy Partners and Coalitions*

Assess the extent to which the organization has partnerships—with other nonprofits, businesses, professional associations, etc.—that advance its goals.

4. *Messaging*

Assess how the organization develops and delivers its advocacy messages.

5. *Media Relations*

Assess the extent to which the organization communicates effectively with the media and uses various media to advance its policy goals.

6. *Influencing Decision-Makers*

Assess the extent to which the organization builds influential relationships with targeted decision makers.

III. Advocacy Avenues

1. *Administrative*

Assess the organization's skills, knowledge and actions related to administrative advocacy.

2. *Legislative*

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

3. *Ballot Measures, Referenda, and Initiatives*

Assess the organization's skills, knowledge and actions related to activity on ballot measures.

4. *Electoral*

Assess the organization's skills, knowledge and actions related to electoral activity.

5. *Litigation*

Assess the organization's skills, knowledge and actions related to litigation and other legal activity.

IV. Organizational Operations to Sustain Advocacy

1. *Organizational Commitment*

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

2. *Funding Advocacy*

Assess the extent to which the organization understands and implements practices for funding its advocacy work.

3. *Decision-Making Structure and Process*

Assess the extent to which the organization has a process for making decisions.

4. *Fiscal Management and Sustainability*

Assess the organization's fiscal management practices.

Descriptive Analysis

The Descriptive Analysis section shows the results of responses based on characteristics including demographics, capacity indicator and overall section averages, areas to strengthen, and regional analysis. For a detailed description on the method for evaluating results, see page 29.

Demographics

Respondents answered several introductory questions related to the demographics of their organizations. Figures A – F represent the responses for each question. Note: 280 distinct organizations responded to each demographic question.

Figure A: Primary Source of Information

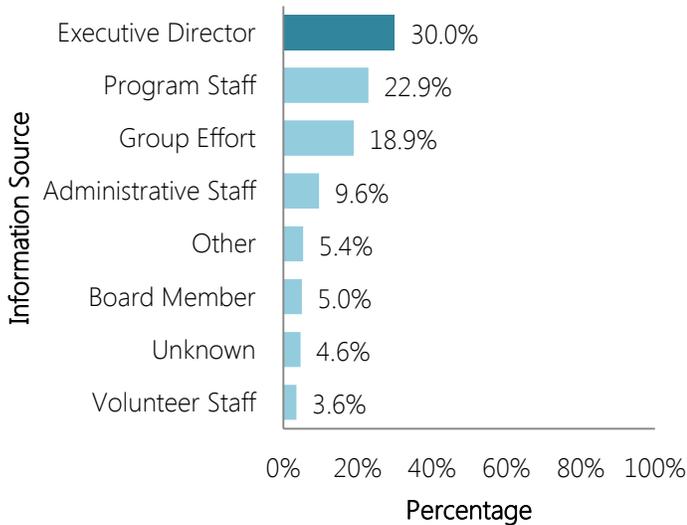


Figure B: Organization Type

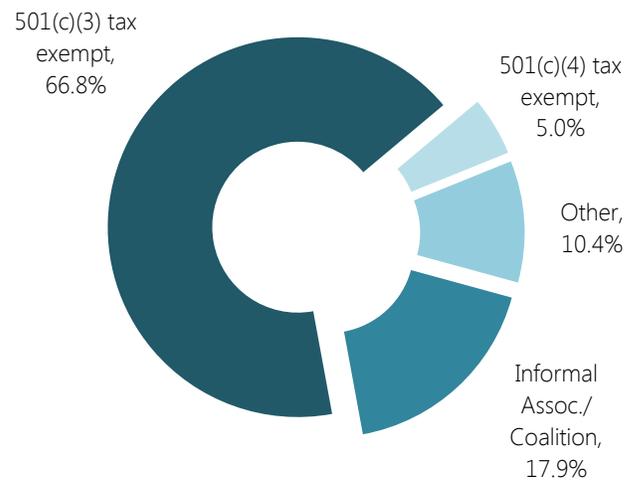


Figure C: Budget Level

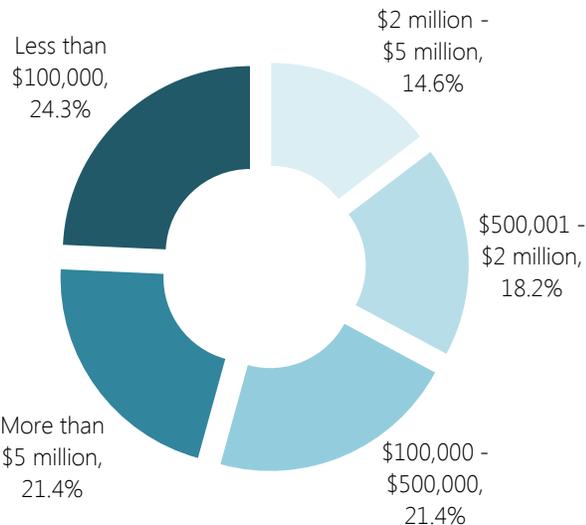


Figure D: Primary Work

Note: respondents could select more than one answer

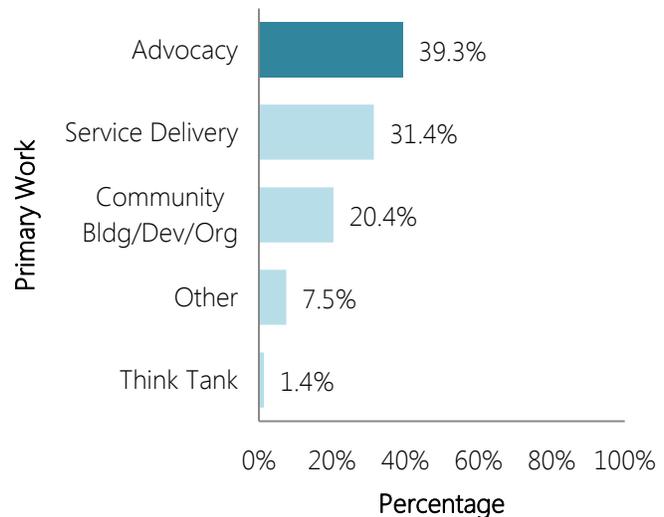


Figure E: Issues Organizations Work On

Note: respondents could select more than one answer

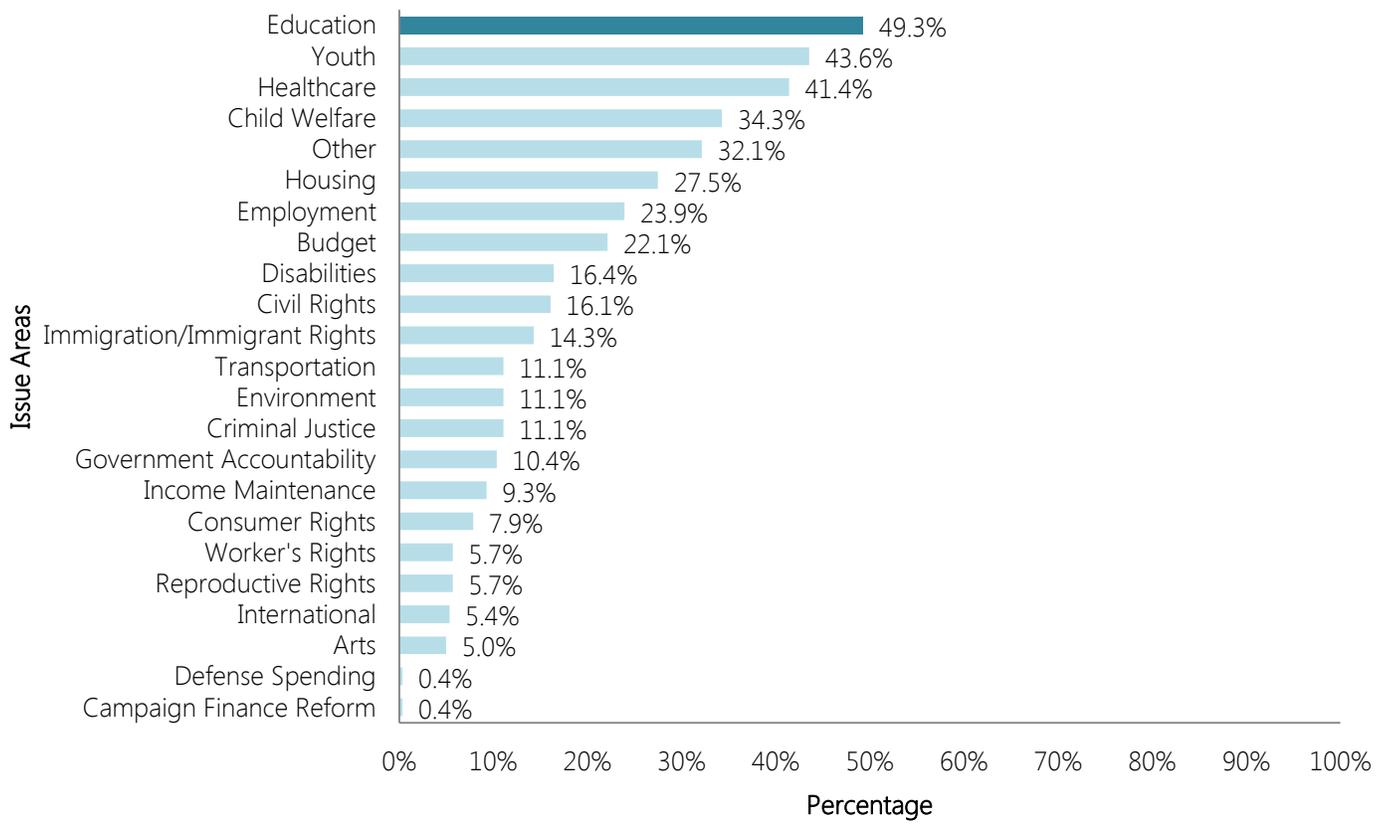
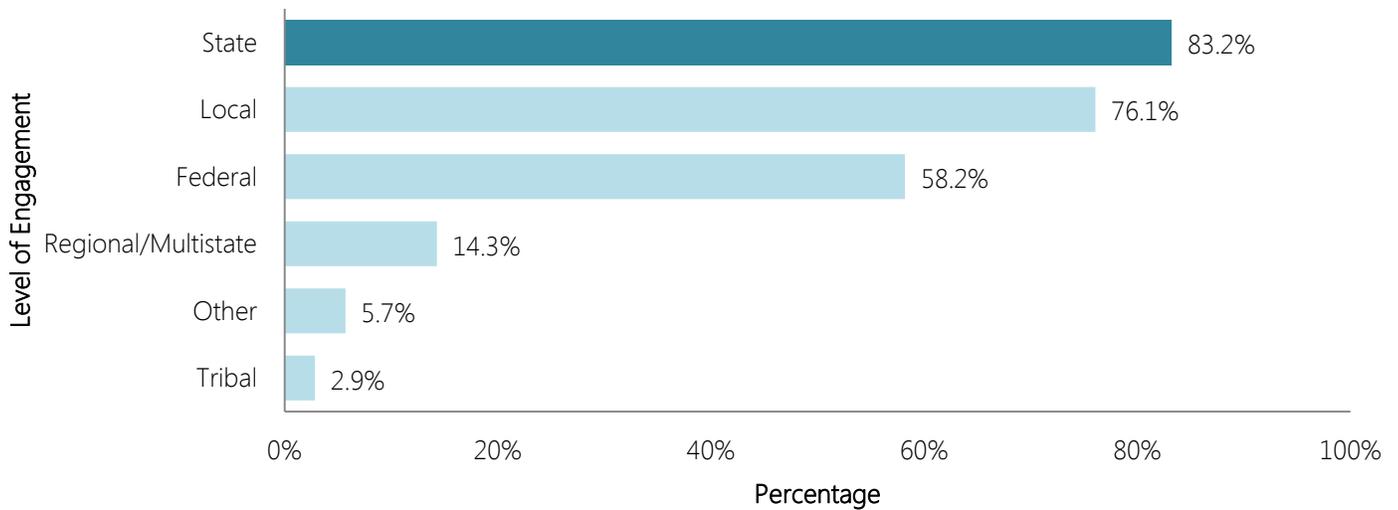


Figure F: Levels of Engagement in Advocacy

Note: respondents could select more than one answer



Indicator Results

The following results show average capacity ratings for each indicator within in each section. Figures G – J illustrate the average capacity ratings for each section. Note: 280 distinct organizations completed each section.

Figure G shows the average capacity ratings for Section 1 indicators. Organizations reported the highest capacity in *preparation* with a 3.27 average, while the lowest capacity in Section 1 is *plans, strategies, and adaptability* with a 2.41 average. Indicators ranked in the same order as in the 2013 ACT User Report.

Figure G: Section 1 – Indicators for Advocacy Goals, Plans and Strategies

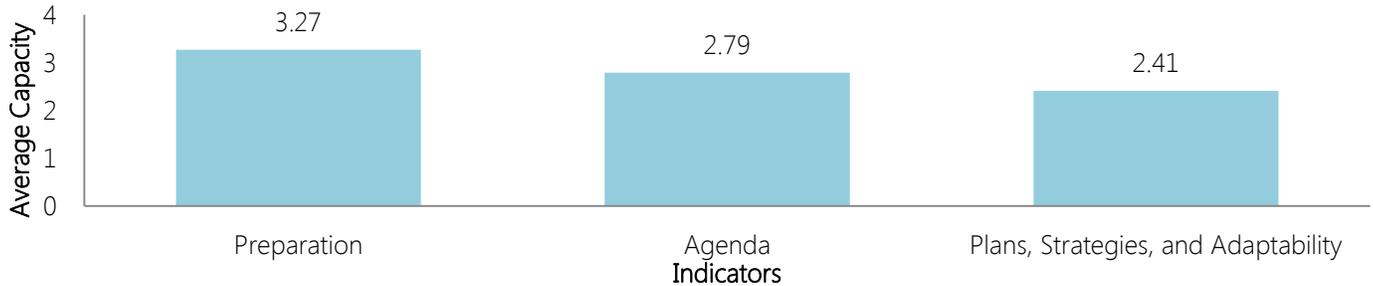


Figure H shows the average capacity ratings for Section 2 indicators. Organizations reported the highest capacity in *advocacy partners and coalitions* with a 3.15 average, while the lowest capacity in Section 2 is *media relations* with a 2.19 average. Indicators in Section 2 ranked in the same order as in the 2013 ACT Report.

Figure H: Section 2 – Indicators for Conducting Advocacy

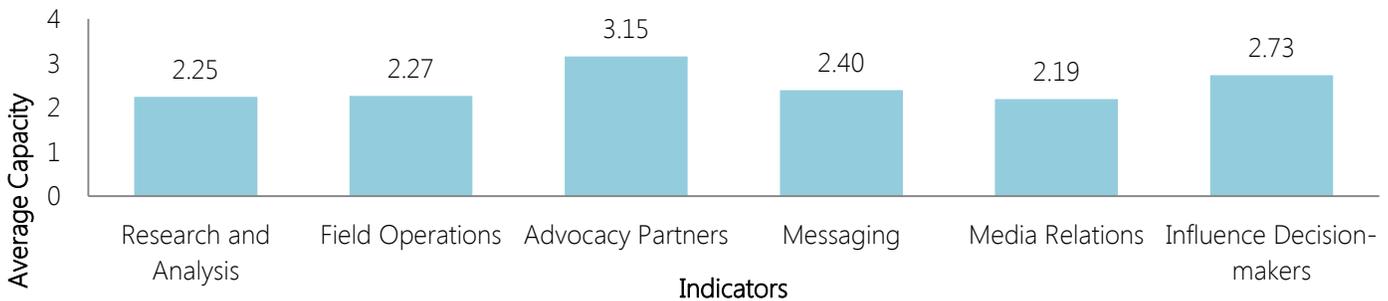


Figure I shows the average capacity ratings for the Section 3 indicators. Organizations reported the highest capacity in *legislative* advocacy work with a 2.50 average, while the lowest capacity is *ballot measures* with a 1.36 average. Indicators in Section 3 ranked in the same order as in the 2013 ACT Report.

Figure I: Section 3 – Indicators for Advocacy Avenues

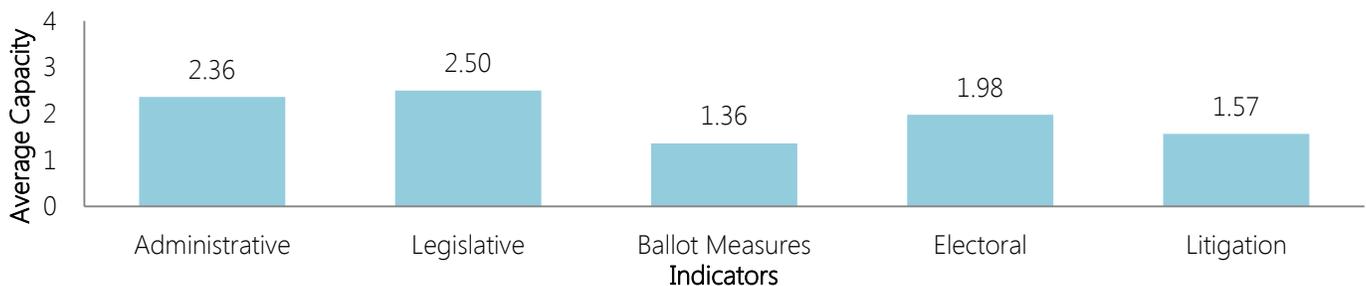
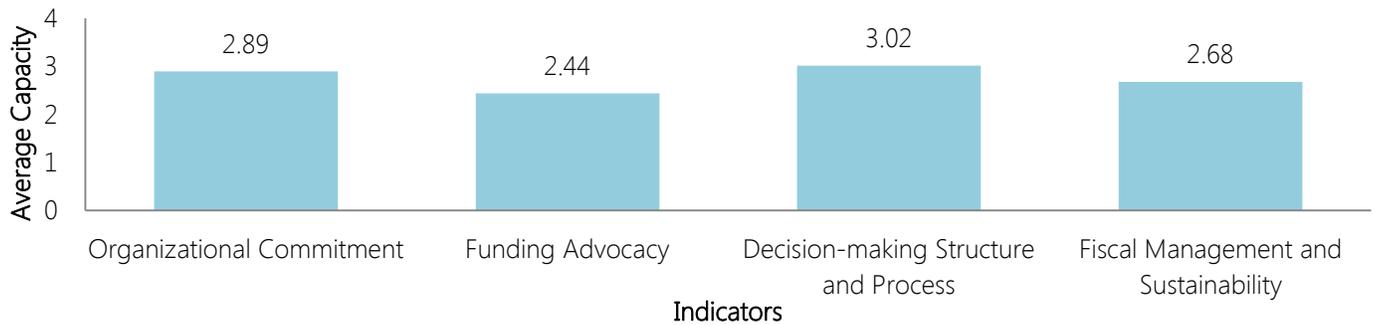


Figure J shows the average capacity ratings for the Section 4 indicators. Organizations reported the highest capacity in *decision-making structure and process* with a 3.02 average, while the lowest capacity is *funding advocacy* with a 2.44 average. Indicators in Section 4 ranked in the same order as in the 2013 ACT Report.

Figure J: Section 4 – Indicators for *Organizational Operations to Sustain Advocacy*

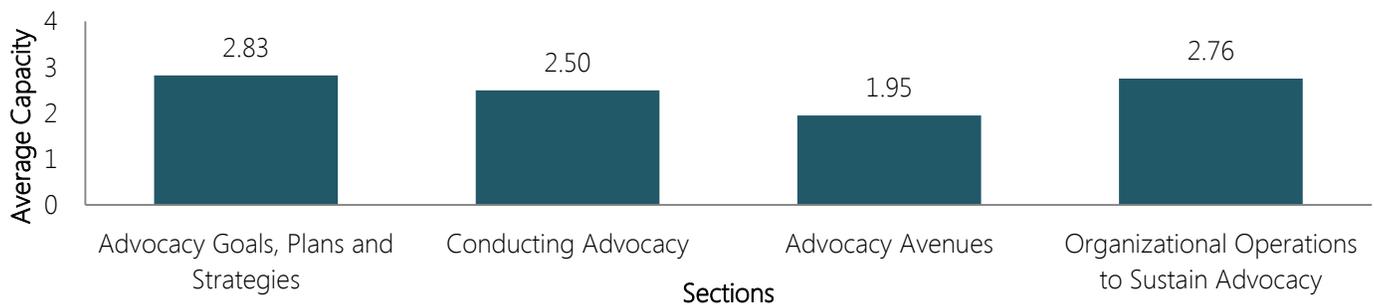


Overall Section Results

The following results show average capacity ratings for each overall section. Note: 280 distinct organizations completed each section.

Figure K shows the accumulated average capacity ratings for each section, based on organizations' responses for each indicator. The highest capacity for all four sections is *Advocacy Goals, Plans and Strategies* with an average capacity of 2.83, while the lowest capacity is *Advocacy Avenues* with an average capacity of 1.95. In the ACT 100 Users Report (2013) organizations reported similar capacity levels with *Advocacy Goals, Plans and Strategies* standing as the highest at 2.78 and *Advocacy Avenues* as the lowest at 2.14.

Figure K: Overall Section Averages



Highest Indicators, Areas to Strengthen, and Rely on Partners

Table 1 presents the average capacity ratings, frequency of selection of areas to strengthen, and frequency of partner reliance for each indicator. Sections 1 and 4 and the *advocacy partners and coalitions* indicator in Section 2 do not provide an option to select “rely on partner.” Respondents had the option to select as many areas to strengthen as they deemed important to the organization.

The highest-rated capacity is *preparation* with a 3.27 capacity; while the lowest capacity is *ballot measures* with a 1.36 average (see Figure L). The most frequently selected areas to strengthen include *plans, strategies, and adaptability; funding advocacy; messaging; and media relations* (see Figure M). This is consistent with the 100 Users Report (2013). Lastly, the indicator for which rely on partners was selected the most times is *Litigation*, followed by *Ballot Measures* and *Research and Analysis* (see Figure N).

Table 1: Comparison of Average Capacity, Areas to Strengthen, and Reliance on Partners

Indicator	Average Capacity (Range 0-4)	# Times Selected As Area to Strengthen	# Times Rely on Partners Selected
Section 1: Preparation	3.27	62	N/A
Section 2: Advocacy Partners and Coalitions	3.15	72	N/A
Section 4: Decision-making Structure and Process	3.02	79	N/A
Section 4: Organizational Commitment	2.89	69	N/A
Section 1: Agenda	2.79	66	N/A
Section 2: Influence Decision-makers	2.73	92	40
Section 4: Fiscal Management and Sustainability	2.68	73	N/A
Section 3: Legislative	2.50	84	141
Section 4: Funding Advocacy	2.44	146	N/A
Section 1: Plans, Strategies, and Adaptability	2.41	169	N/A
Section 2: Messaging	2.40	111	89
Section 3: Administrative	2.36	83	121
Section 2: Field Operations	2.27	79	93
Section 2: Research and Analysis	2.25	64	202
Section 2: Media Relations	2.19	110	72
Section 3: Electoral	1.98	37	147
Section 3: Litigation	1.57	31	240
Section 3: Ballot Measures	1.36	52	213

Figure L: Summary of Indicator Scores

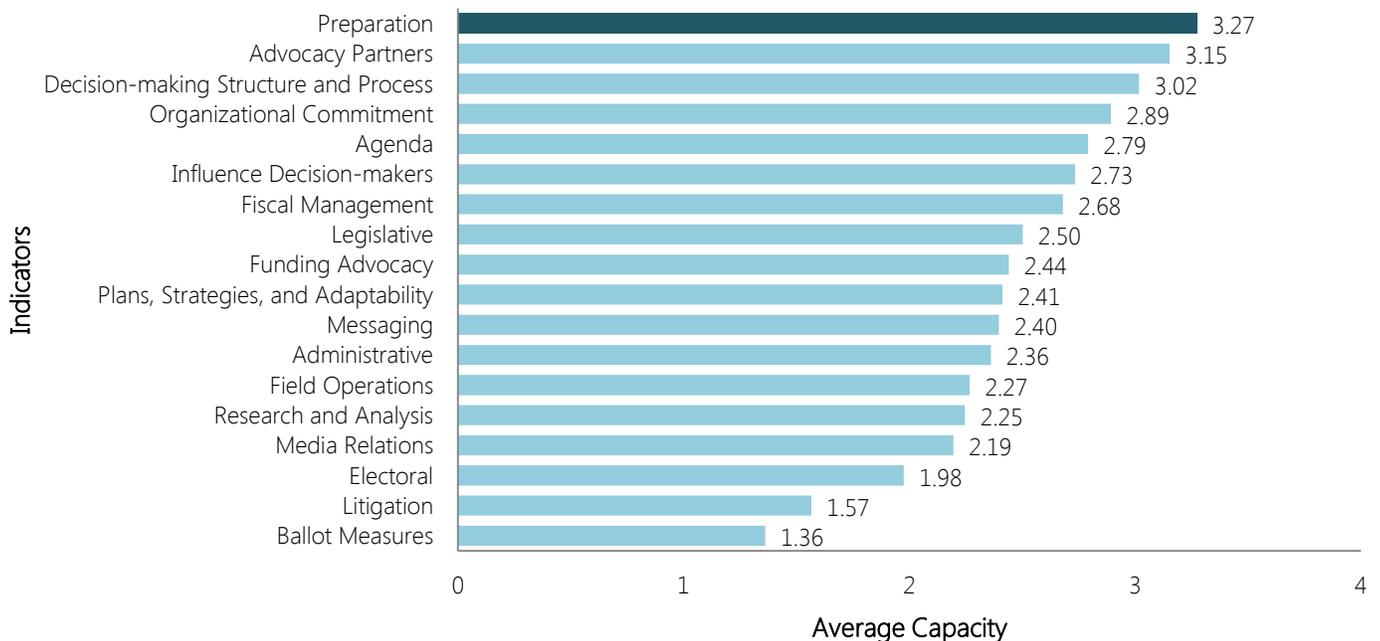


Figure M: Selected Areas to Strengthen

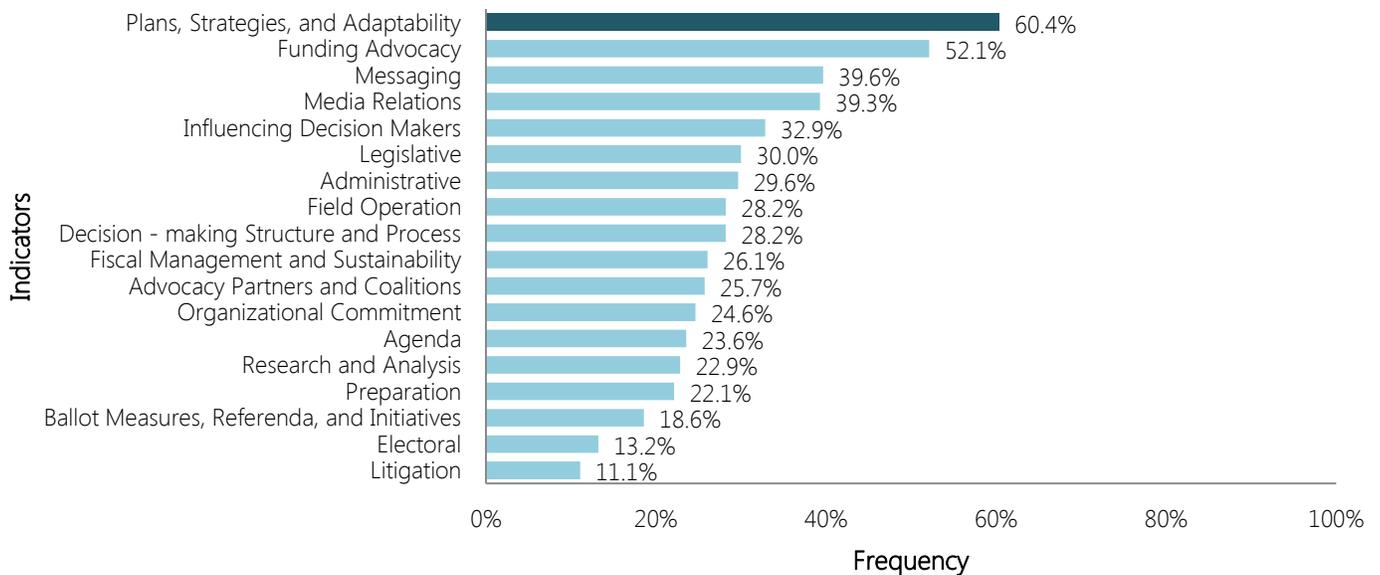
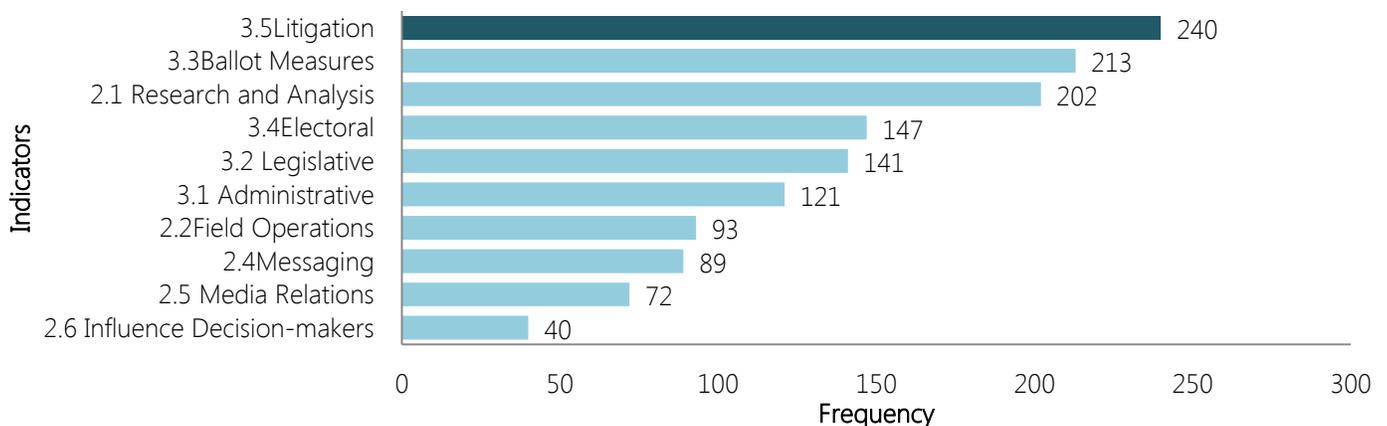


Figure N: Number of Times Rely on Partners was Selected



Highest and Lowest Measures by Average Capacity Scores

Tables 2 and 3 present the top five and lowest five average capacity scores for individual measures. Each indicator includes four individual measures. The average of the four scores determines the capacity for each indicator. The bold labels indicate the associated section and indicators for each measure. The third column indicates when an organization primarily relied on partners for the capacity described in each measure. Rely on Partners was only available in Sections 2 (except *advocacy partners and coalitions* indicator) and Section 3. For a full breakdown of the capacity scores of all measures, see Appendix B.

The two measures with the highest average capacity across organizations come from the *preparation* indicator. They are related to basic knowledge about the subject matter and identification and articulation of the organization’s mission and goals. The measures with the lowest average capacity relate to *ballot measures* and *litigation* indicators, particularly those for conducting get-out-the-vote efforts, pursuing legal activities, and identifying appropriate courts.

As presented in the tables, the measures with lower scores tend to select “Rely on Partners” to conduct those advocacy activities. Note: the average capacity for the measure on the 501(h) election (S4.1, 4th measure), remains stagnant at 2.20 compared to 2.17 in the 2013 ACT Report (see Appendix B and Conclusion).

Table 2: Top Five Measures by Average Capacity Score

Top Five Measures by Average Capacity Score	Average Capacity (Range 0-4)	# Times Rely on Partners Selected
Section 1: Preparation - The organization has basic knowledge about its subject matter, including how its issues affect constituents.	3.59	N/A
Section 1: Preparation - The organization identifies and articulates its mission and goals.	3.45	N/A
Section 2: Advocacy Partners and Coalitions - The organization participates in coalitions that share one or more of its goals and provide value to the organization.	3.32	N/A
Section 4: Decision-Making Structure and Process - The organization has a leadership structure or body that makes timely decisions.	3.27	N/A
Section 1: Preparation - 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.	3.23	N/A

Table 3: Lowest Five Measures by Average Capacity Score

Lowest Five Measures by Average Capacity Score	Average Capacity (Range 0-4)	# Times Rely on Partners Selected
Section 3: Ballot Measures - The organization conducts get-out-the-vote efforts to promote or oppose ballot measures related to its interests.	1.11	66
Section 3: Litigation - The organization pursues legal activities such as initiating litigation or signing on to amicus briefs, as needed.	1.21	74
Section 3: Litigation - The organization identifies appropriate courts, regions and other court leanings to inform possible litigation actions related to the organization's priorities.	1.27	70
Section 3: Ballot Measures - The organization takes public positions on ballot measures related to its interests, its constituents' interests, or its priorities.	1.35	47
Section 3: Ballot Measures - The organization educates its constituents and other voters about its position on measures that will appear on the ballot.	1.40	43

United States Regions

Figure O displays the location of organizations based on their geographical regions in the United States. The report uses multiple federal government department maps to derive the five geographical regions: *Northeast*, *Southeast*, *Midwest*, *Southwest*, and *West*. The *Northeast* ($N = 53$, 18.9%) region consists of states from New England and the East including Vermont, Massachusetts, Pennsylvania, Maryland and Virginia. The *Southeast* ($N = 42$, 15.0%) region consists of states from the South including North Carolina, Florida, Mississippi, Kentucky, and Tennessee. The *Midwest* ($N = 40$, 14.3%) region consists of states from the Great Lakes and Midwest areas including Ohio, Illinois, Minnesota, Nebraska, Iowa, Wyoming, and Montana. The *Southwest* ($N = 42$, 15%) region consists of states from the Southwest and portions of the Midwest including Colorado, Kansas, Louisiana, Texas, and New Mexico. Finally, the *West* ($N = 31$, 11.1%) region consists of states from the Western and Pacific areas including Utah, Arizona, Washington, California, Alaska and Hawaii. For the list of all states by regions, see Appendix C (p. 38).

The results found many organizations working in multiple regions. These organizations fall under the *Multiple Regions* category ($N = 50$, 17.9%) as well as organizations working on an *International* level ($N = 22$, 7.9%).

Overall, ACT users work in a diverse range of regions, allowing for appropriate representation in the statistical analysis.

Figure O: Distribution by Regions



Figures P – U detail the areas chosen to strengthen for groups working in each of the United States regions. Organizations had the option to select as many areas to strengthen as they deemed important to their work. Results show *plans, strategies, and adaptability* and *funding advocacy* in the top five areas to strengthen across the board.

Each region also selected one unique area to strengthen (see Appendix D). They are: Midwest: *legislative*; Northeast: *field operations*; Southeast: *preparation*; Southwest: *organizational commitment*; West: *decision-making structure and process*.

Figure P – Areas to Strengthen in Northeast Region

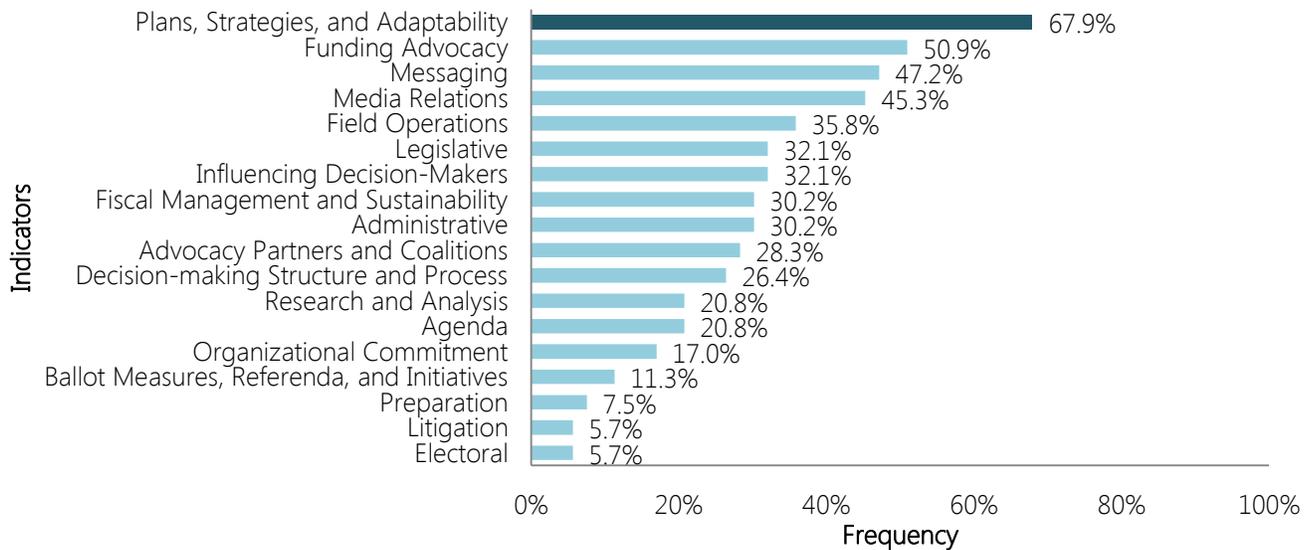


Figure Q – Areas to Strengthen in Southeast Region

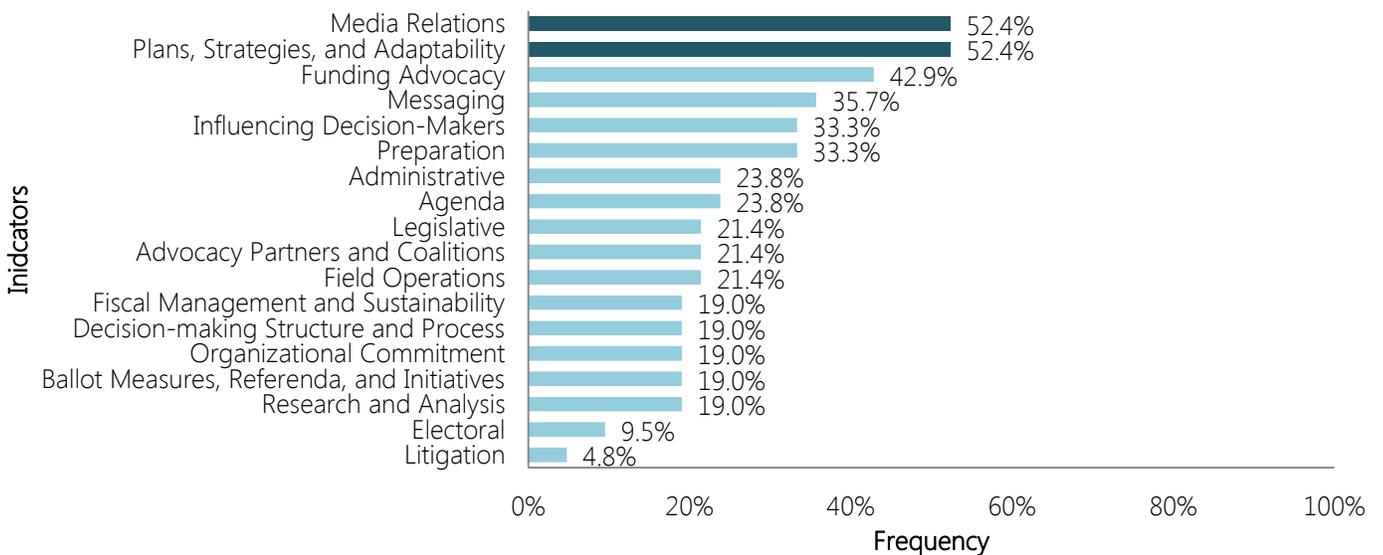


Figure R – Areas to Strengthen in *Midwest* Region

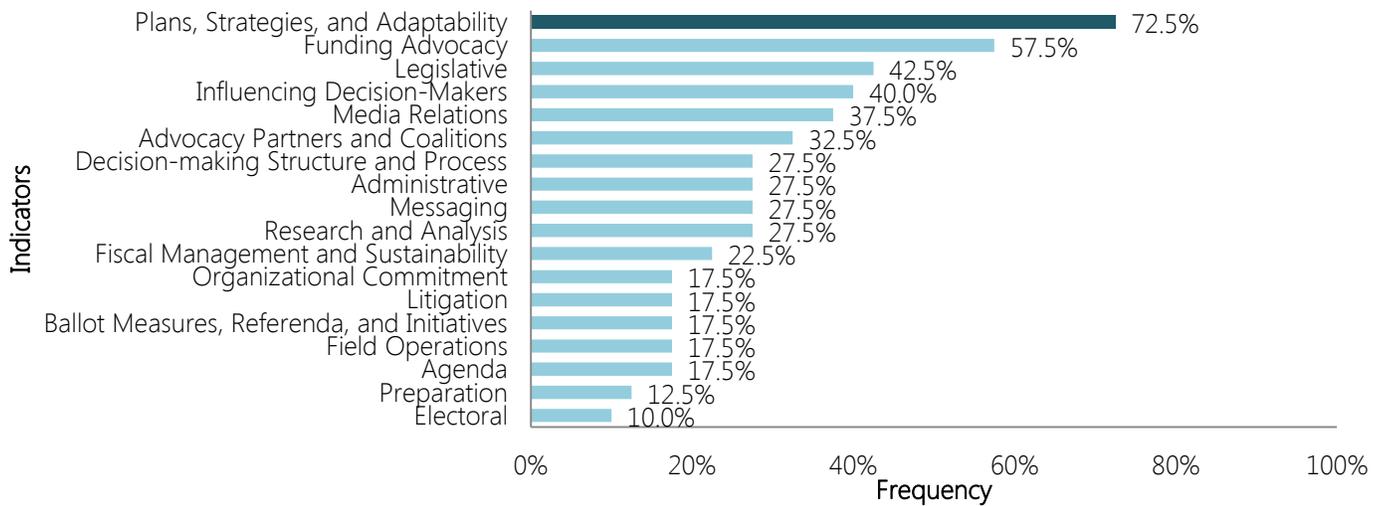


Figure S – Areas to Strengthen in *Southwest* Region

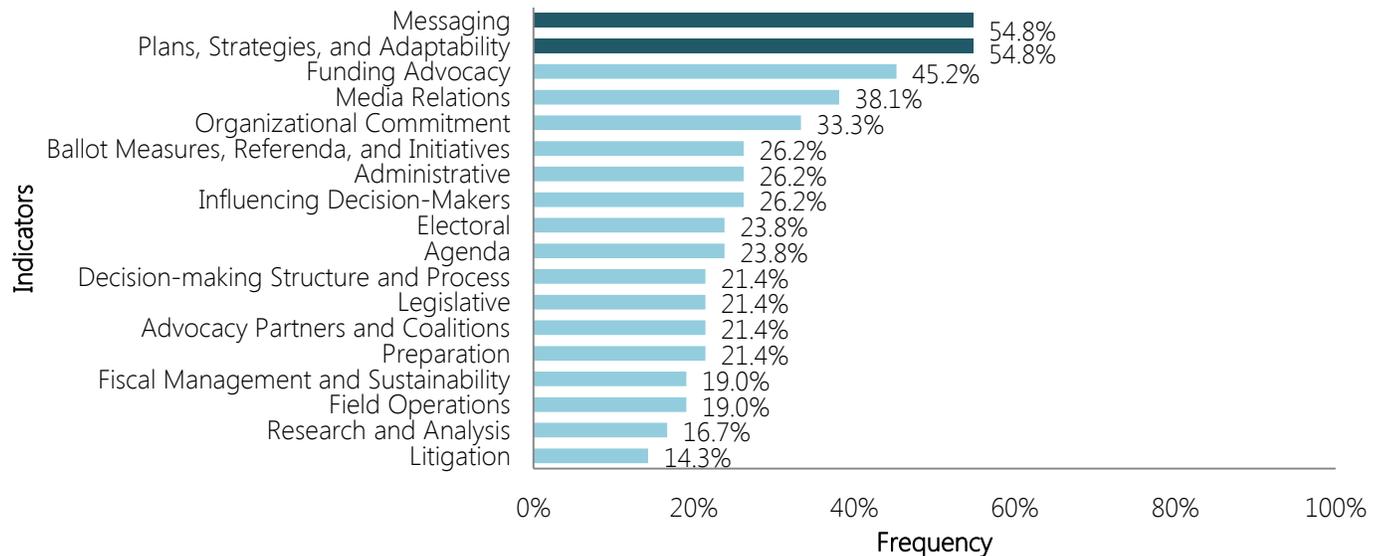


Figure T – Areas to Strengthen in *West* Region

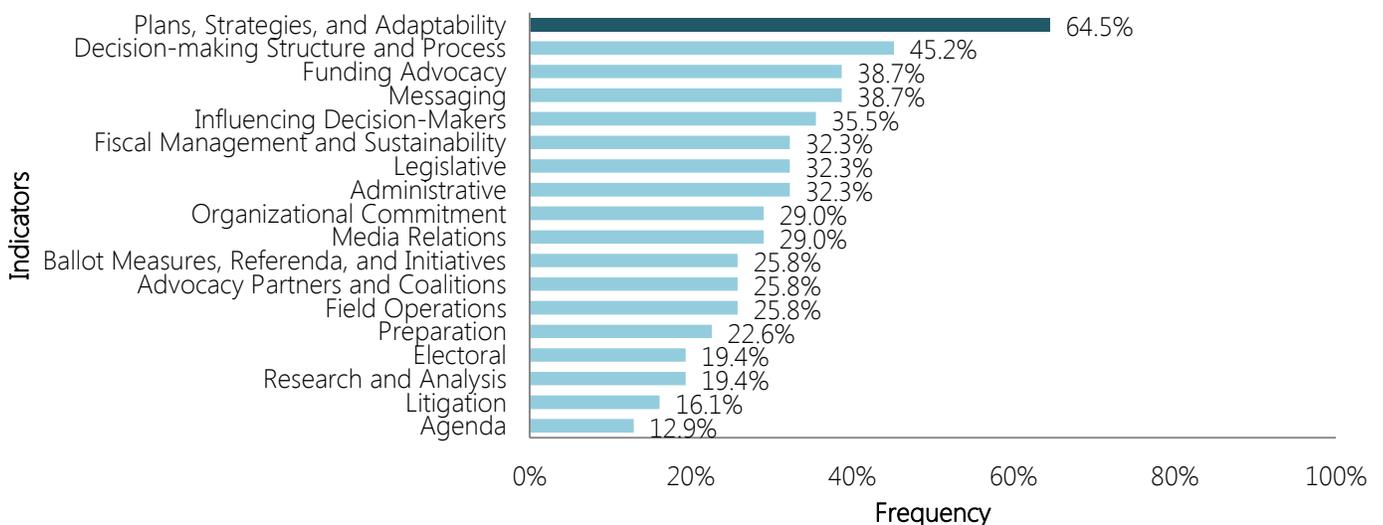
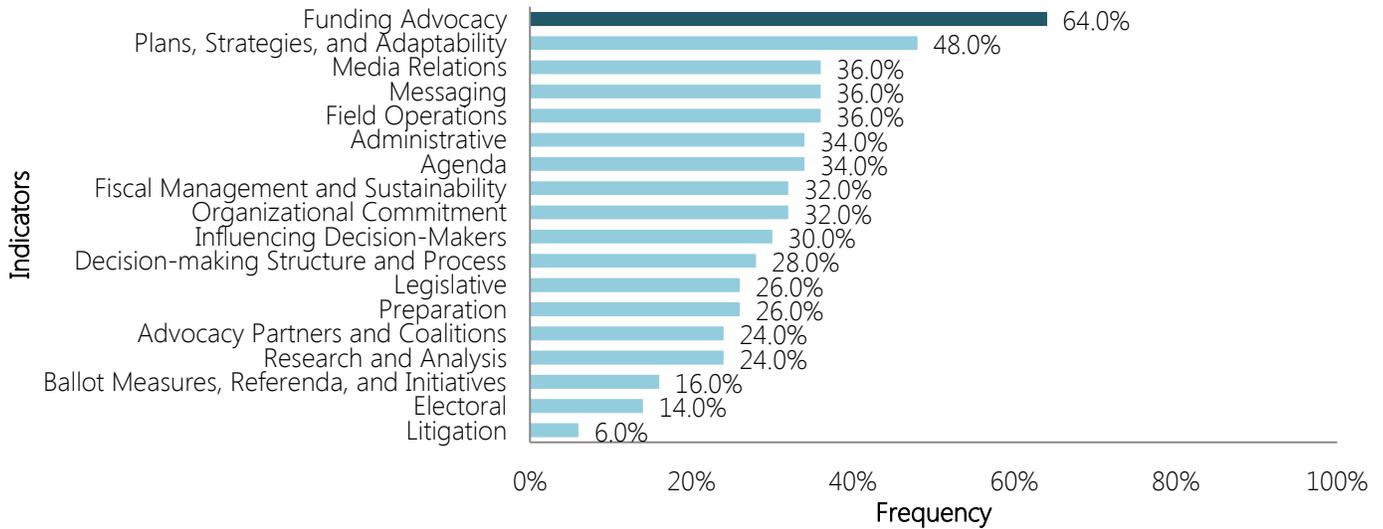


Figure U – Areas to Strengthen in *Multiple Regions*



501(c)(4) Organizations

Figures V – Y illustrate the demographics of organizations that identify as 501(c)(4) social welfare organizations (5%, N = 14). These organizations may pursue ballot measure, educational, lobbying, civic engagement, and some limited political activities.

While the 501(c)(4) organizations sample size is not large enough to compare to the overall report results, it provides a snapshot of some 501(c)(4) organizations. Below is a summary of demographics for the fourteen 501(c)(4) organizations:

Figure V: 501(c)(4) Organizations’ Demographics – Budget Level

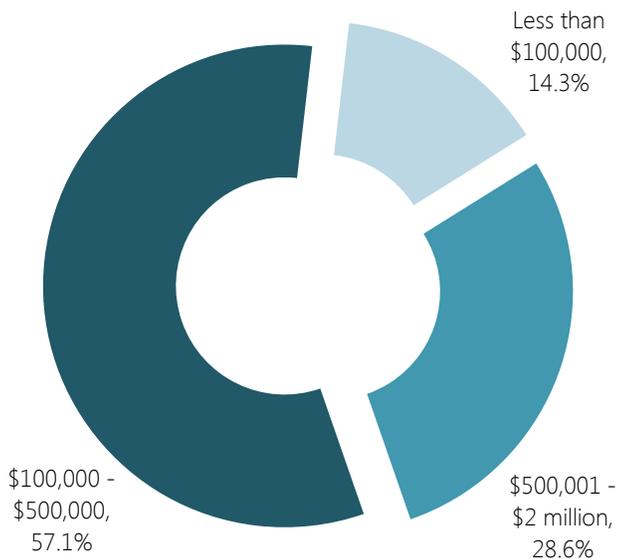


Figure W: 501(c)(4) Organizations’ Demographics – Primary Work

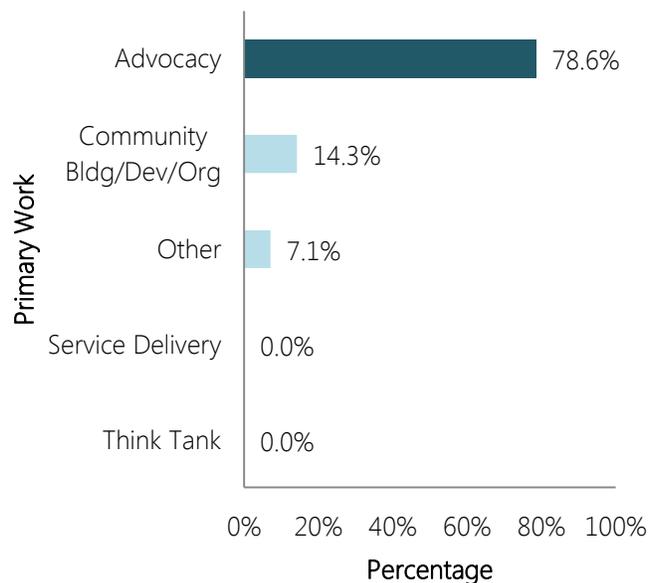


Figure X: 501(c)(4) Organizations' Demographics – Issues Organizations Work On

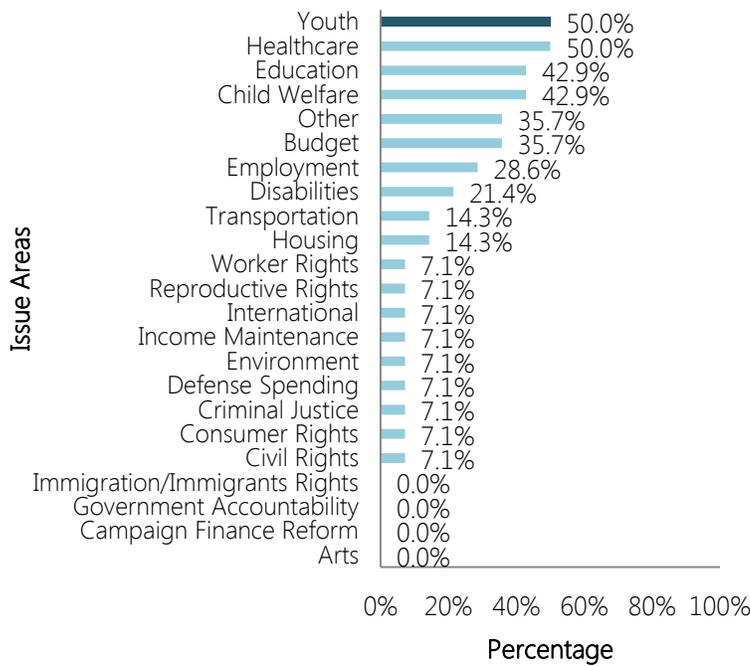


Figure Y: 501(c)(4) Organizations' Demographics – Level of Engagement

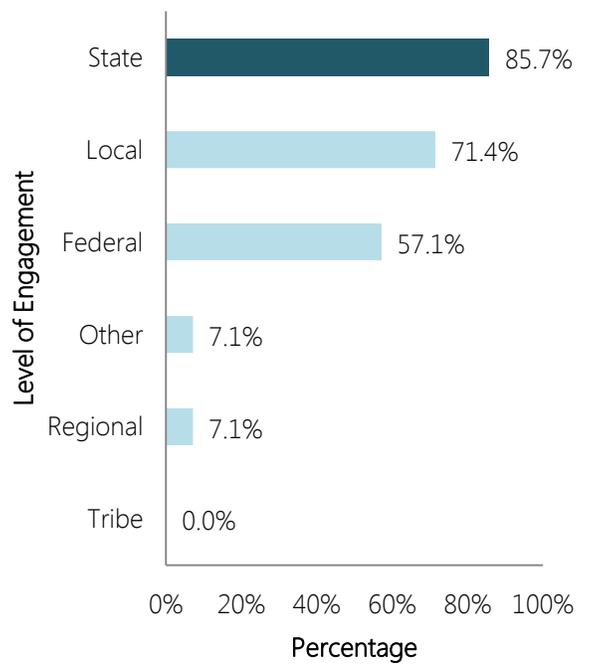


Figure Z shows section average capacity scores for the 501(c)(4) organizations. These organizations report stronger capacity scores in *Organizational Operations to Sustain Advocacy* and *Advocacy Goals, Plans and Strategies*, while weaker capacities reside in *Conducting Advocacy* and *Advocacy Avenues* sections.

Figure Z: Comparison of Overall Section Averages for 501(c)(4) Organizations

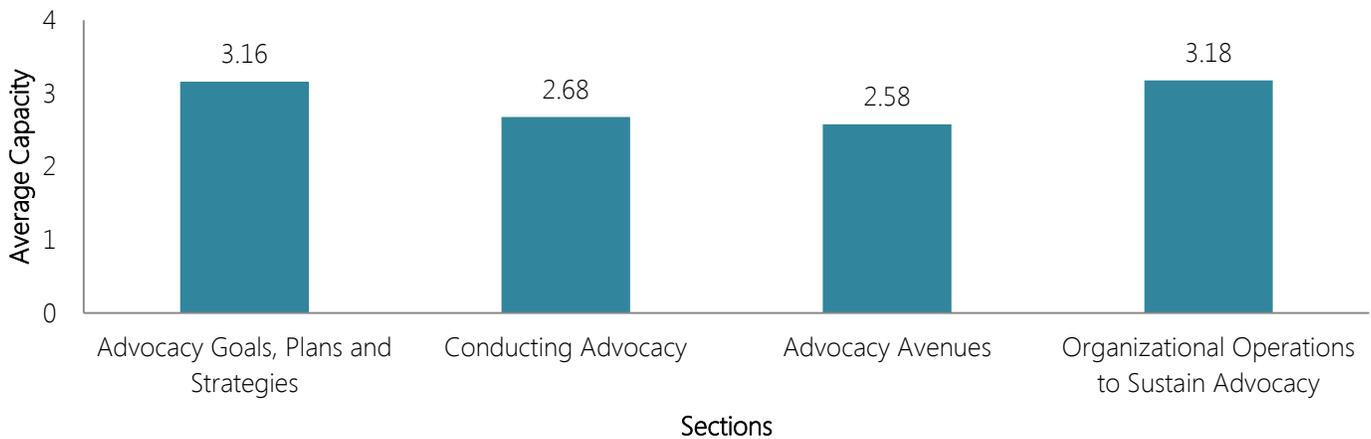


Table 4 presents the average capacity ratings, frequency of selection of areas to strengthen, and frequency of partner reliance for each indicator for 501(c)(4) organizations. Sections 1 and 4 and the *advocacy partners and coalitions* indicator in Section 2 do not provide an option to select “rely on partner.” Respondents had the option to select as many areas to strengthen as they deemed important to the organization.

The bolded indicators highlight the top five highest rated average capacity indicator for 501(c)(4) organizations. These organizations report strong scores in *legislative* and *influence decision-makers* indicators. 501(c)(4) organization results also show a pattern of collaboration as their lowest rated average capacity indicators display the highest selection of times they collaborated with another organization.

For selected areas to strengthen, 501(c)(4) organizations most frequently chose the following indicators (1) *media relations*, (2) *funding advocacy*, (3) *field operations*, (4) *plans, strategies, and adaptability*, and (5) *advocacy partners and collaboration* as their top selections.

Table 4: Comparison of 501(c)(4) Organizations’ Average Capacity, Areas to Strengthen, and Reliance on Partners

Indicator	Average Capacity (Range 0-4)	# Times Selected As Area to Strengthen	# Times Rely on Partners Selected
Section 1: Preparation	3.41	2	N/A
Section 2: Advocacy Partners and Coalitions	3.34	5	N/A
Section 3: Legislative	3.34	3	4
Section 1: Agenda	3.18	2	N/A
Section 2: Influence Decision-makers	3.18	3	4
Section 3: Administrative	3.18	3	3
Section 4: Organizational Commitment	3.16	4	N/A
Section 4: Decision-making Structure and Process	3.02	3	N/A
Section 2: Research and Analysis	3.00	0	4
Section 1: Plans, Strategies, and Adaptability	2.89	6	N/A
Section 4: Fiscal Management and Sustainability	2.68	4	N/A
Section 3: Electoral	2.46	3	6
Section 4: Funding Advocacy	2.44	7	N/A
Section 2: Messaging	2.41	4	4
Section 2: Field Operations	2.39	6	4
Section 3: Ballot Measures	2.21	4	12
Section 2: Media Relations	1.77	8	8
Section 3: Litigation	1.71	3	13

Statistical Analysis

This section includes the statistical analysis conducted on all the individual results.

As described in the Introduction, the report uses the statistical tool (SPSS) to conduct the analysis and provide the following results. Three sets of tests were conducted. The first two subsections, indicator results and overall section results, use correlations to seek strong associations. The remainder of the section uses Independent Samples T-Test and One-Way ANOVA to determine statistically significant differences. These tests provide more detailed analysis about the relationship among indicators and demographic factors. **For a detailed description on the method for evaluating results, see page 28.**

This section includes:

- Relationships between Capacity Indicators; between Sections
- Comparisons by Budget, Work Type, and Information Source; by Federal, State, Regional, and Local Engagement; by Top Five Issues Worked On; and by Geographical Region

Relationships Between Capacity Indicators

The report finds two meaningful relationships between indicators in Section 1, with the strongest association between *agenda* and *preparation*. The relationship demonstrates there is a high probability that organizations that report strong *agenda* capacity will also report strong *preparation* capacity.

As presented in Table 5, the Pearson Correlations test reveals strong positive relationships between *agenda* and *preparation*, $r(280) = .601$, $p \leq .01$, and *preparation* and *plans, strategies and adaptability*, $r(280) = .571$, $p \leq .01$. Finally, the test found a third relationship between *agenda* and *plans, strategies and adaptability*. However, an r -value greater than .700 may represent similar concepts in the indicators' measures.

Table 5: Pearson Correlations Results for Advocacy Goals, Plans and Strategies

Indicators	Agenda	Plans, Strategies, and Adaptability	Preparation
Agenda	--		
Plans, Strategies, and Adaptability	.760**	--	
Preparation	.601**	.571**	--

Note. ** = $p \leq .01$. N = 280 for all analyses.

The report finds several meaningful relationships between indicators in Section 2. Notably, *messaging* has a strong positive relationship with every indicator in Section 2 except *advocacy partners and coalitions*. The strongest association is between *messaging* and *media relations*. The relationship demonstrates there is a high probability that organizations that report strong *messaging* capacity will also report strong *media relations* capacity.

As presented in Table 6, the Pearson Correlations test reveals strong positive relationship between *messaging* and *media relations*, $r(280) = .642$, $p \leq .01$, *messaging* and *influencing decision-makers*, $r(280) = .565$, $p \leq .01$, and *messaging* and *field operations*, $r(280) = .561$, $p \leq .01$. The table also shows strong positive relationships between *advocacy partners and coalitions* and *field operations*, $r(280) = .523$, $p \leq .01$ and *messaging* and *research analysis*, $r(280) = .509$, $p \leq .01$.

Table 6: Pearson Correlations Results for Conducting Advocacy

Indicators	Research and Analysis	Field Operations	Advocacy Partners and Coalitions	Media Relations	Messaging	Influence Decision-Makers
Research and Analysis	--					
Field Operations	.438**	--				
Advocacy Partners and Coalitions	.390**	.523**	--			
Media Relations	.347**	.431**	.349**	--		
Messaging	.509**	.561**	.455**	.642**	--	
Influence Decision-Makers	.442**	.423**	.453**	.365**	.565**	--

Note. ** = $p \leq .01$. N = 280 for all analyses.

The report finds several meaningful relationships between indicators in Section 3 with strongest association between *administrative* and *legislative*. The relationship demonstrates there is a high probability that organizations that report strong *administrative* capacity will also report strong *legislative* capacity.

As presented in Table 7, the Pearson Correlations test reveals a strong positive relationship between *administrative* and *legislative*, $r(280) = .561, p \leq .01$.

Table 7: Pearson Correlations Results for Advocacy Avenues

Indicator	Ballot Measures, Referenda, and Initiatives	Electoral	Legislative	Litigation	Administrative
Ballot Measures, Referenda, and Initiatives	--				
Electoral	.455**	--			
Legislative	.319**	.378**	--		
Litigation	.429**	.339**	.314**	--	
Administrative	.306**	.265**	.561**	.439**	--

Note. ** = $p \leq .01$. N = 280 for all analyses.

The report finds several meaningful relationships between indicators in Section 4. Notably, *organizational commitment* has a strong positive relationship with every indicator in Section 4. The strongest association is between *organizational commitment* and *fiscal management and sustainability*. The relationship demonstrates there is a high probability that organizations that report strong *organizational commitment* capacity will also report strong *fiscal management and sustainability* capacity.

As presented in Table 8, the Pearson Correlations test reveals strong positive relationship between *organizational commitment* and *fiscal management and sustainability*, $r(280) = .682, p \leq .01$, *organizational commitment* and *decision-making structure and process*, $r(280) = .627, p \leq .01$, and *decision-making structure and process* and *fiscal management and sustainability*, $r(280) = .598, p \leq .01$. The table also shows strong positive relationships between *organizational commitment* and *funding advocacy*, $r(280) = .556, p \leq .01$ and *funding advocacy* and *fiscal management and sustainability*, $r(280) = .514, p \leq .01$.

Table 8: Pearson Correlations Results for Organizational Operations to Sustain Advocacy

Indicator	Decision-Making Structure and Process	Fiscal Management and Sustainability	Funding Advocacy	Organizational Commitment
Decision-Making Structure and Process	--			
Fiscal Management and Sustainability	.598**	--		
Funding Advocacy	.424**	.514**	--	
Organizational Commitment	.627**	.682**	.556**	--

Note. ** = $p \leq .01$. N = 280 for all analyses.

Relationships Between Sections

The report finds several meaningful relationships between the four sections with strongest association between *Advocacy Goals, Plans, and Strategies* and *Conducting Advocacy*. The relationship demonstrates there is a high probability that organizations that report strong *Goals, Plans, and Strategies* capacity will also report strong *Conducting Advocacy* capacity.

As presented in Table 9, the Pearson Correlations test reveals strong positive relationship between *Advocacy Goals, Plans and Strategies* and *Conducting Advocacy*, $r(280) = .684, p \leq .01$, *Advocacy Goals, Plans and Strategies* and *Organizational Operations to Sustain Advocacy*, $r(280) = .671, p \leq .01$, and *Conducting Advocacy* and *Advocacy Avenues*, $r(280) = .604, p \leq .01$. The table also shows a strong positive relationships between *Conducting Advocacy* and *Organizational Operations to Sustain Advocacy*, $r(280) = .562, p \leq .01$.

Table 9: Pearson Correlations results for All Sections

Indicator	Advocacy Goals, Plans and Strategies	Conducting Advocacy	Advocacy Avenues	Organizational Operations to Sustain Advocacy
Advocacy Goals, Plans and Strategies	--			
Conducting Advocacy	.684**	--		
Advocacy Avenues	.491**	.604**	--	
Organizational Operations to Sustain Advocacy	.671**	.562**	.475**	--

Note. ** = $p \leq .01$. N = 280 for all analyses.

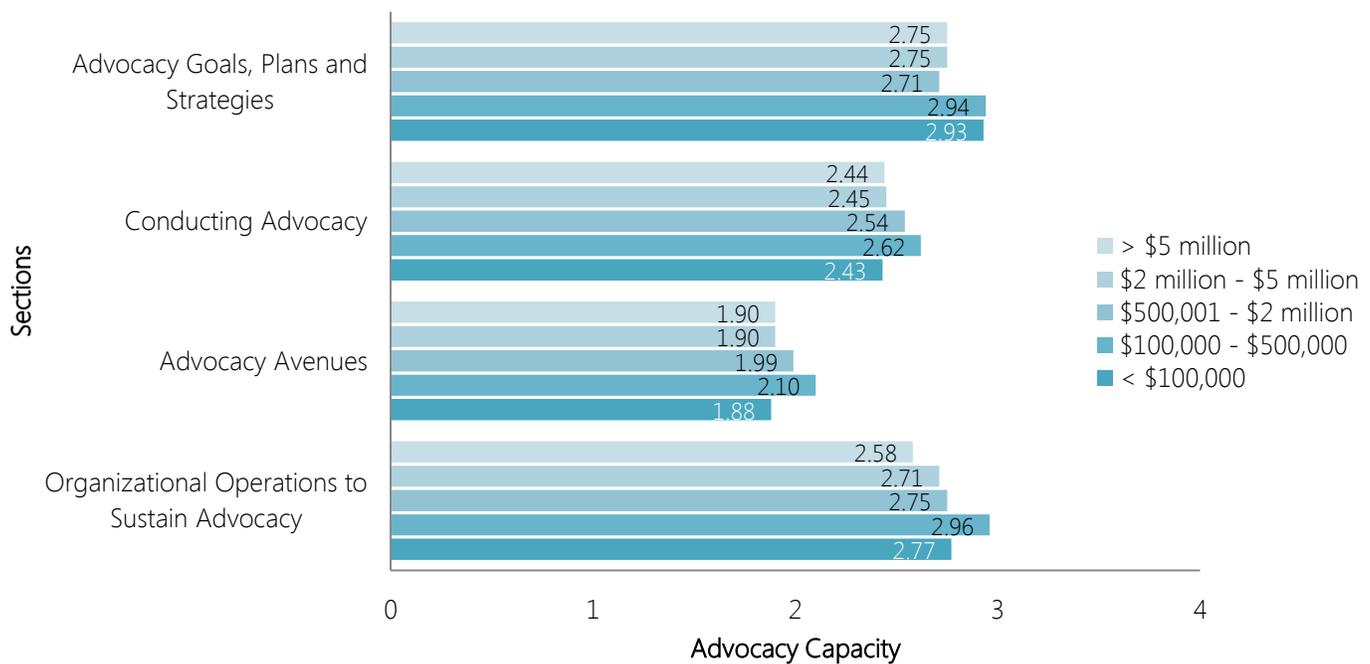
Capacity Comparisons by Budget, Work Type and Information Source

Figures AA, AB, and AC illustrate comparisons of the overall section averages across three distinct levels of demographic variables: *budget level*, *primary work type*, and *information source*. This section of the report uses the One-Way ANOVA test to determine significant difference between statistically different data points.

Note: To allow for comparability, *information source* was coded into three groups: Staff (“volunteer,” “administrative,” and “program”), Group Effort (“it is a group effort”), and Decision-makers (“Executive Director” and “Board member(s)”).

Budget Level: No statistical difference is evident across groups, which indicates the budget size of an organization does not determine the perceived strength or weakness of their advocacy capacity based on each indicator (see Figure AA).

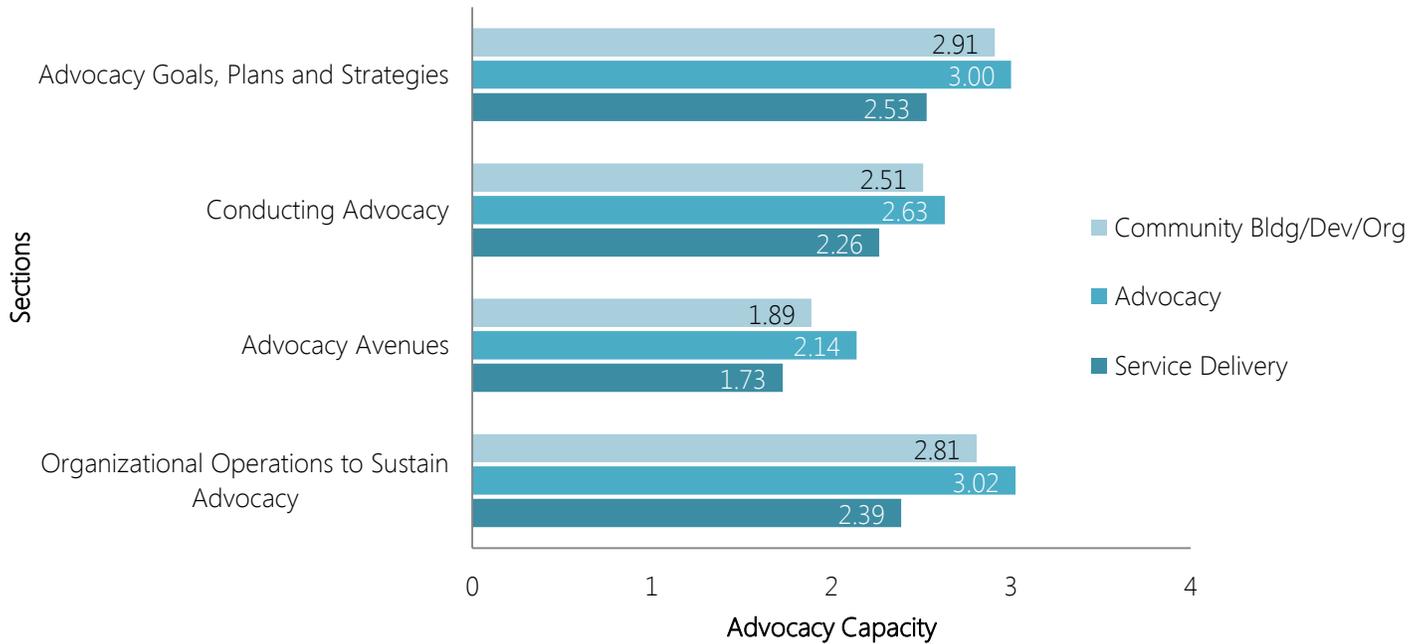
Figure AA: Section Averages by Budget Level



Primary Work Type: Organizations that primarily work in *advocacy* or *community building/development/organizing* report significantly higher average capacities for each indicator than organizations with primary work in *service delivery* (see Figure AB).

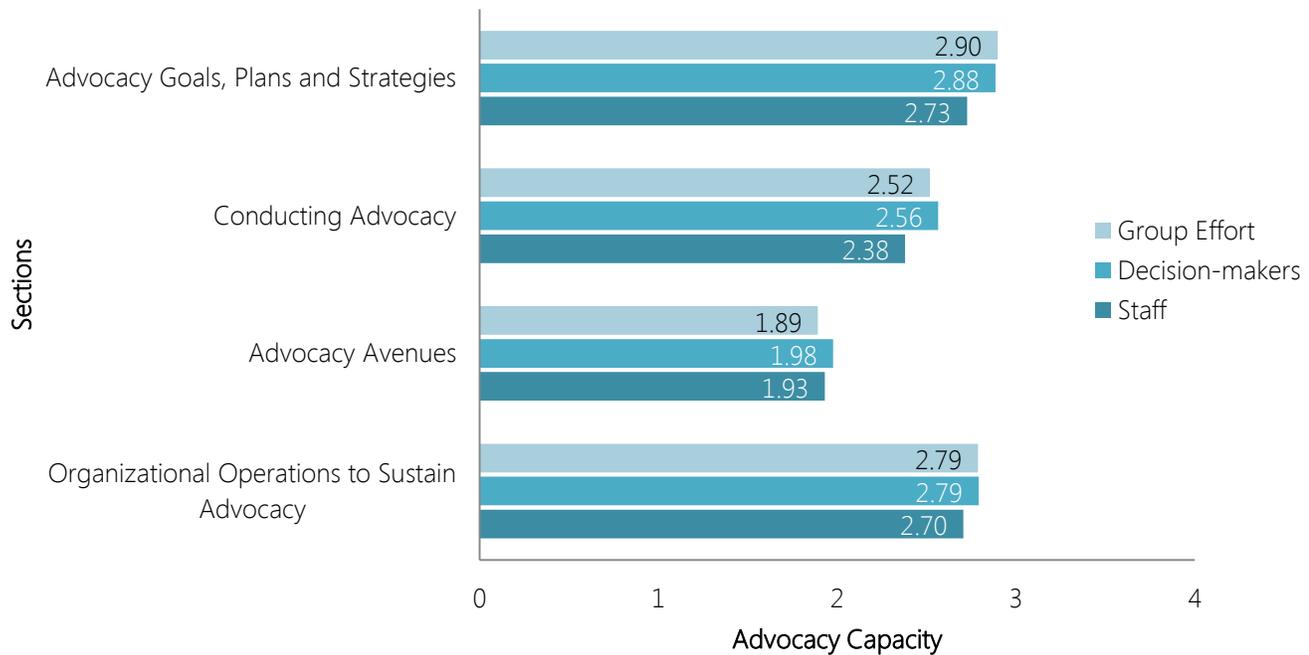
Based on the One-Way ANOVA test with the independent variable set to *Primary Work Type* of the organization and a null hypothesis where the independent variable does not influence average capacity scores, the report determines a statistical difference for all four sections. An analysis of variance shows that an organization’s *Primary Work Type* influences their Section 1 average capacity scores, $F(4,275) = 7.64$, $p = .000$, their Section 2 average capacity scores, $F(4,275) = 4.50$, $p = .002$, their Section 3 average capacity scores, $F(4,275) = 3.94$, $p = .004$, and their Section 4 average capacity scores, $F(4,275) = 12.263$, $p = .000$.

Figure AB: Section Averages by Work Type



Information Source: No statistical difference is evident across groups, which indicates the primary source of information for completing ACT does not influence the organizations' perceived average capacity (see Figure AC).

Figure AC: Section Averages by Information Source



Capacity Comparisons by Federal, State, Regional, and Local Engagement

Figures AD – AG present the comparisons of average section capacities across several levels of advocacy engagement (local, state, regional, or federal). Note: ACT provides organizations with the ability to select as many levels of engagement as is applicable to their work. Therefore, using Independent Samples t-tests, the report compares organizations’ section average capacity scores based on organizations that engage in advocacy at each level with the organizations that do not engage in advocacy at each level. For example, Figure AD compares organizations engaging in local level advocacy versus organizations that do not engage in local level advocacy.

Local: The report finds statistical difference in Section 1: *Advocacy Goals, Plans and Strategies* capacity scores for organizations that engage in local level advocacy versus organizations that do not (see Figure AD).

Organizations that do not engage in local-level advocacy ($N = 67, M = 2.96, SD = .616$) report statistically higher average capacities in Section 1 than organizations that engage in local-level advocacy ($N = 213, M = 2.78, SD = .660$), $t(278) = 2.01, p = .046$.

State: The report finds statistical difference in Section 3: *Advocacy Avenues* and Section 4: *Organizational Operations to Sustain Advocacy* capacity scores for organizations that engage in state-level advocacy versus organizations that do not (see Figure AE).

Organizations that engage in state-level advocacy ($N = 233, M = 2.00, SD = .815$) report statistically higher average capacities in Section 3 than organizations that do not engage in state-level advocacy ($N = 47, M = 1.74, SD = .611$), $t(278) = -2.06, p = .041$. In addition, organizations that engage in state-level advocacy ($N = 233, M = 2.81, SD = .707$) report statistically higher average capacities in Section 4 than organizations that do not engage in state-level advocacy ($N = 47, M = 2.48, SD = .643$), $t(278) = -2.99, p = .003$.

Figure AD: Section Averages by Local Engagement

Figure AE: Section Averages by State Engagement



Regional/Multistate: No statistical difference is evident between organizations that engage in regional-level advocacy versus organizations that do not (see Figure AF).

Federal: The report finds statistical difference in Section 4: *Organizational Operations to Sustain Advocacy* capacity scores for organizations that engage in federal-level advocacy versus organizations that do not (see Figure AG).

Organizations that engage in federal-level advocacy ($N = 163$, $M = 2.86$, $SD = .689$) report statistically higher average capacity in Section 4 than organizations that do not engage in federal-level advocacy ($N = 117$, $M = 2.62$, $SD = .710$), $t(278) = -2.83$, $p = .005$.

Figure AF: Section Averages by Regional Engagement

Figure AG: Section Averages by Federal Engagement

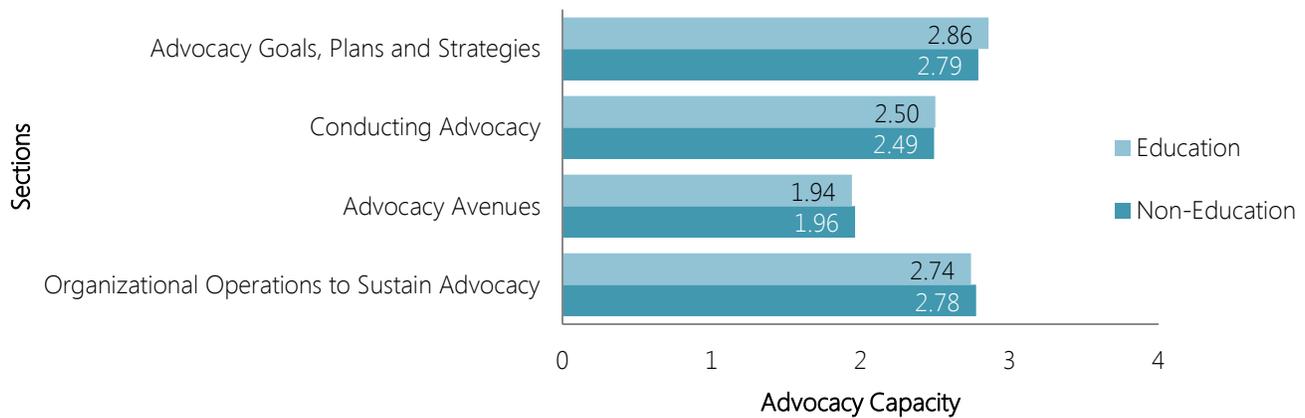


Capacity Comparisons by Top Five Issues Worked On

Figures AH – AL illustrate the comparisons of section average capacity across the top five issues areas represented. Similar to levels of engagement, ACT allows organizations the option to select all applicable issue areas. Therefore, this section, using Independent Samples T-Tests, compares organizations’ section average capacity scores based on organizations that work on the specific issue and organizations that do not. For example, Figure AH compares organizations that work on education issues versus organizations that do not.

Education ($N = 138$): No statistical difference is evident between organizations that work on education issues versus organizations that do not (see Figure AH).

Figure AH: Section Averages by Work on Education Issues



Youth ($N = 122$): No statistical difference is evident between organizations that work on youth issues versus organizations that do not (see Figure AI).

Figure AI: Section Averages by Work on Youth Issues

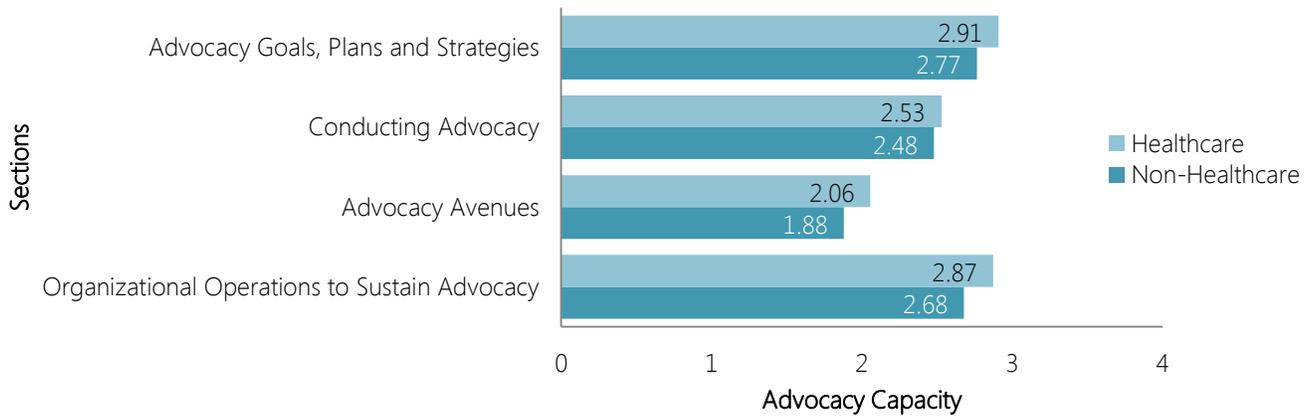


Healthcare ($N = 116$): The report finds statistical difference in Section 4: *Organizational Operations to Sustain Advocacy* for organizations that work on healthcare issues versus organizations that do not. Furthermore, healthcare organizations report higher average capacity in the *organizational commitment* indicator than organizations that do not work on healthcare issues (see Figure AJ).

Organizations that work on healthcare issues ($N = 116$, $M = 2.87$, $SD = .699$) report statistically higher average capacities in Section 4 than organizations that do not, ($N = 164$, $M = 2.68$, $SD = .703$), $t(278) = -2.29$, $p = .023$. A further look into the SPSS test shows a meaningful significance for the *organizational commitment* indicator.

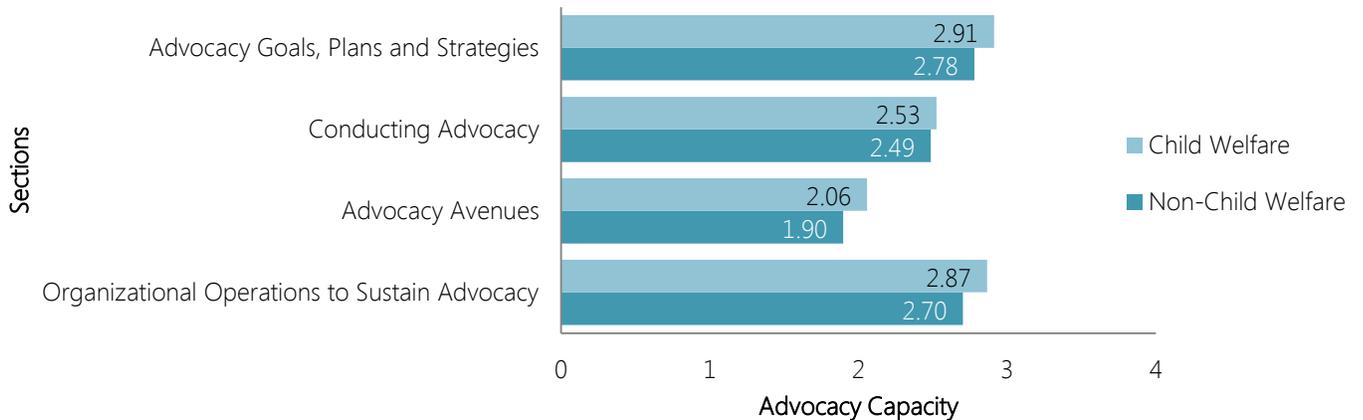
Organizations that work on healthcare issues ($N = 116$, $M = 3.03$, $SD = .772$) report statistically higher average capacities in the *organizational commitment* indicator than organizations that do not work on healthcare, ($N = 164$, $M = 2.80$, $SD = .846$), $t(278) = -2.33$, $p = .020$.

Figure AJ: Section Averages by Work on Healthcare Issues



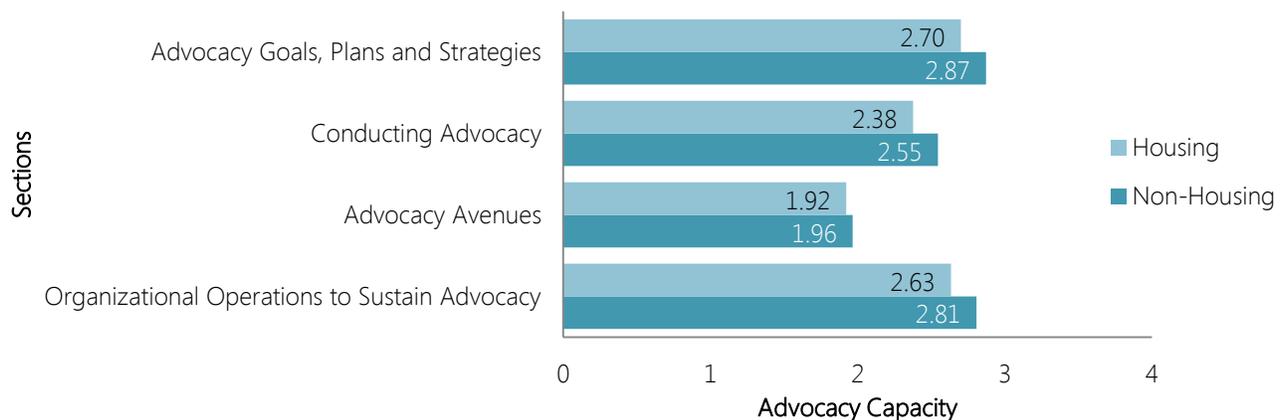
Child Welfare (N = 96): No statistical difference is evident between organizations that work on child welfare issues versus organizations that do not (see Figure AK).

Figure AK: Section Averages by Work on Child Welfare Issues



Housing (N = 77): No statistical difference is evident between organizations that work on housing issues versus organizations that do not (see Figure AL).

Figure AL: Section Averages by Work on Housing Issues



Capacity Comparisons by Geographical Regions

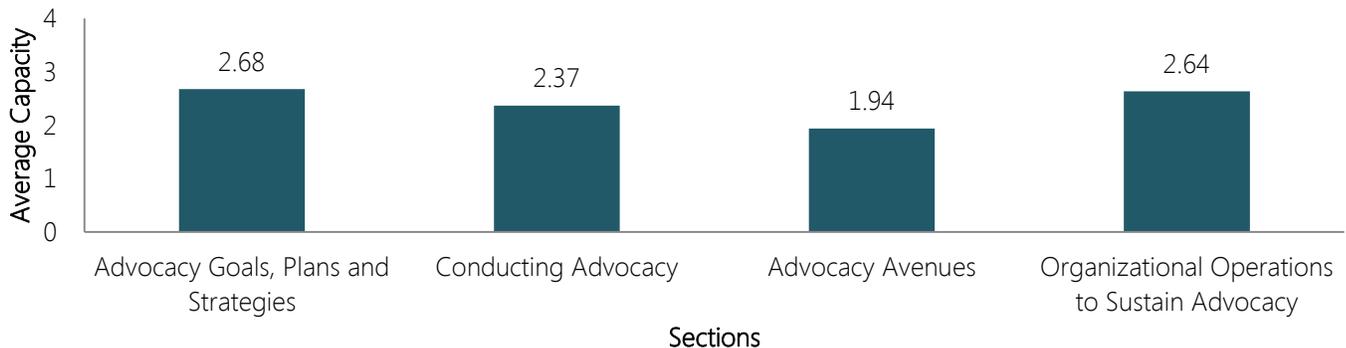
Figures AM – AS show the overall section averages for each region. The report finds statistical differences between the *Northeast* and *Southeast* regions for Section 1: *Advocacy Goals, Plans, and Strategies* and Section 4: *Organizational Operations to Sustain Advocacy*, as well as the *Northeast* region and *Multiple Regions* for Section 4.

To determine if section averages were statistically different between regions, this section uses One-Way ANOVA test. A *post-hoc* analysis, conducted after a significant difference in the One-Way ANOVA *F*-test, found statistical difference ($p \leq .05$) between *Northeast* ($M = 2.96$, $SD = .590$) and *Southeast* ($M = 2.68$, $SD = .704$) regions in Section 1 and *Northeast* ($M = 2.93$, $SD = .690$) and *Southeast* ($M = 2.64$, $SD = .709$) regions in Section 4. It also found statistical difference between the *Northeast* region ($M = 2.93$, $SD = .690$) and *Multiple Regions* ($M = 2.66$, $SD = .776$) in Section 4.

Figure AM: Overall Section Averages by Northeast Region



Figure AN: Overall Section Averages by Southeast Region



The report finds statistical difference in Section 1 between *Northeast* and *Southeast*. Furthermore, organizations that work in the *Northeast* region report higher capacity in *agenda* and *plans, strategies and adaptability* than organizations that work in the *Southeast* region.

Organizations that work in the *Northeast* regions ($M = 3.01$, $SD = .795$) report a higher statistically significant average capacity than the *Southeast* region ($M = 2.60$, $SD = .838$) in *agenda*, $t(93) = 2.43$, $p = .017$, $d = .50$. The *Northeast* region ($M = 2.56$, $SD = .705$) also report a higher statistically significant average capacity than the *Southeast* region ($M = 2.16$, $SD = .811$) in *plans, strategies and adaptability*, $t(93) = 2.54$, $p = .013$, $d = .52$.

The report also finds statistical difference in Section 4 between *Northeast* and *Southeast*. Furthermore, organizations that works in the *Northeast* region report higher capacity in *fiscal management and sustainability* and *organizational commitment*, than organizations that work in the *Southeast* region.

Organizations that work in the *Northeast* region ($M = 2.94, SD = .922$) report a higher statistically significant average capacity than the *Southeast* region ($M = 2.51, SD = 1.064$) in *fiscal management and sustainability*, $t(93) = 2.12, p = .037, d = .44$. Also, organizations that work in the *Northeast* regions ($M = 3.08, SD = .798$) also report a higher statistically significant average capacity than the *Southeast* region ($M = 2.68, SD = .836$) in *organizational commitment*, $t(93) = 2.35, p = .021, d = .48$.

Figure AO: Section Averages by *Midwest* Region

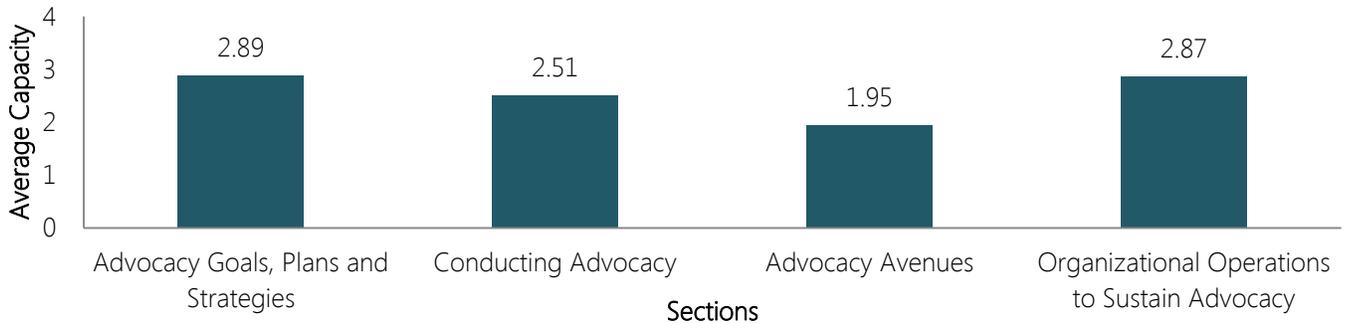


Figure AP: Section Averages by *Southwest* Region

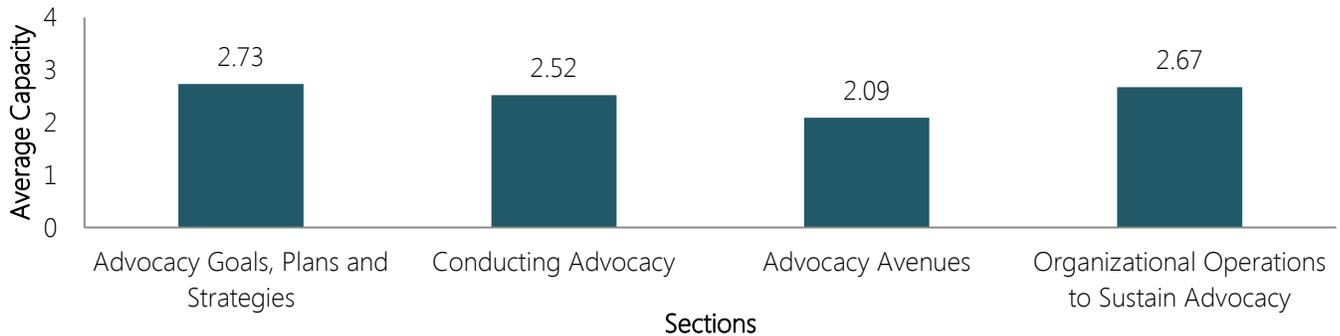


Figure AQ Section Averages by *West* Region

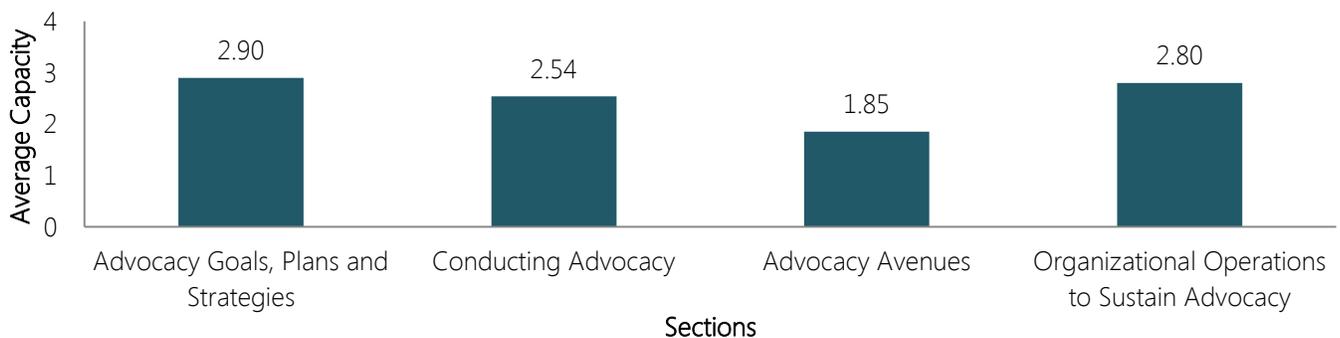
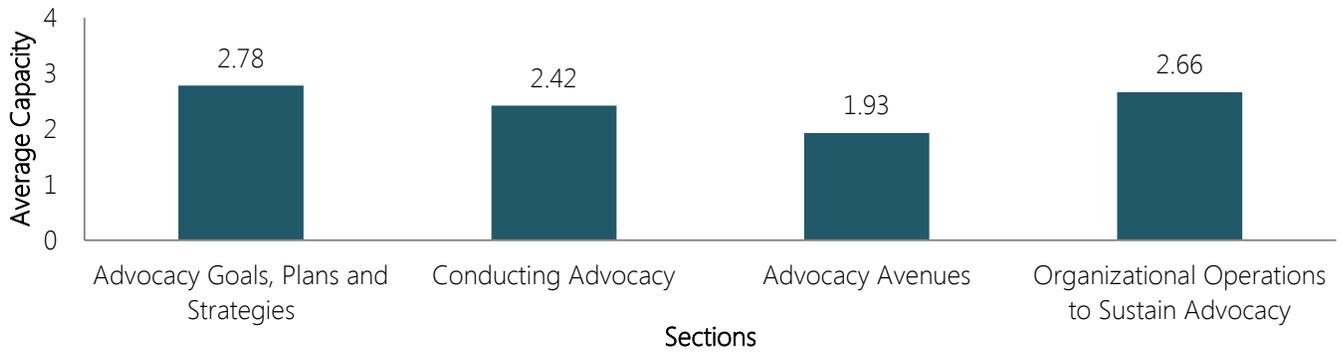


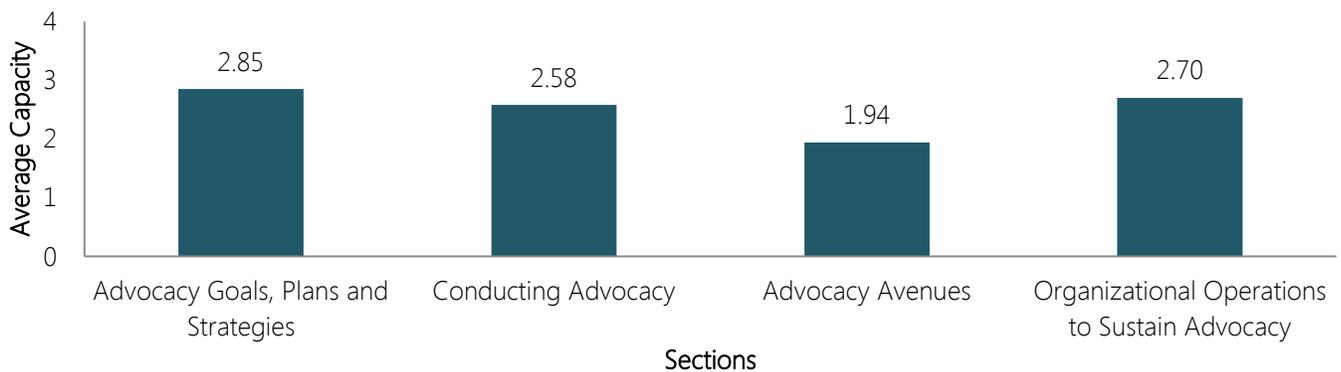
Figure AR: Section Averages by Multiple Region



The report also finds statistical difference in Section 4 between *Northeast* region and *Multiple Regions*. Furthermore, organizations that work in the *Northeast* region report higher capacity in *fiscal management and sustainability* than organizations that work in *Multiple Regions*.

Organizations that work in the *Northeast* region ($M = 2.94$, $SD = .922$) report a higher statistically significant average capacity than *Multiple Regions* ($M = 2.44$, $SD = .981$) in *fiscal management and sustainability*, $t(101) = 2.66$, $p = .009$, $d = .52$.

Figure AS: Section Averages by International



Method for Evaluating Results

The following provides insight on the methods for evaluating results in the report. Note: N represents the number of participants in each analysis throughout the report. The demographics section is an overall accumulation of results and percentages for answers selected on each question. Several demographic questions allow participants to select more than one answer, such as one asking groups to list the issue areas on which they work. The report compares capacity averages across indicators in each section and across sections for all demographic variables, except type of organization.

Statistical analysis software was used to analyze comparisons across indicators by determining whether a statistically significant difference between variables exists or whether the difference occurred by chance. Three distinct tests were used to analyze statistical difference and associations: Pearson Correlations, One-Way ANOVA and

Independent Samples t-test. Each test requires a specific type of variable to ensure a valid analysis. One-Way ANOVA and Independent Samples t-test explore statistical difference, while Pearson Correlations explores association between two variables. Differences between average capacity scores were observed at the $p = .05$ level, which indicates a 95 percent chance that a determinant variable influenced the difference.

Note: Pearson Correlations tests do not analyze statistical difference; instead, these tests explore the degree of relation of two variables, where 1 is a perfect positive correlation, 0 illustrates absolutely no relationship and -1 indicates a perfect negative correlation. Therefore, if two variables have a degree of correlation (r) of 1, then for every 1-unit increase in variable x there is a 1-unit increase in variable y . A degree of correlation of -1 indicates that for every 1-unit increase in variable x there is a 1-unit decrease in variable y .

The report uses the Cohen's d method for measuring effect size, since its use is typical when comparing two groups. The effect size is an additional layer to determine the magnitude of statistical difference, or practical significance (meaningfulness) of a result. However, a report cannot use the effect size alone and will need a test that determines statistical difference prior to using effect size, such as a One-Way ANOVA or Independent Samples t-test. Generally, the interpretation of this type of effect size uses three incremental conventions: small, medium, and large.

- Regarding Cohen's d :
 - Small = .2 and below
 - Medium = .5
 - Large = .8 and above
- Ferguson¹ suggests that practical significance of results requires a minimum d of 0.41.

¹ Note. From "An Effect Size Primer: A Guide for Clinicians and Researchers," by C. Ferguson, 2009, *Professional Psychology: Research and Practice*, pp. 1-2.

Conclusion

This report summarizes results for 280 unique users of the Alliance for Justice Advocacy Capacity Tool, which focuses on the capacity—or readiness—of organizations to engage in advocacy to advance their missions. While each organization, coalition, or cohort of grantees uses individual results to inform its work or funding, taken together, the summary of the larger group of users produced five key findings with potential impact on the sector.

Nonprofit advocates can measure their readiness for advocacy work by taking a step back from the everyday grind. Identifying strengths and weaknesses allows for a thoughtful discussion of where to spend limited time and resources. Looking into a variety of indicators and measures of capacity may point to areas or approaches not yet considered.

Funders can also benefit from this information. While advocacy can be difficult to measure, benchmarking a grantees' capacity for engaging helps focus funding and training needs. It may also inform potential collaboration to address capacity gaps and areas to grow.

It is the hope of Alliance for Justice's Bolder Advocacy initiative that this report will help advocates and their supporters be bold in their work for the communities and issues they serve. The key findings are described below:

Strengthening Advocacy Capacity

After assessing their organizations' advocacy resources and practices, individuals completing the Advocacy Capacity Tool were automatically provided with their numerical results. They then selected the organizational capacity areas they would most like to strengthen. Findings from those choices include:

- The largest percentages of groups want to focus on strengthening their organizations' detailed planning (*plans, strategies, and adaptability*), fundraising (*funding advocacy*), and *messaging*, in that order.
- Groups have at least a medium average capacity in the areas they most often chose to strengthen, including *funding advocacy; plans, strategies, and adaptability; and messaging*. *Media relations* is the one exception; it was chosen as the fifth most popular area to strengthen, but on an average was ranked low for current capacity.
- One unique area for strengthening advocacy capacity reached each geographical region's top five choices: Midwest: *legislative*; Northeast: *field operations*; Southeast: *preparation*; Southwest: *organizational commitment*; West: *decision-making structure and process*.

Users most frequently (60 percent of the time) selected to strengthen the *plans, strategies, and adaptability* capacity. That includes the time-consuming work of developing detailed and strategic plans for advancing an advocacy agenda in a way that allows for adaptations to changes in the environment. It may be that while most groups using ACT recognize that developing flexible advocacy plans and strategies, is fundamental to building strong advocacy work, they have difficulty finding the time to do so.

Over half of groups also indicated a desire to strengthen their *funding advocacy* work, including increasing their understanding and implementation of funding practices and developing relationships with foundations. This finding comes as no surprise to anyone who reads about the sector and understands that organizational survival and levels of resources are highly dependent upon funding.

The third most commonly selected area to strengthen by groups, *messaging*, addresses how an organization develops and delivers its advocacy information in a persuasive and targeted manner. Analysis of the data showed a strong, positive correlation between *messaging* and *research and analysis, field operations, media relations, and influencing decision-makers*. Without assuming causation, these capacities are seen as inter-related. Strengthening one may result in strengthening others to a certain extent.

Groups are less likely to choose to strengthen their own organization in areas for which their current capacity is lowest, such as *litigation, ballot measures, or electoral*. The data show that they instead more often select “Rely on Partners” for these areas. Note: ACT does not allow a user to identify “Rely on Partners” when assessing their capacity for internally focused work included in Section 1: *Advocacy Goals, Plans and Strategies* or Section 4: *Organizational Operations to Sustain Advocacy*.

Categorizing responses for areas to strengthen by region reveals that *plans, strategies, and adaptability, funding advocacy*, and either *messaging* or *media relations* were in the top five areas to strengthen for all regions. In addition, users in each region identified one unique area for strengthening in their top five that was unique to their region.

Identifying Current Organizational Strengths

- The top three areas of reported advocacy capacity for the ACT users are: basic *preparation* for engaging in advocacy, development of *advocacy partners and coalitions*, and *decision-making structure and process*.
- The bottom three areas of reported advocacy capacity for the ACT users are: *electoral work, litigation, and ballot measures*.

Preparation, which includes early and basic planning activities, such as scanning of the environment and the groups’ own resources and practices, received the highest average score for current capacity of all the indicators. That is in contrast with the more time-consuming detailed planning, *plans, strategies, and adaptability* capacity, which groups most often chose to strengthen.

The ranking of organizational strengths alone, however, does not tell the whole capacity story. As is explained further in the Collaborating for Strength section below, the highly rated *advocacy partners and coalitions* capacity is particularly important because having this strength allows groups to connect with others to cover advocacy work that their organization alone cannot.

Collaborating for Strength

The 280 users included in this analysis ranked their collaborative work highly in two different ways—by assessing their strength in the *advocacy partners and coalitions* capacity indicator, and by choosing “Rely on Partners” in Sections 2: *Conducting Advocacy*, and 3: *Organizational Operations to Sustain Advocacy*:

- Groups report being strong (the second highest capacity ranking of the 18 indicators) in the *advocacy partners and coalitions* capacity.
- Organizations most frequently rely on partners, rather than build their own strength, in areas where they report their own current capacity as low. (The tool allows users to choose “Rely on Partners” in areas of advocacy work where the organization has decided not to build capacity “because it primarily gets that capacity from other individuals or groups.”)

Four of the five advocacy capacities for which groups most often rely on partners, including *litigation, ballot measures, research and analysis, and electoral*, are also among the five lowest areas of reported advocacy strength. Organizations tend to seek partners for key advocacy practices where they may not have the skills, knowledge, or resources to conduct themselves in apparent recognition that successful advocacy often requires the work of numerous groups and individuals. (Note: ACT does not allow a user to identify “Rely on Partners” when assessing their capacity for internally focused work included in Section 1: *Advocacy Goals, Plans and Strategies* or Section 4: *Organizational Operations to Sustain Advocacy*.)

Advocacy Budget & Funding

Findings focusing on budget and funding issues include one on capacity and budget that might be unexpected to many in the nonprofit sector:

- Low budget and higher budget organizations rate their advocacy capacities similarly.
- Groups most want to improve their ability to obtain funding for advocacy (*funding advocacy*) above all other advocacy capacities except for detailed planning (*plans, strategies, and adaptability*).

For these 280 users, the budget size of an organization did not result in statistically different ratings of capacity in any section. Groups with smaller or larger budgets did not consistently rate themselves higher or lower in any of the advocacy capacity indicators or measures.

However, users chose *funding advocacy* as the second highest area that groups desire to strengthen, reflecting their interest in improving their ability to find continuous and viable funding sources for their advocacy work. It may also reflect that the long-term process of advocacy work, requiring ways to measure outcomes that differ from those for providing services, and the lack of understanding around the legality of funding advocacy work influences organizations' ability to secure funding.

Sustaining Advocacy Work

Given the often long-term nature of advocacy and the challenges to obtaining advocacy funding, strong commitment to sustaining this work is key for many groups. Findings in the report related to organizational commitment include:

- Groups engaged at the federal level and groups engaged at the state level report statistically higher average capacities in *Organizational Operations to Sustain Advocacy* and in *Advocacy Goals, Plans, and Strategies* than organizations that do not engage at either of these levels.
- Strong *organizational commitment* capacity correlated with strong *funding advocacy*, *decision-making*, and *fiscal management* capacities.
- Organizations that work on healthcare issues report higher average capacity and organizational commitment than organizations that do not work on healthcare issues. This was the only significant result based on differences between groups working in the different top five issue areas.

The differences in results based on federal, state, and local levels of advocacy engagement might be attributed to higher levels of resources available to groups working at federal and state levels.

Adding to the importance of the *organizational commitment* indicator itself is a significant positive relationship in the findings of capacity strength between *organizational commitment* and the three other capacities contained in Section 4: *Organizational Operations to Sustain Advocacy: funding advocacy, decision-making structure, and fiscal management*. Without assuming causation, these capacities are inter-related and strengthening one may result in strengthening others.

Finally, when separating results based on the top five issue areas worked on by users (education, youth, healthcare, child welfare, and housing) there was only one statistically significant result. Organizations that work on healthcare issues report higher average capacity in *organizational commitment* than organizations that do not work on healthcare issues. Recent campaigns around healthcare changes may be one factor contributing to this finding.

Potential Opportunities for Increased Advocacy

The report's findings suggest two potential legal paths for increasing organizational advocacy capacity:

- On average, organizations only “sometimes” investigated and decided whether to use the **501(h) expenditure test** even though most can benefit from selecting this option.
- The small sample size of **501(c)(4) organizations** have strong capacities in *preparation, advocacy partners and coalitions, legislative, agenda, and influencing decision-makers capacities*.

The 501(h) expenditure test is a simple, one-time election that provides clear definitions of lobbying, dollar-based limits for spending, and simpler recordkeeping. Groups only “sometimes” considered this option. Bolder Advocacy lawyers who educate nonprofits on the benefits of the 501(h) expenditure test find that many are unfamiliar with the test and are unsure of how it would influence the organization's work.

The report also provides a glimpse into the advocacy capacity of 501(c)(4) organizations. Though the sample size was limited, analysis reveals 501(c)(4) organizations have strong capacity in *preparation; advocacy partners and coalitions; legislative; agenda; and influencing decision-makers* indicators. These results are not surprising since (c)(4) organizations not only have the ability to conduct unlimited lobbying, but also are permitted by law to perform some partisan political activity. 501(c)(4) organizations also reported strong capacity in advocacy partners and coalitions, presumably often with (c)(3) organizations.

Moving Forward

The information from completing ACT and analyzing the responses of 280 unique organizations, while representative of a small portion of the sector, can provide a useful snapshot to funders, technical assistance providers, evaluators, and organizations engaged or interested in advocacy on what is most needed to build nonprofit advocacy capacity for effectiveness. Groups can fill out the tool for the first time or take it again to assess changes in capacity by going to www.bolderadvocacy.org/ACT.

In conclusion, we present the following recommendations for the sector:

- **Funders can increase organizations' advocacy capacity by providing general support funding.** This would be particularly useful for detailed planning (*Plans, Strategies, and Adaptability*), which was chosen most frequently as the advocacy capacity groups most want to strengthen.
- **Nonprofits should consider using the 501(h) expenditure test, which allows most groups to have higher lobbying limits and simpler recordkeeping requirements. Funders can recommend their grantees consider using the test through grant proposal guidelines or other communications with grantees.** Of all the measures under

Organizational Commitment capacity, this average score was the lowest (2.2 out of 4), indicating that a number of groups have not fully considered choosing to use the 501(h) expenditure test.

- **Foundations and grantees should include individuals with deep understanding of and expertise in advocacy in leadership positions.** In addition to enhancing the appreciation of advocacy and strategic decision-making, it can also help strengthen advocacy communications between funders and their nonprofit partners. Continuing communications between nonprofit organizations and funders regarding the value of and the legal funding of advocacy (*Funding Advocacy*) was chosen second most frequently as the advocacy capacity groups most want to strengthen.

Appendix

Appendix A: Averages and Rely on Partners by Measure

S1.1 Preparation	Average Capacity	# Times Rely on Partners Selected
The organization identifies and articulates its mission and goals.	3.45	N/A
The organization has basic knowledge about its subject matter, including how its issues affect constituents.	3.59	N/A
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	3.23	N/A
The organization identifies its existing advocacy capacities, including staffing, skills and knowledge, and strength of field operation.	2.83	N/A
S1.2 Agenda	Average Capacity	# Times Rely on Partners Selected
The organization has a written advocacy agenda, approved by the organization's leadership that identifies its goals and priorities.	2.65	N/A
The organization gathers information and recommendations from constituents and other stakeholders in the development of its agenda.	2.78	N/A
The organization shares its agenda or segments thereof, with decision-makers, constituents, partners, and media, as appropriate.	2.80	N/A
The organization adjusts its focus on particular agenda items in response to internal and external changes.	2.94	N/A
S1.3 Plans, Strategies, and Adaptability	Average Capacity	# Times Rely on Partners Selected
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.	2.34	N/A
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.	2.31	N/A
The organization monitors internal and external changes in the policy environment and adapts its strategies as needed.	2.85	N/A
The organization has a plan for assessing advocacy capacity and for strengthening its capacity as needed.	2.15	N/A
S2.1 Research and Analysis	Average Capacity	# Times Rely on Partners Selected
The organization researches, compiles and analyzes information about specific issues.	2.23	59
The organization researches and analyzes the impact of current policies, the policy environment and opportunities for advancing its goals.	2.10	63
The organization employs a process for verifying that its issues or issue analyses and other materials are accurate and reliable.	2.02	61
The organization shares information, analyses and supporting materials with decision-makers, constituents, and partners, as appropriate.	2.64	19

S2.2 Field Operation	Average Capacity	# Times Rely on Partners Selected
The organization has a network of various networks of individuals and organizations that it can activate to advocate or collaborate on key policy issues.	2.70	18
The organization communicates with its network on the status of advocacy efforts, opportunities to engage, messages and results.	2.53	14
The organization identifies segments of the public to educate about its agenda.	2.23	15
The organization conducts phone banks, informational mailings, online communications and/or canvassing to educate and mobilize their network and gain public support.	1.69	46
S2.3 Advocacy Partners and Coalitions	Average Capacity	# Times Rely on Partners Selected
The organization identifies other stakeholders that have similar goals, including those with complementary knowledge and skills, with which it could collaborate.	3.08	N/A
The organization participates in coalitions that share one or more of its goals and provide value to the organization.	3.32	N/A
The organization actively seeks support for its priorities from its coalition partners.	3.04	N/A
The organization exchanges information with its partners, as appropriate.	3.17	N/A
S2.4 Messaging	Average Capacity	# Times Rely on Partners Selected
The organization develops clear, compelling and concise messages tailored to its target audiences.	2.46	18
The organization bases its messages and materials on reliable, credible and up-to-date information.	2.93	20
The organization identifies and uses effective messengers and spokespeople.	2.45	17
The organization chooses a variety of paid and/or earned media strategies to communicate its messages.	1.75	34
S2.5 Media Relations	Average Capacity	# Times Rely on Partners Selected
The organization monitors media coverage related to its issues	2.71	11
The organization identifies, develops and maintains a list of media contacts relevant to its program issue(s)	2.33	17
The organization distributes information to a wide range of media outlets—including online, broadcast and print media—to communicate its messages	2.10	22
The organization has a written media plan with objectives, targets, and timelines	1.64	22
S2.6 Influencing Decision-Makers	Average Capacity	# Times Rely on Partners Selected
The organization monitors the actions of decision-makers related to the organization's agenda.	2.76	15
The organization builds working relationships with decision-makers by providing information.	2.79	9
The organization consistently nurtures relationships with decision-makers throughout the year.	2.59	6
The organization deliberately builds relationships with elected officials without regard to political affiliations.	2.80	10

S3.1: Administrative	Average Capacity	# Times Rely on Partners Selected
The organization understands the regulatory and enforcement processes of the agencies that implement policies and programs, and know how to influence these processes.	2.48	26
The organization identifies and works with appropriate decision makers within the administrative agencies, including related commissions and advisory committees.	2.45	23
The organization identifies monitors and analyzes proposed rules, regulations, other administrative branch activities, and their potential impact on the organization's priorities.	2.30	39
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 other to further its priorities.	2.21	33
S3.2: Legislative	Average Capacity	# Times Rely on Partners Selected
The organization has knowledge of the legislative process (including budgeting and appropriations), and knows how to influence these processes.	2.79	25
The organization identifies and works with appropriate legislators, committees, staff and stakeholders.	2.55	27
The organization identifies monitors and analyzes proposed legislation and the potential impact on its priorities.	2.58	36
The organization promotes, opposes or helps design or amend legislation.	2.09	53
S3.3: Ballot Measures	Average Capacity	# Times Rely on Partners Selected
The organization identifies, monitors, and analyzes measures that will appear or may appear on the ballot and the potential impact on its policy priorities.	1.59	57
The organization takes public positions on ballot measures related to its interests, its constituents' interests, or its priorities.	1.35	47
The organization educates its constituents and other voters about its position on measures that will appear on the ballot.	1.40	43
The organization conducts get-out-the-vote efforts to promote or oppose ballot measures related to its interests.	1.11	66
S3.4: Electoral	Average Capacity	# Times Rely on Partners Selected
The organization understands the primary and general election processes for candidate elections in relevant jurisdictions and the possible roles nonprofits can play.	2.62	22
The organization reminds and encourages its constituency and the public to vote.	1.94	36
The organization participates in voter and/or candidate education efforts.	1.47	56
The organization educates its staff and governing body about the legal guidelines for electoral activity.	1.87	33
S3.5: Litigation	Average Capacity	# Times Rely on Partners Selected
The organization understands the role litigation plays to complement other strategies.	1.74	52
The organization identifies appropriate courts, regions and other court leanings to inform possible litigation actions related to the organization's priorities.	1.27	70
The organization has access to competent counsel who can provide advice or pursue legal strategies.	2.04	44
The organization pursues legal activities such as initiating litigation or signing on to amicus briefs, as needed.	1.21	74

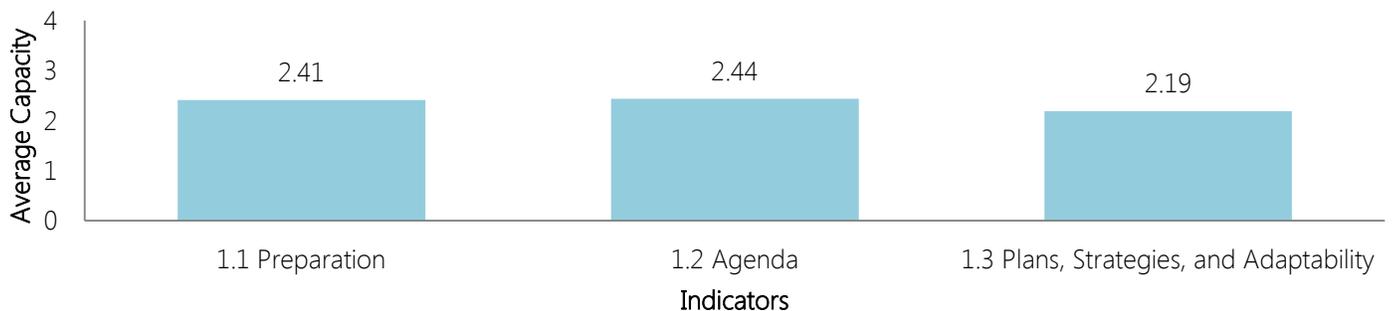
S4.1: Organizational Commitment	Average Capacity	# Times Rely on Partners Selected
The organization's governing structure is committed to advocacy.	3.13	N/A
The organization has at least one staff person whose job description includes specific responsibilities for advocacy.	3.01	N/A
The executive director 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.	3.23	N/A
The organization has investigated and elected whether or not to use the 501(h) expenditure test.	2.20	N/A

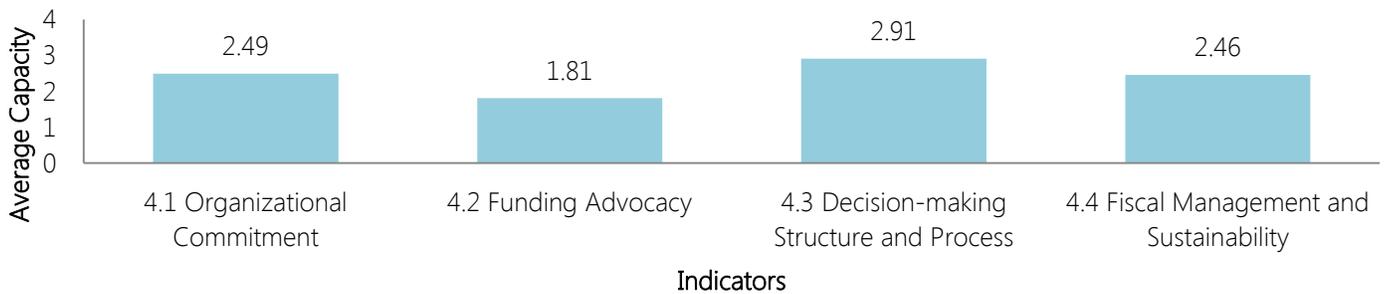
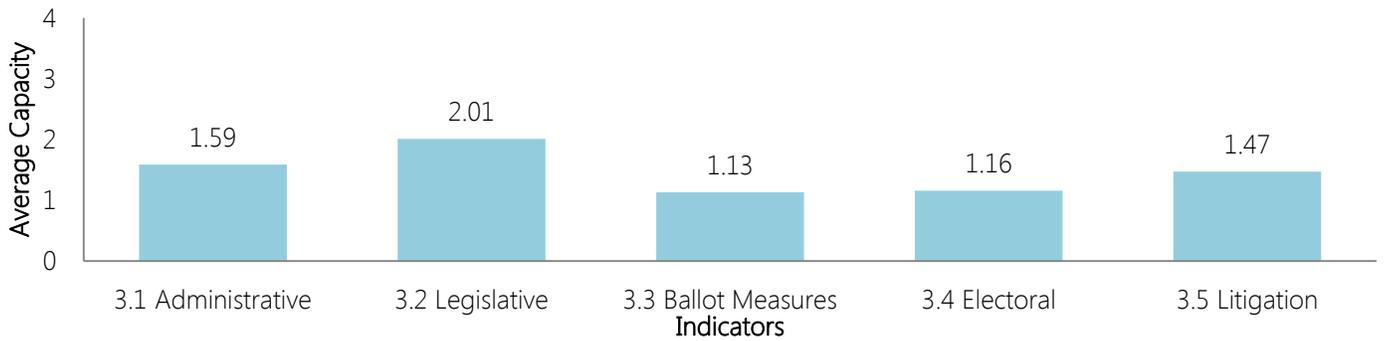
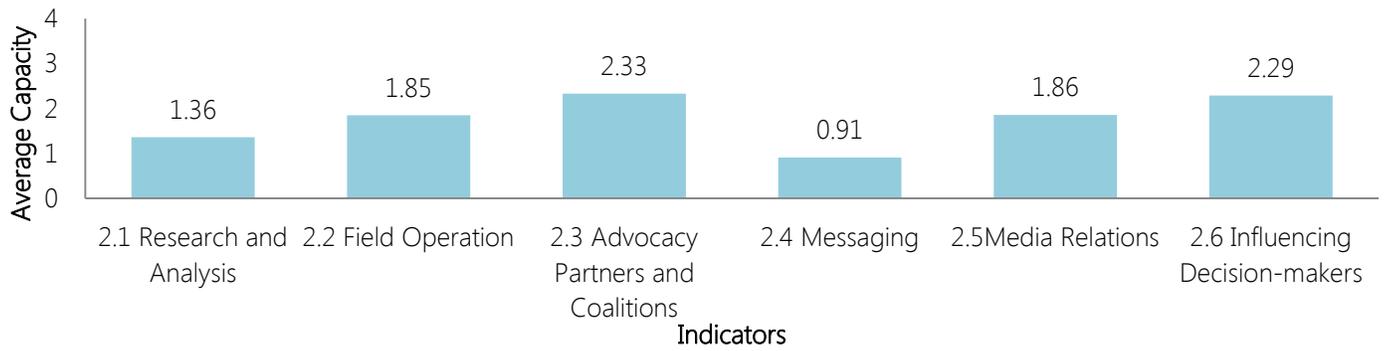
S4.2: Funding Advocacy	Average Capacity	# Times Rely on Partners Selected
The organization understands how foundations can support advocacy.	2.82	N/A
The organization informs and educates funders about the legal rules for supporting advocacy.	2.01	N/A
The organization informs and educates funders and donors about the value of funding advocacy.	2.19	N/A
The organization fosters long-term relationships with individual donors and foundations.	2.74	N/A

S4.3: Decision-Making Structure and Process	Average Capacity	# Times Rely on Partners Selected
The organization has a leadership structure or body that makes timely decisions.	3.27	N/A
The organization's leadership and advocacy staff communicate regularly about the status of activities.	3.10	N/A
Staff identifies, for organizational leaders, potential opportunities and risks for the organization before engaging in advocacy work.	2.88	N/A
The organization evaluates its progress and uses lessons learned to inform its decision-making.	2.83	N/A

S4.4: Fiscal Management and Sustainability	Average Capacity	# Times Rely on Partners Selected
The organization's board treasurer, executive director, fiscal and relevant program staff have received training and understand rules for monitoring and reporting funds for lobbying.	2.65	N/A
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.	2.66	N/A
The organization budgets funds for advocacy programs.	2.73	N/A
The organization commits a portion of general operating support to advocacy.	2.69	N/A

Appendix B: Averages for Advanced (optional) Measures by Indicator





Appendix C: Distribution of States by Region

Distribution of States by Region	
Northeast	Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Maryland, Virginia, West Virginia, and the District of Columbia
Southeast	Kentucky, Tennessee, North Carolina, South Carolina, Georgia, Florida, Mississippi and Alabama
Midwest	Ohio, Michigan, Indiana, Illinois, Wisconsin, Minnesota, Iowa, Missouri, Nebraska, North Dakota, South Dakota, Montana, and Wyoming
Southwest	Arkansas, Louisiana, Oklahoma, Kansas, Texas, New Mexico, and Colorado
West	Idaho, Utah, Arizona, Nevada, Washington, Oregon, California, Hawaii, and Alaska

Appendix D: Areas to Strengthen by Region

Chosen by All Regions	Plans, Strategies, and Adaptability	Funding Advocacy			
Chosen by Multiple Regions	Messaging (W/SW/SE/NE)	Media Relations (MW/SW/SE/NE)	Influencing Decision-Makers (W/MW)		
Unique to Individual Regions	Legislative (Midwest)	Decision-Making Structure & Process (West)	Preparation (Southeast)	Field Operations (Northeast)	Organizational Commitment (Southwest)

Appendix E: Advocacy Capacity Tool Information

Advocacy Capacity Tool

Recognizing the need for a tool that could help in the understanding, assessment, and building of advocacy capacity, Alliance for Justice (AFJ) created several free evaluation tools through the Bolder Advocacy initiative. In May 2012, AFJ revised one of the tools in response to recommendations from a third party evaluator and created the Advocacy Capacity Tool (ACT). It is available for no cost both online and in PDF format.

ACT targets the organization's overall readiness and efficiency to engage in advocacy, helps identify advocacy strengths and weaknesses, helps assess growth in advocacy capacity, and provides knowledge to enhance organizational understanding of what the organization needs to become effective advocates. The tool is self-administered and completed by an individual organization, or by a group such as a coalition. For funders working with multiple groups on a policy issue, evaluating advocacy capacity can help identify strengths and recognize gaps among the grantee portfolio as well as identify areas where training can enhance grantees' capacity.

Completing ACT

Respondents (also called "users") were asked to rate their organization's resources and practices relevant to advocacy. The tool has four *sections* comprised of 18 *capacity indicators*. Each indicator includes four detailed questions (*measures*). Additionally, each indicator provides one to three optional *advanced measures*. The overall capacity scores for each indicator and section do not include the optional advanced measure scores. For all advanced indicator scores, see Appendix B on p. 39.

The four sections are:

1. Advocacy Goals, Plans and Strategies
2. Conducting Advocacy
3. Advocacy Avenues
4. Organizational Operations to Sustain Advocacy

The sample measure below is one of four basic measures for Influencing Decision-makers. Influencing Decision-makers is part of the Conducting Advocacy section.

SECTION 2: Conducting Advocacy

INDICATOR 2.6: Influencing Decision-makers

MEASURE: The organization deliberately builds relationships without regard to political affiliations

Scoring ACT

Respondents rate each measure on a 4-point scale where 1 = *Not Strong/Rarely/Never* and 4 = *Very Strong/Always*. However, in Sections 2 and 3 (excluding 2.3: Advocacy Partners and Coalitions), respondents have the choice to select 0, where 0 = *Rely on Partners*, if their organization primarily relies on other individuals or groups for that measure and has chosen not to build capacity in that area.

Note: ACT scores each section separately. There is no total score, as the goal of the tool is to highlight areas of capacity, not determine if an organization has passed or failed. Groups are expected to receive lower scores in some areas, and not to excel in every area. For this reason, ACT provides the option “Rely on Partners.”

The Advocacy Capacity Tool is also available in PDF format, distributed via email requests, conferences, and in-person trainings. Since the 2012 release, there have been over 700 individual email requests for the PDF (as of July 2015) with planned distribution to countless grantees, coalition partners, conference attendees, and others, according to the email requests. This report covers only the electronic users. Finally, the participants for the current study include those who completed ACT from September 2012-December 2014. Only one user per group was included when there were multiple respondents from the same organization. If an organization completed multiple ACT entries at different periods, then AFJ considers the most recent entry for that organization. However, if an organization completed multiple entries within a three-month period, AFJ considers the entry that includes an organizational decision-maker as its primary source of information.

A Frequently Asked Questions webpage, instructions, and online resources are available to assist ACT users in the process. It is unknown which users used these resources when completing the assessment, though these may have helped shape responses.