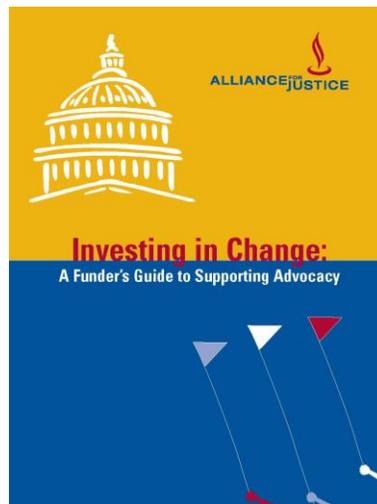




Benchmarks for Advocacy Evaluation

*Executive Branch
Judicial Branch
Legislative Branch
Electoral Process
Cross-cutting Advocacy*

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Sample Benchmarks of Advocacy Effectiveness

Below are sample benchmarks, or indicators, for each of the types of advocacy defined in Chapter I. The cross-cutting benchmarks can be applied to all types of advocacy. Grantmakers may wish to share these with grantees, or applicants for advocacy funding, so they can use such benchmarks in developing concrete objectives and evaluation plans in their proposals and their work. Please note that these are only examples; grantees should be encouraged to develop their own benchmarks in line with advocacy goals and objectives.

Some of the benchmarks point toward a level of activity or accomplishment that is considered desirable for any organization evaluating its advocacy work. Others are more demanding and indicate what an advocacy organization would do in an ideal situation, with sufficient resources. As always, each organization's capacity, resources, history, and current situation must be taken into account.

Many of these benchmarks, such as building relationships with policy makers, building an active constituent network, and learning the legislative or regulatory process, develop the organization's **capacity** for effective future advocacy work; others reflect **progress** towards objectives, or both. Still others, such as showing increased voter turnout show that the organization reached a goal or objective as an **outcome** of its work.

Remember: Be as definitive as possible and quantify as much as possible. For example:

- "Reached public with voter education materials" could be reported as: "Reached 50% of Casper County with two voter education brochures."
- "Building relationships with legislators and staff on key issues" might be reported as: "Developed close relationship with two environmental committee chairs that included weekly meetings with their staff on the upcoming water pollution bill."

There are many additional examples of effective benchmarking related to specific areas of advocacy work. Think about your organization and which of these benchmarks might apply:

Executive Branch

The organization:

- Can identify and has contacts in agencies that implement policies and programs related to its issue priorities

- Understands relevant agencies' deliberation and rulemaking processes
- Monitors the implementation of legislation related to key priorities at the administrative/executive level by tracking rules and regulations
- Has an ongoing relationship with the cabinet-level secretaries and/or key department administrators of the government agencies overseeing public policy
- Identifies gaps in data of government agencies and develops and advocates for strategies for filling the gaps
- Files comments on governmental actions and proposed regulations
- Directs public attention to proposed regulations, and challenges policies or regulations in court when they are inconsistent with the law
- Negotiates with department administrators and provides input on initial and ongoing implementation of policies
- Meets with chief administration officials of target jurisdiction and prior to official submission of legislative agenda and budgets
- Has its comments on proposed regulations cited by the targeted administrative agency in final regulations
- Generates numerous comments on proposed regulations from members of the public
- Demonstrates that its concerns are reflected in stepped-up implementation or enforcement of legislation or regulations by an administrative agency

Judicial Branch

The organization:

- Has a working knowledge of the litigation process and develops annual, proactive plans for engaging in litigation
- Develops ongoing relationships with lawyers, judges, and other key stakeholders
- Works collaboratively with other organizations that engaged in judicial advocacy
- Participates in legal challenges to legislation

- Has clear criteria for selecting prospective cases, including their potential for setting legal precedents
- Regularly prepares *amicus* briefs in support of cases relevant to its issues
- Has language from its legal pleadings or *amicus* brief used by a judge in her or his opinion
- Shows favorable rulings related to its interests

Legislative Branch

The organization:

- Possesses a clear working knowledge of the rules regarding lobbying by a nonprofit organization. This is reflected in the organization's board policies and personnel policies and in the orientation of new board members and employees
- Understands federal, state, county, and local legislative process, including annual schedules for development of legislative and budgetary priorities
- Understands and complies with federal and state rules governing direct and grassroots lobbying and reporting of lobbying
- Identifies, builds, and maintains working relationships with appropriate legislators and their staff who make or influence policy decisions related to the organization's objectives or its core constituency
- Maintains a consistent presence in federal, state, county, and local legislative bodies
- Invites lawmakers to meet and observe the people and places for which it is advocating
- Develops relationships across all political parties
- Identifies and tracks bills directly related to its issue priorities
- Analyzes proposed legislation and develops proposed changes, when needed, to significant bills that it tracks
- Provides all legislators with written copies of its annual legislative agenda and data-driven information on the status of its constituents
- Generates jurisdiction-specific information and data for legislators throughout the year
- Is called upon by policymakers for information and opinions on key issues
- Maintains records for tracking lobbying expenses that are adequate to meet federal, state, and local requirements

- Has a working knowledge of public programs related to its key issues as well as their revenue structure and sources
- Tracks and monitors the annual budget and/or expenditures (federal, state, or local) in areas related to its issue priorities
- Analyzes the nature and adequacy of revenues as well as the impact of tax policies on its constituents
- Makes recommendations to key legislative committees about strategies effectively using additional public funds
- Articulates the needs of its constituents during issue debates by providing timely information on the potential impact of legislative proposals
- Strategically publicizes information on spending trends on issues affecting its constituents
- Understands the judicial nominations process
- Monitors judicial appointments, obtains information on prospective appointees' backgrounds related to its issues, and disseminates this information to its network
- Influences a legislative committee to hold a hearing on issue for which the organization seeks the legislature's attention
- Is asked to testify at hearings
- Sees its stance reflected in ballot measures (IRS treats as part of the legislative process)
- Demonstrates that policymakers champion organization's issue in committee or with other legislators
- Demonstrates that policymakers give informal or formal (written) support to its recommendations
- Shows that policymakers introduce bills which reflect some or all of its interests
- Establishes that legislation representing its interests proceeds through different steps of approval in legislative process
- Confirms that legislation representing its interests is signed into law

Electoral Process

The organization:

- Clearly understands the rules regarding what a nonprofit organization can and cannot do during elections. This is reflected in its board policies and personnel policies and in the orientation of new board members and employees

- Engages in nonpartisan voter registration campaigns
- Regularly engages with its constituents in get-out-the-vote campaigns
- Requests candidates' positions through candidate forums, questionnaires, or other strategies
- Has a process for briefing all candidates or newly elected officials on key issues facing its constituents
- Reaches the public with voter education activities
- Shows increased voter registration
- Shows increased voter turnout

Cross-cutting Advocacy

Note: Cross-cutting advocacy can be applied to all types of advocacy

Constituency Involvement:

The organization:

- Has a clearly defined core constituency (i.e., a group of individuals, and/or organizations that it feels accountable to for its actions)
- Involves its constituency in the development of its issue priorities and advocacy objectives
- Obtains input from its constituents on its mobilization activities through strategies such as convening planning meetings, conducting surveys, and using action committees
- Has procedures through which its constituency holds it accountable
- Increases the involvement of its core constituency, particularly those people affected by the issues, across a number of policy issue priorities

Network Building:

The organization:

- Has a network of individuals and organizations interested in and willing to take coordinated action to address issues affecting its constituents
- Communicates regularly with its network to share information on progress and key issues
- Periodically engages in activities to reach out to and expand its network. This builds the network to include a range of individuals and organizations with a shared commitment to its constituency or core issue

- Conducts one or more formal activities each year to educate and engage its network about issues affecting its constituency
- Strategically builds its network to engage those likely to have an impact on policies affecting its constituency
- Regularly communicates with its network through e-mail, newsletters, meetings, or other means
- Uses mobilization activities to promote diversity, tolerance, and understanding
- Monitors actions taken by network members in response to its requests for action
- Periodically asks its network to take specific action in support of its issue priorities and advocacy objectives
- Regularly provides formal activities to educate and build the advocacy capacity of its network, using approaches such as skills training and/or leadership development, and provides training based on needs articulated by its network
- Successfully mobilizes its network and other interested individuals and organizations to take advantage of unexpected events bringing attention to its core public policy issues
- Uses online social media tools to connect and stay up-to-date with one's network

Coalition Building:

The organization:

- Understands the definition of, types of, and strategies for building coalitions
- Regularly identifies other organizations working toward the same goals and meets with them to share information and avoid duplication of effort
- Conducts a strategic assessment of whether, when, and with whom it should collaborate in order to advance its goals, before becoming part of a coalition or alliance
- Participates in coalitions that can help advance its goals
- Has a clear understanding about which coalitions and issues it chooses to lead and in which coalitions it will play a supporting role
- Plays a lead role in starting and building coalitions that can help advance strategic objectives
- Reaches out to a broad array of groups and sectors by building alliances and coalitions

Mobilization:

The organization:

- Has established communication procedures and infrastructure necessary to mobilize its network in a timely and strategic fashion
- Uses multiple strategies for alerting and mobilizing its network
- Has a mobilization plan with objectives, targeted groups, timelines, and strategies for reaching diverse individuals and organizations
- Uses mobilization activities to promote diversity, tolerance, and understanding
- Provides constituents resources and ready-made materials to take action on specific bills or proposals

Media Advocacy:

The organization

- Has identified media spokespersons
- Provides media training for staff and board members involved in its media activities
- Has written policies and procedures that guide its media work
- Monitors media coverage of issues affecting its major issue areas and identifies trends in coverage
- Identifies opportunities for placement of stories about key issues and the impact of policy decisions on those issues
- Maintains strong relationships with key personnel in print, broadcast, and online media and works to become familiar with reporters, editors, producers, and bloggers.
- Is respected as a credible source by the media and is regularly for information about its important issues
- Disseminates news releases for major events and reports, and consistently follows up with phone

calls, e-mail messages, blog posts and other online information

- Uses a variety of methods and vehicles to attract broadcast, print, and online media coverage of its issues
- Facilitates media use of its information and materials by adapting them for easy use and dissemination (e.g., adapting material to the Associated Press style guide, generating images and infographics to convey messages, or shortening messages for Twitter)
- Frames its media messages to take advantage of breaking news stories, supportive data, and timely information on public opinion
- Provides a “local angle” to data and a “human story” enmeshed in a policy framework for the media
- Influences regular press coverage on its key issue priorities, demonstrated through quotes and issue stances reflecting its view
- Maintains updated online presence including, but not limited to, with website, blog, Twitter, Facebook
- Tracks online influence and reach of information including numbers of visits to specific parts of the website and engagement with audience on social media
- Gains significant number of visits to key parts of the website
- Utilizes online call to action forms (for messages to legislators, petitions, etc.)
- Gains significant number of online responses from audience through Facebook, Twitter, blogs, online call to action forms, etc.