

The Advocacy Planning, Strategy and Skills Guide

Advocacy



Stakeholder Management



Collaboration Tools



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Introduction

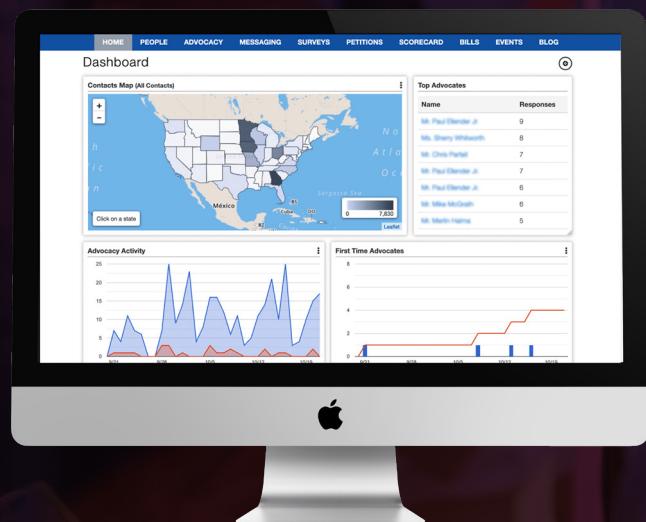
Every great advocacy, nonprofit or government relations campaign needs a plan, a strategy, and a fair amount of skill to execute.

This guide gives you that insight, as well as the tools and tactics you'll need to knock your next campaign out of the park. If you've got legislation to fight, regulations to comment on, or advocates to engage, prepare to get your strategy on with these three great chapters:

- ✓ **25 Advocacy Planning Tips You Can Implement Today**
- ✓ **The 10 Advocacy Skills You Need to Navigate Government Relations**
- ✓ **9 Winning Advocacy Strategies from the Experts**

25 Advocacy Planning Tips You Can Implement Today

A goal without a plan is just a wish, said writer Antoine de Saint-Exupéry. Most government relations and advocacy folks already know campaigns to change legislation aren't fueled by cravings. That's why a strategic plan to kickstart and maintain momentum is vitally important to your future success. So, here are 25 tips from the people who know how to get the job done — and who know that there's always more to learn.



FiscalNote Pro Tip:

Leverage the VoterVoice platform to mobilize your supporters. Our address matching technology connects your advocates with their local, state, and federal legislators, so they can act on your behalf at any level.



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1 A picture is worth a 1,000 words

Images draw eyes. Where eyes go, hearts and minds follow. So, make images central to your advocacy campaign. Include them in stand-alone social media posts with brief cutlines, or in emails to help tell your story in a way people are more likely to read. Link the image to your call-to-action to drive your reader or advocate to where they need to be with one click.

"While no one gets excited about pictures of numbers, people do get excited when they see a photo of something getting built," says Brian Turmail, Vice President of Public Affairs & Strategic Initiatives for the Associated General Contractors of America (AGC), which represents more than 27,000 construction-related firms and more than 9,000 specialty-contractors.



2 Find the Right Messenger

Loose lips sink ships, and a reluctant representative can derail all momentum in orchestrating a campaign. Don't hesitate to rely on the same volunteers, if they are willing and able to deliver. These grassroots can become the face of your organization, and familiarity breeds trust, which is the foundation of building relationships that are pivotal to your success.

"When you work on issues, you think 'policy' – which is important – but you not only need the right message, but you need to have the right messenger," says Chip Felkel, CEO of Rap Index, a strategic communications consulting shop in South Carolina.

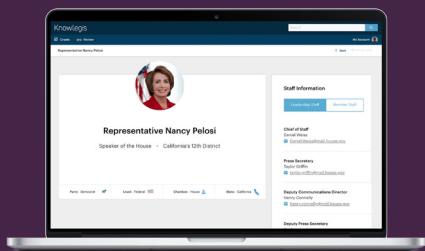
"You can be more acutely effective with the right messenger. Don't waste time on people who don't care, who were dragged into a seminar. Focus on your core messengers, your uber advocates."

Learn more about **FiscalNote's advocacy solutions**



FiscalNote Pro Tip:

Contact Congress with Knowlegis. Our platform lets you build customized mailing lists and emails all in one place. Readily contact legislators by name, party, issue area, staff, chamber, voting record, and more.



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3 Be Patient, Be Persistent, Persevere

Fighting legislation can seem like an uphill and long-drawn-out battle. There will be defeat, defection, days when it all seems useless. But it's not.

"Patience is probably the greatest advocacy skill I've learned over time. It's hard at first but it really is the key," says Mark J. Walsh, Campaign Director for the Illinois Council Against Handgun Violence (ICAHV), the oldest, largest, statewide gun-control organization in the U.S.

"It takes patience to get folks up to speed on the goal – especially new partners. If you're willing to put the advocacy goal ahead of personal glory, I find success usually is closer. I've worked on [everything from] environmental advocacy to gun violence prevention and other human rights issues, and I've yet to see any true effort that happens immediately," he says.

"Don't get discouraged," agrees Christine Hill, Sierra Club's Acting Campaign Director. "Issue campaigns can take years and years, with many ups and downs and roadblocks in between. Have solid footing to support yourself and your team when weathering storms and challenges that may arise. Issue campaigns are like marathons, not sprints – don't run out of steam! Take care of yourself.



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FiscalNote Pro Tip:

Use FiscalNote Converge to create an advocacy app without the hassle of hiring an outside developer. Easily integrate your app with your advocacy software, and direct grassroots campaigns with ease.



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Converge

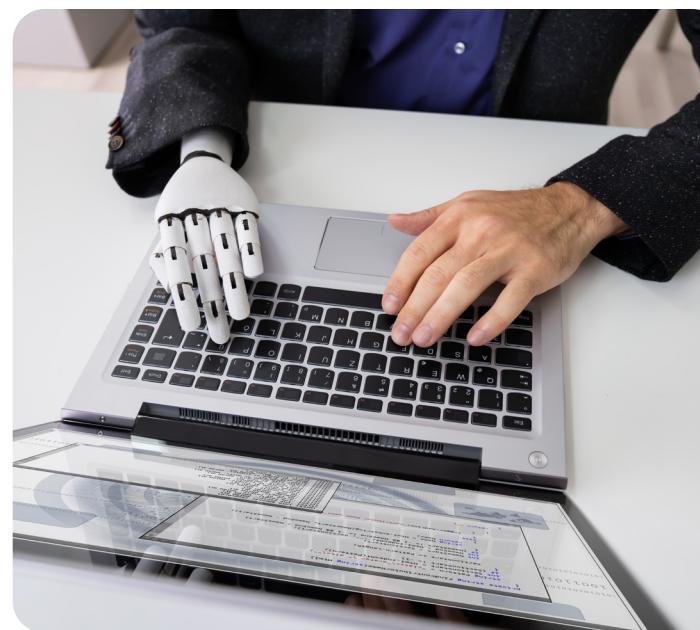
4 Do Your Research Beforehand

Know what you're talking about, and what the opposition is talking about. Study their arguments. There's a reason why they're fighting, and it's not simply because they're the bad guys and you're good. Sometimes, they just might be right. And that's a good thing. Wars have been averted because opposing forces found common ground. Acknowledge things you agree with—or could concede—and present a path forward. You'll look smart, progressive, conciliatory, and ready to do the right thing.

"Do the research and learn the facts. Engage opponents. Try to initiate a dialogue instead of a debate," says Dave Workman, Communications Director for the Citizens Committee For The Right To Keep And Bear Arms (CCRKBA) and the Second Amendment Foundation (SAF), as well as senior editor of thegunmag.com.

"Listening is a powerful tool," The Sierra Club's Hill says. "Educate yourself. Do your homework — yes, homework."

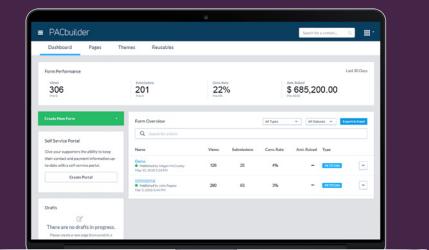
"The best advocates know their policy issues, understand their industry and know what they're advocating for," says J.C. Scott, President & CEO at the Pharmaceutical Care Management Association (PCMA), the national association representing America's pharmacy benefit managers. "Take the time to learn your substance and know your history."



Learn more about **FiscalNote's advocacy solutions**

FiscalNote Pro Tip:

Effectively manage your political action committee with PACbuilder. With our platform, you can stay on top of compliance records, run campaigns, engage supporters, and even raise funds from a centralized dashboard.



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5 Plan on Being Attacked

Stand for anything and expect opposition, especially in this era of social media. Emily Convers, former Chairwoman of United Monroe, a grassroots nonprofit formed in 2013 to combat “bloc-vote” politics in Monroe, New York, learned this the hard way. Her advocacy on behalf of neighbors and fellow residents of her lower Hudson Valley town put her in the crosshairs of an orchestrated smear campaign.

“It took me a while to develop thick skin,” she says. “There will always be people who will criticize, and not always constructively. In fact, people can be downright mean. The sooner I was able to stay focused on the supporters, and less on the detractors, the better my time was managed, and the more fruitful the outcome.”



6 Find Your Friends and Allies

One example of organic advocacy was a group of often-conflicting constituencies who opposed Rep. Jason Chaffetz’s (R-Utah)’Disposal of Excess Federal Lands Act of 2017.’ The bill proposed selling 3.3 million acres of Bureau of Land Management (BLM) land in 10 states to “non-federal entities.”

The opposition was so widespread that Chaffetz announced he was withdrawing it in a Feb. 1 concession tweet along with links to the #KeepItPublic hashtag campaign that had squelched the bill. The takeaway is that sometimes enemies can be your friends. When former adversaries align to advocate for a common cause, the unusual unity has strong resonance.

“This seems intuitive, but I think it can be all too easy to focus only on your own organization, or get a bit competitive,” says Gregory Blascovich, co-founder of Keep It Public, a nonprofit battling attempts to turn federal public land management over to states. “It’s important to understand where you stand in the larger arena and cultivate mutually-beneficial working relationships. There are so many good organizations out there.”

FiscalNote Pro Tip:

With Advocate Acquisition, you can obtain the supporters you need to reach your advocacy action goals. With our service, you'll use a micro-targeted network to find new voices and amplify your message.



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7 Incorporate Spreading the Word

Asking volunteers or association members to participate in a campaign often involves participating in an event, contacting elected officials, or donating money. But if you've got all those bases covered, don't hesitate to ask your supporters to incorporate the cause into their conversations with friends, families and co-workers.

"Promoting interpersonal communication and facilitating it by offering people opportunities to do it is one of the most effective advocacy tools there is," says Mason Tvert, partner at VS Strategies, a firm that specializes in policy, government relations, campaigns, and research for clients in the marijuana and hemp space. "Ask people to talk to people."

**8 Go to Where the People Are**

Be seen and heard. Attend civic club meetings, go to public hearings and town halls. Make the rounds. Engage people in grocery stores, the mall, parks – within reason!

"Your main job as a community organizer is to speak to people where they are at," says Thomas DeVito, East Coast Policy Manager for Transit, Bikes, and Scooters at Lyft.

Keep an eye on who attends these meetings, who you see where. Each specific place offers a venue that you can tailor your message to.

"You need to be prepared to look at who's in the room with you during one of your campaign meetings, and ask yourself how you can support them," DeVito says. "Of course, you also need to ask yourself who is not in the room, why they aren't there, and how you can get them there."

Learn more about **FiscalNote's advocacy solutions**



FiscalNote Pro Tip:

Want to mobilize your advocates, grow your grassroots, and get in front of policy writers all in one targeted campaign? With our advocacy advertising offer, we provide a 360 approach with VoterVoice, Advocate Acquisition & CQ Roll Call.



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10

9 Take to Social (and Regular) Media

Opportunities to present your group and frame the issue abound. "We went door-to-door and hit every home in town. We were a presence at every fair and festival in the community. We designed an eye-catching logo and ear-catching slogan," United Monroe's Convers said.

"We wrote letters to the editor every single week. We rallied near high-traffic intersections. We attended every town board meeting and spoke during public comment whenever possible."

"We forged positive relationships with members of the local press. We created a Facebook page, website, and captured email addresses from as many citizens as possible and began sending out regular email newsletters," Convers continued. "Within a few short months, we became a household name."

10 Keep the "Ask" Straightforward

When asking members and volunteers to participate in your campaign, make sure they understand the issue and can follow through with "the ask" in an easy, simple way. Keep-It-Simple is also a key to success in training those interested in being active in advocacy for the cause. "Make sure training is concise, easy to regurgitate, simple so they aren't overwhelmed," says Rap Index's Felkel. "Take away the fear some people may have about engagement and make it about having a conversation."

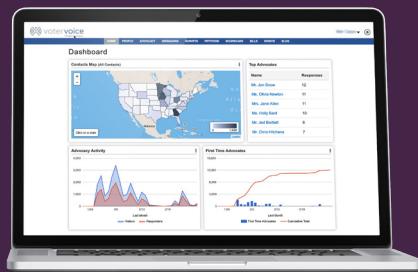


Learn more about **FiscalNote's advocacy solutions**



FiscalNote Pro Tip:

Use VoterVoice to reach your supporters via email, text, or push notification, to drive them to your Action Center. Pre-filled advocate information means that they can take action with one simple click when they are ready to be heard.



Take action with
VoterVoice

11

11 Translate “Asks” Into Action

Follow-throughs where your advocates take action by emailing, calling or signing a petition remain the holy grail of responsive engagement.

But getting the cavalry to charge in the right direction on command can be an elusive achievement. It needn't be. Format your “ask” so you do more, and prospective respondents do less, with an advocacy software tool like Ignite.

“The best way we’ve found how to translate “asks” into action is, for example, by ‘preloading’ a Tweet that members can simply send along to their Congressman or other select officials at the push of a button,” AGC’s Brian Turmail says.



12 See Your Advocacy As a Public Service

Any form of advocacy is a service to others, whether it’s on behalf of a professional association, trade group or as a volunteer with a civic organization.

If you’re lobbying for or against a bill, agitating on the street against government or corporate policy, or raising awareness about an issue, it is always bigger than just you. Don’t forget that, and others won’t forget you. In fact, they’ll want to emulate you.

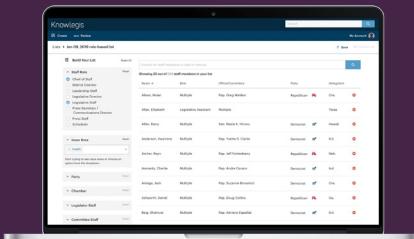
“Working on the Hill gives you an opportunity to serve. The best advocates are often those who feel like they’re still in public service with the work that they do on behalf of their clients, customers, stakeholders,” PCMA’s J.C. Scott says.

Learn more about **FiscalNote’s advocacy solutions**



FiscalNote Pro Tip:

Leverage Knowlegis for more effective outreach. With our tool, you can send messages that look like they came from you rather than a mass mailing tool. Our easy-to-use message builder opens up endless possibilities.



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13 Plan on Telling Your Best Story

A first-person story helps people understand how an issue affects real people and lets your target audience relate to the way policy and legislation has downhome impact. It's also been shown to particularly resonate with lawmakers when a constituent tells it.

"The use of 'the story of self' is important," says ICHV's Walsh. "People want to personalize the connection to change and hearing why an advocate is engaged changes the dynamic."



14 Don't Hound Your Supporters

Any form of advocacy is a service to others, whether it's on behalf of a professional association, trade group or as a volunteer with a civic organization. Legislators and policy makers can sniff out mass-mailed appeals and so can your members and volunteers.

Email blasts about a pending bill or other informational notices are important, but if you're sending form-letter requests with generic "asks" all the time, you're not helping your cause.

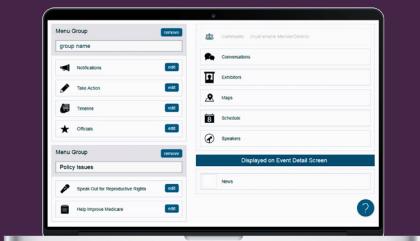
"If you request people to check off their interest in participating in Activity A, B or C and they say they aren't interested in A, yet you keep asking them to participate in A, that isn't good," says VS Strategies' Mason Tvert.

"Give people an idea of what they can do to be helpful, check a box: yard sign, phone calls, door-to-door." The bottom line? Collect and manage the right data about those you are soliciting for help. "The more you know about (volunteers, members)," Tvert says, "the more you can cater to their needs and avoid unnecessary communication."



FiscalNote Pro Tip:

Our Converge app builder can integrate with your main advocacy software, whether it's one of our platforms or not. Drag and drop calls-to-action and vital campaign updates into your app through our intuitive visual editor.



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13

15 Mold the Message to the Audience

The dynamic diversity of social media has created opportunities to pinpoint specific constituencies with niche messages quickly and cheaply.

"Years ago, messaging was a bank shot we'd throw up in hopes of reaching as wide an audience as possible with big radio, TV and print ads. Today, I can be very specific in reaching very specific audiences, very inexpensively, through social media, such as, say, vehicle fleet owners and commuters stuck in traffic," AGC's Brian Turmail says.

In addition to narrowing the focus, social media allows you to expand that same message to a broader constituency simultaneously. "You can actually target a message that can reach every commuter in the country," Turmail says.



16 Be Empathetic Or Just Human

If you can't relate to people, especially those affected by the issue or policy you are raising awareness about, others won't relate either. And, if you aren't nice, don't expect a welcome reception.

"Empathy and people skills — I don't think you can be a good advocate for any cause without those qualities," United Monroe's Convers says.

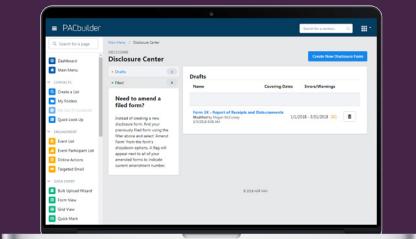
"People like people who listen, who care and who are genuine. No one will join your group, or advocate for a cause or issue by your side if they think you're a jerk. Faking it would only work for so long. I think you need to be a genuinely good soul to have staying power in an advocacy role. So, if you're a narcissist, don't be an advocate for anything."

Learn more about **FiscalNote's advocacy solutions**



FiscalNote Pro Tip:

With PACbuilder, we help make compliance a key component of your political action committee. Track reporting requirements, ensure compliance at the federal and state levels, and submit key forms through a unified system of record.



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17 Don't Make Everything About the Bottom-Line

Money is important and when government imposes regulations that inflate the cost of doing business, it's a valid concern worth campaigning against.

But be careful. Nuance is necessary. Stress the related fallouts from higher compliance costs, such as diminished plans to hire people. Find flaws in data. Make a case that is not exclusively about money.

"The number one temptation is to advocate against a proposed regulation people have never heard of, or that seems benign to the general public — such as environmental protection, worker's compensation regulations — on the basis of compliance costs," AGC's Brian Turmail says.

"Instinctually, we go after compliance costs and even if we're right about that, how many people really care if it costs (industry) money when a life is priceless? It is an ineffective way to go after a regulative issue. You need to ask, is this a fight worth having?"

18 Get Out of Your Own Echo Chamber

Sometimes, the more engaged you are in advocating for a particular issue, the more immersed you are in a world where everyone agrees with your premise, arguments, and goals. Then you step out the door and the real world hits you in the face. To be successful, you need to keep taking the temperature of how the opposition and your own rank and file feel about the issue.

"It's easy to get lost speaking to other 'activists,' or folks who have self-selected into caring about your issue," Lyft's DeVito says.

"Good community organizing requires intentionally breaking out of that habit and engaging people on their terms. This means: No jargon, no acronyms and speaking in plain terms. It means going to other people's meetings, not always expecting them to come to yours." DeVito continues. "It's uncomfortable and it's challenging, and it's also vitally important."



FiscalNote Pro Tip:

Use Advocate Acquisition to find people who support your cause. Our micro-targeted ad network identifies potential new advocates who already support your mission and goals. You aren't buying a list, you're finding new supporters.



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19 Get Good at Giving Speeches

Before you say "Ugh" yes, we know not everyone is a gifted public speaker capable of inspiring passion and making people believe in your cause. But, it's worth the time to develop public speaking skills or find someone who can.

"Using language that inspires people to act, and appealing to the public's inherent sense of justice, is vital to advocacy," United Monroe's Convers says. "Whether it's a large turnout for a rally, getting out the vote, or getting people donating to your cause, you have to give them a good reason to do so."

**20 Your Issue May Not Be Their Issue**

It's sad, but it's true: Not everyone cares as much as you do. Now, get over it and get to work. Gauge what your members or supporters are most upset about or want changed. It's not necessarily for you to decide that. That may require you to make their issue a temporary priority or rethink your whole focus.

"Recognize that your issue, your client's issue, is not always (legislators', regulators', and the general public's) top issue," says Rap Index's Felkel. "Find the right way and the best time to present your case, as opposed to just presenting it."

FiscalNote Pro Tip:

Enhance your exposure on Capitol Hill with our advocacy advertising offering. Through our package, you can place advertisements in our news publications, some of which are delivered to congress daily.



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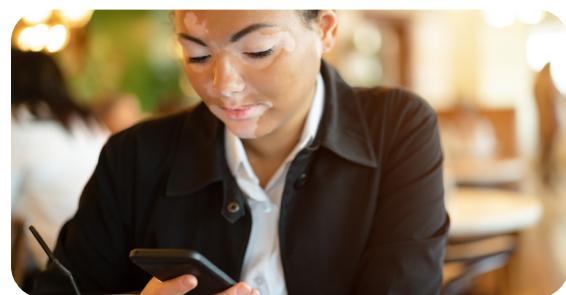


21 Pay Attention to Little Things

Simple mistakes are killers. Check your facts, dot the i's, cross the t's and, of course, spell names correctly.

Everyone is a critic and when it comes to written communication. A misspelled word and that's likely what will be remembered of your finely crafted email and killer call to action.

"Get a hold of a dictionary and learn how to spell properly," CCRKBA's Dave Workman says. "I guess I'm just an old newspaper guy, but when you're misspelling people's names, it makes you look like you lack intelligence and you lose credibility. It's the little things that get you. I have seen it my entire career – something insignificant, something stupid, is something you trip over. You've got to pay attention to that stuff."



22 Play to Grassroots Strength and Expand the Circle

You can't do it all by yourself. And while a tight cadre of established, motivated volunteers always ready to roll up sleeves and get it done is wonderful, a good organization is on the constant prowl to expand their circle of contributors.

This is another reason why it's pivotal to collect extensive, comprehensive data on members and volunteers during the onboarding process.

"Delegate the right jobs for given tasks. It's important to know your volunteers and their strengths and weaknesses," United Monroe's Convers says.

"Get the creative minds to brainstorm on language and message. Get the extroverted, energetic people to hand out flyers and knock on doors. Get the tech savvy people to edit video for the website. Get the quiet organizers to stuff envelopes and create spreadsheets."



FiscalNote Pro Tip:

Use VoterVoice to keep your advocates engaged and informed. Send newsletters, polls, and updates year-round so that your base is ready to act the next time legislation is on the table.



Take action with VoterVoice

23 Learn the Language of Stakeholders & Partners

"Learning how to constantly communicate with your stakeholders is essential to any work you do with coalitions, associations or groups of allied advocates," PCMA's J.C. Scott says. "If information is power, keeping everyone informed is the best way to use that power to keep teams aligned around your objectives. Of course, there is nuance to how and when you communicate to avoid information-overload. Learning how and when to share information is an important skill for any advocacy campaign."



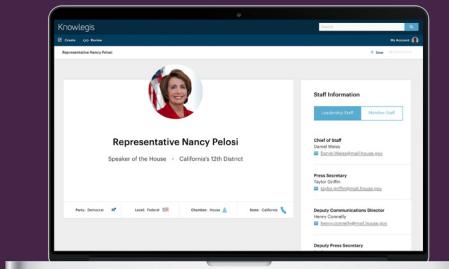
24 Annoy a Few People

Most people become advocates because someone, somewhere, somehow, made them angry and they decided to fight back. Well, if you display any type of passion whatsoever, you're probably going to anger someone and, who knows, maybe inspire them to become an advocate on behalf of what you're advocating against. The best advocacy, though, is that which gets under the skin of elected officials, policy-makers, regulators and influencers. So, aim high.

"If you're not annoying at least a few people in power with your campaign, you're not pushing hard enough," Lyft's Thomas DeVito says.

FiscalNote Pro Tip:

Leverage Knowlegis for the most up-to-date Congressional information. Our staff verifies contact and role information for both staffers and legislators; we don't wait for databases to update.



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25 Show Gratitude

It's the most obvious one and often the one most forgotten. Don't take volunteers' and members' efforts for granted. No matter how little you may feel, on occasion, many are doing to help themselves. There are a lot of demands on peoples' time and energy. "Always, always, make everyone feel really important. I say 'Thank you' more than anything else," United Monroe's Convers says.

**Influence policy and actualize change with our advocacy resources:**

- ✓ Building a Successful Grassroots Advocacy Strategy
- ✓ Advocacy Solutions: It's Time to Get Professional
- ✓ Your Guide for Advocacy Success in 2021
- ✓ 6 Ways VoterVoice Helps You Mobilize Your Supporters to Act



The 10 Advocacy Skills You Need to Navigate Government Relations

In the old days a rolodex full of Senators and big donors' home phone numbers and favorite whiskey might have been the most marketable skill for those seeking a position in government relations, nonprofit or advocacy work. To be fair those are still pretty valuable assets.

But today, job posters are looking at hard skills such as a candidate's technical ability to operate an advocacy platform, craft a content calendar, write a killer call to action, or host an industry fly-in. Those are the obvious talents you can build up over time. But, if your heart is set on navigating the government relations world, make sure you're proficient in the ten things below, too. They're essential to any career in advocacy.

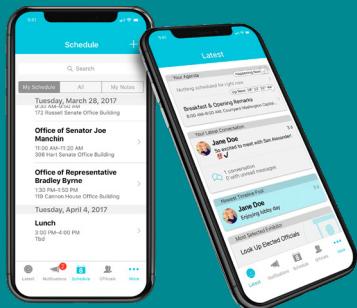


Learn more about [FiscalNote's advocacy solutions](#)



FiscalNote Pro Tip:

With our Converge app builder, you can direct campaign action, coordinate grassroots efforts, contact your advocates, organize fly-ins, and record detailed notes of meetings and interactions in one place. Converge keeps your team connected.



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1 Collaboration

Advocacy is wedged in a strange place between traditional government relations (where most advocacy professionals sit departmentally) and communications, where they retain significant responsibility. Whether you work in a corporation, nonprofit or trade/membership association, collaboration is needed more than ever to successfully navigate government relations.

Membership departments, communications, marketing, C-Suite, education: They're all your allies, not your enemies. All these can amplify your advocacy initiatives and overall government relations strategy, if you build relationships and include them. Your department is likely not a revenue builder, so a secondary skill is being able to convince and show colleagues the value of advocacy. The best have mastered it to the point where departments share resources, on select projects.

"I once had a boss who called us all into his office and said: 'Team, regardless of your title and daily responsibilities, you are all amoeba. The key to your success is taking on any project, working with any group, and finding any solution that will help the whole, regardless of your personal role.' His words have always stuck with me, and, indeed, flexibility has proven to be the most valuable skill you can have in grassroots advocacy." — Austin Roebuck, Senior Manager of Global Customer & Commercial Communications at The Coca-Cola Company.

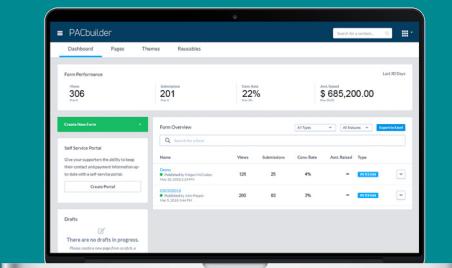


Learn more about **FiscalNote's advocacy solutions**



FiscalNote Pro Tip:

Utilize PACbuilder to solve problems before they become headaches. System alerts find and allow you to address potential issues before they become hurdles to compliance. Manage your PAC with ease with our PACbuilder platform.



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2 Time Management

If you want an easy job without a lot of tasks to juggle and nice even conclusions, advocacy and government relations is probably not the route for you. There are constant pitfalls that can throw you off track, from constantly scrolling through the feeds of influencers on Twitter to attending dead-end briefings. Government relations requires prioritization and considerable time management skills.

In contemporary government relations and advocacy, there are tools that can aggregate news, provide video/clippings of important hearings, text of legislation and transcripts – CQ Roll Call being one!

An advocacy pro has to manage the day-to-day operations of building a sustainable digital program for tracking and outreach, and also deal with inevitable crises as they arise.

Sending out an action alert at a moment's notice while maintaining the growth of an effective key contact program are two different tasks commonly undertaken by advocacy professionals. They both require time management and the ability to prioritize, one in the short-term and one in the long term. Honing your skills of sifting through the data and reacting to what's absolutely necessary will help considerably.

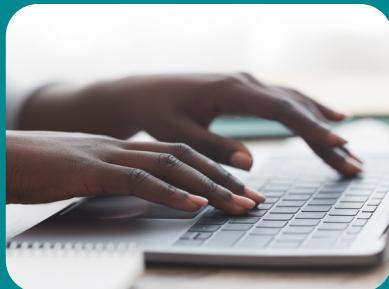
"I've since learned to plan backwards. Start with the end date and calendar in everything until your start date." – Mark J. Walsh, Campaign Director, Illinois Council Against Handgun Violence

"Create a timeline. You and your team need to visibly see deadlines on paper and the goals that need to be met by each check in." – Lincoln Clapper, Chief Sales Officer at Advocacy Associates.



FiscalNote Pro Tip:

Use our Advocate Acquisition service to gain supporters. You don't pay per views or clicks. Instead, you pay for the advocates who take action. Later, advocates are automatically added to your database for future campaigns.



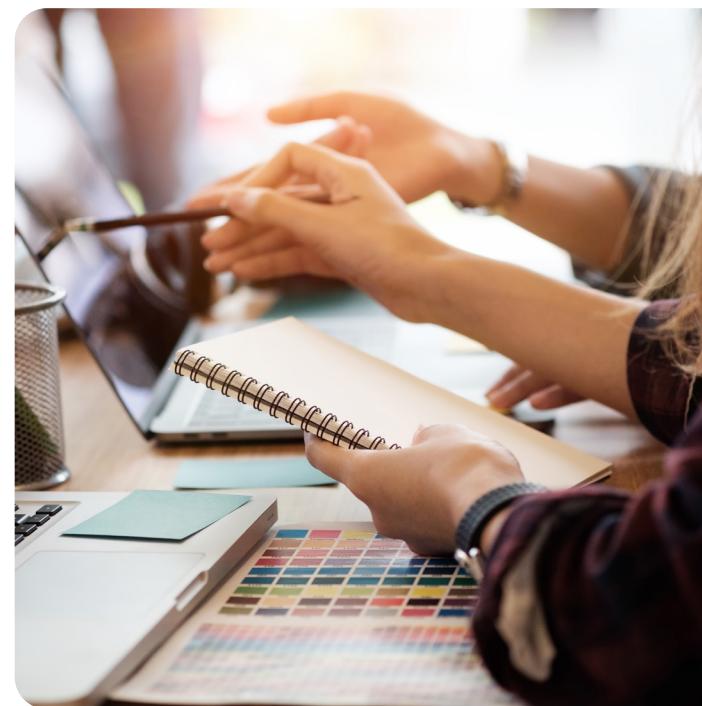
Take action with
Advocate Acquisition

3 Creativity

Advocacy and building grassroots is about compelling action by ordinary citizens to voice their concerns at any level of government. While complex charts, tables, statistics, and 100-plus page reports have their place in certain circumstances for convincing advocates, more often than not a concise, impactful message will be much more effective.

That lays the challenge of conveying something complex in double-quick time at an advocacy worker's door. The communication must be creative enough to hook the advocate from the beginning across multiple platforms, while maintaining organizational professional standards of traditional government relations. But the truth is there's never been a better time for an advocacy campaign to catch fire and grow with the right communication.

"Tell a meaningful story. You can try gimmicks to get people to listen to you, or you can use relationships, but the most effective strategy is to tell a meaningful story that motivates people to act." — LeeAnn Petersen, Founder of the Professional Women in Advocacy Conference (PWIA).



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4 Patience

It's a useful skill for most jobs, but if you've ever worked for or against a big complex piece of legislation you'll know that many government relations goals operate under a timeline of years – and multiple Congresses.

The emotional attachment to causes and issues compels everyone to want to "get it done" today rather than tomorrow. Fortunately, or unfortunately, the legislative and regulatory process is slow moving.

Having the ability to set up tangible benchmarks to prevent personal fatigue as well as issue fatigue in your members, advocates, or clients, is a more than useful skill set.

It also helps to know when to deploy resources and strike. Using too many or too little resources at any given point is where adversarial organizations can exploit and reverse achievements made by your organization. Advocacy takes time and requires a patient facilitator. Rome wasn't built in a day, and neither was Washington.

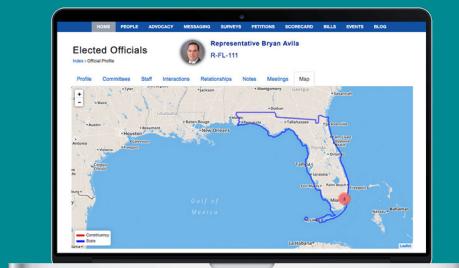
"Developing advocacy skills takes time, patience, and extreme organization. Legislation or months of planning an advocacy campaign can be stopped for factors out of your control [such as] Committee Chairs refusing to hold a hearing, or other lobbying forces." — Frank Harris, Director of State Government Affairs, Mothers Against Drunk Driving National Office.

"Persistence. Everyone involved in the advocacy initiative has to understand this is a long game. There are no short, easy results. Advocacy is a grind and requires a committed, dedicated frame of mind to have your message stand out." — Lincoln Clapper, Advocacy Associates.



FiscalNote Pro Tip:

Ensure your message is heard with VoterVoice. Our support team checks and corrects for undelivered messages, navigating even the most stubborn web forms, resulting in 100% deliverability to legislative officials.



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5 Listening

A common pitfall in government relations and advocacy is continually talking at people. Unfortunately, listening is a cherished skill possessed by a limited number of people. Subduing your ego and recognizing that your members/advocates often have more subject area expertise than you do is an important first step in mastering the art of listening.

Their personal stories and anecdotes are also paramount to the success and failure of swaying the hearts and minds of lawmakers – especially if they’re constituents. Without genuinely hearing your supporters’ feedback, your advocacy program will stall, and its contribution to government relations will diminish.

Listening is the most important part of any conversation, and it’s the fuel between organization and member.

Don’t forget you’re accountable to your clients, members, or to the people or donors you serve at a nonprofit. So take their advice, input, and recommendations very seriously when developing programs and initiatives.

“I remember how hard it was to distance myself from what I thought I knew about an issue. Back then I walked into the room thinking I was the expert. But there is another expert that every good campaign manager needs to pay attention to: the voter. Advocacy lives and dies on the voter’s attitude toward any given issue – and you must anticipate every possible scenario that could sway a voter on a whim. You have to check your preconceived notions at the door, roll up your sleeves, and dive into research before you formulate your message.” — Gerry Gunster, CEO, Gunster Strategies Worldwide



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6 Mobilization

Getting someone to meet with a Member of Congress, tweet about a regulation, send an email about a bill, or make a phone call to support an activity requires a high degree of energy and motivation.

Inspiring advocates towards a type of an action isn't easy. Government relations is not the primary purpose of grassroots advocates busy with their real lives, so developing the skills to mobilize your grassroots and grassstops is huge. Going into a meeting with a lawmaker where you need to make your point about an issue, knowing that you've already motivated the masses or influential community members and constituents is going to make your job a whole lot easier.

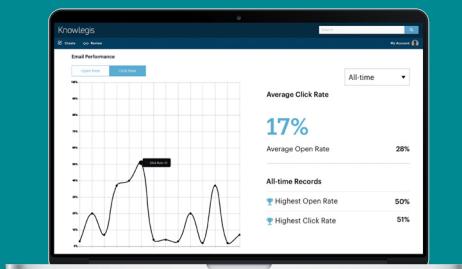
"If you're passionate about what you do, people will listen. They want to be around people who love what they do. Most people these days want to find a driving purpose for their life. So even if your topic isn't their immediate interest, your enthusiasm might just persuade them to get involved!" – Pamela Hawley, CEO, Universal Giving

"If you want someone to take action in Middle America, and keep taking action, they have to trust you and know you're there to help them. Many don't feel they know enough about the political process and it's intimidating. A bunch of people in suits using government or policy phrases and acronyms from D.C. doesn't make them feel comfortable and like they should be involved. – Andy Polk, Senior Vice President, Footwear Distributors and Retailers of America



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7 Conflict Resolution

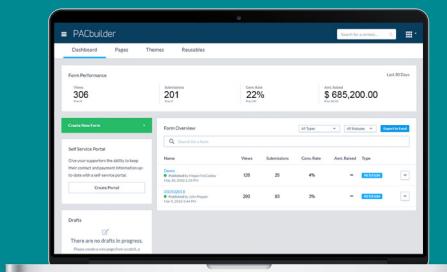
Members or advocates don't always agree. Inter-organizational departments don't always get along. Advocacy professionals and traditional lobbyists don't always see eye-to-eye. Sometimes the home office doesn't get along with the D.C. office. Sometimes an advocate talks about an unrelated issue in a meeting that you have to clean up after your fly-in. Sometimes an affiliate takes a different position, and your advocates follow suit.

Unfortunately that represents some of the common challenges facing advocacy professionals and their interactions with members, peers, and affiliates. Conflict resolution is an important skill to have, especially in a field such as government relations that is often a high contact, high stakes adversarial sport.



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8 Adaptability

An advocacy fly-in meeting was cancelled 10 minutes before members were scheduled to meet with their Member of Congress and staff. The hotel hosting the fly-in messed up the food order or the microphones don't work. Your key contact's flight was delayed. The air conditioning is broken in the briefing room.

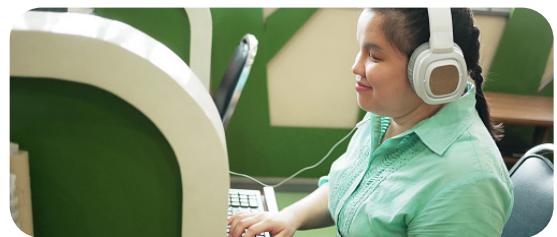
This isn't the sequel to the advocacy horror movie, but some mundane issues that occur as a result of hosting high-volume, high-impact, and high stakes advocacy events.

If you're in this business long enough, problems are going to arise. Fly-ins and lobby days are the Super Bowls of advocacy and receive proportional attention, so you can't go into meltdown when something goes wrong. You need to be willing and able to adapt accordingly – especially when the stakes are high.

"Focus on staying organized. Every campaign has a series of moving parts, and having an organized plan in place from the beginning is crucial. The only guarantee in these complex projects is that things are going to change, and problems will arise. Being organized from the outset allows

your team to stay focused on the goals at hand, rather than being constantly distracted by fixing organizational problems along the way. I'm lucky in that I'm surrounded by a team whose been doing this a long time so they're able to recognize potential roadblocks before they actually arise." – Matt Duckworth, Vice President Government Relations, Hart Health Strategies Inc.

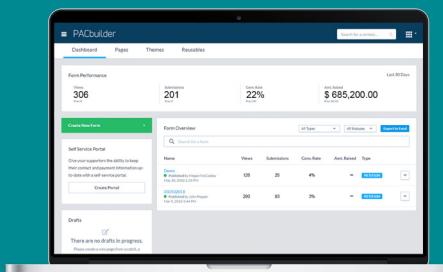
"Legislative calendars, elected officials, target audiences, key messages, and communication mediums all change, and we must adapt with them. When flexibility is part of our advocacy strategy, we will find new opportunities, and, ultimately, success because we are able to adapt to any situation that comes our way." – Austin Roebuck, Senior Manager of Global Customer & Commercial Communications, The Coca-Cola Company.



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9 Networking

Chances are your peers at another association, corporation, or nonprofit have gone through the triumphs, trials and tribulations you're facing. Most of us have very few original ideas that have never been used in some way by someone else first. And that's OK. The acquisition of new skills, ideas and knowledge from peers is essential to move forward. But don't just network within advocacy and government relations with the same insular circle of people at event after event. Broaden your posse to include media, technology specialists, marketing experts, and people outside the government relations space.

Networking is about quality, not quantity. Merely attending every networking reception and going person to person handing out business cards doesn't have much of an impact. Having a meaningful conversation with one person at an event and scheduling a follow-up can lead to business, the exchange of ideas, and even a mentor.

"1. Know your elected officials. Representatives of your organization should attend events that your local officials are attending. Introduce yourself to your local official, city council, county commissioner and also key staffers.

2. Attend your local officials' fundraising events and/or town halls. I started in politics simply attending a small home reception for a man who was running for city council. You can get to know so many important local officials simply by showing up. These are often very casual, even picnics, and the elected officials like and want to meet you and others in the community. If you are representing a large constituency - so much the better!"

3. In general, be out and about in your community. Know who is who and what is going on. Keep up with local issues and events. Show up. Smart nonprofit Executive Directors do this - because they know they are protecting their revenue sources." – Gail Perry, Philanthropy Expert, Founder, Fired Up Fundraising.

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10 Communication

The bedrock of advocacy is communication. Communicating your issue to Congress. Communicating to advocates, supporters and members how it will affect them or their loved ones and then convincing them to take action. Communicating to the media through storytelling. Communicating online through your legislative action center and social media. Communicating in speeches at town halls and through the written word.

The whole world of advocacy rises or falls on an organization's government relations' teams' ability to communicate. So, if you were to pick one skill to work on this year, pick that one.

"Learn how to communicate. Know your audience and what activates them. Chances are you'll be interacting with Members of Congress and their staffs, the press, business leaders, local activists, and everyday citizens."

"Each group is essential to your success, but they all speak different languages, have different metrics for success, and are responsive to different methods of communication. Learn what tools you have at your disposal and how to judge when to use each one." — Zach Schafer, CEO of United for Infrastructure.

"I truly believe that advocacy requires a broad range of abilities: research, organization, grassroots, and media — you need to practice each skill in unison. The best way to practice your skills is to do it in a location you are familiar with — it's wise to take on your first campaign in a city that you know."

"All politics really is local — so keep it local. From the researcher, to the ground team, to the spokespeople in the ads, no one is going to make a connection like a familiar face. Build connections, learn what's been done, and figure out how you can make it better." — Gerry Gunster, CEO, Gunster Strategies Worldwide.



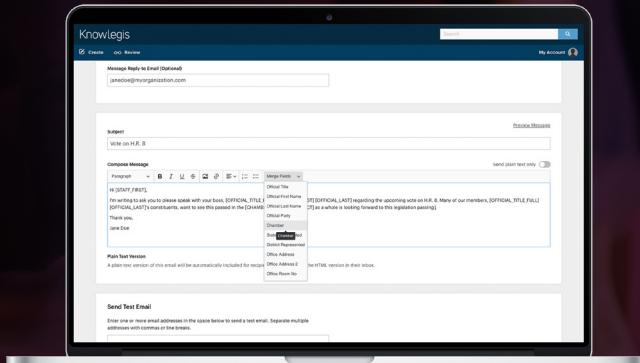
9 Winning Advocacy Strategies from Experts

When taking on an advocacy campaign, or developing a plan to fight legislation, it's easy to become so embroiled in the detail of execution that the end goal can get fuzzy.

So, right from the beginning of any endeavor, it's critical to set forth a plan that establishes where you are, where you want to go, and how you're going to get there.

To help, we asked 10 experts from 10 groups to give us 9 advocacy strategies (you can read in minutes!) that stand the test of time.

From breaking your strategy into manageable steps, to building relationships, and focusing on one issue at a time, implementing the steps in this guide will set you on the path to advocacy success.



Learn more about [FiscalNote's advocacy solutions](#)



FiscalNote Pro Tip:

Leverage the VoterVoice platform to mobilize your supporters. Our address matching technology connects your advocates with their local, state, and federal legislators, so they can act on your behalf at any level.



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1 Break Strategy into Steps

Creating a strategic plan with a step-by-step timeline, flowchart or Google doc can simplify the most complex objective. And simplicity is key, because regardless of how intricate the tactics to achieve a campaign goal, the plan should be clearly understood at a glance.

A good strategic plan looks at all the things your campaign could do, and narrows it down to the actual steps that pinpoint where you want to direct your time, energy and resources.

1. Who are the audience?

2. What are you trying to achieve?

3. Who do I contact in Congress? [or state or local lawmakers if that's your focus].

4. What are the best tactics to reach them? What content and delivery vehicle works best in each case?

"We create a 'strategy chart,' where we're ensuring we are clear on our goals, sober about our organizational constraints, aware of potential allies and opponents, and know who the decision-maker is that can give us what we want," says Thomas DeVito, East Coast Policy Manager for Transit, Bikes and Scooters at Lyft. "Once we've got that down, we can focus in on the tactics that will get us to where we need to be to be successful."

— Brian Turmail, Vice President of Public Affairs & Strategic Initiatives for the Associated General Contractors of America (AGC), begins every endeavor with this strategic four-step timeline.

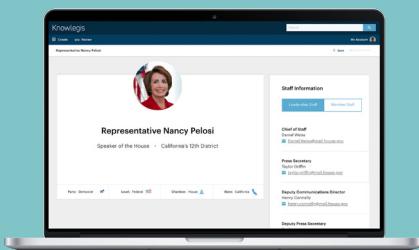


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2 Incorporate Flexibility Into Your Strategy

An effective strategy must be clear, concise and constant. Frequently shifting goals and objectives creates confusion and, ultimately, leads to digression, disgruntlement, and ultimately defections by members and volunteers who need to see progress to sustain interest.

But incorporating some flexibility into your plan to adjust to changing circumstances does not mean you've lost sight of your objective. It may mean the objective itself has changed. Perhaps a bill you were lobbying against was unexpectedly pulled. Maybe the campaign is going so well, the opportunity to achieve more presents itself.

Even more importantly, the plan should have potential for expanding tactics and tools not originally outlined, or embracing allies and joining coalitions that you've encountered along the way.

"There is no one-size-fits-all approach to advocacy," says J.C. Scott, President & CEO at the Pharmaceutical Care Management Association (PCMA).

Seek out these key grasstop contacts through extensive, accurate data collection, during the onboarding process of your members. They'll reap rewards later.

Lyft's Thomas DeVito agrees. "There is no single strategy that can be recommended 'above' others. Grow your community, be bold, invest in training volunteers, show up frequently to community events, make friends with other groups, do your homework and build your power. Being right alone doesn't get you a win, building power does."

All strategies need tweaking in execution as campaigns move forward. So, plan to change tactics originally outlined in the plan as part of the plan.

"Don't hang onto old assumptions," AGC's Brian Turmail adds. "Be in constant learning mode, constant experimental mode. I'm always surprised by what floats and what sinks."

FiscalNote Pro Tip:

Use FiscalNote Converge to create an advocacy app without the hassle of hiring an outside developer. Easily integrate your app with your advocacy software, and direct grassroots campaigns with ease.



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3 Build Your Strategy Around Relationships

According to the Congressional Management Foundation, 74 percent of Congressional staffers say personal relationships are the most effective way to reach influential lawmakers.

Many associations and businesses have members with "hidden and untapped" relationships with legislators and policymakers, says Chip Felkel, CEO of Rap Index, a strategic communications consulting firm based in Greenville, South Carolina.

These could be business associates, former schoolmates, members of the same professional association, or church. They could even be related.

Seek out these key grassroots contacts through extensive, accurate data-collection, during the onboarding process of your members. They'll reap rewards later.

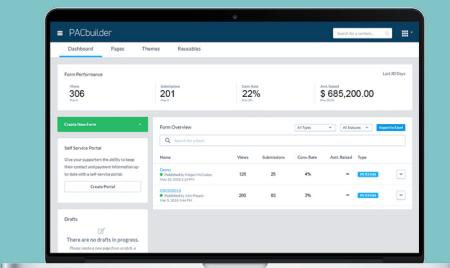
The questions you ask new members and volunteers regarding who they know, what organizations they belong to, where they went to school, and so on, can all become key factors in developing effective strategy. At the very least, geographically, they'll be constituents of a lawmaker that may prove useful in the future.



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3 Build Your Strategy Around Relationships (Continued)

"You need to have an appreciation for the value of relationships that exist between your members and those you are trying to influence," Felkel says.

Good on-boarding questionnaires allowed the Marijuana Policy Project (MPP), and other advocacy groups to get a ballot measure to legalize recreational marijuana on the docket in Colorado – which then passed overwhelmingly – despite little enthusiasm among state legislators and the Governor.

"We asked people to complete a questionnaire that identified political affiliations and (residential) locations so we could ask them to contact local representatives, and to go to (county) caucuses. The more information you can get, the better it is for them and for you," says Mason Tvert, former Director of Communications for MPP.

"Know who your supporters are and keep track of what they have to offer. Even if they do just a little, you can still move the ball forward. Those who are willing and capable of doing more will offer themselves. I've learned everyone has something to offer, but not everyone is going to offer everything. I've learned when to ask for something and how to give people options that span a spectrum of actions they can take." Tvert also notes it's a good idea to invest in digital software that organizes data specifically for advocacy groups. The strategy here is to know who the best people are, and when the best time is, to make that all-important 'Ask' during crunch-time.



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4 Baseline and Benchmark Your Strategy

You need to know where your starting point is in order to see how far you've come, or if your tactics are working. Establish baselines and benchmarks at intervals from the beginning to the end to document progress and pitfalls, and to present a visual manifestation of strategy. Baselines are performance measures that illustrate starting points and include the campaign's scope, schedule and budget. They determine if a campaign is on track and provide junctures to reconsider tactics.

"Create an assessment, a baseline, an audit, of 'What's our issue? Who are our messengers? What are our strengths, our weaknesses?'" Rap Index's Chip Felkel says.

"There's too much noise out there, so you have to know the value (of your campaign) and what makes it worth your time, energy and effort — and that of others' time, energy and effort. You can waste a lot of political capital without a baseline understanding of why this is something that needs to go forward, or something that needs to go no further."

Baselines and benchmarks provide "places" in the step-by-step execution for the assessment of inevitable variances from the plan and options on how to respond. These options can have multiple iterations including alternate risk management plans, quality plans, and procurement plans, staffing and communications plans.



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5 Ensure Communications Strategies Include Personal Outreach

Outreach is certainly a tactic, but it should also be a strategy, both long and short term. It's especially useful for a newly established organization working to become relevant to those it seeks to advocate for. There's no better way to build up lasting influence and attention than by meeting-and-greeting people wherever and whenever you and fellow volunteers and association members or clients and customers can.

Even for a long-established group, outreach has a strategic component because it provides potentially lucrative opportunities for recruitment and can identify issues and priorities you may not be aware of.

"Social media is necessary. Good PR is a must. But nothing beats pounding the pavement and connecting with members of the community one-on-one," says Emily Convers, Chairwoman of United Monroe, a grassroots nonprofit formed in 2013 to combat "bloc-vote" politics in Monroe, New York. "The old-fashioned way is best: Knocking on doors and speaking face-to-face with people."

Whether a local group, such as United Monroe, or a hugely influential group such as the two-million-member Sierra Club, the same back-to-basics strategy remains true.

"When I am new to a campaign, or in the beginning stages of a planning a campaign, before the creation of strategy documents or power maps, I typically conduct listening sessions with team members, community members I am working with, allies, etc.," says Christine Hill, Acting Campaign Director at Sierra Club.



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Use VoterVoice to reach your supporters via email, text, or push notification, to drive them to your Action Center. Pre-filled advocate information means that they can take action with one simple click when they are ready to be heard.



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6 Develop the Right Team for the Right Strategy

Before you put anything into your strategy, start assembling an effective “thought leadership” team who will help form it. This part is as critical as orchestrating the teamwork necessary to follow through with putting the right people in place to be effective.

“Whether you’re working within a small team or a coalition, make sure you first ask yourself: ‘Are the right people in the room, at the table?’” says Sierra Club’s Christine Hill. “Then, begin to practice team-building that incorporates norms, communication styles, etc. A solid foundation will lead to more collaborative work in the future together.”

Essentially, this is the beginning, the star chamber of grand design. From there stem tributaries that channel expertise into actionable tactics, ensuring the best talent is being used in the best way, from overall strategy to the last kicks of a campaign.

“Successful advocacy requires a lot of people with a lot of different skills working in concert, so identifying where people’s strengths are and working with them to improve and apply complementary skills together is key,” Lyft’s Thomas DeVito says.

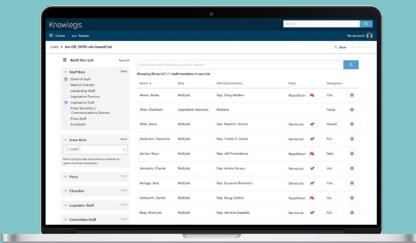


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7 Assure the Strategy Clearly Defines the Win

Clearly defined, attainable goals provide incentive and set your organization up for success with not just the current campaign — but future ones. Everyone from the executive-level brain trust to the most recently recruited volunteer must understand what the campaign is all about.

People join organizations based on what they are trying to achieve, so identifying “The Win” not only defines the tactics in executing the plan, but has long range benefits.

“Define ‘the win’ upfront,” Sierra Club’s Christine Hill says. “Within a campaign, what would a win look like? Sometimes, it’s not obvious. Then, be sure to celebrate that win with your team and partners when you reach it.”

As well as being clear, be realistic. Don’t shoot for the moon before you have a launching pad. Small “wins” can establish the foundation to build on, to point to and say, “We did this and now we can do more.”

Mason Tvert is a partner at VS Strategies, a firm that specializes in policy, government relations, campaigns, and research for clients in the marijuana and hemp space.

“Define what is achievable. You should be creating an attainable goal. It is important to be able to identify what you’ve accomplished. If the goal is to legalize marijuana, then it is likely to fail, but if the goal is to change a city’s laws, that is achievable.”

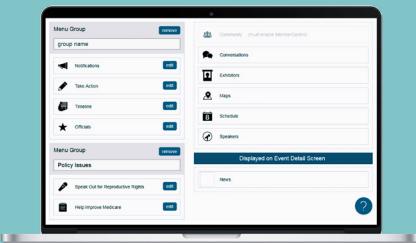
Ensure members and volunteers are aware of the little accomplishments along the way so they can sustain the momentum necessary to achieve the ultimate goal.

Communicate goals with “the boots on the ground” frequently, suggests Dave Workman, Communications Director for the Citizens Committee For The Right To Keep And Bear Arms, a Bellevue, Washington-based gun rights nonprofit that stays in contact with affiliated groups nationwide through email alerts and a monthly newsletter.



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8 Form a Strategy to Build Coalitions

Find other groups with similar concerns and join forces. Alliances can allow you to redeploy resources in a way that emphasizes different organizations' tactical acumen, while expanding the reach of your advocacy.

Other groups or associations may have assets such as financing or human resources, or content creators and designers. Or they might have better access to policymakers or big name organizations that you'd like to influence or have onboard. Maybe you have grassroots numbers you can mobilize, that they don't have. Whatever it is, every organization has some strength others need.

There's power in unity – especially when forming alliances with groups you are not typically aligned with. Don't shy away from reaching out to those you're frequently battling with if there's an opportunity for a singleissue truce. When constituencies that are frequently at odds find common ground, lawmakers and policymakers take note.

Gregory Blascovich, co-founder of Keep It Public, a nonprofit focused on stopping Congressional attempts to turn federal public land management over to states, says alliance building is not simply a tactic, but a perpetual and powerful strategy that needs to be incorporated into any organization's "group think."

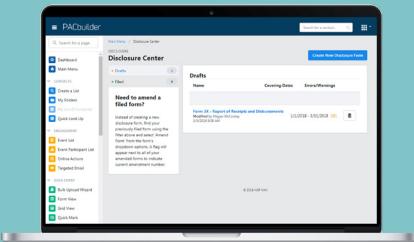
"Building bridges across traditional divides by emphasizing shared views is important because, if we only think about a campaign in isolation, we can make false steps."

"Essentially, we're focused on making sure public lands remain public by fostering a broad-based coalition of interested parties that see eye-to-eye on these lands, but are often at odds with one another on outside issues," Blascovich says. "Groups like hikers, bikers, hunters, anglers, horsemen, ranchers and so on. Looking back, I think that much of our success can be traced to the collaborative relationships we cultivated with individuals and organizations doing work in our area."



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9 Focus Strategy On One Issue At a Time

One thing leads to another, and as often happens, the more immersed you get into one issue, the more others surface. Don't get distracted. Fight one campaign at a time.

The key is to maintain the laser focus that changes circumstances before adding new goals and objectives to the strategic plan.

That's why it's important to clarify priorities and maintain baselines or benchmarks in charting progress. If the aim is not achieved, or being advanced, don't muddy the waters with late-entry objectives that will distract your team.

Should an attainable goal in a related arena surface, assemble the organization's strategic plan team again and, perhaps, create another campaign dedicated to achieving an entirely new set of objectives. Assess the bandwidth for actually getting it done while keeping your main objective on track. If you don't have the resources or manpower to deliver it tactically, set it aside until you finish what you started.

"Time management when juggling multiple campaigns and issues can be tough," says Mark J. Walsh, Campaign Director for the Illinois Council Against Handgun Violence (ICHV), the oldest, largest, statewide gun control organization in the U.S. "It's important to always keep the goal in mind – be it an issue or a legislative approach. I've since learned to plan backwards – start with the end date and calendar in everything until your start date."



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