

# Tools for Case Making in Advocacy Planning

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# Agenda

Agenda	Time
Lecture: Creating an Advocacy Plan	15 min
Activity #1: Advocacy Allies Worksheet	10 min
Lecture: Communicating your Priorities	15 min
Activity #2: Formulating your Pitch	20 min
Closing	5 min

# Objectives

- 1. Introduce practical tools and strategies for developing an advocacy plan** aimed at engaging elected officials and policymakers.
- 2. Examine the significance of performing internal and external environmental scans** before engaging with elected officials to ensure informed and relevant advocacy efforts.
- 3. Learn how to assess when a pivot in your advocacy plan is necessary** in response to changes in the political, social, or organizational landscape.

# Reflection Questions

**How does your organization currently handle advocacy campaigns? What are some successes and challenges that have come out of these campaigns?**

**If your organization does not currently engage in advocacy campaigning, where do you think they should start and why? How would you go about getting started?**

# Advocacy

**Advocacy** is participating in the democratic process by taking action in support of a particular issue or cause without mentioning a bill.

**Educational awareness** can:

1. Create needed policies when none exist.
2. Reform harmful or ineffective policies.
3. Ensure good policies are implemented and enforced.

The goal of advocacy is **policy change**.



## Creating an Advocacy Plan

1. Map the Landscape Internally
2. Protect
3. Resist
4. Map the Landscape Externally
5. Identify Critical Dates
6. Carefully Selected Prioritizations

# Step 1: Map the Landscape Internally

**Successful advocacy requires close coordination of staff, board members and constituents. Before you even launch a campaign, you should identify who, amongst the board, staff and constituents will be engaged in advocacy efforts and what their roles will be.**

Questions to answer with your sites:

1. What does your organization believe and stand for at your core?
1. How will these values and principles help you make decisions, choose fights, and navigate this moment?
1. How will you hold this in your decision making and communications?



# Step 2: Protect

1. Who among our staff, stakeholders, partners, and people we serve (including their families) are under direct threat by specific policies, actions, or groups?
1. What is our promise to them and how will we fulfill that?

# Step 3: Resist

**Determine what policies, personnel, or systems changes may cause direct harm to our organizations, programs, networks, and communities. Please consider those that affect your work directly and those that affect the context in which you work.**

1. What policies will impact your organization or network directly?
2. How will you advocate, protest, mobilize, etc. to resist this policy? Who are likely allies and partners?



Image: Pacific West Group



# Step 4: Map the Landscape Externally

- Identify your advocacy allies on the federal, state, and local levels.
- Compile relevant local representatives based on local govt. committee memberships.
- Learn how to contact your legislative representatives or the organizations you wish
- Visit <https://www.usa.gov/elected-officials> to investigate who are your elected officials.



*Image: Maryland Nonprofits*

# Step 4: Map the Landscape Externally

Identify your advocacy allies on the local, state and federal levels.

	Federal/National	State	Local
<b>Established Relationships</b>	Committee Chairs US State Senators US House of Representative National Council of Nonprofits Independent Sector Associations	Governor Lt. Governor State Senators State Representative Attorney General State-level Organizations	Alderspersons Committee Chairs City Department Personnel Community Based Organizations Coalitions County Officials
<b>Forming Relationships</b>			

# Step 5: Identify Critical Dates

Identify meaningful events that will discuss topics related to your organization's background and mission.

Make connections with other organizations with active advocacy plans and seek opportunities to join active alliances or coalitions.



Meeting	Date	Purpose
State Legislature - Spring Session	4/5/2025	Advocate for the importance of Medicaid
Local Town Hall Assembly	5/1/2025	Ask about existing efforts to save Medicaid
Independent Sector Summit	10/27/2025	Attend Summit to increase partnerships

# Step 6: Carefully Selected Prioritizations

## Issue Mapping

NATIONAL  
COMMUNITY LAND TRUST  
NETWORK

		IMPACT	
		Low	High
LIFT	High	Long-term or intensive campaigns. Rewards are indirect or minimal.	Long-term or intensive campaigns. Returns could be big and direct.
	Low	Small tasks, discrete work or support role. Rewards are indirect, minimal or a long-shot.	Small tasks, discrete work or support role. Returns could be big and direct.

# Step 7: Monitor

*“How do we navigate this moment while remaining steady in our commitment to the communities we serve and the future we’re working toward?”*

- What to continue
- What to pause
- What needs to emerge?
- What to let go

The Strategy Triage Tool	
<b>Guiding Question/Line of Sight:</b> <b>What will it take to ____ ?</b>	The question should be open-ended and future-focused. It should not make assumptions about who is responsible or what the solution is.
<b>Still Relevant/Continues Forward</b>	<b>Pause &amp; Recalibrate</b>
These priorities remain aligned with your purpose and are feasible given current conditions.	These priorities are paused because they're not feasible now or space is needed for emerging priorities.
<b>Emerging Priorities/Adaptive Shifts</b>	<b>Unknown Status/Approach</b>
These are new or newly prioritized efforts emerging in response to current conditions or opportunities.	<b>(Need more data, too much in flux to know.)</b>  These are priorities where the way forward is unclear or in flux.
<b>Honor &amp; Let Go</b>	
<b>(Not going to happen.)</b>  These priorities no longer make sense or are unwise or impossible given current conditions.	

Source: Marian Urquilla, Strategy Triage Tool

# Communicating your Priorities

**Opening Sentence** (Grab Attention): “[Start with a surprising fact or figure related to your cause.] Did you know that [fact/figure]? At [Organization Name], we’re tackling this issue head-on.”

**Description** (Who you are & What you do): “We are [brief description of the organization – e.g., a group of dedicated individuals, a global network, a local community initiative], and we [specific action or service – e.g., provide clean water, educate underserved children, rescue abandoned animals].”

**Mission** (Why you do it): “Our mission is simple: [Condensed mission statement]. Every day, we strive to [specific goal or target].”

**Personal Connection** (Tell your story): “I joined [Organization Name] because [personal reason or anecdote that highlights a bigger picture]. It’s not just an organization; for many, it’s a beacon of hope.”

**Impact** (What a rep’s support can do): “With your support, we can [specific achievable outcome – e.g., build a well, sponsor a child’s education for a year, provide shelter for five families]. Imagine the difference we could make?!”



**Key time: 30-60 seconds**

# Pitch Example

1. **Opening Statement:** Did you know that Medicaid provides healthcare coverage to over 70 million Americans—more than the entire population of the UK? This vital program is not just a safety net; it's a lifeline for millions of our fellow citizens, including children, seniors, individuals with disabilities, and low-income families.
1. **Description:** My name is Karen Aguirre I work with Save Medicaid Now, were a group of volunteers working to advocate for this health insurance program to maintain its existence and cover more marginalized groups like those with disabilities.
1. **Mission:** Our mission is simple, we want protect an existing program that started in 1965, during a time where the cost of hospital care was rising at a rate that was much higher than the cost of living. Pretty much like today as....
1. **Personal Connection:** I joined the organizations because I believe healthcare is a human right. When my family member was diagnosed with diabetes, their income alone was not enough to cover their medical care, so he signed up for medicaid which allowed him access to the care that he needed at a more appropriate price.
1. **Impact:** With your support, we can save this life-changing program that was pitched by American families even 20 years before its existence. It will also keep many families out of poverty, allowing them to live healthy and be contributing members to society.

# Activity #2: Formulating your Pitch

**1. Opening Statement:** Insert attention grabber/ Start with a surprising fact/ mention your organization and how you are tackling the issue.

**1. Description:** Brief description of organization.

**1. Mission:** What is the goal of your organization?

**1. Personal Connection:** Tell your story/ Personal or anecdote.

**1. Impact:** What the representative can do for you? (\*do not mention specific bills).





# Storytelling & Messaging

**“If you start with data,  
people will impeach the  
source of data but if you start  
with a story, they will try to  
fix the person in the story.”**

Allyn Brooks-LaSure



# Closing Reflection

What **thoughts, insights or takeaways** arise as you think about today's activities?

What's **one concept or idea** you want to learn more about?

# THANK YOU

QUESTIONS?

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