



## Guide to Building an Effective Electoral Strategy for 501(c)(3)s

As a 501(c)(3), you can do advocacy activities during an election year. In order for these activities to work in tandem with one another to engage candidates and stakeholders in topics related to your issues, they must align with a broader nonpartisan electoral strategy. This guide presents a 4-step process that will help you build that electoral strategy by walking you through the internal and external elements an effective strategy must entail. Use the Do's and Don'ts of Electoral Advocacy tool to help answer questions you have while building your strategy!



### 4 Steps to Building an Effective Nonprofit Electoral Engagement Strategy

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Cleveland  
1277 West 104th St.  
Cleveland, OH 44102

Columbus  
2612 Zollinger Road  
Columbus, OH 43221

Washington, DC  
300 New Jersey Avenue, NW  
Suite 900, PMB 9005  
Washington, DC 20001

Phoenix  
207 North Gilbert Road  
Suite 007  
Phoenix, AZ 85234

[www.advocacyandcommunication.org](http://www.advocacyandcommunication.org)

For more information about ACS, please contact us at [info@advocacyandcommunication.org](mailto:info@advocacyandcommunication.org).

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Question	Answer
Why do you want to engage in electoral advocacy?	<hr/> <hr/> <hr/>
As a nonprofit, what electoral activities are you allowed to engage in?	<hr/> <hr/> <hr/>
As a nonprofit, what electoral activities are you prohibited from engaging in?	<hr/> <hr/> <hr/>
How many staff members will be working on electoral activities? How much time will each person dedicate?	<hr/> <hr/> <hr/>
What is your organizational budget for electoral activities?	<hr/> <hr/> <hr/>
How much time does your organization plan to commit to these activities in total?	<hr/> <hr/> <hr/>
Will you engage other organizations to partner with your electoral efforts?	<hr/> <hr/> <hr/>
What has your organization done in the past related to electoral activities?	<hr/> <hr/> <hr/>
What are some successes and lessons learned from your past electoral activities that you can apply to future activities?	<hr/> <hr/> <hr/>



## Step 1

## Research: Organizational and Political Awareness

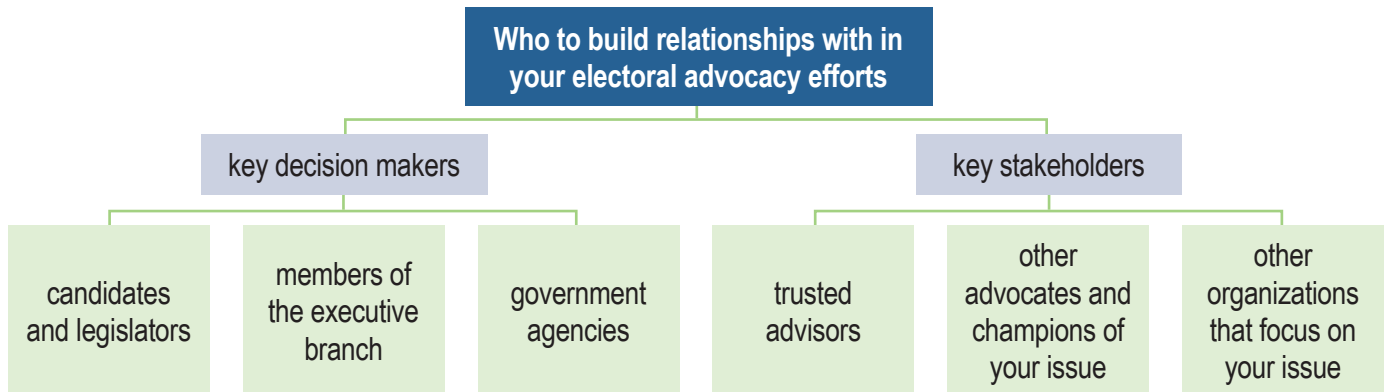
Question	Answer
What elected offices are up for election? (i.e., state school board, local school board, governor, mayor, etc.)	<hr/> <hr/>
Are there ballot issues for this election cycle that your strategy should consider? (i.e., local school levy, library levy, HHS, etc.)	<hr/> <hr/>
What organizations/agencies currently champion your issue?	<hr/> <hr/>
Which organizations championing your issue are active in electoral activities?	<hr/> <hr/>
What are other issues that are at the forefront of the political agenda, and how does your issue relate to those?	<hr/> <hr/>
Who are the champions of policy development related to your issue? (i.e., elected officials, community leaders, candidates)	<hr/> <hr/>
What candidate or other organizations are generally opposed to policy development related to your issue?	<hr/> <hr/>
Who are your main stakeholders? Do you expect them to participate in your electoral activities?	<hr/> <hr/>
Does your organization have any existing relationships with champions and those generally opposed?	<hr/> <hr/>
To what extent is your organization a trusted advisor to elected officials and candidates already?	<hr/> <hr/>
Who are the trusted advisors of those who champion your issue?	<hr/> <hr/>
Who are the trusted advisors of those who oppose your issue?	<hr/> <hr/>
Does anything in the current political/legislative landscape endanger or support your electoral activities?	<hr/> <hr/>



## Step 2

## Relationship Development and Increasing Access

The answers to the questions in Step 1 will help you identify the key individuals to focus your relationship development. The individuals identified in the Political Landscape Table are the key people with whom to build relationships. Use the tips and the worksheet below as a guide to your relationship building efforts. As an expert in your field you are in a position to influence the candidates, decision makers, and key stakeholders' policy priorities, position statements, and campaign promises.



### Tips to Building Good Relationships at the Local, State, and Federal Level:



#### **You must build relationships to be successful.**

Relationships, at the most fundamental level, provide access to candidates. If candidates know who you are and why your mission is important, they are more likely to listen to what you have to say, participate in your events, and support policies that advance your goals if/when they are elected into public office.



#### **Build good relationships with current administration, elected officials, and campaign staff and volunteers.**

Candidates and elected officials talk to their staff often, so your relationship with the staff defines your relationship with the candidates. If you treat a staff member poorly or fail to follow up as promised, your invitations and requests for meetings are more likely to go unanswered. It is important to build these relationships with candidates who are seeking office and elected officials and the administration that currently holds office.



#### **Build relationships across party lines.**

It is important to not rule out a specific group of people or political party as potential supporters. When you are building relationships, be sure to keep an open mind!



#### **Build good relationships with other trusted advisors to candidates.**

Candidates and elected officials have a set of trusted advisors on specific policy topics. Find out who your candidates' trusted advisors are on your issue, and reach out to them and build a relationship with them. Eventually you may want your organization to become a trusted advisor

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to candidates and elected officials. In the meantime, you can position your organization as a key influencer in the field by building relationships with the right people. Refer back to the table on understanding the political landscape to determine who to build relationships with.

➔ **Be knowledgeable about the political landscape, candidates and elected officials, and issues on the ballot.**

Ensure that everyone involved in your electoral activities knows the names and positions of the candidates for their and your organization's local, state, and federal representatives, as well as issues on the ballot.

➔ **Understand the policymaking process.**

Each local and state electoral body has its own process and timeline around policymaking and the budget. Each election also has important dates and processes related to voter registration and voting. Knowing the process and timeline will ensure that you spend your time efficiently and effectively, and never show up to the table after dinner is already over!

➔ **Make sure your staff, champions, and followers are all using the same message.**

Having a clear consistent message is important in advocacy efforts. When you develop your messaging, be sure to train your staff and anyone else who will be speaking on behalf of your organization on using appropriate messaging, responding to specific topics, and understanding how to respond to opposition.

➔ **Know to whom you are talking.**

Before you meet someone for the first time, research their personal history (bios on their website, social media, etc.), determine what issues are important to them, review their voting record, and identify opportunities to make a personal connection (i.e., do they also have young children? Are they a new grandparent?)

➔ **Take an interest in their interests.**

Ask about their priorities, what they think and why!

➔ **Position yourself as a subject matter expert.**

Do not assume the candidate has anything but an introductory level of knowledge about your issue—you are the expert. As an expert in your field you are in a position to influence the candidate's policy priorities, position statements, and campaign promises.

➔ **Don't waste time.**

Be prepared and succinct—they will not have much time. Practice saying your 3–5 key points and prepare a few questions for the candidate related to your issue. If you are distributing materials about your organization or issue, be sure the materials are succinct, contain consistent messaging, and are easy to navigate.

➔ **Know how to respond to opposition.**

Understand the other side of the story you are telling and be prepared to respond and neutralize. **Do not attack.**



### Step 3 Action Plan: Engage in Strategic Electoral Advocacy

Now that you know how much capacity your organization has to put towards electoral activity, have gained an in-depth understanding of the political landscape, and have started to build relationships, you are ready to create a strategic plan of action. Use the worksheet and guidance document below to build a comprehensive action plan that includes your goals, a target audiences, potential partners, messaging, strategies, tactics, and a timeline.

#### 10 Steps to Building an Effective Electoral Strategy

##### Step 1 Goals

Short-term: \_\_\_\_\_  
\_\_\_\_\_

Long-term: \_\_\_\_\_  
\_\_\_\_\_

##### Step 2 Who else is out there?

Who has a similar goal? \_\_\_\_\_  
\_\_\_\_\_

Who has an opposite goal? \_\_\_\_\_  
\_\_\_\_\_

Are you connected with them? \_\_\_\_\_

Do you want to be connected with them? \_\_\_\_\_

##### Step 3 Who are the key stakeholders and decision makers?

Stakeholders: \_\_\_\_\_  
\_\_\_\_\_

Decision makers: \_\_\_\_\_  
\_\_\_\_\_

##### Step 4 Who are the target audiences?

Primary: \_\_\_\_\_

Secondary: \_\_\_\_\_

##### Step 5 How will you reach your target audience?

\_\_\_\_\_  
\_\_\_\_\_

##### Step 6 What are you going to tell them (message)?

What is the key message(s)? \_\_\_\_\_  
\_\_\_\_\_

Is there a call to action? \_\_\_\_\_

Who from your organization should you train on messaging?  
\_\_\_\_\_

##### Step 7 How will you reach your goal (strategies)?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

##### Step 8 What are the specific actions you need take in order to reach your goal?

\_\_\_\_\_  
\_\_\_\_\_

##### Step 9 How can you leverage similar efforts to amplify your message?

\_\_\_\_\_  
\_\_\_\_\_

##### Step 10 What is your budget and timeline (relative to your capacity) for completing all of these things?

\_\_\_\_\_  
\_\_\_\_\_



## Step 3 Action Plan: Engage in Strategic Electoral Advocacy

### A Reference Guide to Help Fill Out the 10 Steps to Building an Effective Electoral Strategy

#### Step 1 Goal

Setting a goal is important to building an effective strategy. A goal should represent what your organization ultimately wants to accomplish and will guide every step in your electoral advocacy strategy.

#### Step 2 Who else is out there?

Understanding who else is moving toward either a similar or opposing goal will help you determine who your organization could be working with and who might seek to interfere with your advocacy efforts. This will help drive communication with key stakeholders, specifically what to say, when to say it, and why you're saying it (or not!)

#### Step 3 Who are the key stakeholders and decision makers?

Stakeholders are people who have an interest in your goal (for or against). These might be individuals, organizations, coalitions, or agencies. Decision makers are the people or organizations who make decisions that will impact an outcome related to your goal. Both of these groups are especially important to building positive relationships.

*NOTE: Your key stakeholders and decision makers will often be included in your target audience and vice versa.*

#### Step 4 Who are the target audiences?

A target audience is the group of people that your communication efforts are geared towards. If your goal is to raise public awareness of a particular issue, your primary target audience might be those who benefit from your issue and your secondary audience might be those who deliver services related to your issue. If your goal is to gain support in the legislature, your primary target audience might be elected officials and groups who influence them, and your secondary audience might be agencies who oversee policy implementation. Target audiences cannot be everyone; they must be tailored groups or groups that can help you meet your goal.

#### Step 5 How will you reach your target audience?

Determining the best way to reach your target audience is important. If your target audience is candidates and/or elected officials, the best way to reach them might be through the media, candidate forums, and one-on-one meetings. If your target audience is parents, the best way to reach them might be through community newspapers, conversations at places where parents interact or events they attend regularly, or Get Out the Vote drive events. Remember—engaging the media can also be a strategic way to reach your target audience.

#### Step 6 What are you going to tell them (message)?

Having a good message is the root of a strong electoral engagement strategy. Your message needs to explain the who, the what, the how, and the why in relation to your goal. If your goal is to gain support for increased funding to statewide professional development programs for early childhood teachers, your message might be: "High quality early learning starts with caring, well-trained teachers who can provide creative and imaginative learning environments. Increasing professional development for teachers will allow them to deliver the highest quality of care to 'Your State's children.'" It is important to train your volunteers, staff, and champions on your messages.

#### Step 7 How will you reach your goal (strategies)?

Now that you know what the best way to reach your target audience is, who your champions and opponents are, and who the key decision makers and stakeholders are, you can use this information to determine what the best way to achieve your goal is. Your strategies might be to host a get-out-the-vote campaign, host a candidate forum, organize a speaker's bureau, conduct monthly tours at centers, etc.

#### Step 8 What are the specific actions you need take in order reach your goal? (i.e., venue, invitations, question development, etc.)

After you decide how you are going to reach your goal, listing out what actions need to be taken will help your organization evaluate capacity and take the right steps to achieve the goal.

#### Step 9 How can you leverage similar efforts to amplify your message?

In Step 2 you identified different organizations that have a similar advocacy goal or are working toward a similar objective. Now that you know your strategies and tactics, taking another look to see if you can coordinate any efforts with others will help you align your goal with a broader set of champions.

#### Step 10 What is your budget and timeline (relative to your capacity) for completing all of these things?

Whether it is weekly, monthly, or quarterly, having a timeline will help you identify who is addressing each task and to better understand if you are making progress toward your goal. It will also help you determine what steps should be taken in what order to help you achieve your goal.



## Step 4

### Monitoring and Evaluation: Regularly Assess Successes and Challenges

Part of having a successful electoral advocacy strategy is knowing what success looks like. Before you begin, define what successfully reaching your goal means. After you build your strategy, go back and determine some indicators that will show success along the way. Use these benchmarks to make sure you are on your way to achieving goals. See the table below for example on what items to track.

Goal	Measurement
Raising public support for your issue	Funds raised by your organization or coalition Number of Facebook/Twitter followers Attendance at events Number of grassroots supporters Web/social media metrics
Gaining support for your issue within the legislature	Number of legislative supporters Number of supportive actions taken by legislators Number of times legislators have spoken publicly in support of your issue
Bringing your issue to the forefront of the political agenda during an election.	Number of mentions in the media Number of events with candidates in attendance Number of meetings with candidates/elected officials/staff members





Understanding what it is to be successful will allow you to constantly evaluate your progress, and if necessary, adjust the way you are working to ensure more success. When you have finished your timeline, take a look at it and your vision of success and set smaller benchmarks to achieve along the way! Use the example timeline below to guide the development of your own timeline that aligns with your strategies. Please note that the timeline below is an example and should be used as a guide to thinking about how to develop your own timeline, relative to the strategies you are trying to achieve.

**Step 4**    **Monitoring and Evaluation: Regularly Assess Successes and Challenges**

<p><b>Strategy</b> EXAMPLE: Engage candidates in a statewide election in public discussions about your issue</p>	<hr/> <hr/> <hr/>
<p><b>June</b> Identify and reach out to all candidates and introduce yourself, your organization, and the importance of your issue</p>	<hr/> <hr/> <hr/>
<p><b>July</b> Invite candidates to a tour or participate in an event focused on your issue</p>	<hr/> <hr/> <hr/>
<p><b>August</b> Circulate a candidate questionnaire and share responses with the media</p>	<hr/> <hr/> <hr/>
<p><b>September</b> Hold a candidate forum at a location that illustrates the impact of your issue in the state capitol</p>	<hr/> <hr/> <hr/>
<p><b>October</b> Engage 3–5 trusted advisors and stakeholders as champions and begin a three-week Get Out the Vote campaign leading up to the election</p>	<hr/> <hr/> <hr/>
<p><b>November</b> Election Day!</p>	<hr/> <hr/> <hr/>

## Important Definitions:



### **Goal:**

Think of the goal as the ultimate “what”. The goal is what you want to accomplish at the end of your advocacy efforts.



### **Strategy:**

Think about strategies in terms of the “how.” Strategies are how you plan to achieve your goal.



### **Tactics:**

Think about tactics in terms of the details. Tactics are the step-by-step actions you will take to fulfill your strategies and achieve your goal.



### **Trusted advisors:**

A trusted advisor is someone that has a good relationship with a key decision maker, candidate, or stakeholder. You can reach out to trusted advisors and ask them to champion your cause, which in turn can influence the key decision maker, candidate, or stakeholder. Eventually, through your advocacy efforts, your organization should aim to become a trusted advisor to electoral candidates.



### **Champion:**

A person(s) who actively supports your cause.



### **Opponent:**

A person(s) who actively disputes your cause.

