



# ADVOCACY TOOLKIT



# Contents

What is Advocacy?	3
Crafting Your Message	10
Sharing Your Story	14
Meeting With Decisionmakers	18
Frequently Asked Questions	23
Templates and Resources	24
Sources	36

# What is Advocacy?

Advocacy is the act of supporting, defending, or arguing in favor of a cause, policy, or organization. It involves various activities aimed at influencing decision making within political, economic, and social systems and institutions. Advocacy can take many forms, including:

- 1.** Raising awareness and garnering public support through media, community events, and other forms of outreach.
- 2.** Directly engaging with policymakers and legislators to persuade them to enact or change laws and regulations. This is known as lobbying which will be more clearly defined in a later section.
- 3.** Providing information, data, and analysis to support a cause, often through reports, studies, and educational initiatives.
- 4.** Mobilizing individuals and communities to take collective action.

Advocacy can be undertaken by individuals, organizations, or groups, and it often aims to bring about social change, promote human rights, and address issues of justice and equality.

Creating personal connections and sharing stories is one of the most effective ways to engage policymakers in your work, as well as the needs of the community.

Creating an advocacy plan and legislative agenda creates an opportunity for champions and advocates to come together with a unified message and educate local, state, and federal decisionmakers. Policymakers are more likely to take a cause seriously when a larger group of constituents requests meetings and shares consistent messaging. It is important to remember that these officials are elected to represent their communities and are tasked with balancing the benefits and consequences of their legislation on their communities.

Creating an effective advocacy plan will look different for each organization. Successful advocacy efforts require planning, training, and coordination to ensure key stakeholders are prepared to communicate effectively with desired decisionmakers. Successful advocacy plans will also include a variety of advocacy activities, creating a balance between grassroots, grassroots, and direct advocacy. This toolkit is designed to help you understand the crucial role advocacy efforts play in our community, different ways to engage in advocacy, and how to begin the planning process.

# Grassroots Advocacy

Grassroots advocacy is a form of advocacy where people come together to advocate for a cause or specific organization. It involves mobilizing a community or group of individuals at the local level to engage in activities such as writing letters, making phone calls, organizing events, or meeting with decisionmakers. The goal of grassroots advocacy is to create a community-led approach to effect change, often by demonstrating broad support for an issue to influence decisionmakers at the local, state, and federal levels. This type of advocacy utilizes the powerful voices of advocates, shapes the narrative, and lays the foundation for policy change. Grassroots advocacy relies on the collective power and voices of individuals rather than relying solely on professional lobbyists or top-down directives.

# Grasstops Advocacy

Grasstops advocacy refers to a strategy that involves leveraging the influence of community leaders, business leaders, or organizations who have established relationships with policymakers. These influencers, or “grasstops,” lend their position, reputation, and connections to advocate for an issue, often amplifying the efforts of grassroots campaigns. The goal of grasstops advocacy is to create a more direct and impactful pathway to decisionmakers by engaging individuals who already have access to these policymakers. This approach combines the broad support of grassroots movements with the targeted influence of key community leaders to achieve desired policy outcomes.

# Lobbying

Engage trusted messengers and practitioners

While the legal definition of lobbying varies by state, certain key themes are common across most states. Generally, lobbying is defined as an attempt to influence government action through written or oral communication. It is crucial to understand your state's specific laws regarding lobbying and to know who is considered a lobbyist. The National Conference of State Legislatures offers a resource that outlines the legal definitions of lobbying and lobbyists for reference.

Lobbying activities generally fall into two subcategories: grassroots lobbying and direct lobbying. Nonprofits organized under IRS chapter 501(c) tax status also have different rules when it comes to lobbying. Charitable nonprofits filed as 501(c)3 are permitted to lobby with certain limitations.

Direct lobbying is the influencing of or direct engagement with policymakers who have the authority to propose or take action on specific legislation, or their staff, in support or opposition to the proposal. This can occur even before a bill is written, when discussing a concept and seeking support, sponsorship, opposition, or abstention. The three components of direct lobbying are:

1. A legislator or their staff,
  2. Direct communication via phone call, letter, face-to-face conversation, email, or text,
  3. A specific proposal with a clear request for action.
- If only two of these components are present, it is not considered direct lobbying.

## Grassroots lobbying consists of four components:

1. Engagement of a legislator or staff, facilitated by asking someone else to contact them,
2. A specific action that the legislator can vote on or implement (including executive orders),
3. A clear point of view in support or opposition of the proposal,
4. Providing the grassroots advocate with the means to contact the legislator or elected official (e.g., phone number, address, social media profile, or email address).

**To qualify as grassroots lobbying, all four components must be present. If there is no direct request to “Vote For or Against,” it is considered education, not lobbying.**

The definition of a lobbyist can vary by jurisdiction, but generally, a lobbyist is someone who is employed or contracted to influence legislation, regulations, or other government decisions on behalf of a specific interest, organization, or group. This can involve activities such as meeting with legislators, communicating with government officials, and organizing advocacy efforts to support or oppose specific legislative or regulatory actions.

A lobbyist can support an organization with both direct and grassroots lobbying, increasing organizational capacity while building an advocacy network. Before hiring a lobbyist, ensure you understand the state's definition of a lobbyist and any additional rules for your organization. A professional lobbyist will be familiar with state reporting requirements and will help ensure compliance with state law. The IRS also imposes strict rules on how much of non-profit organizations' budget can be allocated to lobbying activities. For more information on these regulations, you can visit the IRS website.

# Other Common Terms and Definitions

When you are considering beginning or expanding the advocacy efforts of your organization, it is important to have a clear understanding of the language that is used to describe this work. Below are a few definitions of key terms used when talking about advocacy. For a more comprehensive list, visit the Alliance for Justice “Advocacy Terminology, A Through Z”.

**1.** Decisionmaker is an individual responsible for making choices or decisions within an organization, government, or other entity. This person has the authority to determine policies, actions, and strategies, often impacting the direction and outcomes of the organization or entity they represent. Decision-makers can include executives, managers, policymakers, board members, and other leaders who are empowered to make significant decisions that affect the broader community.

**2.** Coalition Building is the process of forming alliances among groups, organizations, and individuals to achieve a common goal. This collaborative effort involves bringing together diverse voices that share a common interest or objective, often to increase their collective influence, resources, and impact.

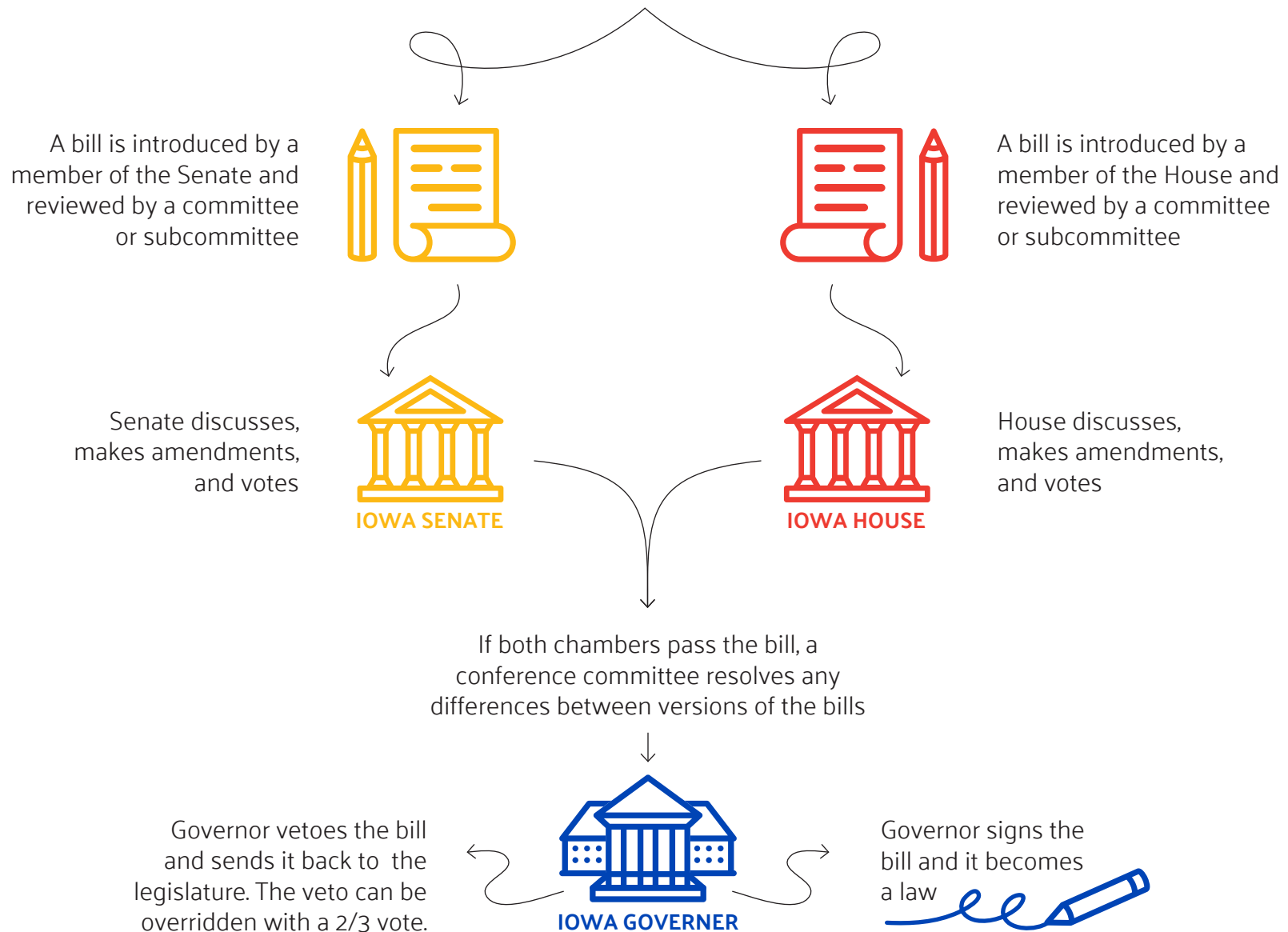
**3.** Day on the Hill/Lobby Day: A “Day on the Hill” event is an organized advocacy activity where individuals, advocates, and organizations, visit with policymakers at the seat of government or their offices. The purpose of these visits is to directly engage with policymakers to discuss specific issues, advocate for certain policies, or present concerns and opinions.

**4.** Champions are often influential people who use their position, expertise, or personal commitment to raise awareness, gain support, and drive action for the cause they believe in. Their advocacy can occur in various settings, including legislative bodies, communities, organizations, or public forums. Key characteristics and roles of a champion in advocacy include leadership, visibility, expertise, persistence, and bridge-building.

**5.** Allies: a person, group, or organization that supports and works alongside another individual or group to achieve a common goal or promote a particular cause. Allies in advocacy often share values, interests, or objectives with the primary advocates but may not directly belong to the affected community or be directly impacted by the issue at hand.

**6.** Constituent: an individual, group, or organization represented or served by an elected official, typically at the local, state, or national level. Constituents are the people whom policymakers are responsible for representing and serving through their positions in government

# How a Bill Becomes a Law



# Why is Advocacy Important

If your organization is just starting to explore the idea of incorporating advocacy into your work in a purposeful way, you may question “why us, why advocacy, what does that even mean?”. Advocacy can bring change and meaningful impact to not only your organization and the individuals you directly serve, but to the entire community.

Your organization’s advocacy at the local, state, or federal level can create meaningful and lasting change for people across your community, state, and even the nation. By engaging in local, state, or federal advocacy, you can move from helping one person at a time to joining a powerful network of advocates working together to raise awareness, educate, and create policies that improve well-being and safety on a larger scale.

Achieving systematic change requires us to champion our communities at every level, from local to legislative. As more community members and organizations get involved in advocacy, decisionmakers and community leaders will recognize the expertise and concerns, leading to new community norms and public policies that protect and promote health and safety for all. All types and levels of advocacy make a difference as we work together to create a healthier and safer future for everyone.

## Consider the following benefits as you are exploring your organization’s role in advocacy.

1. Makes Use of Expertise
2. Builds Long-Term Success
3. Increases Energy and Passion Within the Community
4. Influences Policies that Directly Affect Your Organization and Your Ability to Serve
5. Shows Strength in Numbers
6. Creates Positive Systems-Level Change
7. Translates Experience
8. Fosters a Renewal in Commitment
9. Builds Connection and Relationships with Allies
10. Increases Knowledge of Essential Community Issues



# How to Incorporate Advocacy into Your Work

There are countless ways to be an effective advocate in less than an hour per month. Whether you take 5 minutes to email a decisionmaker, 30 minutes to write a letter to the editor, an hour to speak at a community meeting, or a day to participate in a community event, your advocacy makes a difference. Sometimes taking the first step can be daunting and it can be hard to know where to start. Here are some ways to incorporate advocacy into your organization.

## Small Time Commitment

- Write a letter to a decisionmaker
- Write an op-ed or letter to the editor
- Invite media to your event
- Learn who your policymakers are (personal and for your organization)
- Talk with colleagues about issues you are seeing and advocating for

## Medium Time Commitment

- Incorporate advocacy training into new-hire orientation
- Hold an annual advocacy refresh for all staff
- Join a coalition of organizations that are advocating for similar issues
- Set up an informational table within your organization that talks about the advocacy priorities
- Provide testimony or share your story
- Serve on a board that furthers your organizations advocacy goals
- Inform the community and those you serve about your advocacy goals and ask for support

## Larger Time Commitment

- Host a decisionmaker at your organization for an event or tour
- Host a day on the hill event
- Host or co-host a community wide event
- Form a organizational advocacy committee

# Crafting Your Message

The first step after making the decision to create an advocacy plan is to brainstorm, narrow, and then refine and polish your priorities. Your pitch and ask should represent what your organization is hoping to see change at the local, state, and/or national level. It is important to engage a variety of stakeholders in the process of brainstorming, narrowing, and refining your priorities for the year. If your organization reports to a board, make sure you understand the board's expectation when it comes to involvement in development and then the approval process. Once you understand who needs to be involved in the process, it is time to craft your pitch and your ask. Begin by writing down all the positive ways your organization has impacted communities, the economy, and the state as a whole. Pull together existing resources such as one-pagers and participant testimonials. Once you have finished brainstorming and gathering your resources, it is time to narrow your message.

# What is the Ask

When creating the ask it is important to be realistic, think broadly, and think incrementally. If your organization identifies a large issue as a priority, what are smaller pieces that can be tackled incrementally to begin chipping away at the larger issue. It is also important to identify other organizations that may also be working on the same or similar priorities. If there are other organizations that are also interested in tackling the larger problem, how can you be allies in the work and deliver a cohesive message to decisionmakers?

## 1. What is your advocacy goal(s)?

What are your objectives for this year? How does your pitch align with your overall advocacy plan? Ensure that your talking points clearly support your specific goals.

## 2. Who is the intended audience?

Who are you advocating to, and what messages will resonate most deeply with them? For instance, a legislator who is a retired police officer will likely be moved by programs that reduce crime, while a school administrator will be inspired by youth initiatives that enhance academic success. Understand why someone might oppose your cause and consider their perspective to tailor your message effectively.

## 3. Where does the strength of your organization lie?

Identify the areas where your organization excels and highlight these successes in your talking points. Incorporate a personal story or a unique community partnership that has significantly contributed to a program's success.

## 4. What is your work telling you?

Having compelling data and success stories from your organization is essential to making your talking points more persuasive. Reflect on the benefits you brainstormed and identify those with the most impactful data or stories to support them. Consider how these stories connect different parts of the community, demonstrating the broad impact of your work.

## 5. What is the messaging for the coalition?

What are the messages that coalition members and partner organizations can all get behind? Create shared messaging with other organizations that are advocating for the same issues.

# What are the Talking Points

Advocacy talking points are concise, persuasive statements designed to convey the main arguments and key messages of an advocacy campaign clearly. These points are crucial for ensuring that advocates communicate the organization's position effectively to various audiences, such as policymakers, the media, and the public. Key elements of effective advocacy talking points include clear and concise messages, evidence and data to support the argument, emotional appeals to humanize the issue, and rebuttals to common counterarguments.

The importance of advocacy talking points lies in their ability to maintain message consistency, ensuring that everyone involved in the advocacy effort communicates the same message across all channels. They help distill complex issues into understandable and compelling arguments, making it easier to educate and persuade the audience. Additionally, talking points save time by providing ready-made responses and statements, allowing advocates to address questions and concerns quickly and effectively. By presenting well-crafted, evidence-based arguments that are both logical and emotionally resonant, talking points increase the likelihood of convincing others.

# The Elevator Speech

Preparing for your champions and advocates ensures they are ready to seize any opportunity to talk about the organization, maintaining consistent messaging. After creating your advocacy plan and defining your specific ask, develop your elevator speech. This is a brief, memorable speech for unexpected moments with a decisionmaker. It should start with an introduction of who the advocate is, where they are from, and a thank you for their time. Following the introduction, the advocate should succinctly present the policy issue or ask, highlighting how the organization's work personally impacts them. They should explain why the decisionmaker's support is crucial. Keep the speech short, sincere, simple, and fact-based. If appropriate, these asks can sometimes be made directly to an office or department with established relationships.

# Advocacy Collateral

Effective handouts in advocacy should be well-designed and thoughtfully crafted to engage the audience, convey key messages clearly, and prompt action. Some examples of effective advocacy materials are informational flyers, event flyers, testimonial handouts, informational brochures, and infographic flyers. The type or types of handouts you decide to employ will depend on the needs of each organization. It is important to think about what information you are wanting to convey and what type of handout will do that. When thinking about creating these assets, here are some characteristics of effective materials:

**1. Clear and Concise Messaging:** Use simple language and short sentences to convey the message quickly and effectively. Avoid jargon, acronyms, and complex terminology.

**2. Strong Visual Appeal:** Incorporate eye-catching graphics, images, and colors to draw attention. Use visual hierarchy to emphasize key points.

**3. Compelling Headlines:** Start with a strong, attention-grabbing headline that clearly states the main message.

**4. Logical Layout:** Organize information logically, with headings, subheadings, and key points to make it easy to scan and read.

**5. Contact Information:** Provide contact details or links for more information, including websites, social media handles, or QR codes.

**6. Credibility:** Use reliable sources and data to back up claims, and clearly cite these sources to build trust and credibility.

**7. Accessibility:** Ensure that the design is accessible to a diverse audience, including those with visual impairments. Use readable fonts, high-contrast colors, and consider providing materials in multiple languages if necessary.

**By incorporating these elements, advocacy flyers and handouts can effectively engage the audience, communicate key messages, and inspire action. These assets can also be utilized for social media campaigns and to meet other marketing needs.**



# Sharing Your Story

Personal and community-level stories can be powerful tools for advocacy. By presenting compelling narratives, nonprofits can effectively highlight the needs and challenges of their communities, persuading policymakers to support policies and legislation that address these issues. Nonprofits can provide a human face to abstract policies by sharing stories about the people they serve. This helps policymakers understand the real-world implications of their decisions, making it more likely that they will consider the human impact when crafting or voting on legislation or other policies.

Sharing these stories also increases awareness around the issue. Policymakers may not be fully aware of all the issues and needs within their constituencies. Nonprofits can educate officials by providing detailed, on-the-ground insights, helping them make informed decisions that better serve their communities. In the process of sharing, you are building personal connections and trust between nonprofits and policymakers. When officials see the tangible results of a nonprofit's work and hear firsthand accounts from those affected, they are more likely to view the organization as a credible and trustworthy partner.

By sharing their stories and the challenges they face, nonprofits can encourage policymakers to collaborate with them on initiatives and solutions. This partnership approach can lead to more effective and sustainable outcomes for the communities served. In some cases, when policymakers are moved by the stories and information provided by nonprofits, they may become advocates themselves, championing the cause within their networks and among their constituents, which can lead to broader support and greater impact.

# Where to Tell Your Story

Engaging the media is a critical component of any advocacy effort, offering several powerful ways to amplify your message and reach a broader audience. Writing press releases can help generate coverage in local and national news outlets, ensuring your issue is spotlighted in public discourse. Op-eds and letters to the editor allow you to articulate your position directly, influencing public opinion and decisionmakers. Hosting press conferences or media events can create newsworthy moments that attract journalists and generate real-time coverage. Social media is another essential tool, enabling you to connect with the public, share updates, and engage in conversations about your cause. By leveraging these different media channels, you can effectively raise awareness, mobilize supporters, and apply pressure on decisionmakers to take action.

## Opposite The Editorial Page

An op-ed, short for “opposite the editorial page,” is a written piece typically published in newspapers or online news outlets. It represents the opinions of a guest writer, often someone who is not affiliated with the publication, such as a community leader, expert, or advocate. Unlike regular news articles, which are meant to be objective, op-eds are opinion pieces that allow the writer to express their perspective on a particular issue, argue a position, or advocate for a specific course of action.

## Press Release

A press release is an official statement issued to the media by an organization, company, or individual to announce news, events, or other significant developments. It is a key tool used in public relations to communicate with journalists and the public. The goal of a press release is to provide enough information to generate interest and coverage from news outlets, leading to media stories that help spread the news to a broader audience.

## Earned Media

Earned media refers to the publicity and exposure that a nonprofit or organization gains through unpaid channels, rather than through paid advertising. This type of media coverage is “earned” through activities like public relations efforts, media outreach, and creating compelling content that attracts the attention of journalists, bloggers, and influencers. Essentially, it’s the coverage or mentions of your organization in news outlets, social media, blogs, or other platforms that you don’t pay for.

## Media Alert

A media alert is a brief announcement to inform the media about an upcoming event, press conference, or other newsworthy activity. Media alerts are typically concise, providing the essential details without extensive background information.

**Examples and templates of these can be found in the Templates and Resources section.**

# Building and Maintaining Your Base

To effectively influence policy decisions, advocates need to build a broad coalition of diverse and trusted spokespeople. While your voice is crucial in discussing the importance of your cause, having support from other respected figures such as business leaders, law enforcement, and faith leaders can strengthen your case.

Depending on your organization, you may choose to form a formal coalition or create a more informal network of allies who can support your efforts when needed. When you begin to build your base of advocates and champions it is crucial to keep in mind who your target audience is going to be and to identify advocates that would help you reach that audience.

To start building your base of advocates or informal network of allies, invite potential partners to join you in advancing your cause. Share your vision for the future you aspire to create, one where your mission is fulfilled and your goals are achieved. For example, you might aim for a community where everyone has access to essential services or where specific issues are effectively addressed. Ask potential allies to pledge their support, join your coalition of diverse partners, or participate in advocacy activities.

As you work to establish your base and grow it over multiple years, it is important to continuously activate these advocates and champions to keep

them engaged in your work. This will look different for each organization but can be volunteer opportunities, organizational events, training opportunities, and recognition awards.

A key best practice is to organize annual advocacy training sessions for all your advocates. Well-prepared advocates are more likely to have successful conversations with decisionmakers. Important training topics include:

- Government 101 and the legislative process
- Communication etiquette and how to request meetings
- Organization-specific information, such as whether you have a lobbyist, current funding sources, and the overarching goals of your advocacy work
- Background information on key decisionmakers
- Media training on talking points and how to engage with the media

**Consider recording the training to make it accessible to those who cannot attend as it can be difficult to find times that work for all advocates.**



# Tips and Tricks

Your core message is the foundation of your nonprofit's communications and outreach. It encapsulates why your cause matters and serves as the guiding thread that weaves through all your stories and media efforts. A strong message ensures consistency in how your issue is discussed and makes it resonate across diverse audiences. In essence, your message answers the critical "because."

**For example: "Medicaid is an indispensable health program because it provides health insurance to more than 26 million low-income children who otherwise wouldn't have access to essential health care."**

This message underscores the vital importance of Medicaid funding. Personal stories and experiences can then reinforce this core message, making it even more compelling. Consider these essential elements when crafting your nonprofit's message:

## **CLEAR:**

Your message must be easily understood and relatable, using language that anyone can grasp and repeat. Speak as if you were explaining it to someone new to your cause. Just as you simplify complex ideas for diverse audiences, your message should break down the issue into terms that resonate broadly.

## **CONCISE:**

Your message must be sharp and focused. Remember that attention spans are short, and people prefer information in bite-sized pieces. Stick to your main point and a few key supporting facts—every word should serve a purpose.

## **MEMORABLE:**

Your message should stick in the minds of those who hear it. Make it captivating and easy to recall. Test it out with a friend or colleague, or collaborate with your team to refine it until it's just right.

## **PERSUASIVE:**

Your message must inspire action. Use compelling stories and vivid examples to help others see the impact of your work and why it deserves their support. Make it something they can believe in and advocate for.

## **REPEAT, REPEAT, REPEAT:**

Consistency is key. Every piece of communication from your nonprofit should echo your core message. Studies show that it takes multiple exposures for a message to truly resonate, so keep reinforcing your message across all channels.

# Meeting With Decisionmakers

## Who Are the Decisionmakers

Knowing your policymakers are is crucial for effective advocacy. Policymakers represent your interests at various levels of government, from local city councils to the state legislature and Congress. Understanding who these individuals are allows you to communicate your concerns, influence policy decisions, and hold them accountable for their actions. In Iowa, identifying your policymakers is straightforward. You can use online tools like the “Find Your Legislator” feature on the Iowa Legislature’s website or visit your county auditor’s office for assistance. By entering your address, you can quickly learn who represents you in the Iowa State Senate, House of Representatives, and at the federal level.

<https://www.legis.iowa.gov/legislators/find>

- Find your state level policymakers by address, school district, city, or county

When advocating for a specific issue, it’s important to focus on legislators who have direct influence over that issue area. These may include members of relevant committees, such as those dealing with health, education, or appropriations, depending on your issue. Additionally, ensure you are communicating with decisionmakers who have shown prior support. Leadership positions, like committee chairs or party leaders, also hold significant sway in outcomes. By strategically identifying and reaching out to these key people, you can maximize your impact and increase the likelihood of advancing your advocacy goals.

<https://www.legis.iowa.gov/committees>

- List of who is on each committee at the state level

# Communicating with Decisionmakers

It is important to remember that policymakers and other decisionmakers are also community members and rely on the expertise of organizations and their constituents to inform the decisions they are making. It is also important to keep in mind that many of these people have very busy schedules. Below are some tips to help make your communication with decisionmakers is impactful.

## Verbal Communication

A face-to-face meeting with a decisionmaker and their team is a powerful way to advance your nonprofit's mission. This personal interaction not only helps you advocate effectively but also establishes you as a trusted ally and resource. To maximize the impact of your meeting, follow these steps.

**STRATEGIZE YOUR MEETING:** Decide whether to go solo or bring a team. If you're attending as a group, designate a leader and assign clear roles. This ensures a smooth conversation, covers all critical points, and avoids repetitive or awkward moments. Plan your timing carefully to make every minute count.

**KNOW YOUR AUDIENCE:** Invest time in researching the decisionmaker. Understand their background, their stance on your cause, and any relevant experiences. Leverage your nonprofit's resources to gain deeper insights into what drives their decisions.

**BE CLEAR AND CONCISE:** State your purpose confidently—explain why you're there, why it matters, and what specific action you're seeking. Utilize the talking points you crafted to guide your conversation. This will help you be clear in your delivery as well as consistent when meeting with multiple decisionmakers.

**MEET ON HOME GROUND:** Whenever possible, arrange the meeting in your community. Local settings create a more

relaxed atmosphere and give you the “home turf” advantage. Invite decisionmakers to visit your organization, where they can witness the impact of your work firsthand.

**FIND COMMON GROUND:** Begin the meeting by connecting on a personal level. Whether it's a shared interest or a past interaction, use it to build rapport quickly. A brief, genuine connection can set a positive tone for the conversation.

**ENGAGE AND LISTEN:** Foster an open dialogue. By inviting their comments and questions, you create an opportunity to educate them on your nonprofit's mission and the issue at hand. Listening is just as important as speaking.

**LEAVE SOMETHING BEHIND:** Provide a concise, impactful one-pager summarizing your key points. Make sure it includes your contact information so they can reach out easily. You can find tips on how to create impactful messaging in “Crafting Your Message” section of this toolkit.

**FOLLOW UP WITH IMPACT:** Send a handwritten thank-you note to reinforce your appreciation and commitment. If you promised additional information, deliver it promptly and let them know how to stay connected moving forward.

Making a phone call to a decisionmaker is both quick and easy, allowing you to voice your opinion at any time. Because of this,

it's essential that your call is impactful. You don't need to be an expert to be persuasive; simply sharing your personal perspective can make a difference. Follow these steps to ensure your call to a decisionmaker is effective.

**PLAN:** Before making the call, plan out what you want to say. Keep in mind that your call will be brief, so your message should be clear and concise. It may help to jot down some notes to ensure your call goes smoothly.

**MESSAGE:** Share your story—why you care about the issue you are advocating for and why their support matters. Focus on the key point and how your story highlights your perspective.  
**CALL:** Make the call. Regardless of who the decisionmaker is, make sure to mention that you are a resident of their legislative district and/or community. You might also consider calling when they are at home in the district, where they may have more time and fewer distractions to discuss your concerns.

**STAFF OR MESSAGE:** If you're calling an elected official, community leader, or volunteer board member, you may not reach them directly. Be ready to speak with their staff or leave a message instead.

**PERSUADE:** Get straight to the point. Clearly state the reason for your call, ask for the decisionmaker's current position on the issue, and try to persuade them. Use the talking points you have created to guide the conversation, ensuring consistent messaging.

**THANK:** If the decisionmaker agrees to support your issue, express your gratitude. Regardless of their stance, thank them for their time and let them know you'll stay in touch.

**RECRUIT:** Encourage a like-minded colleague, parent, family member, or friend to make a call as well. With phone calls, numbers matter. Decisionmakers take note when they see that many people are concerned about an issue.

**CALL BACK:** Follow up with additional calls. In advocacy, the number of calls is crucial, as it signals to the decisionmaker that the issue is important to many.

**FOLLOW-UP:** Some decisionmakers may request additional information about the issue. Be sure to provide them with any available information and resources and offer a follow-up call after they have time to review the material.

# Written Communication

Writing a letter or email to a decisionmaker allows you to provide more detailed information than you could in a phone call. However, the drawback is that you're not engaging directly with the decisionmaker, which means they won't have the chance to ask questions, express their position, or respond to your request. To increase interaction, you might consider following up your letter with a phone call or an in-person visit. Follow these basic steps for writing your letter.

**STATE YOUR CONNECTION TO THE COMMUNITY:** Mention that you are a constituent or that you live in their community. This is important because leaders are particularly interested in the opinions of those they represent.

**PERSONALIZE YOUR LETTER:** Research consistently shows that handwritten letters have the most impact on decisionmakers. If you're using a form letter as a base, rewrite it in your own words and consider using personal stationery. This also gives you an opportunity to include your own story, which can have a significant impact.

**USE THE NEWS:** Look for local news stories that can help illustrate your point. Use a relevant local news item as a springboard, or include a clipping that supports your request.

**KEEP IT LOCAL:** Make a strong connection between your issue and what the decisionmaker sees in the local community. Connect broader trends with the real impact they have in your area.

**ACKNOWLEDGE THEIR SUPPORT:** If the decisionmaker has supported your issues in the past, acknowledge this, but don't assume their continued support.

**KEEP IT BRIEF:** Your letter should be concise—no more than 1 to 1.5 pages. Any supporting information should also be brief.

**ENCOURAGE OTHERS TO WRITE:** Encourage like-minded colleagues, community members, friends, or family to write letters as well. Numbers matter, and decisionmakers take note when many people in their communities express concern about an issue.

**FOLLOW UP:** In your letter, request a response. To better understand the decisionmaker's position, follow up with a phone call or a visit.

**COMMUNICATE MORE THAN ONCE:** As you track the issue, continue to communicate with the decisionmaker through additional letters, phone calls, emails, or visits, asking for specific support or action as appropriate.

# Planning a Visit

There are several ways to plan a visit with a decisionmaker, each offering unique opportunities to build relationships and advocate for your cause. You can invite them to visit your nonprofit program, where they can see firsthand the impact of your work and connect with the people you serve. Alternatively, organizing a “Day on the Hill” event allows you to bring your message directly to the state or federal capitol, showcasing your organization alongside other advocates in a powerful, united front. Meeting with them at their office is another effective approach, providing a professional setting to discuss your issues in a focused, one-on-one environment. Regardless of the setting, meeting with decision-makers in person allows for direct communication, builds rapport, and creates a lasting impression that is often more compelling than written or virtual communications alone.

If you would like to plan to host a decisionmaker at your nonprofit or a program you support, a planning document can be found in the Templates and Resources section of this toolkit.

# Keeping in Touch

Maintaining regular communication with decisionmakers is key for a successful advocacy plan. Building and nurturing these relationships ensures that your cause remains on their radar, even when it’s not in the spotlight. Keeping in touch allows you to provide updates on your work, share success stories, and reinforce the impact of their support. It also positions your organization as a reliable resource for information and insight on relevant issues. To stay connected, consider sending periodic newsletters, inviting them to events or site visits, and following up after meetings with thank-you notes or additional information. Personal touches, like congratulating them on recent accomplishments or acknowledging their efforts, can go a long way in strengthening the relationship. Consistent, thoughtful engagement helps keep your organization and its mission front of mind for decisionmakers, making them more likely to support your cause when the time comes.

# Frequently Asked Questions

## What does advocacy look like?

Advocacy begins with recognizing a problem that affects your community. The next step is to raise awareness and seek solutions by engaging with decisionmakers and others who can help. This might involve writing to local media, meeting with influential leaders, or mobilizing support from colleagues, community members, or those directly impacted by the issue. Advocacy can take many forms based on your interests and resources. Regardless of your approach or level of involvement, your efforts contribute to a broader movement for positive change, connecting with others working towards similar goals.

## Can advocacy actually affect decisionmakers and create change?

Absolutely! Decisionmakers, whether policymakers or community leaders, are highly attuned to the opinions of their constituents. They rely on community feedback to stay in office and make informed decisions. The more concerned community members and organizations share their stories, the more these issues will be recognized as top priorities. Similarly, while community leaders may not always be elected, a strong, engaged community can motivate them to support and champion important causes. Effective advocacy can encourage these leaders to get involved and back your initiatives.

## Does being an advocate mean I have to go to the capitol? I don't live anywhere near the capitol.

Not at all. Advocacy doesn't require traveling to state or federal capitals. You can make a significant impact locally with these strategies:

### COMMUNITY ADVOCACY:

Engage with local leaders and advocates to drive change within your community. Collaborate on awareness campaigns, educational efforts, and resources to address key issues.

### ADVOCACY FROM HOME OR WORK:

Even if working on broader issues, you can contribute from your home or professional setting. Consider:

- Inviting Decisionmakers: Meet with local officials when they are in your area to establish yourself as a valuable resource.
- Engaging Others: Discuss important issues with community members or colleagues to broaden support.
- Making Calls: Use a few minutes to call public officials about issues that matter to you.

These actions demonstrate that effective advocacy can be local and impactful, connecting with broader efforts without needing to travel.

## Do I need to be an expert in order to advocate?

No, you don't need to be an expert in every detail of the issue you're advocating for. Your strength lies in being knowledgeable about your own story—how the issue affects you, your work, or your community, and how potential solutions can drive meaningful change. Your nonprofit can provide resources and support to help you understand the technical aspects, whether you're writing a letter or preparing to speak to decisionmakers.

# Templates and Resources

## Guide to Creating Talking Points

### 1. Identify the Core Message

- What is the primary issue or goal you want to address?
- What is the key takeaway you want your audience to remember?

**Core Message:**

---

---

---

---

### 2. Define the Audience

- Who is your target audience? (e.g., decisionmakers, community leaders, the general public)
- What does this audience care about or prioritize?

**Audience:**

---

---

---

---

### 3. Establish Relevance

- How does the issue relate to the audience's interests, values, or responsibilities?
- Why should they care about this issue?

**Relevance to Audience:**

---

---

---

---

### 4. Identify Supporting Points

- List 2-3 key points that support your core message. These should include data, facts, or real-life examples.
- How do these points reinforce your message?

**Supporting Point 1:**

---

---

**Supporting Point 2:**

---

---

**Supporting Point 3 (Optional):**

---

---



## 5. Personalize the Message

- Can you include a personal story or anecdote that illustrates the impact of the issue?
- How can you make the message relatable to your audience?

### Personal Story/Anecdote:

---

---

---

---

---

## 6. Review for Clarity and Conciseness

- Is the message clear and easy to understand?
- Can any points be simplified or removed to make the message stronger?

### Clarity Check:

---

---

---

---

---

## 7. Practice and Refine

- Practice delivering your talking points to ensure they flow naturally.
- Adjust based on feedback or self-assessment.

### Refinements:

---

---

---

---

---

**After completing  
this worksheet  
and identifying  
your talking  
points, use those  
talking points  
to create your  
elevator speech.**

# Checklist for Preparing For a Site Visit

## 1. Pre-Visit Preparation

### • Identify Goals:

Clarify the purpose of the visit (e.g., raising awareness, securing funding, showcasing impact) and determine key messages to convey during the visit.

### • Research the Decisionmaker:

Review their background, interests, and previous support for related issues. Understand their policy priorities and any past engagement with your organization.

### • Select the Date and Time:

Coordinate a date and time that aligns with the program's activities and the decisionmaker's schedule. Ensure key staff and participants are available during the visit.

### • Invite Key Stakeholders:

Identify and invite board members, donors, community leaders, and program participants to attend. Engage these stakeholders by providing them a role during the visit.

### • Prepare the Agenda:

Draft a detailed agenda, including a welcome, program overview, site tour, and time for questions. Assign roles to staff members (e.g., who will lead the tour, who will present on specific topics).

### • Create a Leave-Behind Packet:

Prepare informational materials such as brochures, fact sheets, and success stories. Include your contact information and any relevant follow-up actions.

## 2. Site Preparation

### • Ensure the Site is Ready:

Clean and organize the site to make a strong impression. Display any relevant signage, banners, or materials that showcase your mission and impact.

### • Brief Staff and Volunteers:

Inform everyone involved about the visit, the decisionmaker's background, and their role in the visit. Provide talking points and a brief on the organization's key messages.

### • Prepare Program Participants:

If participants will interact with the decisionmaker, ensure they are comfortable and aware of what to expect. Consider practicing any speeches or presentations they may give.

### • Arrange Logistics:

Confirm parking arrangements, accessibility, and security needs. Ensure that refreshments, seating, and any necessary equipment (e.g., microphones, projectors) are prepared.

# Checklist for Preparing For a Site Visit

## 3. During the Visit

- **Welcome the Decisionmaker:**

Greet them warmly upon arrival and provide an overview of the visit, introducing them to key staff and stakeholders.

- **Conduct the Tour/Presentation:**

Guide the decisionmaker through the program site, highlighting key areas and activities. Share impactful stories, statistics, and outcomes related to your work.

- **Facilitate Interaction:**

Encourage dialogue by inviting questions and fostering conversations between the decisionmaker and participants. Offer opportunities for the decisionmaker to engage directly with the program.

- **Capture the Moment:**

Arrange for photos or videos to document the visit (with permission). Consider using these for future communications, newsletters, or social media.

## 4. Post-Visit Follow-Up

- **Send a Thank-You Note:**

Write a personalized thank-you note to the decisionmaker expressing gratitude for their time and interest. Recap key points discussed and reiterate any follow-up actions.

- **Follow-Up on Requests:**

Provide any additional information or materials that were requested during the visit. Stay in touch with the decisionmaker regarding next steps or further engagement opportunities.

- **Debrief with Staff:**

Hold a post-visit meeting to discuss how the visit went and what could be improved for future visits. Capture feedback and insights from all participants.

- **Leverage the Visit:**

Share highlights from the visit with your broader community through newsletters, social media, or press releases. Use the visit as a platform to further advocate for your cause with other stakeholders.

# Sample One-Pager

## [FOR IMMEDIATE OR EMBARGOED RELEASE]

### Media Contact:

[NAME]

[TITLE]

[ORGANIZATION]

[PHONE]

[EMAIL]

## [ORGANIZATION NAME] Announces Advocacy Efforts to Address [KEY ISSUE]

**[CITY, STATE]** [(DATE OF SENDING TO MEDIA CONTACTS)] – [ORGANIZATION NAME], a nonprofit organization dedicated to [BRIEF DESCRIPTION OF MISSION], is proud to announce a series of advocacy efforts aimed at addressing [KEY ISSUE] in the community. These initiatives are designed to [BRIEF DESCRIPTION OF GOALS, e.g. raise awareness, influence policy, provide support, etc.] reflecting the organization’s commitment to creating a lasting impact.

“[Quote from a key leader, such as the Executive Director or CEO, highlighting the importance of the advocacy efforts and their expected impact],” said [Name], [Title] of [Organization Name]. “We are committed to [restate commitment and connection to the mission].”

## Key Initiatives and Advocacy Efforts:

### 1. Initiative One: [NAME OF INITIATIVE]

- Description: [Brief description of the initiative and its purpose]
- Goals: [Specific goals of the initiative]
- Activities: [Key activities or events related to this initiative].

### 2. Initiative Two: [NAME OF INITIATIVE]

- Description: [Brief description of the initiative and its purpose].
- Goals: [Specific goals of the initiative].
- Activities: [Key activities or events related to this initiative].

### 3. Initiative Three: [NAME OF INITIATIVE]

- Description: [Brief description of the initiative and its purpose].
- Goals: [Specific goals of the initiative].
- Activities: [Key activities or events related to this initiative].

“[Quote from a key leader in support, such as a board member/ board chair, organization’s Advocacy Officer, etc. highlighting the importance of the advocacy efforts and their expected impact],” said [Name], [Title] of [Organization and/or Company Name]. “We are committed to [restate commitment and connection to the mission].”

[ORGANIZATION NAME] encourages community members to get involved in these advocacy efforts by [WAYS THE COMMUNITY CAN PARTICIPATE, e.g. attending events, volunteering, calling legislators, etc.]. Together, we can make a difference and drive meaningful change.

## [BOILER PLATE PLACEHOLDER]

### About [ORGANIZATION NAME]:

[Provide a brief background on the organization, including its mission, history, and key accomplishments. Mention any relevant awards, recognitions, or partnerships.]

### Note to Editors: [OPTIONAL] – only include if relevant

[Include any additional information that may be relevant for editors, such as upcoming events, opportunities for interviews, or additional resources.]

# Communications Plan (Template)

## Scenario Overview (situation, history, etc.)

- Provide a brief explanation of the scenario.

## Audiences

- Primary
  - Audience 1
  - Audience 2
- Secondary
  - Secondary 1

## Objectives

- What do we want to achieve?

## Key Messages

- Anticipated questions & answers

## Timeline

- Dates and steps

## Potential Media Questions

- Anticipated questions & answers

## Holding Statement

- [PLACEHOLDER FOR HOLDING STATEMENT]

## Media/Communications Strategies By Segment

- Internal/Staff
- Volunteer Leadership
- Key Donor Segments/Audiences
- Corporate Partners
- Funded Partners
- Community Partners
- Nonprofit Community
- Policymakers/Policymakers
- General Public
- Local/Regional Media
- OTHERS

**Audience**

**Tactic**

**Channel/Platform**

**Details**

**Timeline**

**Lead**

# Press Release (Template)

**[FOR IMMEDIATE OR EMBARGOED RELEASE]**

**Media Contact:**

[NAME]

[TITLE]

[ORGANIZATION]

[PHONE]

[EMAIL]

**[ORGANIZATION NAME] Announces Advocacy Efforts to Address [KEY ISSUE]**

**[CITY, STATE]** [(DATE OF SENDING TO MEDIA CONTACTS)] – [ORGANIZATION NAME], a nonprofit organization dedicated to [BRIEF DESCRIPTION OF MISSION], is proud to announce a series of advocacy efforts aimed at addressing [KEY ISSUE] in the community. These initiatives are designed to [BRIEF DESCRIPTION OF GOALS, e.g. raise awareness, influence policy, provide support, etc.] reflecting the organization’s commitment to creating a lasting impact.

“[Quote from a key leader, such as the Executive Director or CEO, highlighting the importance of the advocacy efforts and their expected impact],” said [Name], [Title] of [Organization Name]. “We are committed to [restate commitment and connection to the mission].”

## Key Initiatives and Advocacy Efforts:

### 1. Initiative One: [NAME OF INITIATIVE]

- Description: [Brief description of the initiative and its purpose]
- Goals: [Specific goals of the initiative]
- Activities: [Key activities or events related to this initiative].

### 2. Initiative Two: [NAME OF INITIATIVE]

- Description: [Brief description of the initiative and its purpose].
- Goals: [Specific goals of the initiative].
- Activities: [Key activities or events related to this initiative].

### 3. Initiative Three: [NAME OF INITIATIVE]

- Description: [Brief description of the initiative and its purpose].
- Goals: [Specific goals of the initiative].
- Activities: [Key activities or events related to this initiative].

“[Quote from a key leader in support, such as a board member/ board chair, organization’s Advocacy Officer, etc. highlighting the importance of the advocacy efforts and their expected impact],” said [Name], [Title] of [Organization and/or Company Name]. “We are committed to [restate commitment and connection to the mission].”

[ORGANIZATION NAME] encourages community members to get involved in these advocacy efforts by [WAYS THE COMMUNITY CAN PARTICIPATE, e.g. attending events, volunteering, calling legislators, etc.]. Together, we can make a difference and drive meaningful change.

## **[BOILER PLATE PLACEHOLDER]**

### **About [ORGANIZATION NAME]:**

[Provide a brief background on the organization, including its mission, history, and key accomplishments. Mention any relevant awards, recognitions, or partnerships.]

### **Note to Editors: [OPTIONAL] – only include if relevant**

[Include any additional information that may be relevant for editors, such as upcoming events, opportunities for interviews, or additional resources.]

# Example OpEd: Food Insecurity

## Ending Food Insecurity: A Moral and Economic Imperative

By [Your Name]  
[Your Title]  
[Your Organization's Name]

In a nation as prosperous as ours, it is unconscionable that millions of families still struggle to put food on the table. Food insecurity is not just a symptom of poverty—it is a driver of chronic illness, educational disparities, and economic stagnation. As the leader of [Your Organization's Name], I see firsthand the devastating impact of hunger on our community, and I believe it's time we confront this issue with the urgency it demands.

The numbers are staggering. According to the USDA, more than 34 million people in the United States, including 9 million children, are food insecure. This means they lack consistent access to enough food for an active, healthy life. While we often think of food insecurity as a distant problem, the reality is that it exists in every community—from urban centers to rural towns, and even in seemingly affluent suburbs.

But food insecurity is more than just a lack of food. It's a crisis that has far-reaching consequences. For children, it means not only going to bed hungry but also struggling to concentrate in school, falling behind academically, and facing long-term health issues like obesity, diabetes, and heart disease. For adults, it means choosing between paying the rent and buying groceries, and for seniors, it means the risk of malnutrition, which can exacerbate existing health problems.

Addressing food insecurity is not just a moral obligation; it is an economic imperative. Hungry children are less likely to succeed in school, which limits their future earning potential and perpetuates the cycle of poverty. Hungry workers are less productive, which

affects businesses and the broader economy. And the healthcare costs associated with food insecurity and related chronic conditions place a tremendous burden on our healthcare system.

### **So, what can we do?**

First, we must strengthen and expand federal nutrition programs like the Supplemental Nutrition Assistance Program (SNAP) and the National School Lunch Program (NSLP). These programs are essential lifelines for millions of Americans, providing them with the resources they need to purchase nutritious food. However, they are often underfunded and subject to political debates that undermine their effectiveness.

Second, we must support local food banks and community organizations that are on the front lines of this fight. These groups play a critical role in filling the gaps, providing emergency food assistance to those in need, and creating innovative solutions to address the root causes of food insecurity. But they cannot do it alone. They need our support—whether through donations, volunteerism, or advocacy.

Third, we must address the broader economic inequalities that drive food insecurity. This means fighting for living wages, affordable housing, and accessible healthcare. It also means ensuring that all communities, especially those that have been historically marginalized, have access to healthy, affordable food. Finally, we must change the narrative around food insecurity. Too often, those who experience hunger are stigmatized or blamed for their circumstances. We must recognize that food insecurity is not a personal failing but a societal one. It is the result of systemic issues that require systemic solutions.

As we approach the upcoming holiday season—a time when many of us will gather around tables filled with food—I urge you to think about those who are less fortunate. Consider how you can make a difference, whether by supporting local food drives, advocating for stronger policies, or simply raising awareness about the issue. Ending food insecurity will not be easy, but it is possible. It requires collective action, political will, and a commitment to ensuring that no one in our country goes hungry. At [Your Organization's Name], we are dedicated to this cause, and we invite you to join us in the fight against hunger. Together, we can build a future where everyone has the food they need to thrive.



# Media Alert Template

**MEDIA ALERT**  
**For Immediate Release**  
[Date]

---

**CONTACT:**  
[Your Name]  
[Your Title]  
[Your Organization's Name]  
[Phone Number]  
[Email Address]

---

**[Your Organization's Name] to Host [Event Name] to [Brief Purpose or Goal of the Event]**

---

**WHAT:**  
[Your Organization's Name] is hosting [Event Name], an event designed to [briefly describe the purpose or goal of the event]. The event will feature [mention any notable speakers, activities, or elements of interest].

**WHO:**  
[List any key participants, such as speakers, guests, or partnering organizations. Include titles or roles if relevant.]

**WHEN:**  
[Day of the Week, Date]  
[Start Time] – [End Time]

**WHERE:**  
[Event Location]  
[Address]  
[City, State, ZIP Code]

**WHY:**  
[Provide a brief explanation of why this event is important and newsworthy. Mention any specific impact, significance, or relevance to the community.]

**VISUALS:**  
[Describe any photo or video opportunities, such as a ribbon-cutting, demonstration, or other visually engaging activities.]

**RSVP:**  
[Include RSVP details if required, or state "No RSVP required."]  
**ADDITIONAL INFORMATION:**  
[If necessary, include a brief note about additional information, resources, or where to find more details.]

---

**###**  
[Your Organization's Website]  
[Social Media Handles]

# Template Site Visit Invitation

## [Your Organization's Letterhead]

[Date]  
[Decisionmaker's Name]  
[Title]  
[Office Address]  
[City, State, Zip Code]

Dear [Decisionmaker's Name],

I hope this message finds you well. On behalf of [Your Organization's Name], I am writing to extend a warm invitation for you to visit our facility at [Location Name] on [Proposed Date(s)]. As a key leader in our community, your support and insight are invaluable to the work we do, and we would be honored to provide you with a firsthand look at how we are making a difference in [Brief Description of Mission/Area of Focus].

During your visit, you will have the opportunity to:

- **Tour our facilities:** See where we [Describe Activities, e.g., provide services, offer support, engage with the community, etc.].
- **Meet with staff and participants:** Hear directly from those who benefit from our programs and learn about the impact of our work.
- **Discuss key issues:** Engage in a dialogue about the challenges we face and the policy solutions that could enhance our efforts.
- **Explore partnership opportunities:** Identify ways we can collaborate to further our shared goals of [Shared Goals, e.g., improving community health, supporting education, reducing food insecurity, etc.].

We believe that your visit will provide valuable insights into the needs and opportunities within our community, and we are eager to hear your thoughts on how we can work together to drive meaningful change.

Please let us know if you are available on the proposed date or if there is a more convenient time for you. We are happy to accommodate your schedule and ensure that your visit is both informative and productive.

Thank you for your continued commitment to [Community/State Name] and for considering our invitation. We look forward to the possibility of welcoming you to [Your Organization's Name] and discussing how we can collaborate to achieve our shared vision.

Sincerely,

[Your Full Name]  
[Your Title]  
[Your Organization's Name]  
[Your Contact Information]  
[Your Email Address]  
[Your Phone Number]

# Template Thank You Note

**[Your Name]**  
**[Your Title]**  
**[Your Organization's Name]**  
**[Your Address]**  
**[City, State, ZIP Code]**  
**[Email Address]**  
**[Phone Number]**  
**[Date]**

---

**[Decisionmaker's Name]**  
**[Decisionmaker's Title]**  
**[Organization/Office Name]**  
**[Address]**  
**[City, State, ZIP Code]**

---

Dear [Decisionmaker's Name],

I wanted to personally thank you for taking the time to meet with us and learn more about the work of [Your Organization's Name]. Your willingness to engage with our mission and understand the challenges we face is truly appreciated. Your interest and support are vital to our efforts in [briefly describe your nonprofit's mission or cause]. By learning more about our work, you've helped to amplify the voices of those we serve and have taken an important step toward making a positive impact in our community.

We look forward to continuing our partnership with you and your office as we work toward [specific goal or outcome related to your nonprofit's work]. Please do not hesitate to reach out if you have any further questions or if there's anything else we can provide to support your efforts.

Thank you once again for your time and commitment to our cause.

Sincerely,

[Your Name]  
[Your Title]  
[Your Organization's Name]

Other Resources that Are Available Online

# Sources

The Iowa Afterschool Alliance Advocacy Guide

American Academy of Pediatrics Advocacy Guide

Iowa Developmental Disabilities Council Advocacy Toolkit

America's Service Commissions' Day on the Hill Toolkit

