Making a Strategic Advocacy Plan

Planning Worksheets

COMMUNITY FOOD STRATEGIES

These worksheets are designed to offer a systematic method for **community advocacy**. It is meant to be a resource for food councils and community groups to support them in their efforts to advocate for policies, programs or plans that **support healthy and equitable community food systems**.

These worksheets will help you to plan:

1. Setting Outcomes & Goals
2. Getting Prepared
3. Identifying Decision Makers
4. Identifying Allies & Opponents
5. Involving Stakeholders
6. Developing Your Tactics
7. Taking Action

After completing these worksheets, you will have a comprehensive plan for engaging in effective advocacy.

Identifying Outcomes & Goals

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What change do you want to see in your community? Setting long-range, intermediate and short-terms goals are important steps to achieving that vision.

Outcomes:

What is the ultimate change you want to make? How will your community improve?

Long-Range Goals:

These are the broad goals that you eventually hope to win – usually the actual policy change you want to achieve. It is important to set goals that will get you to the outcomes that you want to achieve rather than what you think can be accomplished. Do not ask for too little!

How do your long-range goals and outcomes produce equity or racial justice? How do you know?

You want to set goals that will:

1. Result in real improvement in people's lives
2. Be winnable
3. Be widely felt.
4. Be deeply felt.
5. Be easy to understand.
6. Have a clear decision maker.
7. Be non-divisive (frame your issue to unite stakeholders in working towards a common goal).
8. Be consistent with Mission, Vision, and Values statements.

Identifying Outcomes & Goals – cont'd

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How do we get there? Are there short-term and intermediate goals you can work on to make progress towards your ultimate goal? Short-term and intermediate goals might be things that you are quite sure that you can achieve, such as a meeting with a city council member or mayor. Short-term goals are steps toward your intermediate goals. If possible, put these goals more or less in the order in which they will have to be achieved. Make sure your goals are SMART.

Is your goal SMARTIE?

- **S**pecific,
- **M**easurable,
- **A**chievable,
- **R**esults-focused,
- **T**ime bound
- **I**nclusive
- **E**quitable

Intermediate Goals:

Short-Term Goals:

Outcomes and Goals Notes:

Getting Prepared

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What types of resources will you need to successfully reach your goals? What type of data will help your cause? What can you or your organization bring to the table? For example: financial, number of staff, facilities, reputation, etc..

What resources do you have?

What additional resources are needed?

What data will you need?

What does the data tell about the root cause(s) of inequity related to your issue?

Identifying Decision Makers

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- **What *decision making groups* will you need to interact with to reach your goals?** (Health Dept., City Council, County Commissioners, Planning Commission, NC General Assembly, etc.)
- **What is that group's relevant *decision making history*?**
- **Is there an *individual* within that group who you should connect with?**
- **Who are the *primary decision makers* (the people who have the power to give you what you want)?**
- **Who are the *secondary decision makers* (the people with the power over the people with the power to give you what you want)?**
- **What *power* do you have over any of these decision making individuals or groups?**
- ***What do you need to know* about these decision makers that you don't already know?**

Tip: When you think about who to make contact within the decision making group, it may not be to an actual decision maker. You may need to go through a gatekeeper (the Clerk of the County Commissioner) to get to the right person. OR you may have an ally who can help you make your case to the appropriate decision maker.

Decision Makers Notes:

Identifying Allies and Opponents

Now that you have set your goals, prepared your resources, and identified your decision makers, let's dig in a little deeper and think about who might help you and who might try to stop this policy change.

Allies

- Who cares about this issue enough to help you make a change?
- Whole problem is this issue? (How) are they organized?
- What do they gain if they “win”? (good PR, new/stronger programs)
- What is at risk? (re-election, losing face, budget cuts)
- What power to they have over decision makers?

Lobbying vs. Advocacy

In the same way that we educate our communities, as advocates, we seek to develop relationships elected officials so that we can educate them about our communities. As an advocate, you are not writing legislation, but the information you provide helps leaders create more effective policies. And you may even be asked to join a working group with other advocates to consider the impacts of potential legislation.

Identifying Allies and Opponents – cont'd

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Opponents

- Who are your opponents?
- Who stands to lose or be very upset if you win?
- What will your victory cost them?
- What power do they have over decision makers?

Involving Stakeholders

Involving community members and key stakeholders (those most affected; those living at the margins) in informing and making decisions about advocacy is critical. Advocacy actions and decisions must be grounded in the stories of those directly affected by the issues.

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Stakeholders

- Who is most impacted by this issue?
- What service providers, government agencies or businesses interact with those who are the most impacted by this issue?
- What information do they have that should be shared with decision makers?
- What do the conversations with key stakeholders tell about the root cause of inequities related to the issue?
- How do you plan to build rapport and relationships with key stakeholders?

Developing Tactics

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Tactics are the steps that you take in carrying out your overall strategy. They are the specific things that you and your allies do to the decision making groups and individuals to put pressure on them to win your goals. Tactics should be flexible, creative and substantive. Examples of tactics include: phone calls, emails, petitions, road signs, demonstrations, op-eds in the newspaper, media events, informational events, public hearings, meetings with elected officials, accountability sessions, negotiations, elections, law suits, etc..

Tip: After meeting with your allies and involving all key stakeholders, exploratory meetings with decision makers can be helpful to identify potential champions for your cause. If you identify a decision-making champion early in your process, you will have a strong ally for your advocacy efforts.

Tip: It's important to think through your timeline of what needs to happen first, second, third, etc. Is there a deadline to get this done (before an event, prior to the new school year, etc.)? It's also important to think about how much time each step will take. Are there steps that need to happen simultaneously?

Tactic	Who is the decision maker?	Who is your ally? (It can be the same person)	**Sequence** (If they can be done at the same time, use the same number)	Timeline for Engagement

Developing Tactics – cont'd

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It is very important to be mindful of your how your tactics will engage with decision makers, build relationships for your food council or group, and empower your stakeholders. Below are important questions to consider as you are planning out your tactics for engagement.

Advance Opportunity and Minimize Harm

- **How will you proceed with your tactics in a way that expands your food council's circle of influence?**
- **How does your approach build, serve, and empower the margins?**
- **What are unspoken assumptions about the issue that needs to be surfaced?**
- **How will your approach increase and/or decrease racial justice? Be as specific as possible.**
- **What are the potential unintended consequences or outcomes from your advocacy actions?**
- **How will you address those unintended consequences or outcomes?**

Developing Tactics Notes:

Taking Action!

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Congratulations, now you have the framework for a strategic advocacy plan! But you can't stop here. Now you must move forward and take advantage of all of the work that you have done to prepare. Now is the time to take action. Start meeting with your allies and start engaging with key stakeholders. Follow these tips below as you get started in your work. **Good luck!**

- Check Back In With Your Allies
  Now that you are ready for action, check back in with your allies to make sure that everyone is informed about the key elements of your strategy and your time-lines.

- Launch Your Efforts
  There will never be a perfect time to make your ask, demand, or request ,and at some point you have to stop planning and engage in your strategy. If you have prepared adequately, you are likely to have success. And at the very least build new relationships.

- Celebrate Victories
  Celebrate every little victory along the way to your goals, no matter how small. Many people burn out because they neglect to do this. Remember, there are victories of all sizes! Once you are successful, thank your allies, have some fun, and take some credit for the good work that you have done.

- Evaluate Successes and Failures
  When the dust has settled, take some time to reflect on what went well and what could have gone better. Talk to third parties who can give you objective feedback on how the effort went and engage your key stakeholders. In this way, you will build on your successes and avoid repeating mistakes.