

# Developing an Advocacy Plan

## Step 1: Map the Landscape Internally

Successful advocacy requires close coordination of staff, board members and constituents. Before you even launch a campaign, you should identify who, amongst the board, staff and constituents will be engaged in advocacy efforts and what their roles will be. Establish a board advocacy committee to set overall goals and priorities. Appoint one staff person to serve as point person for all advocacy efforts—especially communication with elected officials.

### Key Questions:

- Who will be engaged in advocacy efforts? What will their role(s) be?
- Do your board, staff and constituents understand the issues? Do they need additional training?
- Do your board, staff and constituents support your organization’s stance on the issues?
- Do you have the human and financial resources necessary for successful advocacy?
- Who will serve as the point person for your advocacy efforts?

## Step 2: Map the Landscape Externally

Identify your advocacy allies on the local, state and federal levels. Subscribe to their newsletters and policy alerts to help make tracking issues easy. By tapping into existing advocacy infrastructure, you can amplify your voice in coalition with others and focus your efforts on issues unique to your mission. Some potential allies are listed below. Identify the organizations with which you have an *established* relationship and those with which you would like to *form* a relationship.

Federal	State	Local
<ul style="list-style-type: none"> <li>• National CLT Network</li> <li>• Cornerstone Partnership</li> <li>• National Low Income Housing Coalition</li> <li>• National Housing Conference</li> <li>• Center for American Progress</li> <li>• PolicyLink</li> <li>• Affordable Rental Housing A.C.T.I.O.N</li> </ul>	<ul style="list-style-type: none"> <li>• State Housing Coalitions</li> <li>• National Low Income Housing Coalition State Partners</li> </ul>	<ul style="list-style-type: none"> <li>• Affordable housing organizations or coalitions</li> <li>• Transit-oriented development groups/ coalitions</li> <li>• Other organizing groups with similar goals</li> </ul>

Next, identify your local, state and federal government representatives and subscribe to their newsletters. This will help you get a sense of what is going on in the political arena in the next year or so. If you are a member of the National CLT Network, the good news is that the Network is already advocating on federal issues on your behalf with all of the government agencies listed above (and then some). By subscribing to Network newsletters and participating in monthly Policy Action Committee meetings, you will have a good understanding of what is happening on a national level and how you can best support the Network’s advocacy efforts. This means that you can focus your advocacy efforts on the state and local levels.

Federal	State	Local
<ul style="list-style-type: none"> <li>• White House</li> <li>• Congress</li> <li>• Housing &amp; Urban Development Department (HUD)</li> <li>• Department of Transportation</li> <li>• Consumer Financial Protection Bureau</li> <li>• Federal Home Loan Banks</li> </ul>	<ul style="list-style-type: none"> <li>• Governor</li> <li>• Legislature</li> <li>• Housing Finance Agency</li> <li>• State Participating Jurisdiction</li> </ul>	<ul style="list-style-type: none"> <li>• Mayor</li> <li>• City Council</li> <li>• Municipal Participating Jurisdiction</li> <li>• Department of Planning</li> <li>• Department of Transportation</li> </ul>

Of course, you cannot and do not want to take action on *every* issue so start by identifying the issues that are most relevant to your organization or your constituents.

### Step 3: Identify Critical Dates

For each of the issues that you decide are relevant and important, identify the critical dates for action. For example, note public comment periods, document releases or hearing dates. For each critical date, describe what actions are needed. This will help you get a sense of whether you are looking at a three month campaign or a three year effort. For example:

Policy Goal	Critical Dates	Action Needed
Advocate for changes in the scoring system of the Tennessee Housing Development Agency’s 2014 Qualified Allocation Plan in order to create a preference for lasting affordability.	<p><b>5/21/13</b>- Forum announced and public feedback on QAP solicited</p> <p><b>6/28/13</b>- Developer forum to discuss QAP</p> <p><b>7/24/13</b>- Tax Credit Committee reviewed proposed QAP changes</p> <p><b>9/24/13</b>- THDA Board of Directors votes on QAP</p>	<p>Read draft QAP and prepare comments for forum.</p> <p>Assemble local coalition to make list of recommendations.</p> <p>Call THDA staff to follow-up on recommendations to ensure understanding.</p>

### Step 4: Carefully Select Targets

You can’t do it all, so it is important that you evaluate each of your policy issues and advocacy efforts relative to the critical dates to assess how heavy a lift the advocacy effort will be and how big of an impact it could make on your work. If an issue is high effort and low impact, you should probably focus elsewhere. Issues that are low effort and high impact are slam dunks. Issues that are both high impact and require high effort should be considered carefully in terms of your organization’s resources.

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

## Step 5: Create a Strategy and Act

Formulate a work plan for each of your selected targets that identifies what you are going to do, when you are going to do it and who is responsible for each step.

### Example:

- WHO:** Tennessee Housing Development Agency
- WHAT:** Advocate for changes in the scoring system of the Tennessee Housing Development Agency's 2015 Qualified Allocation Plan in order to create a preference for lasting affordability.
- WHY:** While this advocacy effort is a "heavy lift" that will take staff time and collaboration, a "win" could enable significant production of permanently affordable rental units through the LIHTC program.

When	How
<b>January</b>	<ul style="list-style-type: none"> <li>• Convene nonprofit housing developers and affordable housing allies to discuss prospect of an advocacy effort on the 2015 QAP.</li> <li>• Contact THDA staff to express interest in being involved in feedback on 2015 QAP; get on notification list.</li> </ul>
<b>February</b>	<ul style="list-style-type: none"> <li>• Convene advocacy group to review mark-ups of existing QAP and come to consensus on recommended changes; review drafted plan.</li> <li>• Set up a meeting with advocacy group representatives and THDA staff to decide on the best process for submitting recommendations and to identify potential recommendations that will receive push back.</li> </ul>
<b>March</b>	<ul style="list-style-type: none"> <li>• Identify potential challengers of advocacy group's recommendations &amp; set-up meetings to educate and negotiate.</li> </ul>
<b>April</b>	<ul style="list-style-type: none"> <li>• Convene advocacy group again to revise proposal based on new information.</li> <li>• Submit written comments to THDA with supporter signatures.</li> </ul>
<b>May-June</b>	<ul style="list-style-type: none"> <li>• Have advocacy group participate in public forums and meetings on QAP.</li> </ul>
<b>July</b>	<ul style="list-style-type: none"> <li>• Review drafted QAP by THDA and decide a strategy to provide feedback or push for recommendations (e.g. additional meetings, phone calls, media coverage)</li> </ul>
<b>End of year</b>	<ul style="list-style-type: none"> <li>• If some or all recommendations are accepted into the QAP, write thank you notes and publically acknowledge the support of THDA.</li> </ul>
<b>2015</b>	<ul style="list-style-type: none"> <li>• Make sure that organizations in the advocacy group submit strong LIHTC Applications.</li> </ul>

# Advocacy Allies



NATIONAL  
COMMUNITY LAND TRUST  
NETWORK

	Federal	State	Local
Established Relationships			
Forming Relationships			



# Government Representatives

	Federal	State	Local
Established Relationships			
Forming Relationships			

# Issue Mapping

		IMPACT	
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	Low	<i>Small tasks, discrete work or support role. Rewards are indirect, minimal or a long-shot.</i>	<i>Small tasks, discrete work or support role. Returns could be big and direct.</i>