Alliance for Justice Advocacy Capacity Tool
2013 Public Aggregate Report
September 2013

Alliance for Justice Advocacy Capacity Tool

2013 Public Aggregate Report

Prepared by:
UW-Stout Applied Research Center

Prepared for:
Alliance for Justice

Survey created by: Report distributed to:
Alliance for Justice   Alliance for Justice

To access the tool, go to http://www.bolderadvocacy.org/act.
For questions, please contact Sue Hoechstetter or Jahanara Saeed at advocacycapacity@afj.org.

RESULTS

Respondents were asked to rate their organization's capacity related to several areas relevant to advocacy. Questions (measures) were broken out into four SECTIONS made up of 18 INDICATORS of capacity. Each of those indicators of capacity is comprised of detailed MEASURES. Survey respondents rated themselves on the measures. The four sections are:

1. Advocacy Goals, Plans and Strategies
2. Conducting Advocacy
3. Advocacy Avenues
4. Organizational Operations to Sustain Advocacy

The sample measure below is one of four basic measures for Influencing Decision-makers. Influencing Decision-makers is part of the Conducting Advocacy section.

SECTION 2: Conducting Advocacy
      INDICATOR 2.6: Influencing Decision-makers
            MEASURE: The organization deliberately builds relationships without regard to political affiliations

Each indicator includes 4 basic measures and 1-3 advanced measures. All of the sections and indicators are listed on the next page. All of the measures are provided at the end of the report.

Ratings on all measures were made on a 4-point scale where 1 = *Not Strong/Rarely/Never* and 4 = *Very Strong/Always.* Advanced measures are optional and are not included in the overall average capacity scores for each indicator and section. The average scores for the optional measures for each section are presented in appendix A at the end of this report.

For all measures in sections 2 and 3 (excluding section 2.3: Advocacy Partners and Coalitions), respondents were able to choose 0 = *Rely on Partners* as a response option only if their organization primarily receives that capacity from other individuals or groups. Cases where *Rely on Partners* was chosen were not included in average calculations for indicators or sections.

Throughout the analysis that follows, statistical differences in average capacity ratings are identified. Comparisons are made across indicators in each section as well as across sections and levels of the demographic variables, where applicable. Statistical differences mean that the chances are very great that differences observed when comparing average capacity ratings did not happen by chance.

Effect sizes are also presented. An effect size is a statistical technique used to estimate the magnitude of difference between variables, providing an additional dimension for interpreting results by estimating the practical significance (meaningfulness) of a result. Thus, statistical differences identify where differences exist that are not due to chance, and the effect size identifies whether these differences are *meaningful.*

Cohen's *d* is the effect size measure typically used when comparing two groups. Generally, an effect size of this type is interpreted using three incremental conventions: small, medium, and large.

      Regarding Cohen's *d*:
- Small = .2 and below
- Medium = .5

- Large = .8 and above

The value of *d* can also be interpreted in standard deviation units, so that a *d* of .5 indicates a .5 standard deviation difference in the averages. Ferguson[1] suggests that practical significance of results requires a minimum *d* of 0.41.

---

[1] *Note*. From "An Effect Size Primer: A Guide for Clinicians and Researchers," by C. Ferguson, 2009, Professional Psychology: Research and Practice, pp. 1-2.

Advocacy Capacity Tool Sections & Indicators

I. Advocacy Goals, Plans and Strategies
1. *Preparation*

This section introduces the key elements of basic preparation for engaging in advocacy

2. *Agenda*

This section introduces the importance of having a clear, written agenda that defines advocacy goals and prioritizes activities.

3. *Plans, Strategies, and Adaptability*

This section introduces the importance of developing a plan to carry out the written agenda.

II. Conducting Advocacy
1. *Research and Analysis*

Assess the extent to which organization researches, gathers information, conducts analyses on its issues.

2. *Field Operation*

Assess how the organization communicates with, educates and engages its network and the public.

3. *Advocacy Partners and Coalitions*

Assess the extent to which the organization has partnerships -- with other nonprofits, businesses, professional associations, etc. -- that advance its goals.

4. *Messaging*

Assess how the organization develops and delivers its advocacy messages.

5. *Media Relations*

Assess the extent to which the organization communicates effectively with the media and uses various media to advance its policy goals.

6. *Influencing Decision Makers*

Assess the extent to which the organization builds influential relationships with targeted decision makers.

III. Advocacy Avenues
1. *Administrative*

Assess the organization's skills, knowledge and actions related to administrative advocacy.

2. *Legislative*

Assess the organization's skills, knowledge and actions related to legislative advocacy.

Note: Under IRS rules, attempting to influence the outcome of ballot measures is also direct lobbying.

3. *Ballot Measures, Referenda, and Initiatives*

Assess the organization's skills, knowledge and actions related to activity on ballot measures.

4. *Electoral*

Assess the organization's skills, knowledge and actions related to electoral activity.

5. *Litigation*

Assess the organization's skills, knowledge and actions related to litigation and other legal activity.

IV. Organizational Operations to Sustain Advocacy
1. *Organizational Commitment*

Assess the organization's operational commitment to its advocacy work.

2. *Funding Advocacy*

Assess the extent to which the organization understands and implements practices for funding its advocacy work.

3. *Decision-Making Structure and Process*

Assess the extent to which the organization has a process for making decisions.
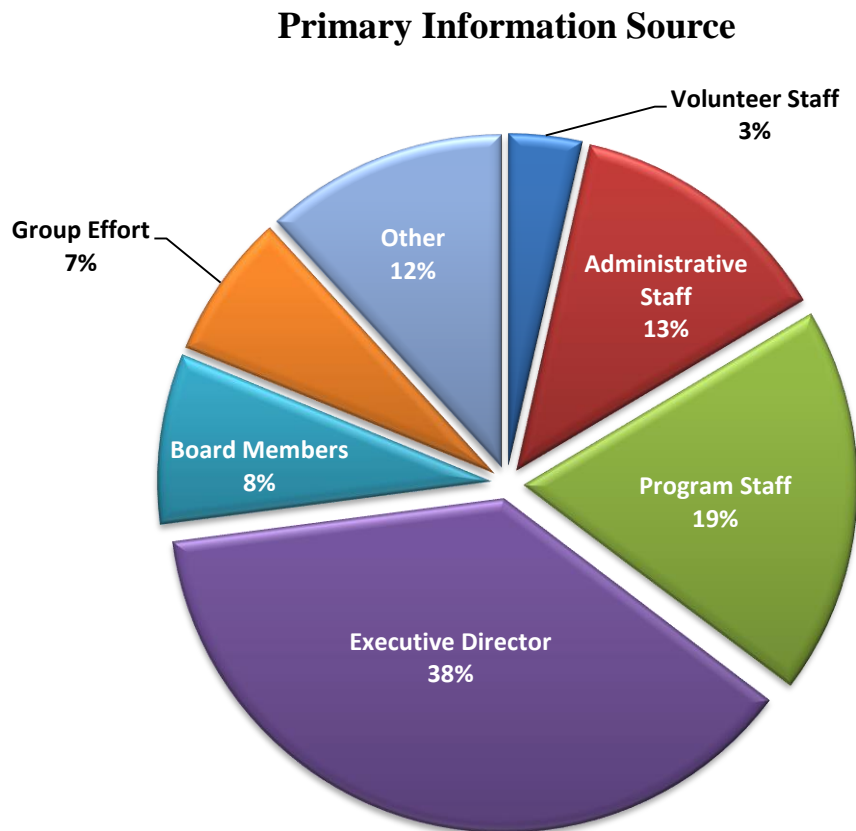
4. *Fiscal Management and Sustainability*

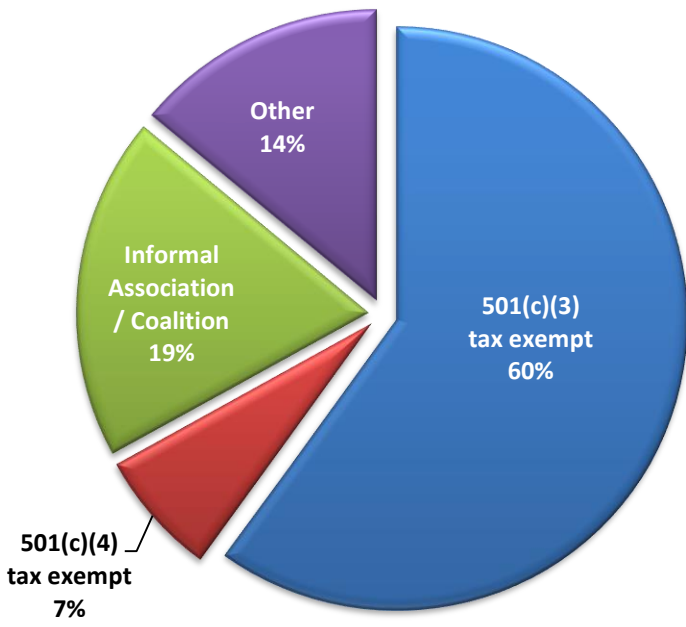Assess the organization's fiscal management practices.

Demographics

Respondents answered several introductory questions related to the demographics of their organizations. The breakdown of responses for each question is represented in figures A-F. Below is a summary of demographics for the 100 organizations included in this report:

- Primary information source: A majority of organizations were represented by an *Executive Director* (38%) or *Program staff* (19%) on the advocacy capacity tool.
- Organization type: Nearly 60% were *501(c)(3) tax exempt* organizations.
- Budget: Nearly half (49%) the organizations had budgets between $100,000 and $2 million.
- Issues worked on: The top three issues worked on among the organizations were *healthcare* (49%), *education* (42%), and *child welfare* (42%).
- Primary work of organization: Nearly three-fourths of the organizations work primarily in the areas of *advocacy* (44%) or *service delivery* (29%).
- Levels of engagement: Most organizations engage in advocacy at the *state* (86%), *local* (71%), and/or *federal* (59%) level.
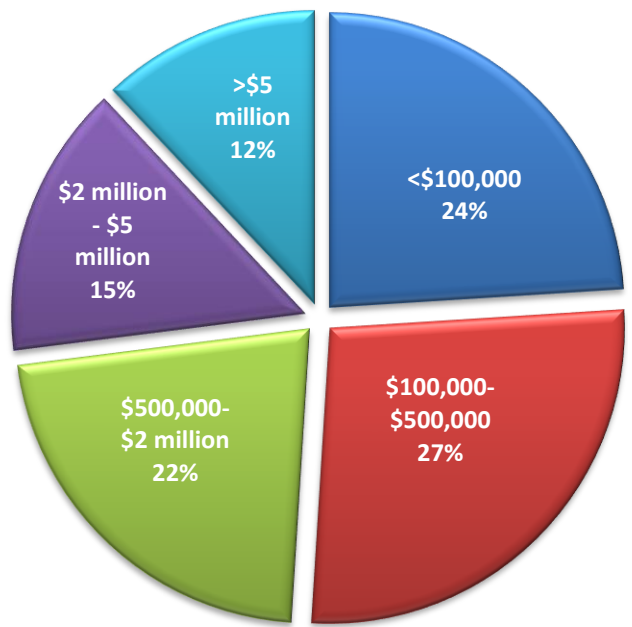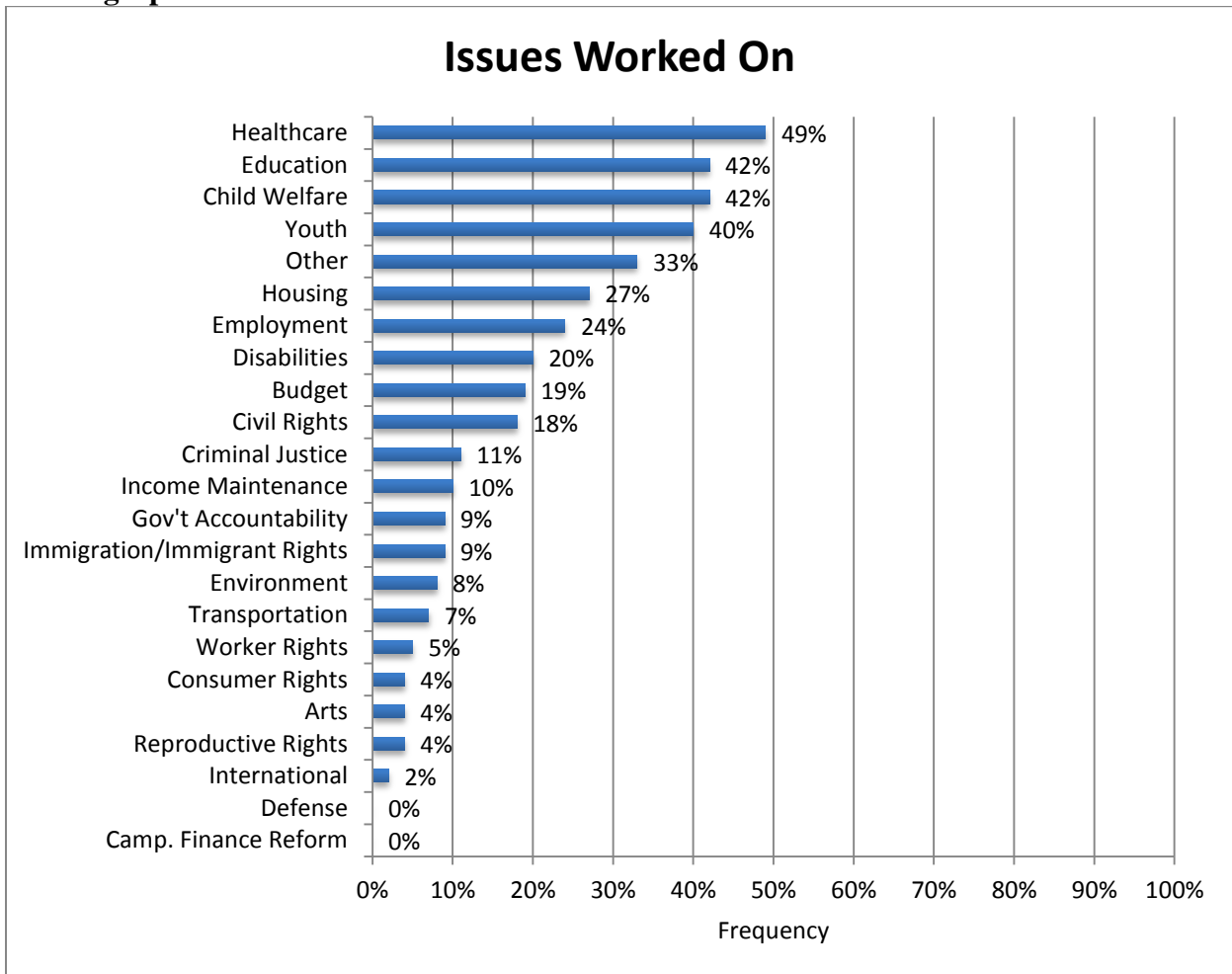
Figure A: Demographics: Primary Information Source

Primary Information Source

Figure B: Demographics: Organization Type

- 501(c)(3) tax exempt 60%
- Other 14%
- Informal Association / Coalition 19%
- 501(c)(4) tax exempt 7%

Figure C: Demographics: Budget

- <$100,000 24%
- >$5 million 12%
- $2 million - $5 million 15%
- $100,000-$500,000 27%
- $500,000-$2 million 22%

Figure D: Demographics: Issues Worked On

Issues Worked On

- Healthcare 49%
- Education 42%
- Child Welfare 42%
- Youth 40%
- Other 33%
- Housing 27%
- Employment 24%
- Disabilities 20%
- Budget 19%
- Civil Rights 18%
- Criminal Justice 11%
- Income Maintenance 10%
- Gov't Accountability 9%
- Immigration/Immigrant Rights 9%
- Environment 8%
- Transportation 7%
- Worker Rights 5%
- Consumer Rights 4%
- Arts 4%
- Reproductive Rights 4%
- International 2%
- Defense 0%
- Camp. Finance Reform 0%

Frequency

Figure E: Primary Work of Organization
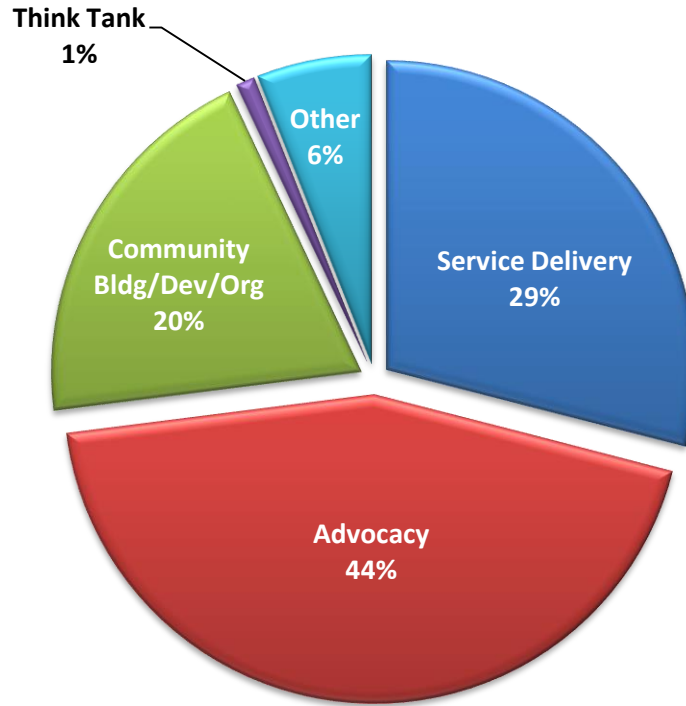
Figure F: Demographics: Levels of Engagement in Advocacy
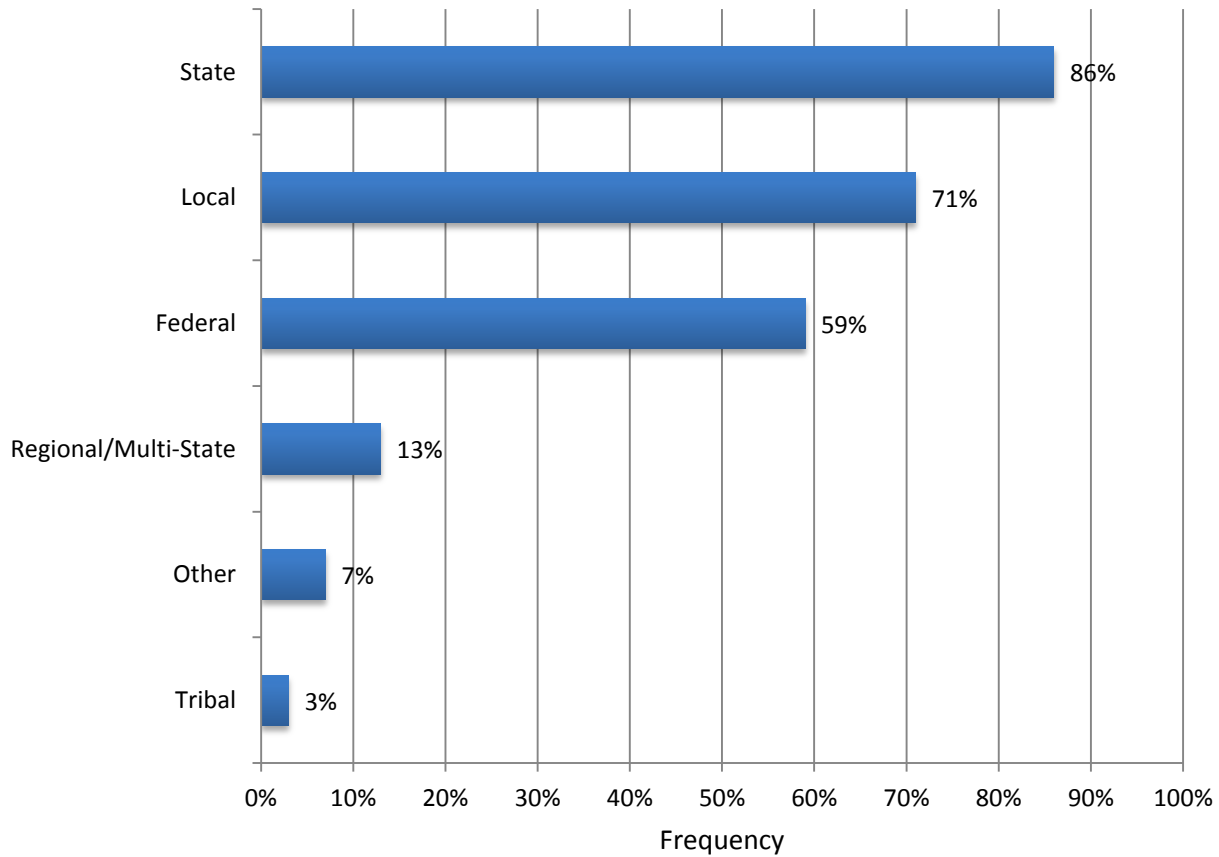
Section Comparisons

The following discussion presents the results for each section. Comparisons are made across indicators within each section and also across sections overall. Statistical differences that are practically significant are identified in the tables.
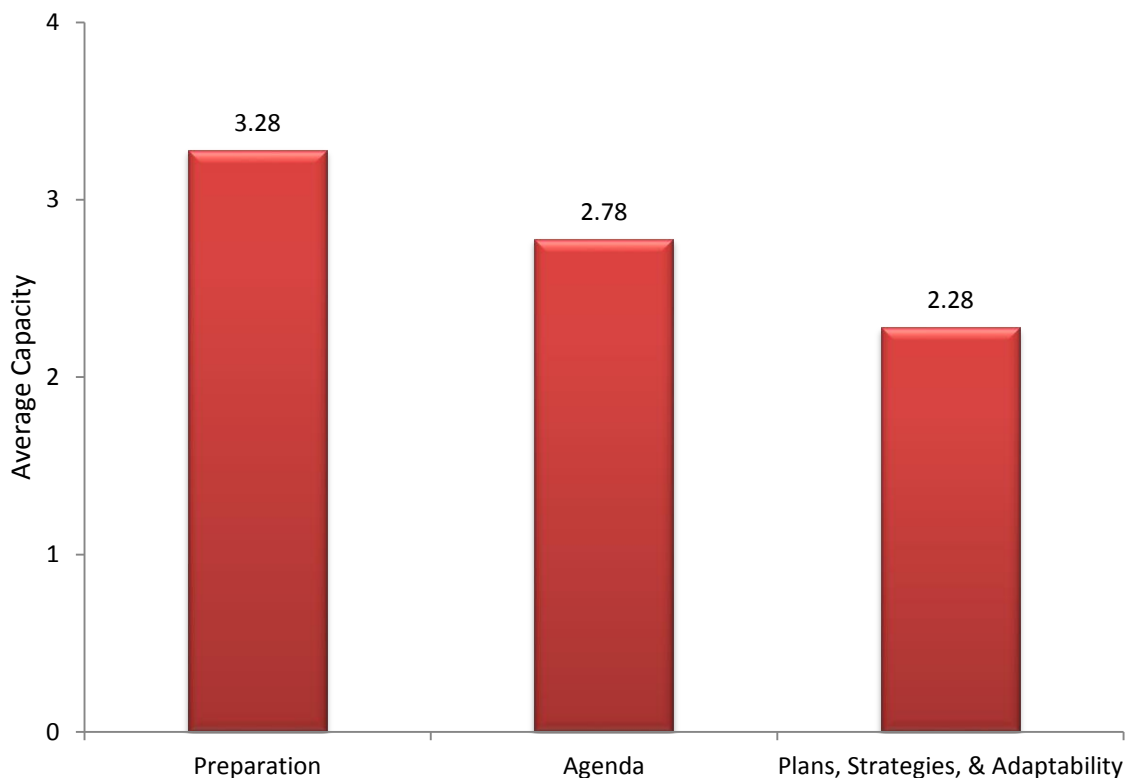
Section 1: Advocacy Goals, Plans, and Strategies

Section one included three indicators pertaining to advocacy goals, plans, and strategies:
- Preparation: basic preparation for engaging in advocacy.
- Agenda: having a clear, written agenda that defines advocacy goals and prioritizes activities.
- Plans, Strategies, & Adaptability: developing a flexible plan to carry out a written agenda.

Figure G shows the average capacity ratings for indicators related to Section 1. Across organizations, capacity for advocacy *Preparation* was the highest-rated indicator. Statistical testing revealed statistical differences in capacity when comparing the indicators. Table 1 shows the average differences which are practically significant.

Figure G: Results: Indicators for *Advocacy Goals, Plans, and Strategies*

Table 1: Statistical Differences and Effect Sizes for *Advocacy Goals, Plans & Strategies*

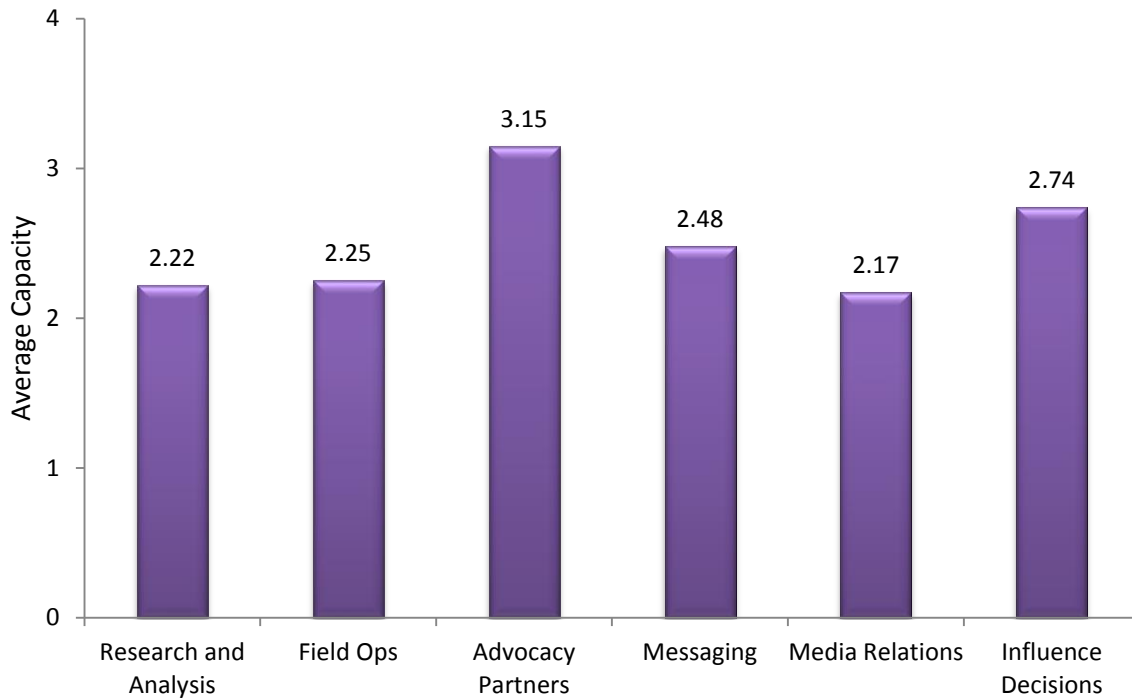| Comparison	Difference	Effect Size (*d*)
Preparation x Plans, Strategies & Adaptability	1.00	1.41
Preparation x Agenda	0.50	0.71
Agenda x Plans, Strategies, & Abilities	0.50	0.62

9

Section 2: Conducting Advocacy

Section two included six indicators pertaining to conducting advocacy:
- Research and analysis: organization researches and gathers information, and conducts analysis on the issues.
- Field operations: organization communicates with, educates, and engages its network and the public.
- Advocacy partners and coalitions: organization has partnerships that advance its goals.
- Messaging: organization develops and delivers its advocacy messages.
- Media relations: organization communicates effectively with the media and uses various media to advance its policy goals.
- Influencing Decision-makers: organization builds influential relationships with targeted decision-makers.

Figure H shows the average capacity ratings for the six indicators related to Section 2. Across organizations, capacity for *advocacy partners and coalitions* that advance organizational goals was the highest-rated indicator. Statistical testing revealed statistical differences in capacity when comparing the indicators. Table 2 shows the average differences which are practically significant.

Figure H: Results: Indicators for *Conducting Advocacy*

Table 2: Statistical Differences and Effect Sizes for *Conducting Advocacy*

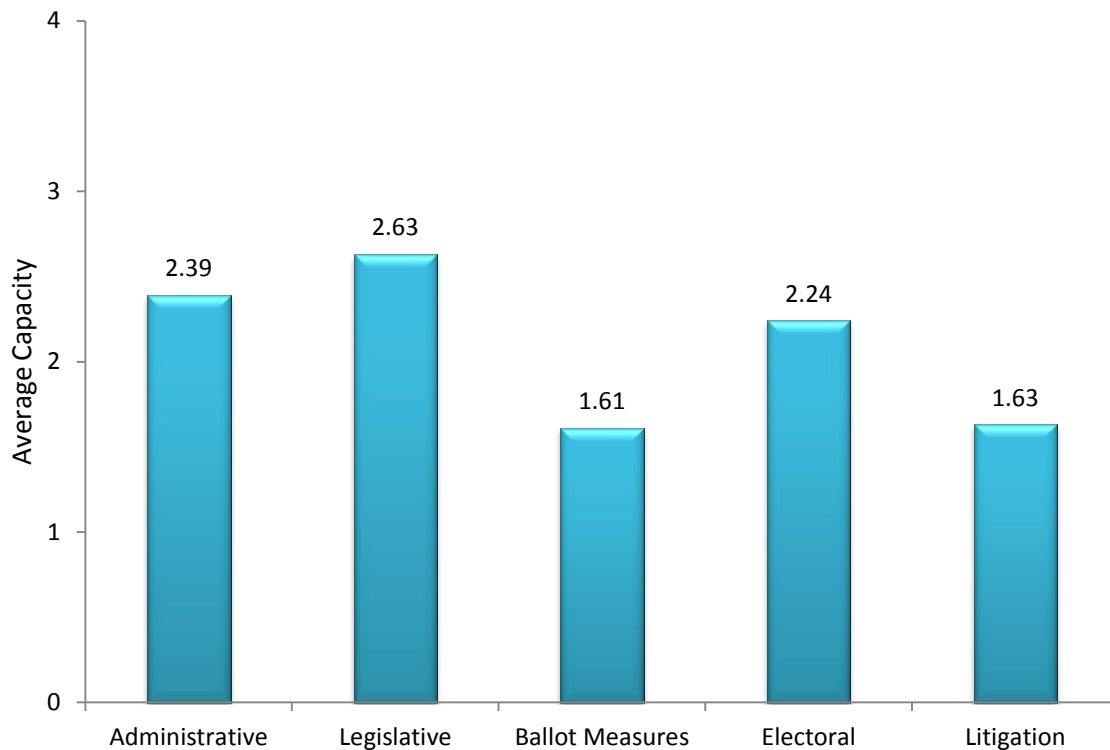| Comparison	Difference	Effect Size (*d*)
Advocacy Partners x Media Relations	0.98	1.19
Advocacy Partners x Field Ops.	0.90	1.13
Advocacy Partners x Messaging	0.67	0.84
Advocacy Partners x Research	0.93	0.97
Influence x Media Relations	0.57	0.62
Advocacy Partners x Influence	0.41	0.48

Section 3: Advocacy Avenues

Section three included five indicators pertaining to advocacy avenues:
- Administrative: skills, knowledge, and actions related to administrative advocacy.
- Legislative: skills, knowledge, and actions related to legislative advocacy.
- Ballot measures, referenda, and initiatives: skills, knowledge, and actions related to activity on ballot measures.
- Electoral: skills, knowledge, and actions related to electoral activity.
- Litigation: skills, knowledge, and actions related to litigation and other legal activity.

Figure I shows the average capacity ratings for the five indicators related to Section 3. Across organizations, capacity for skills, knowledge and actions related to *legislative advocacy* was rated highest. Statistical testing revealed statistical differences in capacity when comparing the indicators. Table 3 shows the average differences which are practically significant.

Figure I: Results: Indicators for *Advocacy Avenues*

Table 3: Statistical Differences and Effect Sizes for *Advocacy Avenues*

Comparison	Difference	Effect Size (*d*)
Legislative x Ballot Measures	1.02	0.84
Legislative x Litigation	1.00	0.79
Administrative x Ballot Measures	0.78	0.66
Electoral x Ballot Measures	0.63	0.58
Administrative x Litigation	0.76	0.61
Electoral x Litigation	0.61	0.52

Section 4: Organizational Operations to Sustain Advocacy

Section four included four indicators pertaining to organizational operations to sustain advocacy:
- Organizational commitment: operational commitment to advocacy work.
- Funding advocacy: organization understands and implements practices for funding its advocacy work.
- Decision-making structure and process: organization's process for making decisions.
- Fiscal management and sustainability: organization's fiscal management and sustainability practices.

Figure J shows the average capacity ratings for the four indicators related to Section 4. Across organizations, having a structure/process in place to facilitate timely and appropriately discussed *decision-making* was the highest rated indicator. Statistical testing revealed statistical differences in capacity when comparing the indicators. Table 4 shows the average differences which are practically significant.

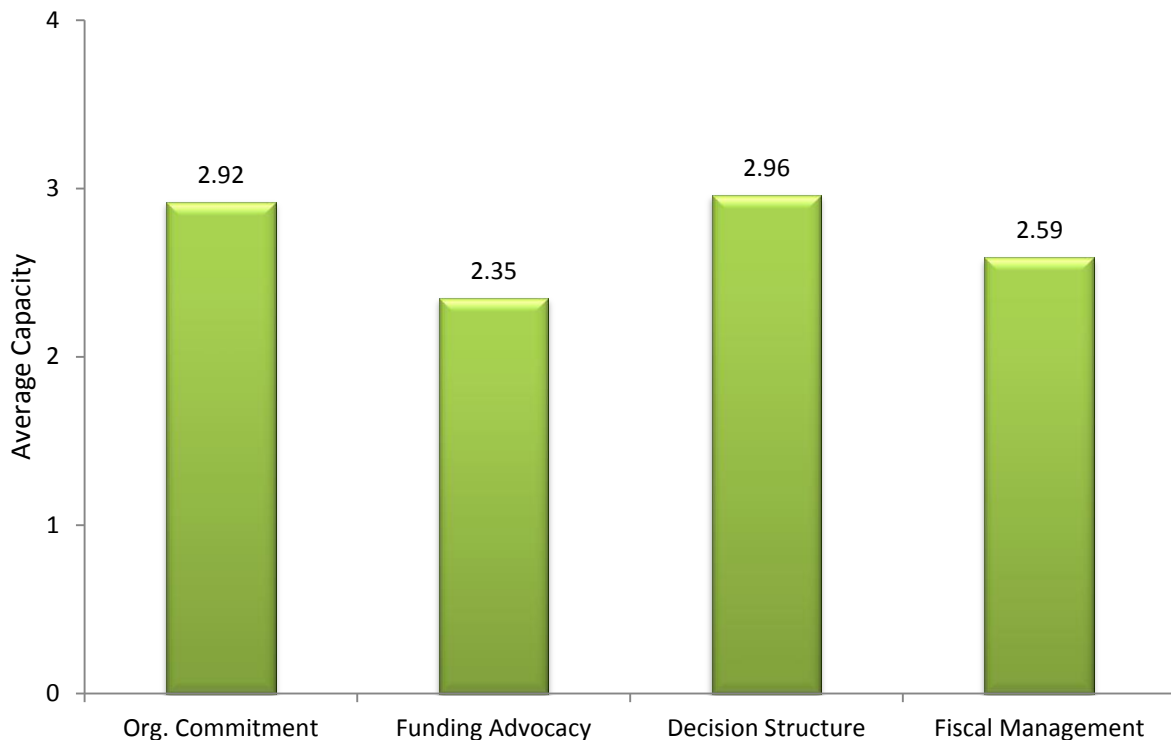**Figure J: Results: Indicators for *Organizational Operations to Sustain Advocacy***

Table 4: Statistical Differences and Effect Sizes *Organizational Operations to Sustain Advocacy*

Comparison	Difference	Effect Size (*d*)
Decision Structure x Funding Advocacy	0.61	0.76
Decision Structure x Fiscal Mgmt.	0.37	0.43
Org. Commitment x Funding Advocacy	0.57	0.67

Comparisons Across Section

Figure K presents the comparisons of the overall average capacity ratings for each section. Across organizations, capacity for indicators related to *advocacy goals, plans and strategies* was rated the highest while capacity related to *advocacy avenues* was rated the lowest. Statistical testing revealed statistical differences in capacity when comparing across sections. *Advocacy goals, plans, and strategies* and *organizational operations to sustain advocacy* were both rated statistically higher than *advocacy avenues*. These differences were practically significant.

Figure K: Comparison of Overall Section Averages
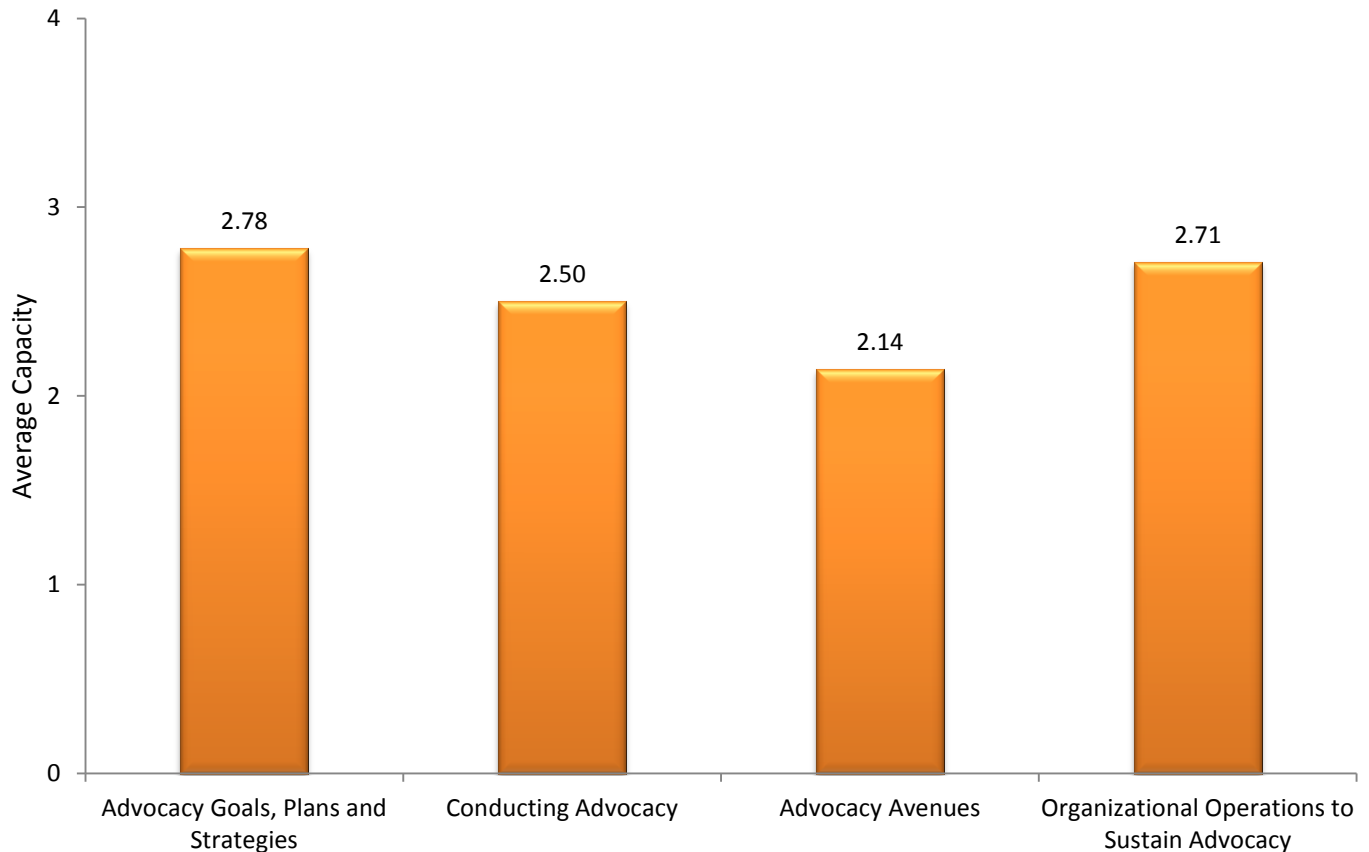
Table 5: Average Difference and Effect Size for Overall Section Comparison

Comparison	Difference	Effect Size (*d*)
Advocacy Goals, Plans & Strategies x Advocacy Avenues	0.64	0.90
Org. Ops. to Sustain Advocacy x Advocacy Avenues	0.57	0.76

Highest and Lowest Average Capacity Scores by Measure

Tables 6 and 7 show the top five and lowest five average capacity scores for the individual measures. The associated indicators are indicated in bold. For a full breakdown of the capacity scores for all measures, see appendix C. The third column indicates when an organization primarily relied on partners for the capacity described in each measure. Rely on partners was only an option in sections II and III.

The three measures with the highest rated capacity across organizations related to *preparation*, specifically basic knowledge about subject matter, articulation of organizational missions and goals, and understanding of the policy environment related to the issues it addresses. The measure with the lowest rated capacity across organizations regarded *litigation*, particularly legal activities such as initiating litigation or signing on to amicus briefs.

Table 6: Top Five Measures by Average Capacity Score

Top Five Measures by Average Capacity Rating	Average Capacity	# Times Rely on Partners Selected
The organization has basic knowledge about its subject matter, including how its issues affect constituents. **(S1: Preparation)**	3.63	N/A
The organization identifies and articulates its mission and goals. **(S1: Preparation)**	3.38	N/A
The organization understands the overall policy environment related to its issues, including trends, possible allies and opponents, and other organizations working towards the same goals. **(S1: Preparation)**	3.29	N/A
The organization has a leadership structure or body that makes timely decisions. **(S4: Decision-Making Structure and Process)**	3.26	N/A
The organization participates in coalitions that share one or more of its goals and provide value to the organization. **(S2: Advocacy Partners and Coalitions)**	3.25	N/A

Table 7: Lowest Six Measures by Average Capacity Score

Lowest Six Measures by Average Capacity Rating	Average Capacity	# Times Rely on Partners Selected
The organization pursues legal activities such as initiating litigation or signing on to amicus briefs, as needed. **S3: Litigation**	1.20	32
The organization conducts get-out-the-vote efforts to promote or oppose ballot measures related to its interests. **S3: Ballot Measures**	1.32	21
The organization identifies appropriate courts, regions and court leanings to inform possible litigation actions related to the organization's priorities. **S3: Litigation**	1.44	24
The organization has a written media plan with objectives, targets, strategies and timelines.' **S2: Media Relations**	1.49	7
The organization conducts phone banks, informational mailings, online communications and/or canvassing to educate and mobilize their network and gain public support. **S2: Field Operations**	1.58	19

Table 8 shows the average capacity ratings, frequency of selection as area to strengthen, and frequency of reliance on partners for each indicator. *Plans, strategies, and adaptability* was the most frequently selected indicator to strengthen among organizations and had the seventh-lowest average capacity rating. *Ballot measures* and *litigation* had the lowest average capacity ratings and were also among the least frequently selected areas to strengthen among organizations. These two indicators were among the highest in terms of reliance on partners. Electoral work was least often chosen to strengthen.

Table 8: Comparison of Average Capacity, Areas to Strengthen, and Reliance on Partners

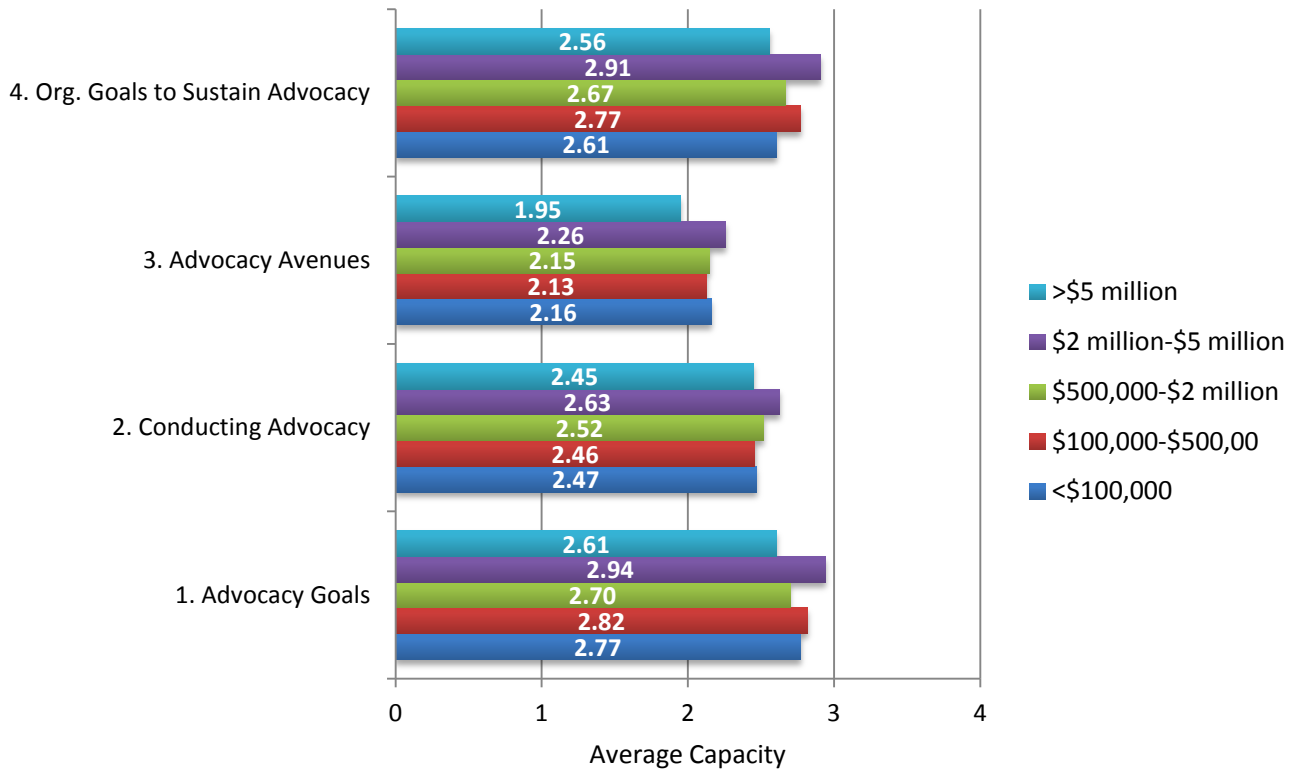| Indicator	Average Capacity	# Times Selected as Area to Strengthen	# Times Rely on Partners Selected
Preparation	3.28	22	N/A
Advocacy Partners	3.15	22	N/A
Decision Structure	2.96	25	N/A
Organizational Commitment	2.92	25	N/A
Agenda	2.78	24	N/A
Influence Decisions	2.74	32	9
Legislative	2.63	25	44
Fiscal Management	2.59	26	N/A
Messaging	2.48	34	24
Administrative	2.39	30	33
Funding Advocacy	2.35	48	N/A
Plans, Strategies & Adaptability	2.28	61	N/A
Field Operations	2.25	27	34
Electoral	2.24	13	34
Research and Analysis	2.22	24	75
Media Relations	2.17	35	22
Litigation	1.63	17	94
Ballot Measures	1.61	19	67

Comparisons across Demographic Segments

The following section presents comparisons of the overall section averages across levels of the demographic variables. Where statistical differences exist when comparing the overall section averages across levels of the variables, practically significant (effect size > 0.41) statistical differences are presented for the indicators within each section.

Comparisons Results: Budget, Information Source, & Organization Work Type
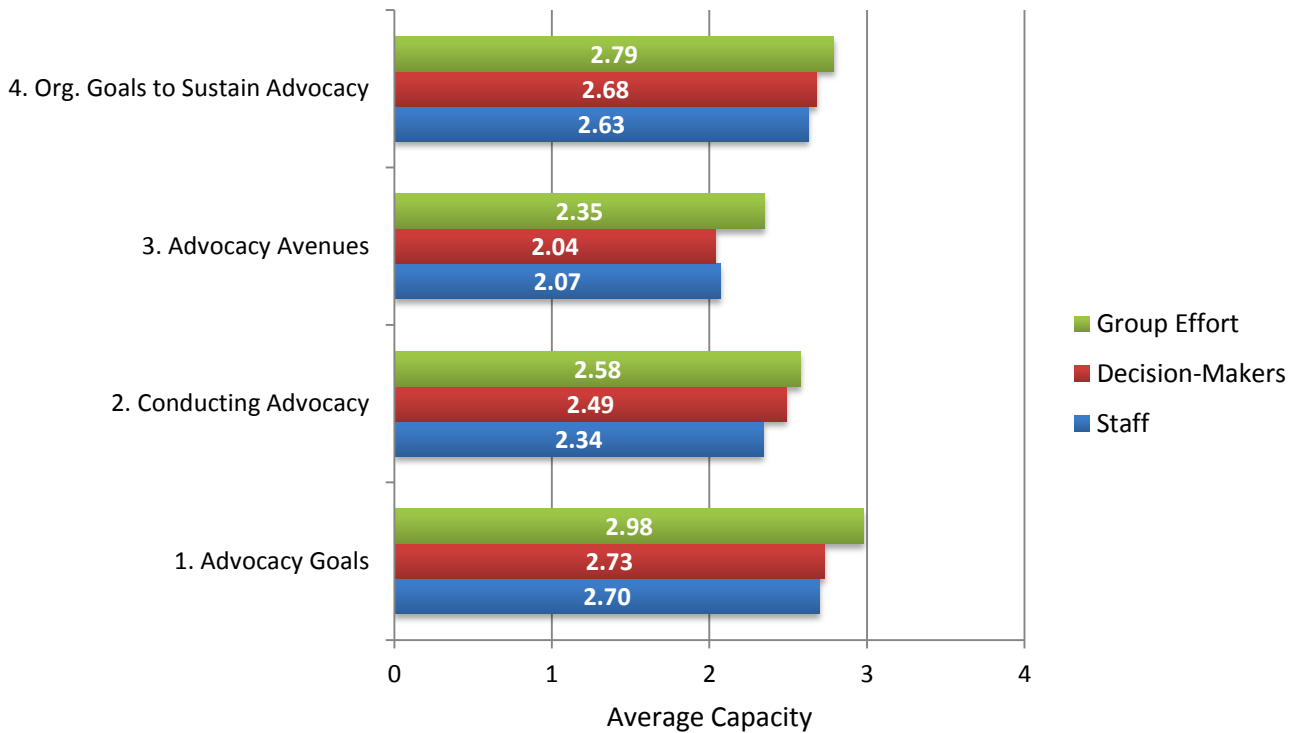
Figures L-O present the comparisons of section capacity averages across levels of budget, information source, and primary work of organization. To allow for comparability, *information source* was recoded into three groups: Staff (volunteer, administrative, program), Group Effort (it is a group effort), and Decision-makers (executive directors, board members).
- Budget level: There were no statistical differences across groups.
- Information source: There were no statistical differences across groups.
- Primary work of organization: Statistical differences were identified in all four sections. Table 9 shows the average differences which are practically significant. Typically, organizations that *deliver services* rated their capacity for each indicator lower than *community building* or *advocacy* organizations.
- Organization type: There were no statistical differences across groups.

Figure L: Comparison of Section Averages by Budget Level

Legend:
- >$5 million
- $2 million-$5 million
- $500,000-$2 million
- $100,000-$500,00
- <$100,000

4. Org. Goals to Sustain Advocacy
- 2.56
- 2.91
- 2.67
- 2.77
- 2.61

3. Advocacy Avenues
- 1.95
- 2.26
- 2.15
- 2.13
- 2.16

2. Conducting Advocacy
- 2.45
- 2.63
- 2.52
- 2.46
- 2.47

1. Advocacy Goals
- 2.61
- 2.94
- 2.70
- 2.82
- 2.77

X-axis: Average Capacity (0 to 4)

Figure M: Comparison of Section Averages by Information Source

Legend:
- Group Effort
- Decision-Makers
- Staff

4. Org. Goals to Sustain Advocacy
- 2.79
- 2.68
- 2.63

3. Advocacy Avenues
- 2.35
- 2.04
- 2.07

2. Conducting Advocacy
- 2.58
- 2.49
- 2.34

1. Advocacy Goals
- 2.98
- 2.73
- 2.70

X-axis: Average Capacity (0 to 4)

16

Figure N: Comparison of Section Averages by Organization Work Type
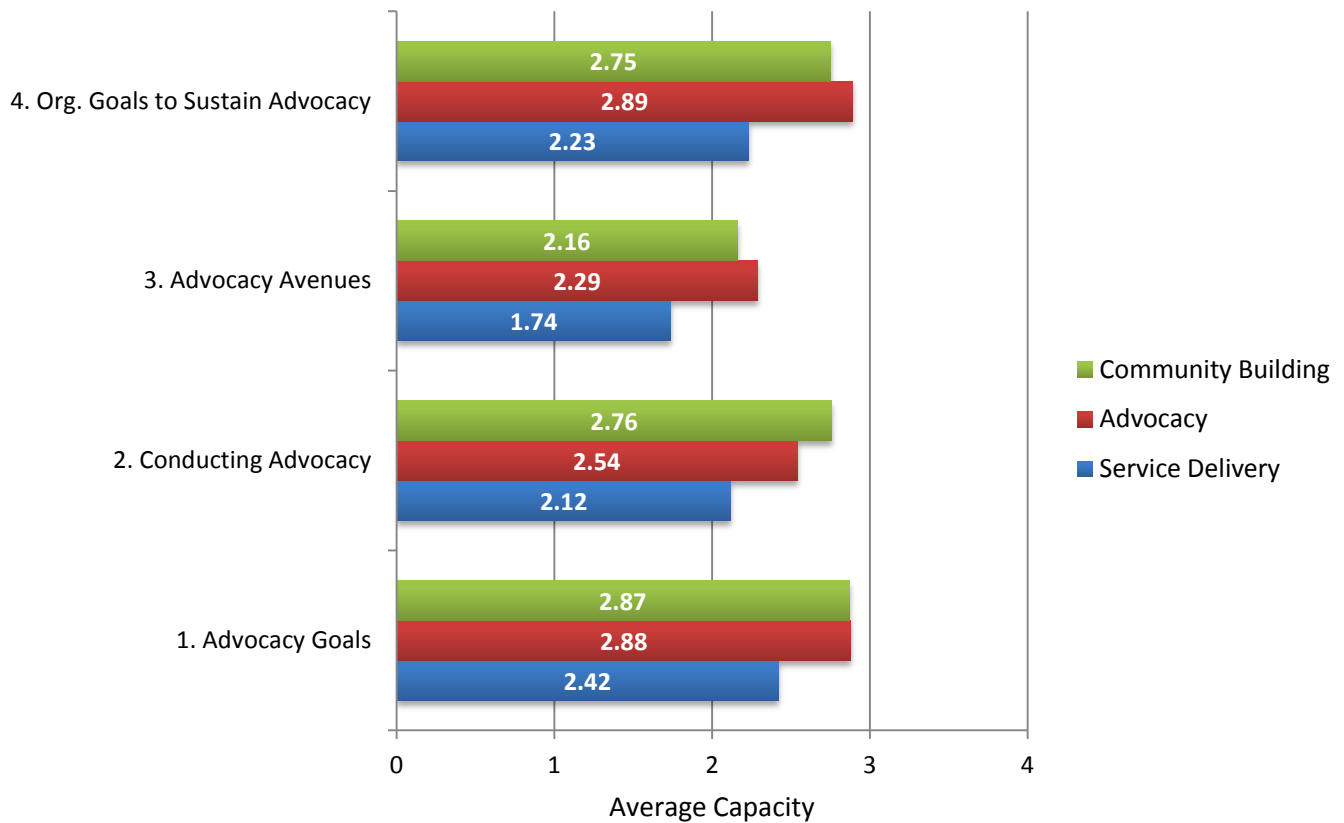

Table 9: Organization Work Type Practically Significant Differences

Section/Indicator	Comparison	Difference	Effect Size
Section 4: Org. Commitment	Service Delivery x Advocacy	0.79	1.1
Section 4: Fiscal Management	Service Delivery x Advocacy	0.92	1.1
Section 2: Research and Analysis	Service Delivery x Community Building	1.13	1.1
Section 3: Legislative	Service Delivery x Advocacy	1.06	0.97
Section 1: Plans	Service Delivery x Community Building	0.62	0.89
Section 1: Agenda	Service Delivery x Advocacy	0.63	0.85
Section 1: Plans	Service Delivery x Advocacy	0.58	0.83
Section 2: Research and Analysis	Service Delivery x Advocacy	0.9	0.83
Section 3: Legislative	Service Delivery x Community Building	0.88	0.81
Section 2: Influence Decisions	Service Delivery x Community Building	0.69	0.76

Section/Indicator	Comparison	Difference	Effect Size
Section 4: Fiscal Management	Service Delivery x Community Building	0.63	0.74
Section 4: Org. Commitment	Service Delivery x Community Building	0.58	0.71
Section 4: Funding Advocacy	Service Delivery x Advocacy	0.53	0.68
Section 2: Messaging	Service Delivery x Advocacy	0.54	0.59
Section 3: Administrative	Service Delivery x Advocacy	0.65	0.59
Section 1: Agenda	Service Delivery x Community Building	0.67	0.43

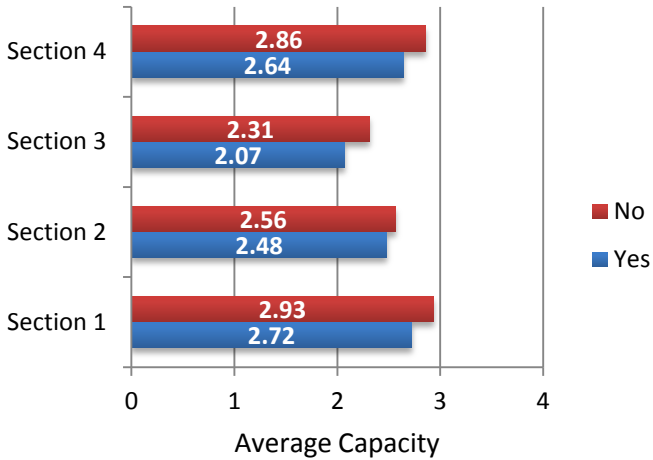**Figure O: Section Comparison for Organization Type**
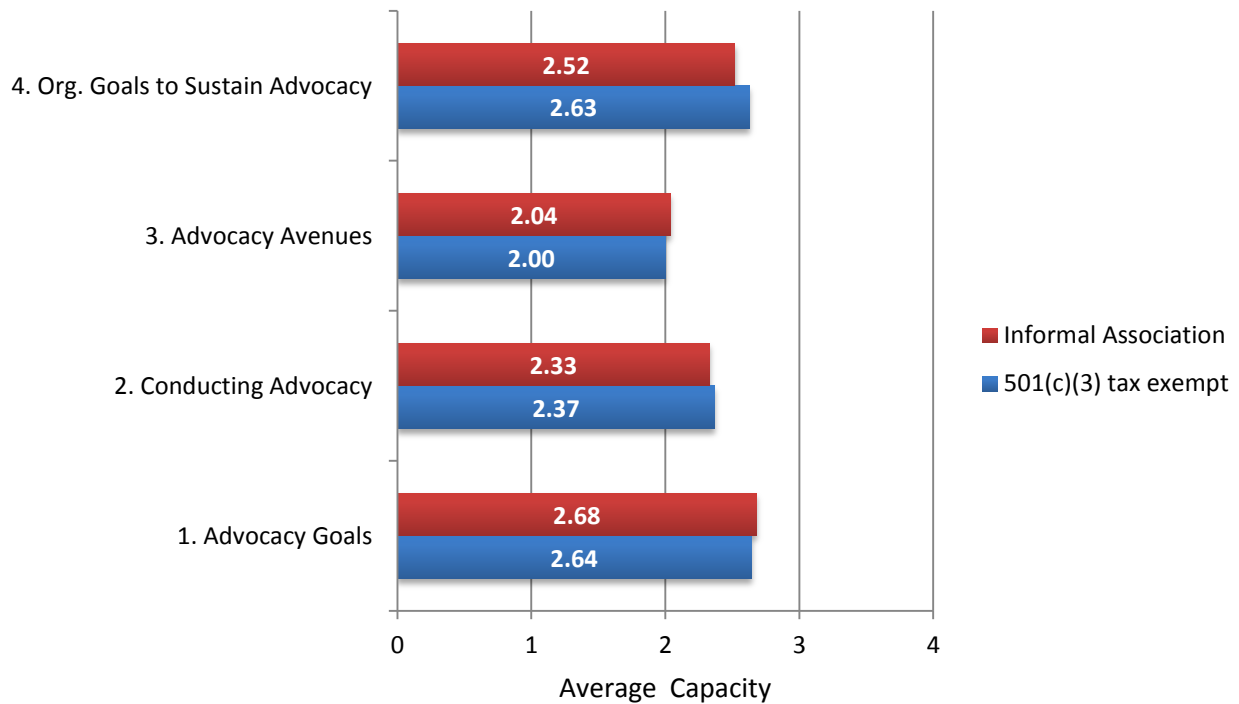
Comparison Results: Service Level

Figures P-S present the comparisons of section capacity averages across several levels in which the organizations engage in advocacy. Because the organizations could choose more than one service level, comparisons are made between the organizations that engage in advocacy at each level and the organizations that do not engage in advocacy at each level.

- Local: There were no statistical differences in average capacity ratings for organizations who engage at the local level compared to those that do not.
- State: There were no statistical differences in average capacity ratings for organizations who engage at the state level compared to those that do not.
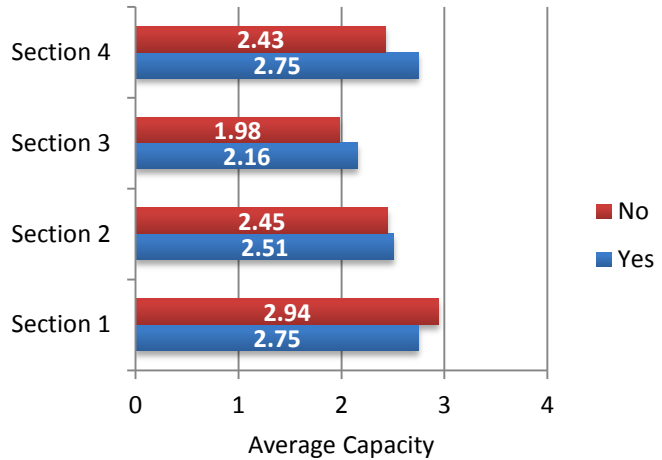- Regional: There were no statistical differences in average capacity ratings for organizations who engage at the regional level compared to those that do not.

- **Federal:** Statistical differences were identified in all four sections when comparing organizations that engage at the federal levels to those that do not. Capacity for organizations that engage at the federal level tended to be statistically higher. Table 10 shows the average differences which are practically significant.
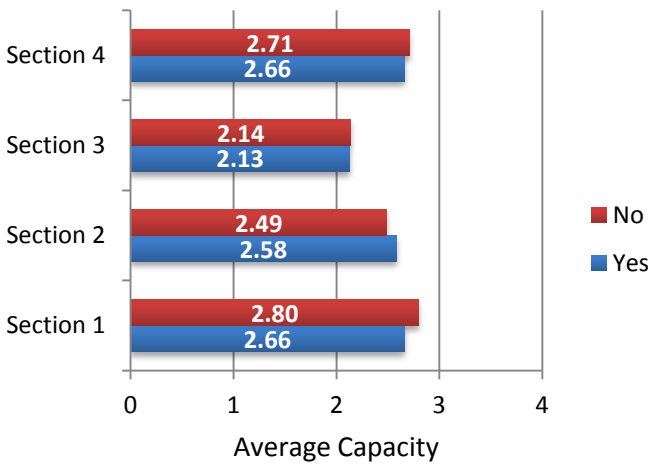
Figure P:
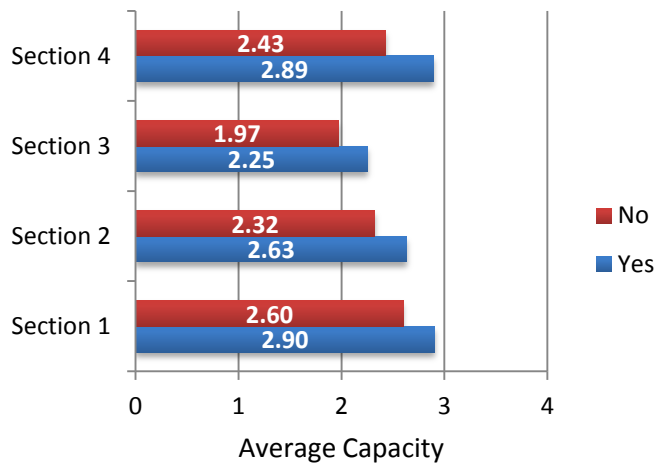**Section Comparison for Local Service**

Section	No	Yes
Section 4	2.86	2.64
Section 3	2.31	2.07
Section 2	2.56	2.48
Section 1	2.93	2.72

Average Capacity

Figure Q:
Section Comparison for State Service

Section	No	Yes
Section 4	2.43	2.75
Section 3	1.98	2.16
Section 2	2.45	2.51
Section 1	2.94	2.75

Average Capacity

Figure R:
Section Comparison for Regional Service

Section	No	Yes
Section 4	2.71	2.66
Section 3	2.14	2.13
Section 2	2.49	2.58
Section 1	2.80	2.66

Average Capacity

Figure S:
Section Comparison for Federal Service

Section	No	Yes
Section 4	2.43	2.89
Section 3	1.97	2.25
Section 2	2.32	2.63
Section 1	2.60	2.90

Average Capacity

Table 10: Federal Service Practically Significant Differences

| Section/Indicator	Average Difference	Effect Size
Section 2: Influence Decisions-Makers	0.70	0.83
Section 3: Legislative	0.59	0.52
Section 4: Decision-Making Structure	0.49	0.69
Section 1: Agenda	0.48	0.63
Section 4: Fiscal Management	0.60	0.63
Section 3: Electoral	0.41	0.43
Section 4: Org. Commitment	0.42	0.50

Comparison Results: Selected Issues

Figures T-X present the comparisons of section capacity averages across several issues that the organizations work on. Because the organizations could choose more than one issue, comparisons are made between the organizations that work on each issue and the organizations that do not work on them.

- Education: There were no statistical differences in capacity ratings when comparing organizations that work on education compared to those that do not.
- Healthcare: There were no statistical differences in capacity ratings when comparing organizations that work on healthcare compared to those that do not.
- Youth: There were no statistical differences in capacity ratings when comparing organizations that work with youth compared to those that do not.
- Housing: There were no statistical differences in capacity ratings when comparing organizations that work on housing compared to those that do not.
- Child Welfare: Statistical differences were identified in sections 2 and 3 when comparing organizations that work on child welfare to those that do not. Table 11 shows the average differences which are practically significant.
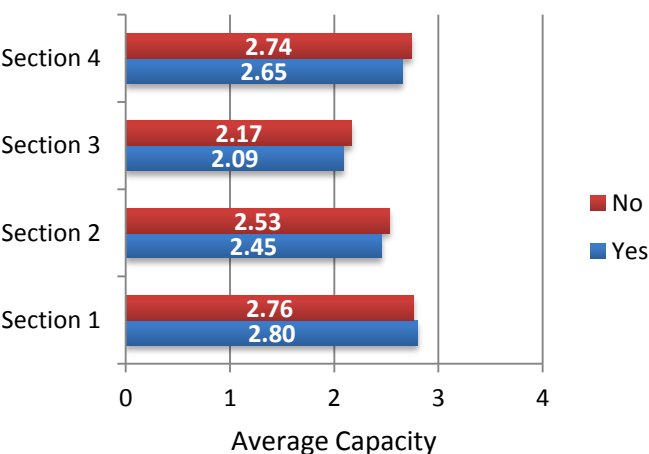
Figure T:
Section Comparisons for Work on Education
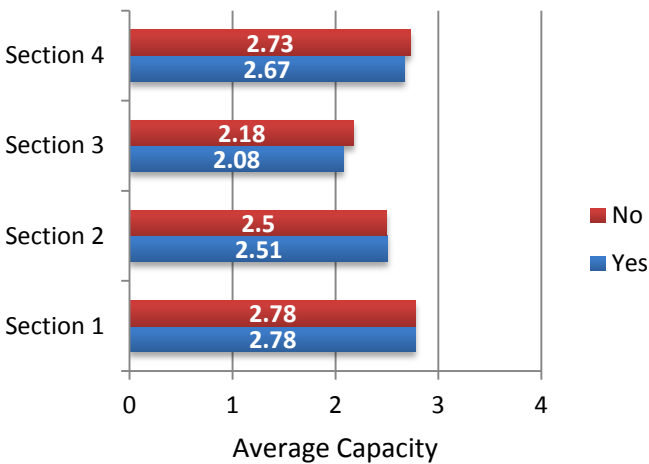
Figure U:
Section Comparisons for Work on Healthcare
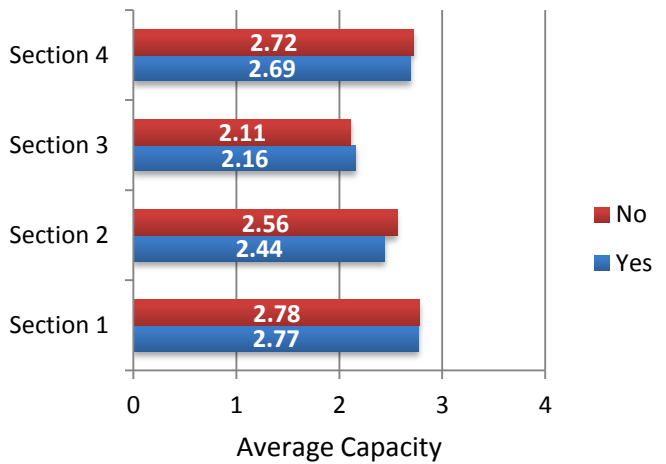
Figure V:
Section Comparisons for Work with Youth

Figure W:
Section Comparisons for Work on Housing
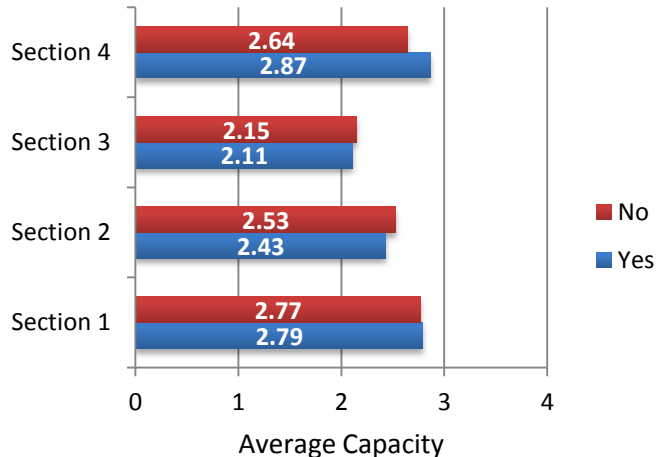
Figure X:
Section Comparisons for Work on Child Welfare
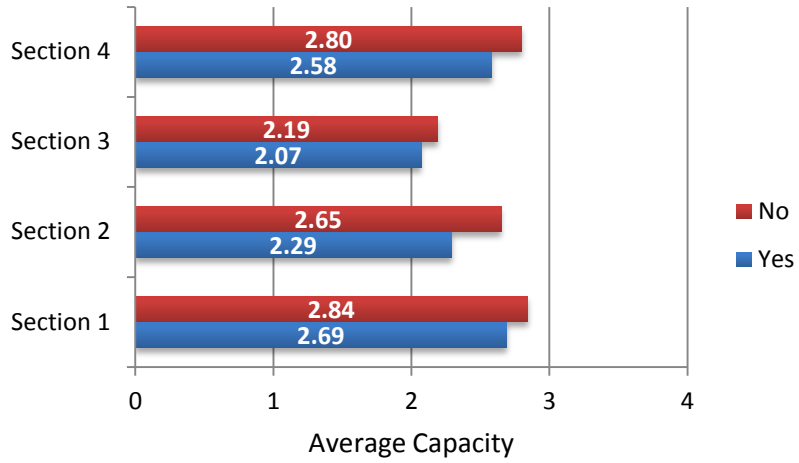
Table 11: Practically Significant Average Differences for Child Welfare

Section/Indicator	Difference	Effect Size
Section 3: Ballot Measures	0.54	0.51
Section 2: Research and Analysis	0.48	0.42
Section 2: Field Operations	0.46	0.55
Section 2: Media Relations	0.47	0.53
Section 2: Messaging	0.43	0.50

Rely on Partners

For all indicators in sections 2 and 3 (excluding section 2.3: Advocacy Partners and Coalitions), respondents were able to choose *Rely on Partners* as a response option only if their organization primarily receives that capacity from other individuals or groups.

Figure Y shows the frequency of how often *Rely on Partners* was selected for each indicator. The frequency for each indicator represents the number of times *Rely on Partners* was selected for all measures associated with that indicator. The indicators where organizations most frequently rely on partners are *litigation*, *research and analysis,* and *ballot measures*.

Figure Y: # Times Rely on Partners was Selected

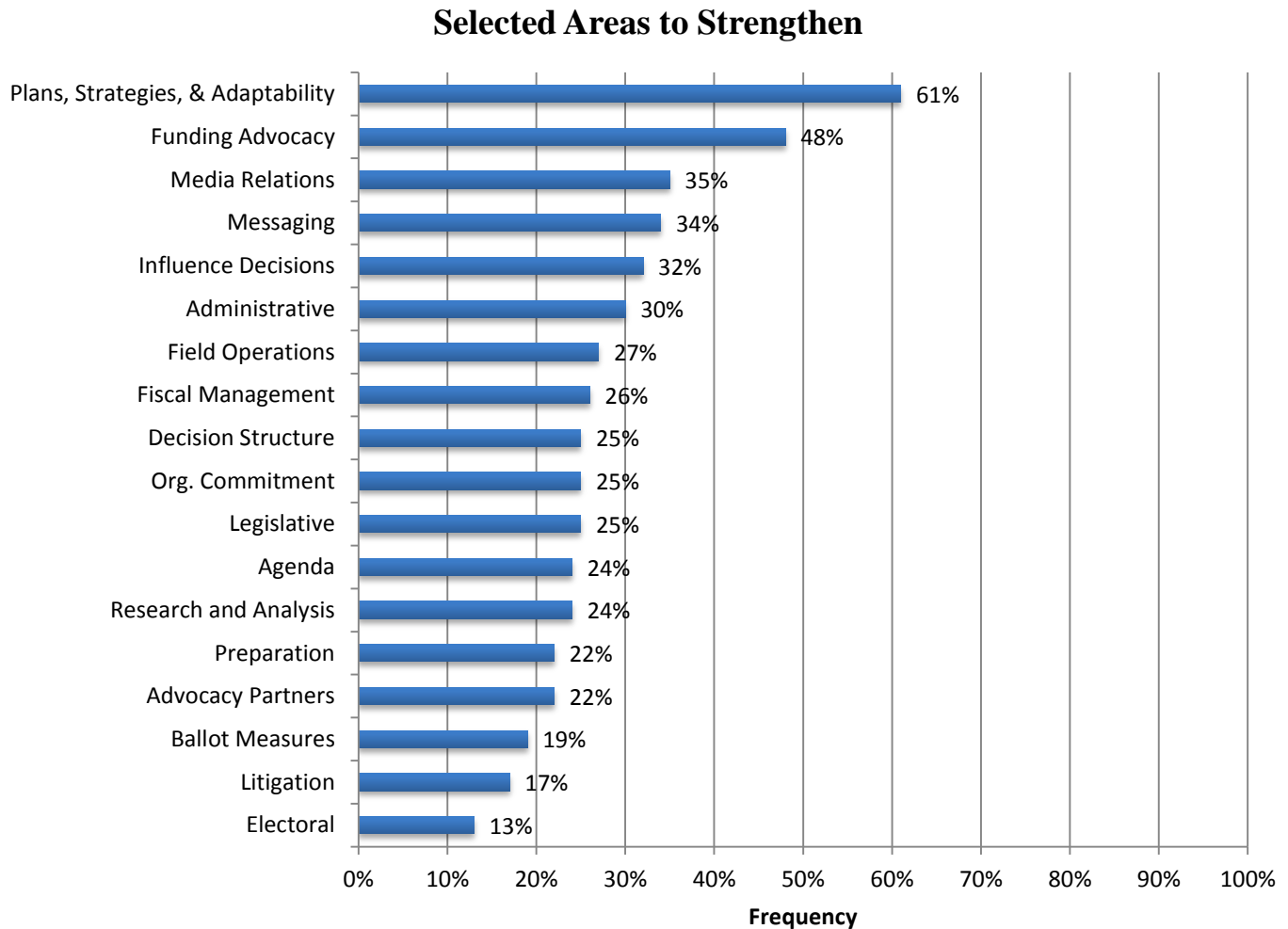| Indicator	# Times Selected
3.5 Litigation	94
2.1 Research & Analysis	75
3.3 Ballot Measures	67
3.2 Legislative	44
2.2 Field Operations	34
3.4 Electoral	34
3.1 Administrative	33
2.4 Messaging	24
2.5 Media Relations	22
2.6 Influence Decisions	9
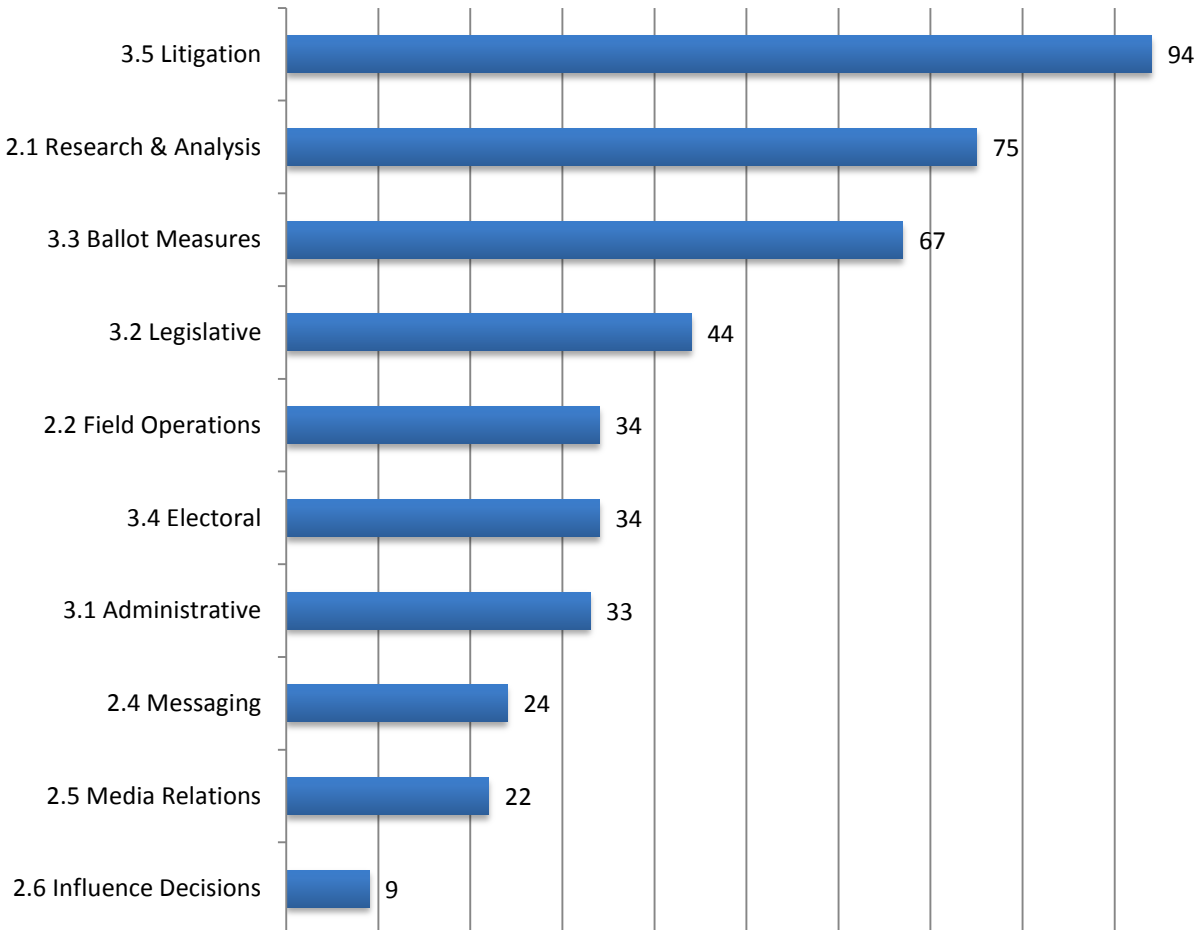
Selected Areas to Strengthen

At the end of the survey, respondents were provided with a breakdown of their results and asked to indicate the top two or three "focus areas" in which capacity should be strengthened in their organization or their partner organizations.

Figure Z shows the frequency of how often each indicator was chosen as a focus area. Nearly two-thirds of respondents identified that their organization should increase capacity for *plans, strategies, and adaptability.* Almost half of the respondents indicated their organization should increase capacity in *funding advocacy.* Organizations least often identified *ballot measures, litigation,* or *electoral* as areas to strengthen.

Figure Z: Selected Areas to Strengthen

Selected Areas to Strengthen

Area	Frequency
Plans, Strategies, & Adaptability	61%
Funding Advocacy	48%
Media Relations	35%
Messaging	34%
Influence Decisions	32%
Administrative	30%
Field Operations	27%
Fiscal Management	26%
Decision Structure	25%
Org. Commitment	25%
Legislative	25%
Agenda	24%
Research and Analysis	24%
Preparation	22%
Advocacy Partners	22%
Ballot Measures	19%
Litigation	17%
Electoral	13%

APPENDICES

Appendix A: Averages for Advanced (optional) Questions by Indicator

Section 1 Advanced Questions (Optional)

Section 2 Advanced Questions (Optional)

Section 3 Advanced Questions (Optional)

Section 4 Advanced Questions (Optional)
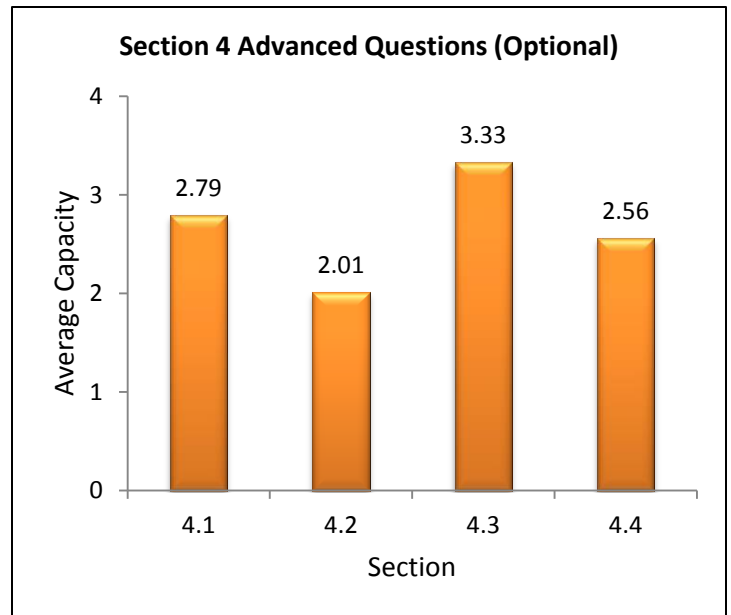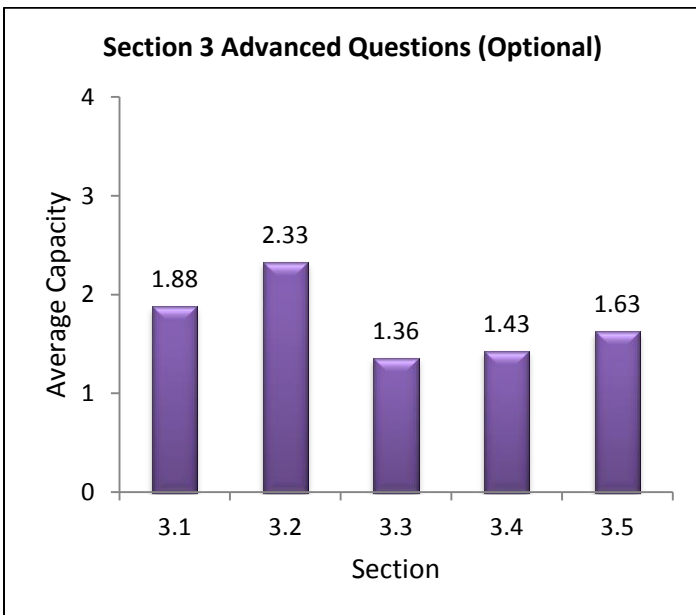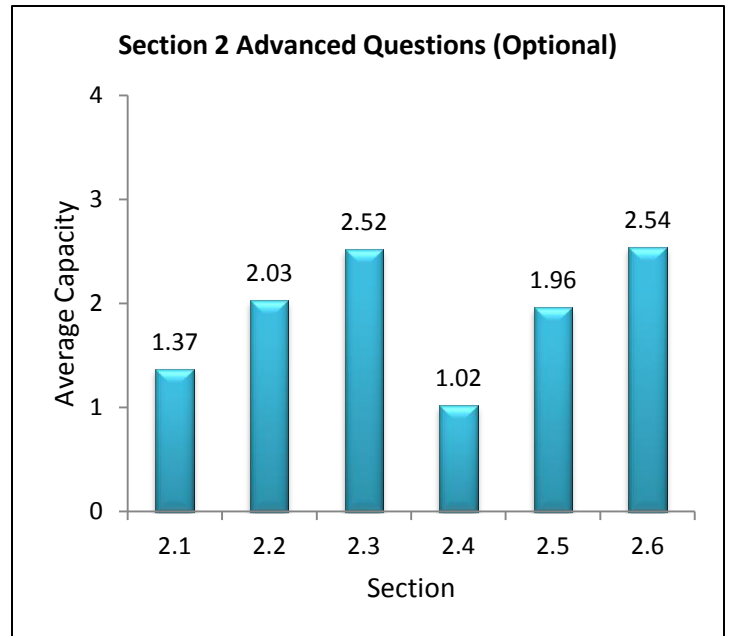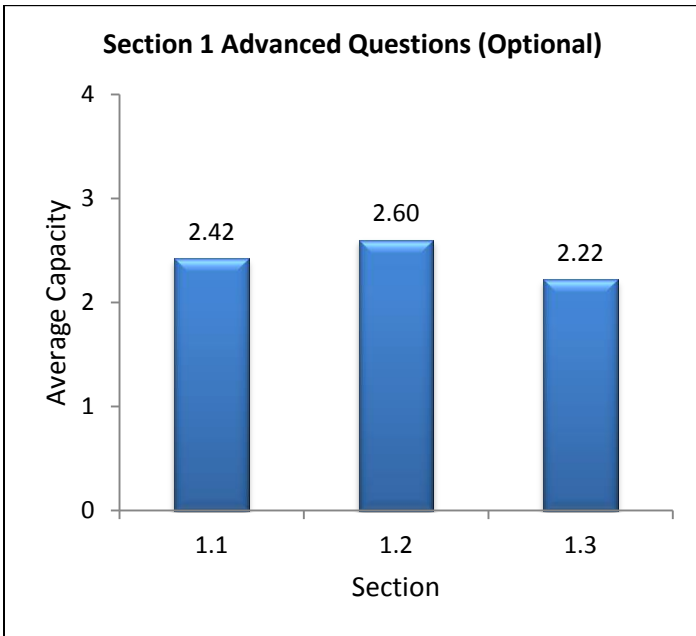
Appendix B: Summary of Indicator Scores

Indicator	Average Capacity
Preparation	3.28
Advocacy Partners	3.15
Decision Structure	2.96
Org. Commitment	2.92
Agenda	2.78
Influence Decisions	2.74
Legislative	2.63
Fiscal Management	2.59
Messaging	2.48
Administrative	2.39
Funding Advocacy	2.35
Plans, Strategies, & Adaptability	2.28
Field Ops	2.25
Electoral	2.24
Research and Analysis	2.22
Media Relations	2.17
Litigation	1.63
Ballot Measures	1.61

Appendix C: Averages and Rely on Partners by Measure

S1: Preparation	Average Capacity (N=100)
The organization identifies and articulates its mission and goals.	3.38
The organization has basic knowledge about its subject matter, including how its issues affect constituents.	3.63
The organization understands the overall policy environment related to its issues, including trends, possible allies and opponents, and other organizations working towards the same goals.	3.29
The organization identifies its existing capacities, including staffing, skills and knowledge, and strength of field operation.	2.80

S1: Agenda	Average Capacity (N=100)
The organization has a written advocacy agenda, approved by the organization's leadership, that identifies its goals and priorities.	2.66
The organization gathers information and recommendations from constituents and other stakeholders in the development of its agenda.	2.74
The organization shares its agenda or segments thereof, with decision makers, constituents, partners and media, as appropriate.	2.73
The organization adjusts its focus on particular agenda items in response to internal and external changes.	2.99

S1: Plans, Strategies, and Adaptability	Average Capacity (N=100)
The organization analyzes what it will take to accomplish each written agenda item, including who has the power to make decisions in legislative, administrative, electoral, litigation, and other areas.	2.20
The organization develops a plan for how it will strategically advance each written agenda item. The plan identifies appropriate targets, tactics, major activities, and expected results.	2.07
The organization monitors internal and external changes in the policy environment and adapts its strategies as needed.	2.79
The organization has a plan for assessing advocacy capacity and for strengthening its capacity as needed.	2.05

S2: Research and Analysis	Average Capacity	# Times Rely on Partners Selected
The organization researches, compiles and analyzes information about specific issues.	2.19	22
The organization researches and analyzes the impact of current policies, the policy environment and opportunities for advancing its goals.	2.07	23
The organization employs a process for verifying that its issues or issue analyses and other materials are accurate and reliable.	1.95	24
The organization shares information, analyses and supporting materials with decision makers, constituents and partners, as appropriate.	2.66	6

S2: Field Operation	Average Capacity	# Times Rely on Partners Selected
The organization has a network or various networks of individuals and organizations that it can activate to advocate or collaborate on key policy issues.	2.72	5
The organization communicates with its network on the status of advocacy efforts, opportunities to engage, messages and results.	2.56	3
The organization identifies segments of the public to educate about its agenda.	2.15	7
The organization conducts phone banks, informational mailings, online communications and/or canvassing to educate and mobilize their network and gain public support.	1.58	19

S2: Advocacy Partners and Coalitions	Average Capacity	# Times Rely on Partners Selected
The organization identifies other stakeholders that have similar goals, including those with complementary knowledge and skills, with whom it could collaborate.	3.12	N/A
The organization participates in coalitions that share one or more of its goals and provide value to the organization.	3.25	N/A
The organization actively seeks support for its priorities from its coalition partners.	3.07	N/A
The organization exchanges information with its partners, as appropriate.	3.14	N/A

S2: Messaging	Average Capacity	# Times Rely on Partners Selected
The organization develops clear, compelling and concise messages tailored to its target audiences.	2.59	4
The organization bases its messages and materials on reliable, credible and up-to-date information.	3.00	7
The organization identifies and uses effective messengers and spokespeople.	2.51	3
The organization chooses a variety of paid and/or earned media strategies to communicate its messages.	1.80	10

S2: Media Relations	Average Capacity	# Times Rely on Partners Selected
The organization monitors media coverage related to its issues.	2.84	1
The organization identifies, develops and maintains a list of media contacts relevant to its program issue(s).	2.30	6
The organization distributes information to a wide range of media outlets -- including online, broadcast and print media -- to communicate its messages.	2.05	8
The organization has a written media plan with objectives, targets, strategies and timelines.	1.49	7

S2: Influencing Decision-Makers	Average Capacity	# Times Rely on Partners Selected
The organization monitors the actions of decision makers related to the organization's agenda.	2.83	4
The organization builds working relationships with decision-makers by providing information.	2.86	2
The organization consistently nurtures relationships with decision-makers throughout the year.	2.52	0
The organization deliberately builds relationships with elected officials without regard to political affiliations.	2.76	3

S3: Administrative	Average Capacity	# Times Rely on Partners Selected
The organization understands the regulatory and enforcement processes of the agencies that implement policies and programs, and knows how to influence these processes.	2.53	6
The organization identifies and works with appropriate decision makers within the administrative agencies, including related commissions and advisory committees.	2.46	6
The organization identifies, monitors and analyzes proposed rules, regulations and other administrative branch activities and their potential impact on the organization's priorities.	2.33	11

The organization recommends policies or actions through comments (or endorsements of other groups' comments) on proposed regulations or other administrative policies, through testimony at agency hearings and/or other Averages to further its priorities.	2.28	10

S3: Legislative	Average Capacity	# Times Rely on Partners Selected
The organization has knowledge of the legislative process (including budgeting and appropriations), and knows how to impact these processes.	2.80	10
The organization identifies and works with appropriate legislators, committees, staff, and stakeholders.	2.66	8
The organization identifies, monitors and analyzes proposed legislation and the potential impact on its priorities.	2.80	9
The organization promotes, opposes or helps to craft or amend legislation.	2.26	17

S3: Ballot Measures	Average Capacity	# Times Rely on Partners Selected
The organization identifies, monitors, and analyzes measures that will appear or may appear on the ballot and the potential impact on its policy priorities.	1.84	17
The organization takes public positions on ballot measures related to its interests, its constituents' interests, or its priorities.	1.65	15
The organization educates its constituents and other voters about its position on measures that will appear on the ballot.	1.63	14
The organization conducts get-out-the-vote efforts to promote or oppose ballot measures related to its interests.	1.32	21

S3: Electoral	Average Capacity	# Times Rely on Partners Selected
The organization understands the primary and general election processes for candidate elections in relevant jurisdictions and the possible roles nonprofits can play.	2.93	2
The organization reminds and encourages its constituency and the public to vote.	2.23	9
The organization participates in voter and/or candidate education efforts.	1.75	14
The organization educates its staff and governing body about the legal guidelines for electoral activity.	2.03	9

S3: Litigation	Average Capacity (N=100)	# Times Rely on Partners Selected
The organization understands the role litigation plays to complement other strategies.	1.76	21
The organization identifies appropriate courts, regions and court leanings to inform possible litigation actions related to the organization's priorities.	1.44	24
The organization has access to competent counsel who can provide advice or pursue legal strategies.	2.14	17
The organization pursues legal activities such as initiating litigation or signing on to amicus briefs, as needed.	1.20	32

S4: Organizational Commitment	Average Capacity (N=100)
The organization's governing structure is committed to advocacy.	3.23
The organization has at least one staff person whose job description includes specific responsibilities for advocacy.	3.10
The executive director and relevant staff have a clear understanding of the basic federal and state rules and regulations that govern lobbying, election-related work, and other advocacy activities.	3.19
The organization has investigated and elected whether or not to use the 501(h) expenditure test.	2.17

S4: Funding Advocacy	Average Capacity (N=100)
The organization understands how foundations can support advocacy.	2.76
The organization informs and educates funders about the legal rules for supporting advocacy.	1.94
The organization informs and educates funders and donors about the value of funding advocacy.	1.99
The organization fosters long-term relationships with individual donors and foundations.	2.69

S4: Decision-Making Structure and Process	Average Capacity (N=100)
The organization has a leadership structure or body that makes timely decisions.	3.26
The organization's leadership and advocacy staff communicate regularly about the status of activities.	3.05
Staff identifies for organizational leaders potential opportunities and risks for the organization before engaging in advocacy work.	2.78
The organization evaluates its progress and uses lessons learned to inform its decision making.	2.76

S4: Fiscal Management and Sustainability	Average Capacity (N=100)
The organization's board treasurer, executive director, fiscal, and relevant program staff have received training and understand rules for monitoring and reporting funds for lobbying.	2.56
The organization's financial management system tracks lobbying activities and expenses -- as well as funds not allowable for lobbying -- in keeping with appropriate federal and state laws.	2.56
The organization budgets funds for advocacy programs.	2.63
The organization commits a portion of general operating support to advocacy.	2.61