



ACNM Department of Advocacy and Government Affairs
Grassroots Advocacy Resources

Guide to Strategic Planning for Advocacy

What is Advocacy Planning?

Advocacy planning is an interactive process which intends to clarify advocacy goals, analyze the internal and external environment, set a clear direction for immediate and future steps, and identify concrete goals that are realistically achievable.

There are a number of steps involved with developing a functional strategic plan for policy work:

- 1). Determine who should be involved in the process and at what stage
- 2). Analysis of the affiliate's current advocacy capabilities
- 3). Creation of a unified vision and development of the strategic plan
- 4). Monitoring and reviewing the plan; Annual evaluation of advocacy efforts

This might seem like an overwhelming process at first glance, but affiliates should remember that you are most likely already doing some or most of these steps in an informal manner. And that's great because advocacy planning is important! Like all strategic planning processes, the development of an advocacy plan will help the affiliate to identify top policy goals and plan for appropriate resource allocation.

Step One – Who Should be Involved in the Process?

Affiliates will likely utilize different individuals at different points in the process of creating an advocacy plan. Strategic planning should be initiated by the affiliate legislative chair and include the other affiliate leaders, the policy committee (if one exists), the lobbyist (if applicable), and any interested affiliate members. Depending on the particular policy goal, it may be appropriate to reach out to stakeholder organizations at the preliminary stages of strategy development.

This group of interested individuals will develop the initial plan, but before it is implemented the plan should be presented to the membership for critique and approval. A successful advocacy plan will ultimately require the support and enthusiasm of the membership, who need to understand the importance of the advocacy goals in order to foster commitment to the significant time (and often financial expenditures) required to achieve policy goals.



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Step Two – Analysis of Current Advocacy Capabilities

To plan for the future affiliates must have a sound understanding of current strengths and weaknesses. A SWOT analysis is commonly used to identify strengths, weaknesses, opportunities, and threats. Consideration of strengths and weaknesses will be primarily an analysis of the affiliate’s capabilities, whereas consideration of opportunities and threats is an analysis of the external environment.

Category	Sample Questions to Consider
Strengths and Weaknesses	<ul style="list-style-type: none"> • What are your main achievements over the last two years? • How successful have you been in achieving your policy goals? • How effective are your relationships with other key stakeholders in the state? • How secure is your financial position? Do you have enough resources to finance any major advocacy campaigns under consideration? • Do you have the volunteer levels and expertise needed to meet your objectives? • Are you able to build effective relationships with those you wish to influence? • Are you effective at communicating advocacy goals and updates to your membership? • How effective is your infrastructure? Is your affiliate functioning efficiently? • Does the affiliate leadership have the expertise needed to lead the advocacy work? • What are your grassroots capabilities? Have you considered how to use your client base in advocacy efforts?
Opportunities and Threats	<ul style="list-style-type: none"> • How is your affiliate regarded externally? Are stakeholders familiar with you? • Are other allied groups considering a legislative push that you could join? If not, would they be supportive of your advocacy goals? • Who will oppose your agenda? Who will support it? • Are there legislators who are friendly toward midwifery or maternal-child health that you should approach?



Step Three – Creation of a Unified Vision and Plan Development

After completing the SWOT analysis, the next stage in strategic planning is to arrive at a common vision regarding the future policy activities of the affiliate. These goals will be broken down between short-term and long-term activities. Remember that strategic advocacy planning tends to focus on a period of about 5 years. Your goals will likely be different depending upon the advocacy goals that the affiliate designates as priorities. For example, affiliates will likely develop different relationships if the final goal is a regulatory versus a legislative change.

No two advocacy plans will be entirely alike, and that's ok! The ultimate aim of advocacy plan development is to identify the steps and processes that will be most helpful for your affiliate given your unique state environment. Even within the same affiliate, the emphasis of an advocacy plan will likely change from year to year. Resist the urge to compare your advocacy agenda with other affiliates as a critical measurement of success or failure. Maintain your focus on *your* priorities, strengths, and opportunities, but do utilize other affiliate leaders as resources with valuable experiences to share whenever possible.



Short-term Goals: These are the goals and policy activities of the affiliate for the next 12-24 months. These goals will emerge from the SWOT analysis of both the internal and external environment and will specifically address issues that could “make or break” policy success.

Examples: Form relationships with stakeholder organizations and key committee members; Achieve fundraising goals; Complete any needed

research for advocacy materials

Long-term Goals: The long-term goals represent the implementation phase of policy planning. Long-term goals describe the specific outcomes the affiliate hopes to achieve within 3-5 years. These goals should be limited in number (4 to 10 total), demonstrate a clear direction, delineate well-defined roles and responsibilities of affiliate leaders and membership, and be measurable.

Examples: Hire a lobbyist; Identify a bill sponsor; Enact favorable legislative or regulatory changes

Approach each of these goals from the SMART perspective. Goals should be specific, measurable, achievable, realistic, and time-bound. In other words, affiliates should



identify the needed change, discuss how the change can be accomplished, identify what resources might be needed to achieve the goal, and estimate how much time is needed to accomplish each task.

Affiliate leadership and others involved in the planning process must take into account the resource implications of the goals. You should review what is possible given the affiliate's available resources and identify where or how additional resources could be procured, if needed. This analysis might highlight gaps in the number of available members to work on an issue, the availability of supporting data and research, or financial limitations. Affiliates may need to plan for changes in their existing structure related to how volunteers and leaders are organized, how financial resources are obtained, and whether members are in need of any advocacy or issue-specific training.

Sample from Affiliate Advocacy Calendar

December 2012

Review prefiled legislation.

Begin planning for affiliate lobby day.

January 2013

Session begins on January 8.

Meet with key House and Senate members.

Identify contacts on key legislative committees.

Monitor and track legislation of interest.

It might be helpful for affiliates to create a written record of these conversations that can serve as a roadmap for the current year and be referenced during the next planning period. Key areas that should be noted in the written plan include a summary of the SWOT analysis, the short and long-term policy goals, an analysis of available and needed resources, and a timeline to help guide affiliate activities. Many affiliates find it helpful to create monthly to-do lists in order to increase the ability of the affiliate to effectively monitor progress on advocacy goals.

Step Four – Monitoring and Evaluation of the Plan

The intent of advocacy planning is to construct a road map that can guide affiliate efforts, but, like all roads in life, there are often unexpected twists and turns. Advocacy plans are living documents that need to be monitored and updated in order to reflect changing circumstances. If you choose to create a timeline, the monthly review of next steps is a convenient time to assess whether any immediate changes are needed to the plan. It is strongly recommended that the affiliate's policy team review the plan in more detail on a quarterly basis.

Basic evaluation of the advocacy plan will be an on-going process that occurs as part of monthly and quarterly monitoring, but a more detailed evaluation of the plan's effectiveness should occur on an annual basis. Good evaluations consider the



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obvious components of campaigns, such as whether the affiliate achieved all or the majority of its policy goals, but pay equal attention to the smaller victories. Each meeting with stakeholders, every opportunity affiliate members took to share talking points, and even the experiences of responding to the opposition and pivoting accordingly are successes.

Effective advocacy is a learned skill. Each year of work represents another year of learning. In this respect, there is truly no such thing as failure.

Thank you for all your efforts on behalf of midwifery and the women and babies we serve.



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