

Meeting this Moment with Advocacy

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2025 UnidosUS



Module 3

What's in Your Toolkit?

Using Your Theory of Change to Act:

How to translate your strategy into tactics

Module 3

What's In Your Tool Box?

Advocacy can help identify problems and enable action on them to alter a system.

Learning Goal:

Developing **confidence** to use a **tool box of options** in a **strategic and responsive way** to push for **actionable solutions** that make **systems change** for the better.

WELCOME

1 Say hello

Your preferred name, pronouns, role, organization, location, and one thing you hope to learn today

2 Camera on please

Turn your camera on as you're comfortable

3 Mute

Mute yourself when you're not speaking

Meeting
the
Moment
with
Advocacy:

A Training
Series

Quick Review: Module 1 *Raising Our Voices: Advocacy for Non-Profits*

- ✓ Working Alongside UnidosUS & Campaigns
- ✓ Assessing Readiness for Advocacy Work
- ✓ What 501(c)(3)s *Can* Do
- ✓ Lobbying vs. Advocacy
- ✓ Compliance Do's and Don'ts

It's recorded! See the Hub.



Module 3

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Review:

Why Policy Change Matters

- Many community organizations are mission-driven and service oriented
- Their programs offer food, health, financial, or other assistance to families in need
- By leveraging what they know about where systems fail, they use their experience, stories, and relationships to work for changes *at scale*
- Ex: Improving how SNAP works at the state or federal level can impact 100,000 or 1 million
...That's *systems change*.

Module 2 Recap: What *We Can Be Best* at Doing

How do you figure out where to start?

Achieving Strategic Focus for Non-Profits



Tools to Predict Impact and Identify Windows of Opportunity:

- **Data gathering:** Scale of program, pop impacted, gaps
- **Legislative Analysis:** Committees, leadership, politics
- **Power Mapping:** Stakeholders & landscape
- **Issue Scan:** issues, timing, next steps, policy gaps
- **Ask for a Map from Partners:** Ask allies/mentors for views on a strategy or plan; bring them in!

Strategy Under Stress: Assessing Risk Tolerance

Canvas the state of your institutional resilience & resources. For example:

- Finances and vulnerabilities to financial impacts
- Internal controls
- Assets—reputational, political, etc.
- Necessity of risk-taking to achieve mission goals or respond to community needs
- Board and staff tolerance and readiness
- Specific political/geographic context
- Consider forms of leadership (public, private, practical)
- Others?



This assessment can drive BOTH strategy AND tactics.



Strategy
versus
Tactics

- Strategy is the plan.
- Tactics are the moves you make to carry it out.
- Strategy decides *what* your goal is and *why*.
- Tactics decide *how* and *when* to do something to advance the plan.

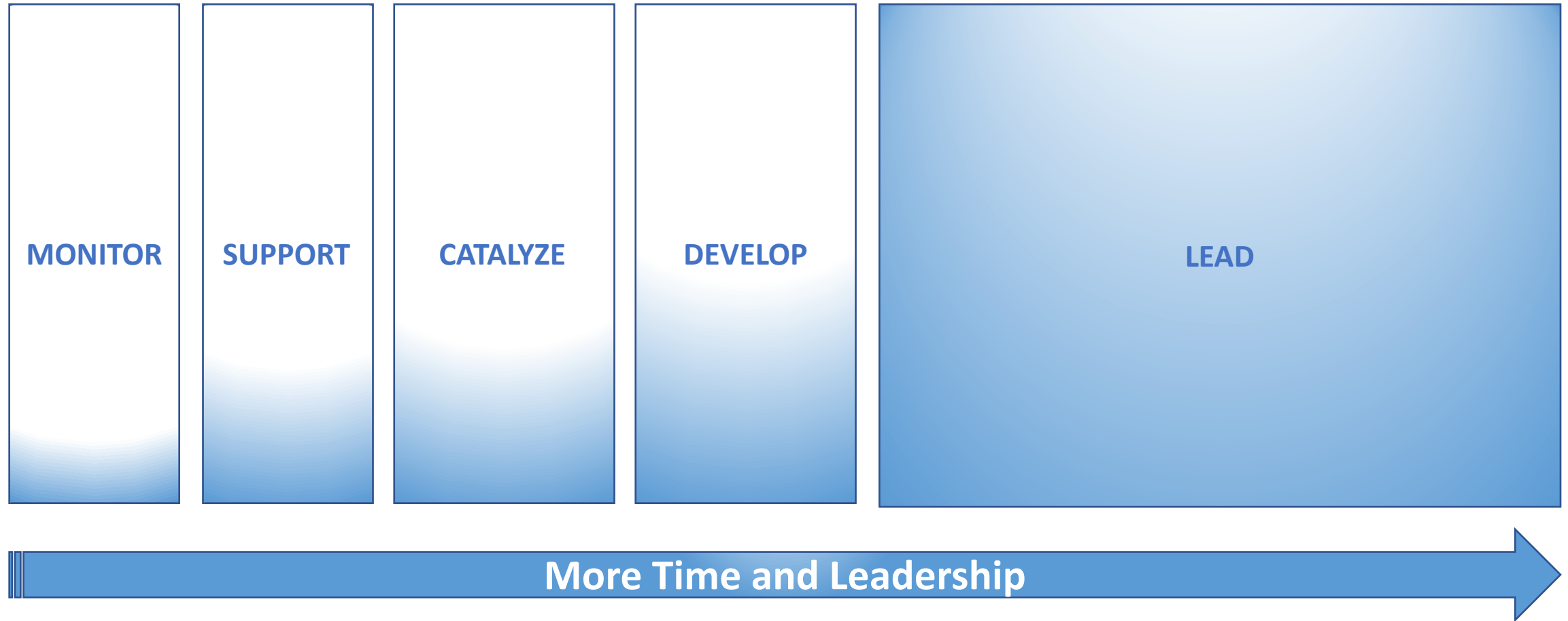
An Exercise

- 1) Identify 2-3 major goals for your work this year
- 2) Describe how they could be augmented with an advocacy strategy
- 3) What questions do you have on the strategy?
- 4) What more would you need to know to figure out the tactics to move this forward?
- 5) How will you discover or create this information?

Refining Strategy by Setting SMARTIE Goals

- Specific:** Be specific you can be about what it is you want to achieve and by when. Instead of, "We'll hold a meeting," your goal could be: "We'll hold a meeting for parents of teenage children in Memorial Hall to invite input on X initiative."
- Measurable:** State goals in measurable terms. Not: "X in our community will be reduced," but rather "X will decline by 30% by Y."
- Achievable:** Set realistic goals that your group can actually achieve.
- Relevant:** To our mission, needs, and vision for our community.
- Timed:** A timeline – linked to *windows of opportunity*.
- Inclusive:** Structured to drive inclusion in policies for marginalized communities.
- Equitable:** Outcomes should proportionately benefit the community, including specific steps that may be needed to ensure access to the benefits.

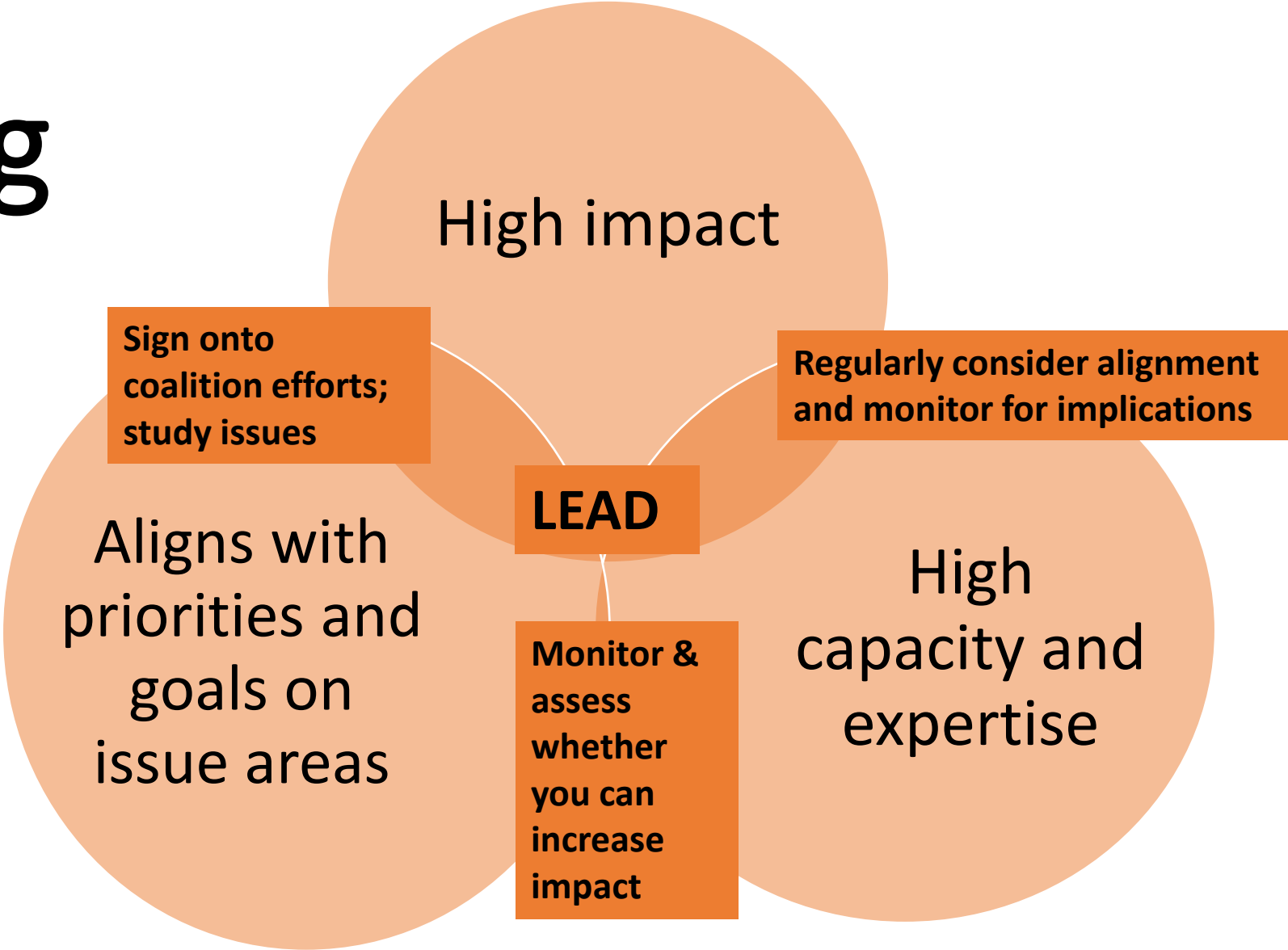
Choosing Your Level of Engagement in an Issue



Continue Refining Your Strategic Assessment & Experimenting

- Debriefs on meetings, events, tactics
- Short analytic writing (blog/white paper/fact sheet)
- Grant proposals
- Project dissemination plans
- Issue memos
- Funding proposals

Considering New Areas of Focus



Role Clarification Using MOCHA

- **Manager:** Supports and holds owner accountable through delegation. Serves as a resource, shares feedback, asks probing questions, reviews progress, and intervenes if the work is off-track. This person may or may not be the owner's supervisor.
- **Owner:** Has overall responsibility for driving the project forward and coordinating steps to accomplish the goal. Ensures all the work gets done (directly or with helpers) and involves others (consults) in a meaningful way. There should only be one owner.
- **Consulted:** Provides input and perspective. May share resources or referrals.
- **Helper:** Implements aspects of the work and actively contributes to project success. The helper may own a significant area of work with its own MOCHA.
- **Approver:** Signs off on the final product or key decisions. May be the owner or manager, though it can also be a person or group with a clear decision-making role on the project.

Role Clarification Using MOCHA

MOCHA FOR FUNDRAISER

Manager	Owner	Consulted	Helper(s)	Approver
María	You!	Rini (event plan and your workload as needed) Kevin (major donor list, work plan for Joelle) Ariana (program, work plan for Thuy and Kara)	Joelle (outreach and registration) Thuy (fundraising) Kara (program logistics)	Mana (budget) You (program)

Use it when:

- 1) Balls are getting dropped, or there is duplication of effort**
- 2) The project is complex and/or large**
- 3) You have to hand it off in stages**
- 4) To address equity in participation for a process**
- 5) You can embed sub-MOCHAs on large projects**



Tactics can help to gather evidence, build support, pressure and the factual case; refine messages and adapt your posture to changing conditions

Data Gathering

- Focus groups
- Polls and surveys
- Story collection
- Key Informant Interviews
- Interviewing allies, experts, and academics
- Internet research
- Regulatory docket analysis
- Agency/hearing statements and records
- Institutional statements
- Data analysis
- Power mapping

LEARNING & REFINEMENT



Case-Making

- Narrative crafting
- Academic papers
- Reports
- White paper
- Policy analysis
- Ed board memo
- Op-ed
- Blog
- Letter to the Editor
- Note to Hill/press
- Fact sheet
- Coalition Letter to policy maker
- Unidos letter
- Social media

In-Person Advocacy

- Testimony
- Press events
- Holding events (summit)
- Convenings
- Closed door meetings
- Panels you propose/moderate
- Panels you speak on
- Webinars
- Press calls/radio tours
- Meetings with decision makers
- Coalition meetings
- Calls



IMPACT

AGILITY



There are always trade-offs in impact and resources

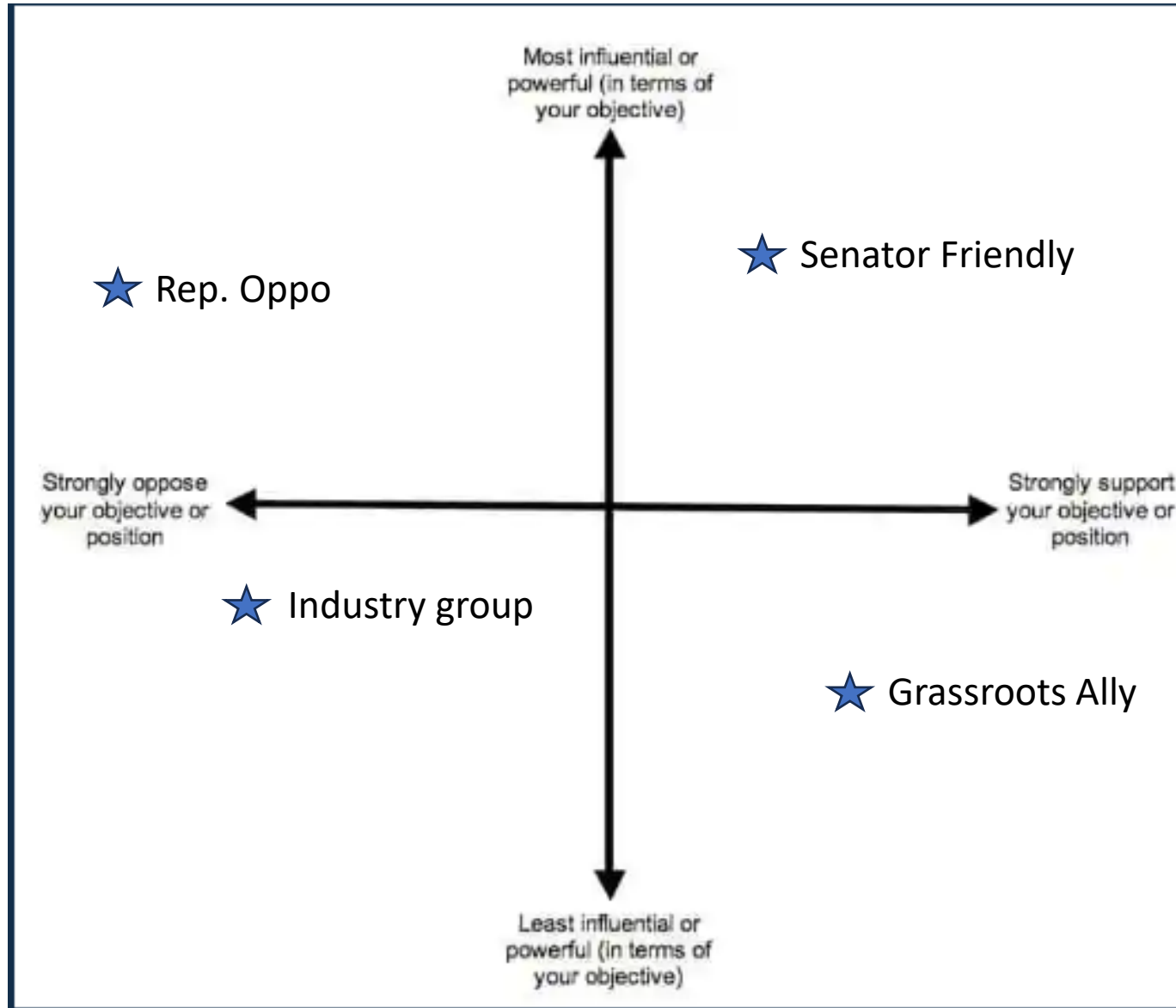
DISCUSSION

What's a new tactic & why would you use it?

What questions do you have about using it to achieve your strategy?

Steps to Power Map Your Issue

- 1) Decide the arena (state, federal, Congress, etc.)
- 2) Define the issue precisely
- 3) Look for insights re: Windows of Opportunity to influence key players to move them **up and right** in the grid



If a single decision-maker or small group of decision-makers is central to your strategy, you can next do a deep dive on ways in which to influence them, or to increase or decrease their power.

Tool 2: Power Mapping



1. Who has the power to decide? Put them in the center
2. Who are the less powerful players that influence decision maker? Write their names down in the appropriate category
3. Who of these have the most influence? Circle them
4. Who do we have access to? Star them
5. Look over list – whom do we know that has access to and can influence those identified or the decision-maker directly?

The Promises and Pitfalls of Coalitions

Coalitions are essential to getting things done and an opportunity.

But they vary widely in effectiveness, reach, power, process and culture.

When you enter a new coalition, it's good to notice and assess these questions:

- **When do they move?** What is the cadence of meetings and reaction times to events and opportunities?
- **How do they decide to act?** What is the level of formality for meetings and decision-making?
- **Who can they reach?** What is their political reach? Does the coalition do the outreach or specific groups?
- **Who's in the room?** What types of groups participate (policy wonks, grassroots, state/federal, civil rights)?
- **What is their history?** Have there been conflicts or consistent cooperation? Where are the disagreements?
- **Who are the power centers and leaders?** Can these folks be a mentor? Who should you cultivate?

Coalitions can meet for decades, years, months or days. They can be formed over time or suddenly brought together by you or others for a specific purpose. **Your attendance can outlive its purpose and should be continually reassessed.**

Having a strong social awareness of the dynamics, convening allies when appropriate, or making room for UnidosUS at the table, can be an effective use of your energy and time when it is clearly connected to a policy goal.

How to Make a Truth Sandwich

START BY STATING YOUR VALUES.

ACKNOWLEDGE THE DISINFORMATION WITHOUT REPEATING OR LINKING TO IT!

ADD A THICK LAYER OF TRUTH.

ASK YOUR NETWORK TO AMPLIFY.

Immigrants and Public Safety

Diverse, welcoming communities flourish. Inclusive neighborhoods create **safer, more vibrant environments for all of us.**

Yet **some leaders** are spreading **unfounded claims linking immigration with higher crime**, cherry-picking data and ignoring the facts.

FBI data shows that the average homicide rate of 11 border cities was lower than the national average. Undocumented immigrants are 33% less likely to be incarcerated than those born in the U.S. In other words, **immigrant communities enhance both our security and our quality of life.**

Making the Most of Your Tactics

Don't do "one and done."

Instead, be sure to spend time and energy **maximizing** impact.



Lower
Priority



Higher

Writing a paper? Consider whether it makes sense to:

- Send with cover email to Policymakers
- Send to the coalition and allies (or coordinate sign-on)
- Send with note to key press covering the issues (or develop pitch packet)
- Do social media thread/make a graphic for social and highlight a story of an impacted person/make a video explainer
- Make a one-page version for partners
- Turn it into an action for online audiences
- Write a fact sheet with key points and a story
- Turn it into a blog with a link to fact sheet/comment
- Request a meeting to follow up
- Communicate on strategy to allies/coalitions/funders
- Include it in communications round-up
- Follow-through with funding lawmaker
- Do a docket analysis and send it to allies; identify leverage points

Ask: What is Working Now?



- **Democracy is a process of public deliberation about what is right for all of us. We all have a role.**
- **When you have a stopping point in a campaign, assess what is working and why—and what was different than you thought it would be**
- **Applying tactics to strategy is building a muscle that will serve you no matter what you do**

Saying YES to the Job You Want: *Connecting Tactics to Professional Development*

If you'd like more experiences doing...

Public Speaking:

- Panels
- Events
- Press events
- Community events
- Webinars
- Congressional briefings
- Panel proposals
- Testimony
(written/oral)

Messaging & Communications:

- Press Interviews
- Messaging work (focus groups, polls)
- News Analysis
- Notes to Reporters
- Letters to the Editor
- Op-eds and blogs
- Outreach to reporters
- Responsive social media

Writing and Analysis:

- Grant proposals
- Comments to rules
- Opeds/blogs
- Reports and white papers
- Fact Sheets
- Policy proposals and analysis
- Peer reviewed papers and academic resources



Find Your Balance

- Our work is hard and important.
- We take on a lot of responsibility to help people and get it all right.
- This is noble. It can also be draining.
- **Be sure to find your balance** – find joy where you can, and forgive yourself for not getting it right, all of the time, and for bringing what you have to bring at that moment.

We want you in the long fight!

Questions

