

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1: In the Beginning There Was a Good Idea...

Chapter 1 Blue Pages, p. 15

Public Policy Priority Setting Tool

Potential Issue in 25 words or less – What needs to be fixed/stopped/created/improved:

We can fix/stop/create/improve _____ by mounting a campaign to

(the issue)

push for, request, demand, win:

1. An Administrative decision. _____ must be persuaded to

(who)

(do what)

2. A Budget appropriation increase/earmark. The FY ____ Budget must be amended by increasing/inserting/adding

(what)

by/into/to _____

(certain line item or outside section)

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 16

Assign Priority Level

| | |
|---------------------------|--|
| Imperative to Our Mission | |
| Important to Our Mission | |
| Nice to Do | |

Timeframe of Accomplishment

| | |
|----------------------------------|--|
| Short-Term (12 months – 2 years) | |
| Long-Term (3 years – 5 years) | |

Identify INTERNAL Time and Resources

| Number of: | Needed | Available | Days per Week |
|-------------------|---------------|------------------|----------------------|
| Staff | | | |
| Volunteers | | | |
| Other | | | |

Identify EXTERNAL Resources that are Needed and Available

List statewide and/or local supporters (e.g., allied organizations) with modest to good ability to influence public policy in order of importance.

| Would like to have on our side | Are able to work with us |
|---------------------------------------|---------------------------------|
| | |
| | |
| | |
| | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 17

Identify potential public policy heroes, supporters and possible supporters in the administration and legislature and make an informed guess at their level of commitment.

| Potential Public Policy Heroes | | | | | |
|---------------------------------------|---------------------------------------|--|------------------------------------|---|--|
| Name | Very committed (top 10 issues) | Very Supportive (top 25 issues) | Supportive (top 100 issues) | Don't care but willing to consider | Have some problems, but will consider |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 18

| <i>Potential Heroes/Opponents in the Administration</i> | | |
|--|---|---|
| Names In... | Contact Information (including personal staff) | Notes clarifying position on the issue |
| Governor's Office | | |
| Budget Office | | |
| Secretariat's Office | | |
| Commissioner's Office | | |
| Agency Managers | | |
| Line Managers | | |

| | | |
|--|--|--|
| | | |
|--|--|--|

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 18

| <i>Potential Heroes/Opponents in Legislature</i> | | |
|---|---|---|
| Names In... | Contact Information (including personal staff) | Notes clarifying position on the issue |
| Top Leadership | | |
| Chairs/Vice Chairs | | |
| Rank and File | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 20

| <i>Potential Organizational Partners</i> | | |
|---|---------------------------|--|
| Organization Contact Information | History in Support | Notes: Influence and Contacts in Administration and Legislature |
| | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 21

| <i>Potential Organizational Opposition</i> | | |
|---|------------------------------|--|
| Organization Contact Information | History in Opposition | Notes: Influence and Contacts in Administration and Legislature |
| | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 22

| <i>Policymaking Schedule</i> | | |
|------------------------------|--------------------------------|-------------------------|
| Legislation | Date/Timetable/Deadline | Notes/Exceptions |
| New | | |
| Late Filed | | |
| Hearings | | |
| | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 23

| <i>Budget Timetable</i> | | |
|---------------------------------------|----------------------|-------------------------|
| Fiscal Year Budget | Date/Timeline | Notes/Exceptions |
| Governor begins drafting budget | | |
| Governor submits annual budget | | |
| House Budget Committee deliberations | | |
| House Floor debate | | |
| Senate Budget Committee deliberations | | |
| Senate Floor debate | | |
| Conference Committee report | | |
| Veto overrides | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 1 Blue Pages, p. 29

| <i>Campaign Budget Worksheet</i> | |
|---|---------------|
| Item | Budget |
| <i>Staff</i> | |
| | |
| | |
| <i>Fringe</i> | |
| <i>Subtotal</i> | |
| | |
| <i>Overhead</i> | |
| Rent | |
| Computers | |
| | |
| <i>Subtotal</i> | |
| | |
| <i>Other Expenses</i> | |
| Printing, postage, phones | |
| Polling | |
| | |
| <i>Subtotal</i> | |
| | |
| <i>Subcontracts</i> | |
| Legislative Strategy Consultant | |
| Media Consultant | |
| <i>Subtotal</i> | |
| | |
| TOTAL | |

**Appendix 11: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 2: Strategic Thinking: Pre-Campaign Activities

Chapter 2 Blue Pages, p. 42

The “About Time Campaign” Operations Planning Tool & Commitment Form

Executive Committee: Name coalition conveners (diverse stakeholders committed to representing key constituencies).

Campaign Goals

Win _____ for _____.
(what) (whom)

Build a diverse coalition of consumers, organized labor, community-based and mission-driven organizations, business supporters, and most major stakeholders in the

_____.
(public policy field)

Operating Assumptions

- Collaboration across constituencies will contribute to strong campaigns.
- Effective campaigns require resources and there is a commitment to seek the necessary resources acknowledging that community-based organizations and consumer organizations have the least financial resources and may need additional support, and that the “About Time Campaign” fundraising strategies will not interfere with funding for core operations of collaborating partners.
- We will focus on those areas in which coordination or economies of

The “About Time Campaign” Operations Planning Tool & Commitment Form, continued

Elements of a Campaign: *Members will be asked to participate in these activities to the extent they are able and that it builds their organizational power.*

- Policy analysis and research
- Coalition governance, communications and maintenance
- Budget/fundraising
- Outreach and mobilization
- Message and media relations
- Political strategy and coordination

General Campaign Ground Rules

- The “About Time Campaign” will establish clear campaign goals and operating guidelines.
- The “About Time Campaign” will communicate these goals and guidelines broadly to campaign members, potential participants, policymakers, media and the broader public.
- The “About Time Campaign” will establish clear decision-making protocols with a relatively small “executive” group authorized to make key decisions and able to move promptly when time demands are tight.
- All decisions about policy and strategy must be made by authorized campaign committee (NO individual deal-making).
- All “About Time Campaign” members are committed to full information-sharing and disclosure on matters that materially affect the campaign.
- All members will respect and recognition of the contributions of all partners is a key element of a successful campaign
- The “About Time Campaign” will produce a budget and a written work plan with roles, responsibilities, and timelines laid out, which will be distributed to all members; the plan will address legal/policy work, media relations, outreach and public involvement, legislative strategy, etc.
- The “About Time Campaign” will convene regular meetings of the steering committee and the full membership for the purposes of monitoring and adjusting the work plan and budget.
- The “About Time Campaign” will develop a protocol for public

The “About Time Campaign” Operations Planning Tool & Commitment Form, continued

Key Planning Deadlines: Three Month _____ to _____ Workplan

- Coordinate regular meetings and conference calls among the collaborators to develop workplan, review progress, coordinate research and other common functions.
- Draft initial policy change, legislation, and secure sponsors by _____.

(date)

The “About Time Campaign” Coalition Conveners Agreement

We, the undersigned, agree to represent our constituency and the shared interests of our coalition partners for the purpose of achieving

_____ (campaign goal)

and agree to operate collaboratively with our partners under the above mentioned campaign coalition assumptions and ground rules to accomplish our collective campaign goal.

(organization name)
representative)

(organization

(organization name)
representative)

(organization

(organization name)
representative)

(organization

(organization name)
representative)

(organization

(organization name)
representative)

(organization

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 2 Blue Pages, p. 46

| <i>Legislative Heroes' To-Do List</i> | |
|--|-------------------|
| To-Do | Completed? |
| Solicit co-sponsors and assist in building a “floor team” of other respected members of each legislative branch. (When: Before session or budget debate begins; beginning of session or debate.) | |
| Send out a “Dear Colleague” letter to other members of the legislature at appropriate times during the process. (When: Before a hearing; before a debate; before a conference committee.) | |
| Testify at a bill or budget hearing, assist in accommodating schedule if necessary. | |
| Schedule internal briefing for colleagues and staff at appropriate times during the process (When: Beginning of a session; before a debate.) | |
| Submit op-eds and letters to the editor to statewide and regional media outlets at appropriate times during the process. Share authorship with appropriate co-sponsors and/or local grassroots leaders. (When: at the beginning of a session; before a floor debate; before a conference committee; before the governor decides to sign a bill or budget.) | |
| Convene floor team meetings at appropriate times during the process (When: before a hearing; before and during floor debate.) | |
| Lead legislative heroes will expect to be primary spokespeople at any press event, rallies, or public occasions at the state capital. Co-sponsors will expect to be invited and introduced with the opportunity to say a few words. | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 2 Blue Pages, p. 46

| <i>Contact Chart for Legislative Heroes</i> | | | |
|---|----------------------------|----------------------|----------------------|
| Names/Title | Contact Information | Staff Contact | Contact Notes |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 2 Blue Pages, p. 46

| <i>Administrative Heroes' To-Do List</i> | |
|--|-------------------|
| To-Do | Completed? |
| Identify and brief administrative officials who should see this policy change in their own direct self-interest. (When: Before session or budget debate begins; beginning of session or debate.) | |
| Assist the organization to meet with and brief key administrative officials for the purpose of sharing useful data and information that might be helpful for the campaign. (When: Before session or budget debate begins; beginning of session or debate.) | |
| Prepare official background paper on costs and impacts of proposed change to be shared with the legislative committee and staff. (When: before a hearing; before a debate; before a conference committee.) | |
| Try to arrange public announcement of high administrative official support for press conferences, op-ed articles, letters to the legislative leadership, etc. | |
| Maintain regular communication with campaign leaders and help analyze proposed amendments and communicate administration's opinion. | |
| Set up early warning system with campaign if a member of the administration finds reason to withdraw support. Make sure it happens quietly (if it happens). | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 2 Blue Pages, p. 46

| <i>Contact Chart for Administrative Heroes</i> | | | |
|--|----------------------------|----------------------|----------------------|
| Names/Title | Contact Information | Staff Contact | Contact Notes |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Appendix 11: Lists and Charts for State Capital-Based Professional Advocates (Blue Pages)

Chapter 3: Strategic Doing: In the Campaign

Chapter 3 Blue Pages, pp. 76-89

The “About Time Campaign” Power Prism Workplan

Goal

Win _____ for _____.
(what) (whom)

Build a diverse coalition of consumers, organized labor, community-based and mission-driven organizations, business supporters, and most major stakeholders in the _____.
(public policy field)

Objectives

- Develop compelling and effective legislative and/or administrative proposals to address problems related to _____.
- Craft a powerful message to raise the visibility of these issues and build public support for _____.
- Build a broad, diverse, statewide coalition of self-interested and mission-driven consumers, providers, religious leaders, business leaders and community-based leaders to raise the necessary funds to plan and implement a winning campaign.
- Activate a large, diverse network of community-based activists into a series of appropriate activities in support of _____.

The “About Time Campaign” Power Prism Workplan, continued

Campaign Elements

RESEARCH & DATA COLLECTION (Policy Director, Communications)

1. Develop effective and achievable proposals to meet campaign policy goals.
2. Develop and distribute a series of reports, briefings, fact sheets, alerts and updates to make your policy proposal and its affected programs accessible and understandable.
3. Plan and conduct a series of polls and focus groups – research on voter support for your issue can help influence elected officials...the more local, the better.
4. Continuously monitor proposals and changes in programs related to your policy solution as well as changes in federal policies affecting your agenda.
5. Continuously monitor similar state and federal policy proposals and collaborate as appropriate.

The “About Time Campaign” Stage One Goals:

- Develop final draft of policy proposal in consultation with key coalition members.
- Finalize list of reports, briefings, etc. that will be needed throughout the campaign.
- Gather critical statistics. Data about the scope of the problem, the potential impact of your proposed solution and how such solutions can be implemented are all essential.
- Conduct poll on policy issue and use results to frame the campaign.

The “About Time Campaign” Stage Two Goals:

- Issue first set of reports providing background on the issue and impact of proposed policy solution.
- Revise your campaign's policy proposal if necessary.
- Monitor other related state and federal policy proposal and budgeting issues.

The “About Time Campaign” Stage Three Goals:

- Continue to monitor other related proposals.
- Conduct voter poll on policy solution and release results.

- Issue second set of reports providing additional information on the financial and/or community impact that your proposed policy solution will have. Also, be prepared to refute your opposition's position.

The “About Time Campaign” Stage Four Goals:

- Continue monitoring of other related proposals that may affect your campaign.
- Issue additional reports and briefings as needed.

The “About Time Campaign” Power Prism Workplan, continued

COALITION BUILDING & MAINTENANCE (Executive Director, Campaign Manager)

1. Recruit coalition members.
 - a. Consumers: broad range of diverse membership-based advocacy/mission-driven nonprofits
 - b. Providers
 - c. Faith-based organizations
 - d. Business: Chambers, small businesses, large corporations, enlightened individuals, industry leaders
 - e. Labor: AFL-CIO appropriate locals
 - f. Other
2. Develop governance structure including a Steering Committee and working sub-committees – Research and Policy Analysis, Grassroots Mobilization, Media Advocacy, Lobbying & Legislative Advocacy, Fundraising & Development.
3. Build and maintain internal communications, including bi-weekly meetings, email updates, action alert system and up-to-date website.
4. Plan a series of public displays of unity through press conferences, advertisements, op-ed in local newspapers, etc.
5. Plan a series of coalition-sponsored campaign activities, for example letter-writing drives, community meetings, and rallies at the state capitol.

The “About Time Campaign” Stage One Goals:

- Determine initial steering committee composition.
- Hold first meeting to discuss governance structure; shape of legislation; key legislative sponsors.

The “About Time Campaign” Stage Two Goals:

- Build membership communication list, campaign website, regular coalition meeting schedule and other internal systems.
- Hold a press conference or other public display of unity for coalition members.

The “About Time Campaign” Stage Three Goals:

- Hold campaign activity, for example a rally and lobby day at the state capitol.
- Organize another press conference or public event to promote your campaign policy solution and to demonstrate continued and broad-based support.

The “About Time Campaign” Stage Four Goals:

- Hold additional coalition activity to maintain or re-energize the campaign.

The “About Time Campaign” Power Prism Workplan, continued

FUNDRAISING & DEVELOPMENT (Executive Director, Campaign Director)

1. After your budgets are prepared, work with coalition partners to identify which needs can be covered by members through cash and in-kind contributions.
2. Encourage coalition members to solicit contributions from public and private sources to support their own in-kind contributions.
3. Once these components are clear, design a plan for raising money to pay for unmet needs.
4. Identify potential funders.
 - a. Private foundation funding opportunities
 - b. Major national and/or statewide organizations that may have an interest in your policy proposal to contribute to the campaign
 - c. Corporate interests
 - d. Supportive individuals
5. Establish a transparent budget and budget process available to the steering committee.

The “About Time Campaign” Stage One Goals:

- Construct a campaign budget.
- Establish clear financial and organizational commitments from all voting Steering Committee members.

The “About Time Campaign” Stage Two Goals:

- Finalize a fundraising plan.
- Finalize a fundraising pitch along with appropriate campaign materials.
- Create a team of coalition partners to begin soliciting funding from various groups as identified in fundraising plan.
- Begin fundraising efforts, keeping in mind specific needs for direct lobbying, etc.
- Seek funding for polling or focus group research.

The “About Time Campaign” Stage Three Goals:

- Continue efforts to identify new prospects and solicit additional funding.

The “About Time Campaign” Stage Four Goals:

Continue efforts to identify new prospects and solicit additional funding for campaign operations and any specific need, such as advertising or direct lobbying.

The “About Time Campaign” Power Prism Workplan, continued

GRASSROOTS & KEY CONTACTS *(Field Coordinator, Lobbyist, Communications)*

1. Identify, engage and mobilize influential community leaders in targeted districts to marshal their communities into a network focused on educating their local legislators through district-based meetings and statewide events.
2. Identify and mobilize members and employees of key ally organizations.
3. Identify and empower individual consumers affected by your policy proposal.
4. Establish local “Civic Committees” of prominent persons who volunteer to stand up and speak out on behalf of your agenda. Possible members include consumers, providers, including board members who are businesspersons, religious leaders, other respected local leaders and celebrities.
5. Develop communications protocol and communicate regularly with advocates to provide campaign updates and alerts for action throughout the legislative process.
6. Include ‘power profiling’ in your research: Learn as much as possible about your grassroots activists (their relationships to lawmakers, local leaders and media).

The “About Time Campaign” Stage One Goals:

- Begin building the base for local advocate networks.
- Develop organizing plan and schedule of probable opportunities for public events and legislative meetings.

The “About Time Campaign” Stage Two Goals:

- Set up state-wide campaign briefings for advocates in the district.
- Finalize Civic Committees.
- Coordinate constituent meetings for advocates and their lawmakers in the district or at the state capitol.

The “About Time Campaign” Stage Three Goals:

- Engage Civic Committee members in press conference or other public event.

- Engage local advocate networks in activity at the state capitol, for example a rally or lobby day.

The "About Time Campaign" Stage Four Goals:

- Hold additional community events to demonstrate statewide support for your policy campaign.
- Coordinate follow up meetings for advocates and Civic Committee members with their policymakers depending on legislative action or lack thereof.

The “About Time Campaign” Power Prism Workplan, continued

MEDIA ADVOCACY & COMMUNICATIONS (*Communications Coordinator, Executive Director, Policy Director*)

1. Design and coordinate media plan, including paid and earned media coverage.
2. Develop media contact list, leveraging coalition member's relationships with reporters and editors.
3. Plan and conduct series of message delivery workshops for local activists and coalition members.
4. Coordinate media attendance and news coverage for every public event.

The “About Time Campaign” Stage One Goals:

- Hire/Designate Media Advocacy/Communications Coordinator.
- Develop message for initial media outreach.
- Finalize strategic media plan.

The “About Time Campaign” Stage Two Goals:

- Formalize a Speaker's Bureau for public events and media interviews.
- Conduct media how-to workshops for campaign spokespeople, including advocates and coalition partners.
- Implement media plan, placing hard news and feature stories, op-eds, editorials, and letters to the editor in key newspapers.
- Develop radio and television message for public awareness advertising campaign.

The “About Time Campaign” Stage Three Goals:

- Continue targeted implementation of media plan, placing hard news and feature stories, op-eds, editorials, and letters to the editor in key newspapers.
- Run radio and television advertising campaign.

The “About Time Campaign” Stage Four Goals:

- Continue media activities contingent on the need to push for continued legislative action or to rebuild campaign momentum.

The “About Time Campaign” Power Prism Workplan, continued

LOBBYING & LEGISLATIVE ADVOCACY (Executive Director, Policy Director, Lobbyist, Field coordinator)

1. Identify and establish a group of key sponsoring legislators.
2. Develop a plan to promote campaign agenda through legislative strategies and to engage legislative sponsors in disseminating materials to their colleagues.
3. Develop strategic advocacy plan around the budget and legislative policy-making schedule.
4. Plan and coordinate a regular schedule of meetings to maintain open and consistent communication among all professional lobbyists.
5. Include ‘power profiling’ in your research: Learn as much as possible about your legislative heroes and potential heroes (their interests, affiliations and goals).

The “About Time Campaign” Stage One Goals:

- Hire/Designate Legislative Strategy Consultant (Lobbyist)
- Agree on key legislative sponsors.
- Set up a plan for co-sponsor solicitation and press announcement for bill filing.
- Brief legislative leadership and other key public officials.
- Finalize strategic advocacy plan around budget and legislative schedule.

The “About Time Campaign” Stage Two Goals:

- Hold legislative briefings hosted by your bill's sponsor(s).
- Implement advocacy plan, setting up meetings with legislators, distributing policy campaign literature and letters from coalition partners.
- Engage legislative sponsors in media outreach, for example writing and placing an opinion editorial or participating in media interviews.

The “About Time Campaign” Stage Three Goals:

- Hold public legislative event, for example a community meeting, press conference, or legislative breakfast.
- Continue meetings with policymakers and legislative leadership, tracking support and opposition.

- Engage legislative supporters in media outreach, for example an editorial board meeting or participation in media interviews.

The “About Time Campaign” Stage Four Goals:

- Hold additional legislative meetings and public events engaging legislative supporters and continue media outreach to maintain or re-energize policy campaign.

**Appendix 11: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 3 Blue Pages, p. 76

| Research & Data Collection Action Checklist | | |
|---|-------------------------------------|-------------------|
| <i>Key Question:</i> | <i>Who is responsible? By when?</i> | <i>Completed?</i> |
| Do you need help drafting a regulation or bill? | | |
| Is the policy proposal complete? | | |
| Has your coalition met with groups or administrative offices that are part of your policy solution? | | |
| What data do you need to demonstrate your policy need and to back up your policy solution? | | |
| Who is your opposition? How much do you know about the opposition? | | |
| Do you have sufficient and up-to-date polling data of voters about your issue? | | |
| How much do you know about local media's support for your issue? | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 3 Blue Pages, p. 79

| Coalition Building & Maintenance Action Checklist | | |
|---|-------------------------------------|-------------------|
| <i>Key Question:</i> | <i>Who is responsible? By when?</i> | <i>Completed?</i> |
| Is there already a coalition working on your issue? | | |
| | | |
| If so, what organizations are currently part of the coalition? | | |
| | | |
| Of those, which are active participants? Core decision-makers and worker bees? | | |
| | | |
| Why are some organizations less engaged? | | |
| | | |
| What other organizations need to be invited? | | |
| Who will invite those organizations? | | |
| By what date will outreach occur? | | |
| Do you have a good recruitment pitch, package and formal enlistment form? | | |
| What does your coalition have to offer these other organizations? | | |
| | | |
| Do member organizations forward your coalition's action alerts to their | | |

| | | |
|---|--|--|
| grassroots advocates? | | |
| | | |
| How do you track coalition participation? | | |

Coalition Building & Maintenance Action Checklist, continued

| Key Question: | Who is responsible? By when? | Completed? |
|--|------------------------------|------------|
| Are political decision makers aligned with organizations that could be enlisted to join the coalition? (As board members, donors, volunteers, bill sponsors, etc?) | | |
| Does the coalition provide template newsletter articles or other awareness and recruitment tools to member organizations? | | |
| If not, should it? Who should be responsible? | | |
| Is the leadership of the coalition solid? | | |
| Does the coalition include organizations that represent and include those constituencies your policy campaign seeks to help? | | |

**Appendix 11: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 3 Blue Pages, p. 81

| Fundraising & Development Action Checklist | | |
|--|-------------------------------------|-------------------|
| <i>Key Question:</i> | <i>Who is responsible? By when?</i> | <i>Completed?</i> |
| Is there a fiscal agent for your campaign operations? | | |
| Do you have a campaign budget? | | |
| What in-kind donations might member organizations commit to contributing? (printing, mailings, meeting space, food for meetings/events, lobbyist time, etc.) | | |
| Are there local foundations, businesses, etc. that might help fund your campaign? | | |
| Can you approach grassroots activists or member organizations to help raise money for a campaign "product"? (poll, advertisement, window decal, direct mail piece, etc.) | | |
| What organizations might find a public-private partnership appealing and marketable? | | |
| | | |

| | | |
|--|--|--|
| Are there places you can go to raise hard cash for lobbying? | | |
|--|--|--|

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 3 Blue Pages, p. 83

| Grassroots & Key Contacts Action Checklist | | |
|--|-------------------------------------|-------------------|
| <i>Key Question:</i> | <i>Who is responsible? By when?</i> | <i>Completed?</i> |
| How many local advocates do you have access to? | | |
| Of those, how complete are your records (email addresses, voting addresses, phone numbers, personal connection to the issue, relationships with decision-makers or potential funders)? | | |
| What is your technology capacity for online grassroots recruitment and mobilization? | | |
| Who manages communications with grassroots advocates? | | |
| How often do you communicate with your grassroots advocates? | | |
| Do you have highly active activists in key voting districts? | | |
| Do you have district captains in key districts? | | |
| What opportunities are | | |

| | | |
|---|--|--|
| there for grassroots activists to meet coalition members? | | |
| ...to meet each other? | | |
| ...to meet lawmakers? | | |
| | | |
| Do you train your grassroots members as advocates? | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 3 Blue Pages, p. 86

| Media Advocacy & Communications Action Checklist | | |
|---|-------------------------------------|-------------------|
| <i>Key Question:</i> | <i>Who is responsible? By when?</i> | <i>Completed?</i> |
| Do you have a complete and up-to-date media list? | | |
| How strong are your relationships with the media? What about relationships of your coalition partners with members of the media? | | |
| Do grassroots activists and coalition members know basic principles of media advocacy (How to's of press releases, participating in editorial board meetings, press interviews, etc.) | | |
| Do you have a training plan for your spokespeople? | | |
| Do you know who your key spokespeople are? | | |
| Affected constituents (people who will be helped by your policy solution) | | |
| Experts on your issue and policy solution | | |
| Public officials or community leaders to promote the statewide | | |

| | | |
|--|--|--|
| impact | | |
| Community leaders or providers to promote the local impact | | |
| Partners from key coalition organizations | | |

**Appendix 1I: Lists and Charts for
State Capital-Based Professional Advocates
(Blue Pages)**

Chapter 3 Blue Pages, p. 88

| Lobbying & Legislative Advocacy Action Checklist | | |
|---|-------------------------------------|-------------------|
| <i>Key Question:</i> | <i>Who is responsible? By when?</i> | <i>Completed?</i> |
| Do you have a designated or hired legislative consultant who's a trusted insider/lobbyist? Does he/she have insider information about the public officials that you need to know (What are their top issues? Who are their allies and opposition?)? | | |
| Are you able to combine your collective coalition member's information about the public officials with the information from the lobbyist so that you have all the background about your lawmakers that you need? | | |
| Is someone keeping the list of legislators and a record of: their support or opposition to your policy proposal; directed grassroots activities; other district-based or targeted coalition activities to influence support? | | |
| Can you develop a | | |

| | | |
|--|--|--|
| calendar of events for lawmakers and through which you might educate them and move them to support your issue? | | |
| | | |

Lobbying & Legislative Advocacy Action Checklist, continued

| Key Question: | Key Question: | Key Question: |
|---|---------------|---------------|
| Can you create a schedule for regular strategy meetings of coalition lobbyists and for literature drops to legislative leaders? | | |
| Will member organizations take responsibility for communicating with legislators and key decision makers on their own stationery and as part of their own organizational priority requests? | | |
| Do you have good legal expertise to advise your member organizations who are 501(c)3 that it's ok to participate in permitted lobbying activities? | | |