

Annual Grassroots Audit

Each year you should take the time to assess how the individual pieces of your grassroots program are functioning and then how they are (or aren't) helping you advance your overall grassroots strategy.

As you start your audit, the components below will provide a helpful checklist and, ultimately, a benchmark as you compare your answers year over year.

Foundation/Structure

Mission Statement

- Dust off your mission statement. Does it reflect the current goals of your program? Is it reflective of the broader organization's mission?
- Use your mission statement as a benchmarking tool. Did you advance the vision outlined in your mission statement? Providing details on how helps demonstrate your ROI.
- Don't file it away. Plan to include your mission statement on your website or on printed materials to reinforce your program's goals.
- Then ask yourself with every new initiative, especially one that requires budget dollars or significant amounts of staff time, "Is this the best choice to make to advance the mission today?"

Political Involvement Policies

- Review your policy statements for timeliness and accuracy.
- Do your policies and programs reflect your program's commitment to ethics and compliance with all campaign finance laws, Congressional rules, and gift policies?
- Ensure your policies have up-to-date information regarding the use of company facilities and leave policies for political activities.
- Determine if any changes in law warrant a new or updated policy. For instance, many organizations revisited their policies after the Supreme Court's ruling in *Citizens United*.

Ethical Considerations

- Review practices for compliance with existing gift laws at all levels.
- Review your procedures for complying with all lobbying disclosure requirements.
- Reassess if the training you are providing to employees and advocates who are speaking on your behalf is adequate.

Contracts

- Review your use of current vendors and consultants.

- Are you up-to-date on all current capabilities of your product or service?
- Evaluate the performance of your external groups with respect to meeting established goals and guidelines.
- Meet with these groups to discuss where you are and where you're going.
- Determine if your current service is meeting your program needs.

Recruitment

Senior Executives

- Evaluate the level of activity from your senior management team. Are they promoting grassroots and serving as an advocate?
- If senior management is not engaged, explore why not and then develop a plan to change that.
- Common activities include: signing letters, lobbying, speaking to peers, serving as a key contact, and hosting/appearing at grassroots events.
- For those that are active, outline new methods of senior management activity in the coming year.

Marketing Collateral

- Marketing collateral entails every hard copy and electronic piece you develop to support program communications. This would include: brochures, newsletters, payroll stuffers, flyers, websites, and e-mails.
- Review your marketing collateral for accuracy and timeliness and update staff names and contact information.
- Evaluate your brand: freshen up the design to keep your materials contemporary and evaluate how well people know you exist.
- Draft at least one new recruitment campaign for the coming year.

Strategic Recruitment

- Evaluate the level of advocate "coverage" you have. Do you have advocates in all key districts? At all relevant facilities? Then ask yourself if they're the "right" advocate.
- Every year it's important to compile a list of key legislative stakeholders to assess if you have advocates in their districts. This includes committee chairs and members, legislators who represent your district, legislators with a particular interest in your issue, and those influential legislators who impact the parliamentary process if general.
- Identify resources available to you in these new areas through which you can strategically recruit new advocates.
- And don't overlook the opposition. Factor in assets you can bring to the table that may sway those who were once opposed.
- Take time to build a plan to bridge any gaps you identify.



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Corporate Culture

- Review if your program components are consistent with the organizational culture.
- If your members aren't in front of computers all day, have you provided alternative facilities to access online resources, or have you developed a hard copy communication that works?
- Offer yourself as a speaker or resource to other departments that are developing professional development and training events.
- Are there new issues of concern buzzing around the office, email or the membership? Is there a way to leverage your grassroots program to organize this new interest?
- Remember that you need to go to your advocates instead of hoping that your advocates will come to you.

Education

Your Program

- Explaining who you are and what you do is as important as explaining the critical issue at hand when it comes to convincing potential advocates to engage.
- Have you incorporated information in your various communications that outlines the mission of your program, the members of your team, how grassroots impacts public policy, and how individuals can make a difference?
- Consider sharing a success story of an advocate meeting a legislator or providing testimony.

Your Issues

- Take a critical eye to your issue briefs and backgrounders.
- First, determine if these are the issues you anticipate addressing in the coming year.
- If yes, update the material with relevant, contemporary facts and determine if they effectively convey the issue. And, please, for your own sake make it easy to read and visually appealing.
- If no, research the likely issues to be considered in the coming legislative session and begin compiling material for new issue briefs and backgrounders.

Static Education

- Confirm that you are using a variety of static forums to provide educational information, including web, e-mail, newsletters, calls to action, etc.
- Are the materials consistent, informative, and interesting?
- Are they collected in something like a downloadable toolkit or online reference tool?

Dynamic Education

- Evaluate which events had the greatest impact: Brown bag lunches, candidate forums, site visits, fly-in, a joint PAC/grassroots event.

- Continue to allocate resources for events that demonstrate strong attendance and sign-ups as well as follow-through on activities.

Activation

Call to Action Formats

- Compile all calls to action from the previous year.
- Did you rely on multiple channels to activate members, including web, e-mail, voice mail, events, newsletters, and social media?
- Are these formats appropriate to your member audience?

Content

- Look at how long your calls to action are. More than one page is too long.
- Is it difficult or easy to understand what the alert is about if you glance at it for less than a couple of seconds?
- Do your alerts encourage a specific action and make it easy to take that action?
- Are they visually appealing?

Traction

- Which action alerts got the most participation?
- Why was that? Was it the issue? The timing? The familiarity with the issues?
- How can you translate those lessons to future alerts?

Follow Up

- Did you let advocates think their participation went unnoticed?
- Review communications to ensure you let advocates know what happened with the issue or told them what to expect next.
- Did you say thank you?
- Did you explain how these activities connect to the issue themselves?
- Be frank about what you should do differently next year.

Coordination

Working with Other Departments

- Evaluate the existing relationships with other departments, including HR, IT, CSR, and PR.
- Did you seek opportunities to provide these groups with information that could help them do their job?
- Schedule 15 minutes to sit with a challenging department. Schedule this at a time when you don't have a request to discuss how you can work together.

- Evaluate your relationship with key internal decision makers in relevant business units or chapters. Listen to what they're struggling with and try to identify a way you can help. You will likely see a boost to your program as a result.

Using Existing Vehicles

- With limited time and resources, the goal is often to avoid reinventing the wheel.
- Evaluate what existing opportunities there might be for communication. If HR already has a popular newsletter, you offer to provide some content.
- If CSR has a great one pager about their activities in a certain area, incorporate it into your backgrounders.

Political Synergy

- The strongest programs are those that integrate their various political programs. The coordination increases both internal and external recognition, while reducing confusion and competition.
- Review your various lobbying campaigns. Did the contract lobbyists use grassroots information? Did you coordinate meetings with legislators?
- Review your PAC and grassroots activities. Did you host a coordinated event?

Tracking & Measurement

Review member activities

- Who activated?
- What issues did they care about?
- When did they participate?
- Where were they?
- Why were they compelled to act?
- How did you reach them?
- Use this information next year when determining how to and how not to involve your advocates.

Communication

Branded

- Grassroots is 100% dependent on communication.
- Evaluate your messages for a consistent look.
- Do you have a logo, name, and tagline you consistently use on all hard copy and electronic materials?
- Will your advocates know it is coming from you?



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Consistent Messaging

- Do all of your communications effectively reinforce your mission and position on policies?
- Were you political but not partisan?
- Were you able to boil the issue down to its core and convey that information to your advocates?
- Do these messages align with other company-led communications that external stakeholders are likely to see? For instance, your lobbying position or your environmental commitments on a CSR project?

Motivation

Political Inventory Surveys

- Draft your next political inventory survey.
- Compile feedback from advocates regarding which issues they care about, their familiarity with your program as well as the issues, and their interest in politics and participating.
- Use this vehicle to locate relationships with legislators.

Reward and Recognition Programs

- How did you recognize the activities of your faithful advocates this year?
- Send a handwritten thank you note, a letter from a senior executive, or a small token.
- Spotlight members in a newsletter or at a fun and exclusive event.

Attitude

- Gauge your attitude. You should be the best example to other advocates for the possibilities of grassroots.