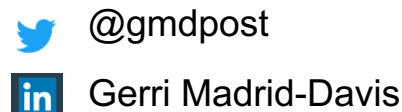


# Organizational Structure Best Practices: Chapters, Regional Teams and More

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Public Affairs Counsel  
2019 State and Local Government Relations Conference  
September 27, 2019

Gerri Madrid-Davis  
Director, Financial Security & Consumer Affairs  
State Advocacy & Strategy Integration, Government Affairs



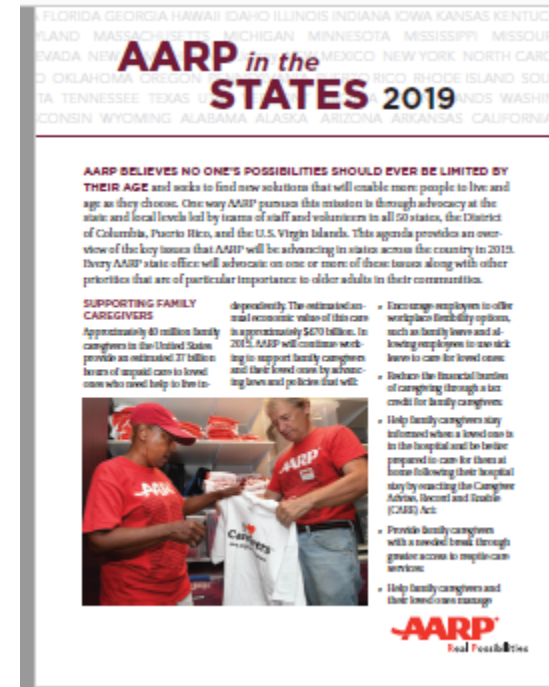
# State & Local Advocacy Strategy & Metrics

- ***Nationwide & Thinking Differently***

- Enterprise Strategy
- National State Advocacy Agenda
- States define state & local priorities
- Guided by AARP Policy

- **Accountability & Metrics**

- Enterprise Dashboard
- Key Performance Indicators
- Multiyear State Plans & IPOs
- RACI – Role Clarity
  - Responsible
  - Approved
  - Consulted
  - Informed



# Advocacy Campaigns: A Nationwide Approach

- **Matrixed/Cross-functional Teams**
  - **Community State National**
    - **State, Community Engagement**
      - 53 state offices
      - Volunteers & Community Engagement
    - **Government Affairs**
      - 3 Federal Teams
      - 2 SASI Teams
    - **Campaigns**
      - Campaign Managers
      - Field Managers
      - Outreach
    - & Friends—Communications, Policy, Thought Leadership...
  - **Engaged Leaders Throughout**



# Contractors & Volunteers

- **Even large organizations have limits on FTEs**
- **Our “advocacy” contractors are diverse and fill different roles**
  - State contract lobbyists
  - Subject matter & tactical experts
  - Extra pairs of skilled hands: contracts, temps, fellows
  - SOWs & Role clarity
- **Couldn't have advocacy success without our Volunteers**
  - Experience SMEs
  - Passionate fierce defenders
  - Red shirts (or blue if it's Santa Fe)
  - Strike forces, district liaisons & more
  - Shared and mutual value(s)



# Budgets, Compliance & Tracking

- **Enterprise**
  - **Group**
    - **Departments**
      - **Budget Units**
        - **Enterprise Strategies**
        - **BU general**
- **Strategic & Opportunistic Budgeting**
- **Plan—Pitch—Budget—Refine—Execute—Evaluate—Report—REPEAT**
- **Compliance: Use a service for state and local compliance**
- **Tracking: No longer subscribe to a tracking service**
  - **Trade publications, daily clips, cross team communication, NCSL**

# SASI FinCon: Our Contributions

- Drafting testimony and comments
- In-state services include presenting testimony, training volunteers, participating in advocacy forums, negotiating legislation and other proceedings (in-person/virtual)
- Drafting legislation and amendments
- Analysis of legislation and regulations
- Collaborating, brainstorming and developing legislative, regulatory and court strategies
- Identifying emerging advocacy issues and trends
- Developing written policy analysis and advocacy resources
- Developing and collaborating on collateral materials for ballot, legislative and regulatory efforts; including targeted population collateral
- Building organizational issue knowledge
- Collaborating on conceptualizing and organizing issue summits to enhance legislative and implementation strategies
- Facilitating connections and building relationships with outside issue experts, potential proponents, opponents, thought leaders and allies
- Sponsoring partnerships with national organizations to enhance our advocacy
- Subject matter and political expertise to support state policy and opinion research
- Project management of state advocacy efforts
- Review of comprehensive plans and refining advocacy strategies

# Best Practices for Success

- **Role clarity & intended redundancies**
- **Assume a positive intent**
- **Check in regularly with individuals/team(s)**
- **Honest, Quality feedback is everything**
- **Make everybody & the organization look good**
- **Our only constant is change – Embracing innovation and thinking differently**
- **Test & Learn, Try & Fail, Don't make the same mistakes**
- **Be grateful**
- **WWED?**

