

# Building a Strategic Grassroots Program

The Advocacy Conference  
February 6, 2018



# You're the Cure Business Plan

- Tied closely to the organization's mission and guiding values
- Advocacy is evolving. Daily realities are evolving.  
We must evolve, also.
- Plan includes:
  - Guiding Values
  - Actionable items under each guiding value
  - Measurable goals, annual progress detailed
  - Assessment of current program state/ Snapshot of the future

# Annual Program Planning

## Goals and Performance Objectives

### Grassroots Plans- A Visionary Document for each region

- Integration/Collaboration
- Staff & Volunteer Recognition
- Network Growth
  - General
  - Targeted
- Network Maintenance
- Key Contact Development
- Grassroots Training Needs

# Campaign Planning

First, Identify top advocacy issues and priority legislative targets

Campaign plans include:

- Grassroots strength analysis (YTC capacity) for each target identified
- Recruitment needs for each identified target
- Additional recruitment needs for the campaign, such as a particular group or advocate profile (Informed by in-depth decision-maker research, such as Pathways of Influence®)
- Key volunteer advocates for the campaign, their roles, and plans for engaging them
- Tactics specifically focused on moving your targets
- A campaign theme that will resonate with volunteer advocates, and offer a recognizable brand for your communications and activities
- Grassroots messaging that will easily convey the campaign to a lay audience. Aim for 3-5 points that explain the problem, and how our campaign will provide a solution.
- A thorough communications plan/calendar that captures the full picture across mediums, and helps ensure you reach the broadest audience with educational and engaging messaging and many, varied opportunities for activation.

TIP: Focus on your active campaigns and legislative targets first when allocating recruitment and retention resources, working with communications staff on media placements, recognition, etc.



# Great Grassroots Campaigns...

- Win policy change
  - Move individual legislators
  - Create public pressure
- Set you up for future success
  - Brand/Group recognition
  - Newly recruited advocates
  - Enhanced advocate skill-set
  - Stronger partnerships
  - Momentum

# Communications Planning

- Look at the overall picture; Plan ahead!

## YTC COMMUNICATIONS THROUGH FY13-14

CAMPAIGN/ISSUES/EVENTS	STARTING	ENDING	DETAILS
ISSUE 1	XX.XX.XX	XX.XX.XX	
ISSUE 2	XX.XX.XX	XX.XX.XX	
ISSUE 3	XX.XX.XX	XX.XX.XX	
ISSUE 4	XX.XX.XX	XX.XX.XX	
ISSUE 5	XX.XX.XX	XX.XX.XX	
ISSUE 6	XX.XX.XX	XX.XX.XX	
ISSUE 7	XX.XX.XX	XX.XX.XX	
ISSUE 8	XX.XX.XX	XX.XX.XX	

July 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

# Reporting

- Campaign metrics
  - Opens, Response Rate, Unsubscribes
- Quarterly List Health Reports

	A	B	C	D	E
	Key Measures for your online program				
1					
2	<b>Analytic</b>	<b>Current Statistic</b>		<b>Industry Benchmark or Definition</b>	
3	<b>List growth</b> since the beginning of the FY (% and Net)	#DIV/0!		Health groups saw a 4% decline last year NOTE: Deliverable emails are used for this statistic	
4	<b>List Churn</b> -Churn includes those emails that are no longer deliverables and unsubscribes. NOTE: It is better to look at this stat overtime, as month-to-month comparisons might not be helpful	#DIV/0!		21.6% for health groups last year	
5	<b>Percentage of Inactive Networkers</b> - Percentage of networkers who are lapsed or have not taken an action	#DIV/0!			
6	<b>Percentage of list that is new</b>	#DIV/0!			
7	<b>Average Actions per Advocate</b> with Deliverable Email	#DIV/0!			
8	Average Response Rate	#DIV/0!		1.6% for Advocacy	
9	Advocate Rank (% and Net)	#DIV/0!		0 0-49 Points	
10	Activist Rank (% and Net)	#DIV/0!		0 50-99 Points	
11	Ace Rank (% and Net)	#DIV/0!		0 100-149 Points	
12	Champion Rank (% and Net)	#DIV/0!		0 150-299 Points	
13	Hero Rank (% and Net)	#DIV/0!		0 300 + points	
14	Textable list growth since beginning of the FY (% and NET)	#DIV/0!		0	
15					
16					

- Annual Review: benchmarks & goals

# Budgeting

- Stick to your priorities
- What is the cost/benefit analysis?
- A little \$\$ can go a long way in some places- seek value

- Stretch your dollar



- Spend on Program Development and Meaningful Tactics- Not 'Stuff'



# Case Study: AHAs 2017 Lobby Day

Let's break the rules and see what happens.

Email	Date	Audience	Action	
1	13-Jun	All Networkers	Sign up	Test Period / Gauge support
2	15-Jun	All Networkers	Quiz/survey	
3	19-Jun	All Networkers	Social Share	
4	20-Jun	All Networkers	Petition	
5	21-Jun	Those who didn't open/click Email 4	Petition	
6	22-Jun	Those who signed petition	Call Congress	
7	24-Jun	Those who haven't taken action	Petition	Put lessons learned to work
8	26-Jun	Petition signers AND clicked email 6	Social Share	
9	26-Jun	Petition signers & didn't click email 6	Call Congress	
10	26-Jun	Those who haven't taken action	Petition	
11	27-Jun	All Networkers	Promote FB live	
12	28-Jun	Those who didn't click email 11	Promote FB live	
13	30-Jun	All Networkers	Wrap-up	

# Case Study: AHAs 2017 Lobby Day

## Tested EVERYTHING.



[Click here to call your senators and tell them to oppose the American Health Care Act and any Senate substitute that would reduce access to affordable and adequate health care coverage.](#)

I'm so grateful you signed our recent petition, Mark. I know heart health matters to you, so I'm hoping I can count on you again.

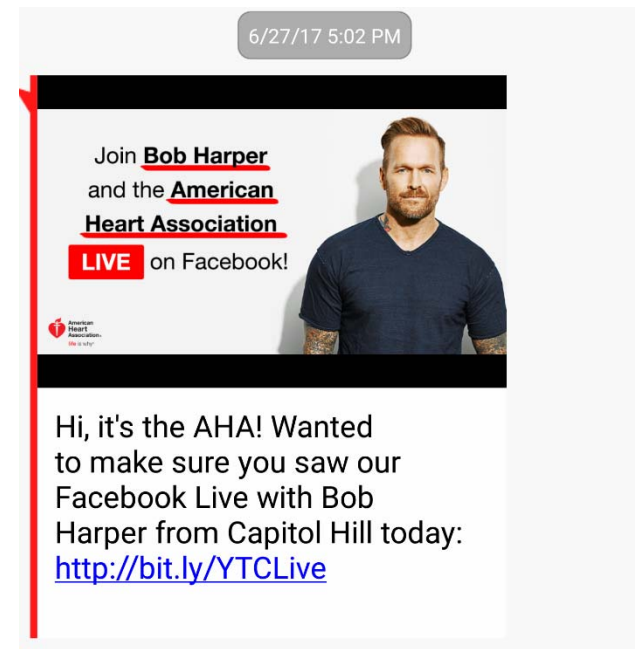
In just FIVE days, our team and hundreds of heart advocates will be in Washington, D.C., advocating for Congress to lift the burden of cardiovascular disease.



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In just FIVE days, our team and hundreds of heart advocates will be in Washington, D.C., advocating for Congress to lift the burden of cardiovascular disease.

One major way we'll urge them to do this is by opposing the American Health Care Act (AHCA) — a bill that would cause 23 million Americans to lose health care coverage and reduce access to affordable coverage for those with cardiovascular disease.



+ Type a message...










AHA Team  
Spare 3 minutes for heart health?

[quiz@heart.org](mailto:quiz@heart.org)  
Spare 3 minutes for heart health?

# Case Study: AHAs 2017 Lobby Day

## What the data told us

- Early morning sends 
- Eye catching subject lines  
- Weekend emails 
- Take action text above greeting line 
- Increased email traffic 
- Text messages 

# Case Study: AHAs 2017 Lobby Day

- **367,409** Total reach
- **43,133** FB Live views
  - 6x more than 2017
- **14,157** Re-engaged volunteers
  - 15% increase in our engaged audience
- **14,250** total actions



# Key Takeaways

- Align your program goals with your organization's goals
- Make every decision based on guiding values and established program goals
- Be smart with your resources
- Let your data drive your next move
- Tell your story!

# Contact Me

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# Questions & Discussion