



Advocacy Education Series

Effective Communications Strategy Checklist

Effectively communicating with elected officials and other policymakers is absolutely critical to the success of your efforts. Many great causes have failed simply because the leaders failed to adequately plan their outreach strategy. As you develop your plan, keep this list close by to check off each item as it's finished. By doing so, you will ensure that you have covered all of the important aspects of an effective communications strategy and will increase your odds of success.

1.) What Are You Trying to Communicate?

What action item do you want your audience to take part in? Do you want legislators to support legislation? Oppose legislation? Draft legislation? Do you want bureaucrats to support or oppose a policy? Do you want a particular person or group of people to attend a townhall meeting? A public hearing? Be sure to know from the onset what you want to accomplish with your message!

2.) With Whom Are You Trying to Communicate?

Who is the audience? Is it all legislators? All policymakers? Is it just the Republicans? Or maybe the Democrats? Perhaps it's just legislators on a specific committee? Make sure you know exactly who it is you are trying to reach so that you can tailor your communication to them in the most effective way possible. For example, if you are reaching out to both Republicans and Democrats with an issue brief, you may need to draft two different briefs to emphasize specific values and viewpoints that each party holds in order to get a better response. You never want to put conflicted ideas or too much information into one communication.

3.) Frame Your Message

Once you have completed steps one and two, framing your message should be relatively straightforward. Do you frame your issue as financially beneficial to the state? Or do you frame it as a civil liberties issue? Now that you know your audience(s) you know which



direction to take. Keep your message simple. In essence, you want your message to be a headline of just a few powerful words; something that instantly summarizes your effort and evokes a positive reaction from those who hear it. Test your message with a sample of your audience or colleagues prior to officially rolling it out.

4.) Make Your Point

Choose a handful of facts and a personal and/or relatable story to make your point. Less is more. Personal is best. Keep it brief and to the point.

5.) Get Your Message to your Audience

On what exact method works best with policymakers, there is no absolute answer. Some prefer phone calls, others prefer e-mail or letters. Some rely heavily on in-person meetings. The good news is that the method is secondary to the messenger. The vast majority of policymakers respond positively to thoughtful, relevant, and personal messages from their constituents. Use this to your advantage by having members of your group or leadership mean mainly with their respective elected officials. The method you use to convey the message is largely a function of time and/or resources. If an important vote is happening in a matter of hours, you certainly don't want to mail a letter. If you don't have the money to send out a mass mailing, phone calls and/or e-mails will be your best bet.

6.) Time Your Message for Optimal Impact

The last thing you want is for your message to arrive to your audience too late. A message that gets to policymakers after they make a decision is completely worthless. But you also don't want to send your message too early. Pay attention to what policymakers are currently working on and what they've historically worked on at certain times of the year in the past. If June in your state is budget season, a push to create legislation dealing with the nuances of DUI law is unlikely to garner much attention or interest. Keep your eyes and ears to the ground to know when the best possible time to strike is. If you hear that your issue is going to be brought up in the next few days, have at it! If you hear that your issue is being tabled until next session, relax but don't go away. You never know when an issue is going to be revived!

7.) Keep Your Group Aware

Do the folks you expect to send messages know the issue? Do they know why they are involved or vested in the issue? Have you been sending them regular updates? Sending alerts or action items only when you want people to do things is about as effective as politicians who only visit the district at campaign time. Make sure your people know the issue, know how it affects them, and feel comfortable speaking, writing, or sharing their opinion about it with their elected officials.

8.) Post Effort: Evaluate

How did your effort fare? Where you successful or unsuccessful? Look into what factors may have affected your success or failure and replicate the positives and stay away from the negatives. Talk with those involved and find out what you could have done better, what went according to plan, what seemed to have the best impact, and what seemed to turn people away. Learning from past successes and mistakes are the most valuable tool available. After each effort do a complete evaluation of the strategy. By doing so, you and your group will only get better after each effort, thereby increasing you odds of success!