

ACT!

Advocacy Capacity Tool

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About the Advocacy Capacity Tool (ACT!)

For nonprofits, coalitions, and groups engaged in advocacy, it's important to understand your advocacy capacity so that you are ready to take action when opportunities arise. The Advocacy Capacity Tool (ACT!) is designed to help your organization become more effective at advocacy.

Who should use this tool?

Organizations, coalitions, and groups interested in evaluating their advocacy capacity. Advocacy capacity consists of the skills, resources, knowledge, and practices that lead to effective advocacy over time.

What does this tool help me do?

By completing this tool, you will have a comprehensive snapshot of your organizational advocacy capacity. You can use this tool to benchmark your skills, identify gaps and opportunities in your strategies, and determine where you need to build capacity to achieve your goals. This tool can also be used as part of an advocacy evaluation plan.

How does the tool work?

ACT! has four sections that span the breadth of “what it takes” to do advocacy:

1. Advocacy Goals, Plans, and Strategies
2. Conducting Advocacy
3. Advocacy Avenues
4. Organizational Operations to Sustain Advocacy

Each section consists of three to six indicators. As you complete each section, you will be asked to review a set of statements under each indicator and rank your organization's capacity in this area, using the following scale:

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

In Sections 2 and 3, you will also be asked: “To what extent does your organization rely on partners for the above indicator?”

At the end of the tool, you will receive a score for all 18 capacity indicators and have the opportunity to reflect on which areas you would like to prioritize to strengthen your organization's advocacy capacity.

Keep in mind:

- **Achieving a high score in every category is not the goal.** Rather, the goal should be to use this tool for honest reflection about where you are now, so you can plan with intention as you map out where you want to go from here.
- **Remember that finding ways to rely on your partners is often the best strategy to fulfill a capacity need.** Nobody has it all – or needs to do it all by themselves.
- **Plan on repeating ACT! at regular intervals to assess your progress and growth over time.** For example, many organizations have found it beneficial to repeat this tool every 12 months as part of their annual strategic planning cycle.
- **Consider using the [free online version](#) of this tool to calculate your results automatically and have a PDF copy of your results emailed to you.** All data provided are confidential and protected under the terms of [our data privacy policy](#).
- **Check out the [terminology](#) page on our website as needed to look up technical terms used in this tool.**



Section 1

Advocacy Goals, Plans, and Strategies

Please review each statement below and select the response that best fits your organization. Advanced questions are optional and should not be included as part of your score.



Indicator 1 - Preparation: Assess to what extent the organization has basic elements in place to engage in advocacy.

1.1. The organization identifies and articulates its mission and goals.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

1.2. The organization has knowledge about its subject matter, including how its issues affect constituents.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

1.3. The organization understands the overall policy environment related to its issues, including trends, possible allies, and opponents.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

1.4. The organization identifies its existing capacity to engage in advocacy, including staffing, skills, knowledge, and resources.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

1.5. (Advanced - Optional): The organization has a long-term plan for its advocacy goals and for increasing its advocacy capacity over time.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Indicator 2 - Agenda: Assess the extent to which the organization has developed an advocacy plan that identifies goals and prioritizes activities.

2.1. The organization has a written advocacy agenda, approved by the organization's leadership, that identifies its goals and priorities.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

2.2. The organization gathers information and recommendations from constituents and other stakeholders in the development of its advocacy agenda.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

2.3. The organization shares its agenda, or parts of it, with decision-makers, constituents, partners, and media, as appropriate.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

2.4. The organization adjusts its focus on agenda items in response to internal and external changes.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

2.5. (Advanced - Optional): The organization's agenda includes one or more priorities that are proactive rather than reactive.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

2.6. (Advanced - Optional): The organization has an agenda-setting process that is understood throughout the organization.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Indicator 3 - Plans, Strategies, and Adaptability: Assess the organization's ability to develop a flexible plan to carry out its advocacy agenda.

3.1. The organization analyzes what it will take to accomplish each item on its advocacy agenda, including who has the power to make decisions.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

3.2. The organization develops a plan for how it will strategically advance each item on its advocacy agenda. The plan identifies appropriate targets, tactics, major activities, and anticipated results.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

3.3. The organization monitors internal and external changes in the policy environment and adapts its strategies as needed.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

3.4. The organization has a plan for assessing advocacy capacity and for strengthening its capacity as needed.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

3.5. (Advanced - Optional): The organization plans to try out different strategies and tactics, such as new ways to mobilize networks.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Section 2

Conducting Advocacy

Please review each statement below and select the response that best fits your organization. Advanced questions are optional and are not included as part of your score.



Indicator 4 - Research and Analysis: Assess the extent to which the organization researches and gathers information and conducts analyses on its issues.

4.1. The organization researches, compiles, and analyzes information about specific issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

4.2. The organization researches and analyzes the impact of current policies, the policy environment, and opportunities for advancing its goals.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

4.3. The organization has a process for verifying that its analyses and other materials are accurate and reliable.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

4.4. The organization shares information, analyses, and supporting materials with decision-makers, constituents, and partners, as appropriate.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

4.5. (Advanced - Optional): The organization conducts in-depth research and produces reports or other materials related to its advocacy agenda.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Research and Analysis)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 5 - Field Operations: Assess how the organization communicates with, educates, and educates its network and the public.

5.1. The organization has a network or various networks of individuals and organizations that it can activate to advocate on key policy issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

5.2. The organization communicates with its network on the status of advocacy efforts and opportunities to engage.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

5.3. The organization educates the public about its agenda.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

5.4. The organization uses informational mailings, online platforms, and/or canvassing to educate and mobilize its network and gain public support.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

5.5. (Advanced - Optional): The organization develops and implements a plan to expand the size and diversity of its network.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

5.6. (Advanced - Optional): The organization works to expand the knowledge and advocacy skills of those in its network.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

5.7. (Advanced - Optional): The organization activates advocates in the field to influence decision-makers in support of organizational priorities.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Field Operation)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 6 - Advocacy Partners and Coalitions: Assess the extent to which the organization has partnerships that advance its goals.

6.1. The organization identifies other stakeholders that have similar goals, including those with complementary knowledge and skills, with whom it could collaborate.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

6.2. The organization participates in coalitions that share one or more of its goals and provide value to the organization.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

6.3. The organization actively seeks support for its priorities from its coalition partners.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

6.4. The organization exchanges information with its partners, as appropriate.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

6.5. (Advanced - Optional): The organization seeks support from stakeholders who may not be traditional allies, but with whom it could partner on a project.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

6.6. (Advanced - Optional): The organization plays a leadership role in establishing and/or managing a coalition.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Indicator 7 - Messaging: Assess how the organization develops and delivers its advocacy messages.

7.1. The organization develops clear, compelling, and concise messages tailored to its target audiences.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

7.2. The organization bases its messages and materials on accurate and reliable information.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

7.3. The organization identifies and uses effective messengers and spokespeople.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

7.4. The organization chooses a variety of paid and/or earned media strategies to communicate its messages.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

7.5. (Advanced - Optional): The organization conducts polling and focus groups to develop and test effective messages.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Messaging)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 8 - Media Relations: Assess the extent to which the organization communicates effectively with the media and uses various media to advance its advocacy goals.

8.1. The organization monitors media coverage related to its issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

8.2. The organization identifies, develops, and maintains a list of media contacts relevant to its issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

8.3. The organization distributes information to a wide range of media outlets—including online, broadcast, and print media—to communicate its messages.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

8.4. The organization has a written media plan with objectives, targets, strategies, and timelines.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

8.5. (Advanced - Optional): The organization identifies, builds, and maintains relationships with key personnel in online, broadcast, and print media.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

8.6. (Advanced - Optional): The organization maintains an active social media presence.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

8.7. (Advanced - Optional): The organization has developed a crisis communications strategy for effectively dealing with negative press or an internal crisis.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Media Relations)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 9 - Influencing Decision-Makers: Assess the extent to which the organization builds influential relationships with important decision-makers.

9.1. The organization monitors the actions of decision-makers related to the organization's agenda.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

9.2. The organization builds working relationships with decision-makers by providing information about its issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

9.3. The organization consistently nurtures relationships with decision-makers throughout the year.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

9.4. The organization deliberately builds relationships with elected officials without regard to political affiliations.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

9.5. (Advanced - Optional): The organization identifies and builds relationships with influential individuals and groups who can persuade decision-makers.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Influencing Decision-Makers)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Section 3

Advocacy Avenues

Please review each statement below and select the response that best fits your organization. Advanced questions are optional and are not included as part of your score.



Indicator 10 - Administrative Advocacy: Assess the organization's skills, knowledge, and actions related to administrative advocacy.

- | | |
|---|---|
| <p>10.1. The organization understands the regulatory and enforcement processes of agencies that implement policies and programs and knows how to influence these processes.</p> | <p><input type="radio"/> Very Strong / Always = 4
 <input type="radio"/> Moderately Strong / Usually = 3
 <input type="radio"/> Somewhat Strong / Sometimes = 2
 <input type="radio"/> Not Strong / Rarely / Never = 1
 <input type="radio"/> I Don't Know / Not Applicable = N/A</p> |
| <p>10.2. The organization identifies and works with appropriate decision-makers within administrative agencies, including relevant commissions and advisory committees.</p> | <p><input type="radio"/> Very Strong / Always = 4
 <input type="radio"/> Moderately Strong / Usually = 3
 <input type="radio"/> Somewhat Strong / Sometimes = 2
 <input type="radio"/> Not Strong / Rarely / Never = 1
 <input type="radio"/> I Don't Know / Not Applicable = N/A</p> |
| <p>10.3. The organization identifies, monitors, and analyzes proposed rules, regulations, other administrative branch activities, and their potential impact on the organization's priorities.</p> | <p><input type="radio"/> Very Strong / Always = 4
 <input type="radio"/> Moderately Strong / Usually = 3
 <input type="radio"/> Somewhat Strong / Sometimes = 2
 <input type="radio"/> Not Strong / Rarely / Never = 1
 <input type="radio"/> I Don't Know / Not Applicable = N/A</p> |
| <p>10.4. The organization recommends policies or actions through comments (or endorsement of other groups' comments) on proposed regulations or other administrative policies, through testimony at agency hearings, and/or to further its priorities.</p> | <p><input type="radio"/> Very Strong / Always = 4
 <input type="radio"/> Moderately Strong / Usually = 3
 <input type="radio"/> Somewhat Strong / Sometimes = 2
 <input type="radio"/> Not Strong / Rarely / Never = 1
 <input type="radio"/> I Don't Know / Not Applicable = N/A</p> |
| <p>10.5. (Advanced - Optional): The organization proposes new regulations, executive orders, commissions, enforcement measures, or other administrative actions to further its priorities.</p> | <p><input type="radio"/> Very Strong / Always
 <input type="radio"/> Moderately Strong / Usually
 <input type="radio"/> Somewhat Strong / Sometimes
 <input type="radio"/> Not Strong / Rarely / Never
 <input type="radio"/> I Don't Know / Not Applicable</p> |
| <p>10.6. (Advanced - Optional): The organization is aware of planned activities by federal, state, and/or local administration agencies related to the organization's priorities.</p> | <p><input type="radio"/> Very Strong / Always
 <input type="radio"/> Moderately Strong / Usually
 <input type="radio"/> Somewhat Strong / Sometimes
 <input type="radio"/> Not Strong / Rarely / Never
 <input type="radio"/> I Don't Know / Not Applicable</p> |

To what extent do you rely on partners for this indicator (Administrative Advocacy)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 11 - Legislative Advocacy: Assess the organization's skills, knowledge, and actions related to legislative advocacy.

11.1. The organization has knowledge of the legislative process (including budgeting and appropriations) and knows how to influence this process.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

11.2. The organization identifies and works with appropriate legislators, committees, staff, and related stakeholders.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

11.3. The organization identifies, monitors, and analyzes proposed legislation and the potential impact on its priorities.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

11.4. The organization promotes, opposes, or helps design or amend legislation.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

11.5. (Advanced - Optional): The organization is aware of planned activities by legislators and other advocates that are related to the organization's issues.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Legislative Advocacy)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 12 - Ballot Measures, Referenda, and Initiatives: Assess the organization's skills, knowledge, and actions related to activity on ballot measures.

12.1. The organization identifies, monitors, and analyzes measures that will appear or may appear on the ballot and the potential impact on its policy priorities.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

12.2. The organization takes public positions on ballot measures related to its interests, its constituents' interests, or its issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

12.3. The organization educates voters about its position on measures that will appear on the ballot.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

12.4. The organization conducts get-out-the-vote (GOTV) efforts to promote or oppose ballot measures related to its issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

12.5. (Advanced - Optional): The organization is aware of state and local laws and processes governing the process for qualifying a measure for the ballot.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

12.6. (Advanced - Optional): The organization drafts ballot measures and circulates ballot measures and petitions to further its priorities.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Ballot Measures, Referenda, and Initiatives)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 13 - Electoral Advocacy: Assess the organization's skills, knowledge, and actions related to electoral activity.

13.1. The organization understands the primary and general election processes for candidate elections in relevant jurisdictions.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

13.2. The organization reminds and encourages the public to vote.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

13.3. The organization participates in voter and/or candidate education efforts.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

13.4. The organization educates its staff and governing body about the legal guidelines for electoral activity.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

13.5. (Advanced - Optional): The organization carries out voter and/or candidate education efforts.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

13.6. (Advanced - Optional): The organization engages in efforts to register voters and/or turn out voters.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Ballot Measures, Referenda, and Initiatives)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Indicator 14 – Litigation: Assess the organization’s skills, knowledge, and actions related to litigation and other legal activity.

14.1. The organization understands the role litigation plays to complement other advocacy strategies.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

14.2. The organization identifies appropriate court and judicial trends to inform possible litigation strategies related to the organization’s issues.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

14.3. The organization has access to competent counsel who can provide advice or pursue legal strategies.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

14.4. The organization pursues legal activities, such as initiating litigation or signing onto amicus briefs, as needed.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

14.5. (Advanced - Optional): The organization monitors court cases and decisions relevant to its issues.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

To what extent do you rely on partners for this indicator (Litigation)?

- Always
- Usually
- Sometimes
- Rarely / Never
- I Don't Know / Not Applicable



Section 4

Organizational Operations to Sustain Advocacy

Please review each statement below and select the response that best fits your organization. Advanced questions are optional and are not included as part of your score.



Indicator 15 - Organizational Commitment: Assess the organization's operational commitment to its advocacy work.

15.1. The organization's governing structure is committed to advocacy.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

15.2. The organization has at least one staff person whose job description includes specific responsibilities related to advocacy.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

15.3. The executive director and relevant staff have a clear understanding of the basic federal, state, and local rules and regulations that govern lobbying, election-related work, and other advocacy activities.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

15.4. The organization has investigated and decided whether to use the 501(h)-expenditure test.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

15.5. (Advanced - Optional): The organization invests in staff, board, and volunteer development to strengthen its advocacy work.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

15.6. (Advanced - Optional): The organization allocates increased staff time to strengthen its advocacy work.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

15.7. (Advanced - Optional): The organization's mission or strategic plan includes advocacy.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Indicator 16 - Funding Advocacy: Assess the extent to which the organization understands and implements practices for funding its advocacy work.

16.1. The organization understands how foundations can support advocacy.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

16.2. The organization informs and educates funders about the legal rules for supporting advocacy.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

16.3. The organization informs and educates funders and donors about the value of funding advocacy.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

16.4. The organization fosters long-term relationships with individual donors and foundations.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

16.5. (Advanced - Optional): The organization encourages its network to contribute financially to the organization's advocacy work.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

16.6. (Advanced - Optional): The organization's board and staff actively work to build a diverse base of financial support for advocacy.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Indicator 17 - Decision-Making Structure and Process: Assess the extent to which the organization has a process for making decisions.

17.1. The organization has a leadership structure or body that makes timely decisions.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

17.2. The organization's leadership and advocacy staff communicate regularly with each other about the status of activities.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

17.3. The organization's staff identifies potential opportunities and risks for the organization before engaging in advocacy work.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

17.4. The organization evaluates its progress and uses lessons learned to inform its decision-making.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

17.5. (Advanced - Optional): The organization's leadership structure includes those who have experience in advocacy.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable



Indicator 18 - Fiscal Management and Sustainability: Assess the organization's fiscal management practices.

18.1. The organization's board treasurer, executive director, fiscal staff, and program staff have received training and understand rules for monitoring and reporting funds used for lobbying purposes.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

18.2. The organization's financial management system tracks lobbying activities and expenses—as well as funds not allowable for lobbying—in compliance with appropriate federal, state, and local laws.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

18.3. The organization budgets funds for advocacy programs.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

18.4. The organization commits a portion of general operating support to advocacy.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- I Don't Know / Not Applicable = N/A

18.5. (Advanced - Optional): The organization monitors changes to IRS rules or interpretations of rules that may affect its tax status or way of doing business.

- Very Strong / Always
- Moderately Strong / Usually
- Somewhat Strong / Sometimes
- Not Strong / Rarely / Never
- I Don't Know / Not Applicable

Your ACT! Results

You can calculate your score for each indicator using the tables below. Alternatively, you can complete the online version of ACT! to have your scores calculated for you automatically.

First, review your responses for the first four questions under each of the 18 indicators and assign a numerical value to each response.

- Very Strong / Always = 4
- Moderately Strong / Usually = 3
- Somewhat Strong / Sometimes = 2
- Not Strong / Rarely / Never = 1
- Rely on Partners = 0
- I Don't Know = N/A

Next, calculate your score for each indicator by adding up the four values and dividing by 4 to calculate an average (mean). Write this number under “Points Awarded” in the tables below.

For example: $4 + 3 + 2 + 3 = 12 \div 4 = 3$ Points Awarded

In Sections 2 and 3, make a note in the third column to document your response to the question: “To what extent do you rely on partners for this indicator?”

Section 1: Advocacy, Goals, Plans, and Strategies

Capacity Indicator	Points Awarded
1. Preparation	_____ out of 4
2. Agenda	_____ out of 4
3. Plans, Strategies, and Adaptability	_____ out of 4

Section 2: Conducting Advocacy

Capacity Indicator	Points Awarded	Rely on Partners
4. Research and Analysis	_____ out of 4	_____
5. Field Operation	_____ out of 4	_____
6. Advocacy Partners and Coalitions	_____ out of 4	N/A
7. Messaging	_____ out of 4	_____
8. Media Relations	_____ out of 4	_____
9. Influencing Decision-Makers	_____ out of 4	_____

Section 3: Advocacy Avenues

Capacity Indicator	Points Awarded	Rely on Partners
10. Administrative	____ out of 4	____
11. Legislative	____ out of 4	____
12. Ballot Measures, Referenda, and Initiatives	____ out of 4	____
13. Electoral	____ out of 4	____
14. Litigation	____ out of 4	____

Section 4: Organizational Operations to Sustain Advocacy

Capacity Indicator	Points Awarded
15. Organizational Commitment	____ out of 4
16. Funding Advocacy	____ out of 4
17. Decision-Making Structure and Process	____ out of 4
18. Fiscal Management and Sustainability	____ out of 4

As you review your scores, keep in mind: The goal here is not to get the highest score in every single indicator. No organization, coalition, or group has it all. Rather, this tool is designed to help you reflect with intention about what your assets and strengths are—and prioritize areas in which you want to build your capacity to become more resilient and sustainable.

Areas to Strengthen Checklist

Use the checklist below to document the top three to five areas where you would like to strengthen your capacity in the future. Keeping track of this list—and repeating ACT! again in three, six, or 12 months—can help you monitor your progress over time.

- | | |
|--|--|
| <input type="checkbox"/> Preparation | <input type="checkbox"/> Administrative Advocacy |
| <input type="checkbox"/> Agenda | <input type="checkbox"/> Legislative Advocacy |
| <input type="checkbox"/> Plans, Strategies, and Adaptability | <input type="checkbox"/> Ballot Measures, Referenda, and Initiatives |
| <input type="checkbox"/> Research and Analysis | <input type="checkbox"/> Electoral Advocacy |
| <input type="checkbox"/> Field Operation | <input type="checkbox"/> Litigation |
| <input type="checkbox"/> Advocacy Partners and Coalitions | <input type="checkbox"/> Organizational Commitment |
| <input type="checkbox"/> Messaging | <input type="checkbox"/> Funding Advocacy |
| <input type="checkbox"/> Media Relations | <input type="checkbox"/> Decision-Making Structure and Process |
| <input type="checkbox"/> Influencing Decision-Makers | <input type="checkbox"/> Fiscal Management and Sustainability |

Make a quick note for your future self: Why would you like to strengthen your organization's advocacy capacity in these areas?

ACT! Reflection Questions

How can I analyze and interpret my results?

As you review your scores, keep in mind that the goal is not to get the highest score in every indicator. No organization, coalition, or group has it all. Scores reflect your organization's capacity, not the quality of your work.

Context matters when it comes to interpreting what data means. Certain indicators may be more relevant than others for your organization, coalition, or group, depending on many factors, including:

- The type of advocacy work you are engaged in—or plan to engage in
- The size of the organization or coalition (staff and budget)
- The level of advocacy experience you have (beginner versus advanced)

View your results as a way to spark strategic conversations around what the future could look like. Here are some questions to guide individual or collective reflection around how to interpret and use your results.

Start out with some general reflection on your results overall.

- Do the results resonate with your understanding of the organization?
- Did anything immediately jump out to you as important? Why?
- Did any of the results surprise you?

For the capacity indicators where you have the highest scores, consider the following:

- Why are you strong in this area?
 - Is it because of investments your organization has made?
 - Or do you have staff or board members who have significant expertise?
- How do you currently use this strength?
- Are there other ways you might take advantage of this strength?
- Is this area critical to future advocacy work? If so, what do you need to do to sustain your capacity in this area?

For the capacity indicators where you have the lowest scores, consider the following:

- Why are your scores lower in this area?
 - Is it because you are primarily relying on your partners (not a bad thing)?
 - Is it because it is less critical to the success of your advocacy work?
 - Is it because you have not had the resources to invest in this area?
- Is this area critical to your future work? If so, what should you focus on improving first?
- Should you work more closely with partners to meet any needs you have in this area?

When considering the extent to which you rely on partners, consider the following:

- Who are your partners?
 - How do you currently work together?
 - Are there other areas where you could collaborate?
 - Do your partners' priorities align well with your own?
- Are there other groups with whom your organization should partner?
- Should you consider building your organization's internal capacity in the areas where you currently rely on partners? Why or why not?

As you consider which areas where you would like to become stronger, ask yourself:

- What do we need to accomplish our goals?
- What do we need to prioritize?
- What challenges might we face in moving our goals forward—and how can we mitigate them?
- How do we maintain and/or grow resources to continue the work?
 - Are there any easy wins where a small investment in building our capacity would make a big difference?
 - What types of growth will require a more significant investment of time and resources?

Plan to reuse ACT! again in the future.

These tools are most beneficial when you use them to assess changes in your organizational advocacy capacity over time.

We strongly recommend that you plan to complete ACT! at regular intervals, e.g., every 12 months.

Keep a copy of your initial results to use as a baseline, then compare your new results with your earlier scores to assess your progress toward your goals.

ACT!

Advocacy Capacity Tool

**Thank you for
completing ACT!**



Alliance for Justice is a national association of over 120 organizations, representing a broad array of groups committed to progressive values and the creation of an equitable, just, and free society. Since 1979, AFJ has been the leader in advocating for a fair and independent justice system, preserving access to the courts, and empowering others to stand up and fight for their causes. The two pillars of Alliance for Justice are our Justice Program, focusing on ensuring our nation's courts protect our critical constitutional rights and legal protections, and our Bolder Advocacy Program, focusing on building advocacy capacity for nonprofits and the foundations that fund them. Learn more about us by visiting afj.org.



Bolder Advocacy is the nation's foremost advocacy resource for foundations and nonprofits who want to engage more actively and knowledgeably in the policymaking process to advance their work. Our legal experts will help you move to a bolder path as you consider key strategies like lobbying, election-related activities, ballot measures, grantmaking, or other types of advocacy to accomplish your goals. For more information, sign up for [our newsletter](#), contact our free technical assistance hotline by emailing us at advocacy@afj.org, or visit our website: www.bolderadvocacy.org.