

Congressional Relationship Health Scorecard

Member Toolkit

- ▶ Identify congressional targets to track
- ▶ Assemble a relationship health scorecard
- ▶ Build action plans for top targets
- ▶ Quantify performance of Government Affairs

Congressional Relationship Health Scorecard

Statement of Purpose

Since our program's inception in 2012, hardly a week has gone by without one of our Member's lamenting the difficulty of applying meaningful metrics to the work of a Government Affairs office. Calls for support have grown ever louder and more persistent as practitioners face greater scrutiny of the way they allocate their scarce time and more acute pressure to demonstrate the value of investment in Washington to skeptical outsiders.

The Congressional Relationship Health Scorecard Toolkit addresses this measurement vacuum for Washington's most touted asset: relationships with Members of Congress. It walks the reader through the process of building and implementing a scorecard that allows organizations to evaluate the health of their inside-the-Beltway networks, and develop confidence in the current strength of their ties to the Hill (or elsewhere). By combining data from inside and outside the Hill meeting, this scorecard provides a more robust, objective view of relationship health, and helps pinpoint under-appreciated vulnerabilities and relationship gaps to address.

The measurement framework outlined in the following pages is simple and adaptable. It is intended to fit seamlessly into any Government Affairs professional's workflow, requiring minutes, not hours to complete. We recommend offices work through the toolkit as a team, though it can be scaled for individual use. It is designed for use by even the most experienced lobbyists and values their intuition, supplementing it with objective measurement.

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Tool 1: Target Selection Tool

Objectives

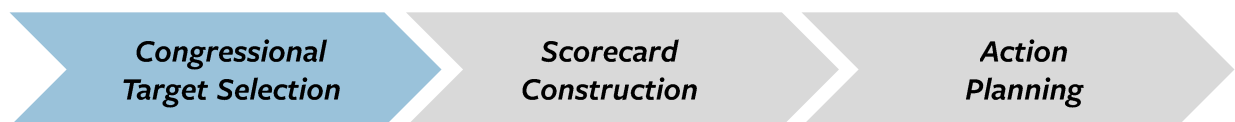
- Define organization's goals for tracking congressional relationships
- Evaluate series of strategic tradeoffs (i.e. depth or breadth, single issue or issue portfolio) to determine which groups of Members of Congress to track
- Isolate highest-value targets to track with the relationship health scorecard
- Refine target list to reflect current relationship status and organizational priorities

Outcomes

- List of Members of Congress to track using the relationship health scorecard
- Goals for tracking congressional relationship strength

Estimated Completion Time: 30 minutes

Toolkit Progress





Tool 1: Target Selection Tool

Step 1: Define Goals of Congressional Scorecard



Directions

- 1 Discuss questions as a group to identify goals for tracking relationship health.
- 2 Place a mark on each spectrum to indicate your organization's priorities in tracking relationship health.
- 3 Consider which Members of Congress are high-value targets based on your goals and tradeoffs.

I. Articulate Goals

- What do you hope to accomplish by tracking the health of your relationships with Members of Congress?
- Where do you see the greatest opportunity to improve your relationships with Congress?
- What is the biggest gap between the congressional relationships you have and the ones that you hope to build?

II. Consider Trade Offs

1. Is your organization interested in tracking its relationships with all Members of Congress or focusing on the strength of a few key relationships?

Most or All Relationships |—————| *Few Key Relationships*

2. Are you hoping to track Members of Congress relevant to a single policy area or Members of Congress relevant to an entire portfolio of issues?

Single Issue |—————| *Entire Issue Portfolio*

3. Do you anticipate active policy debate on your issue / issue set in the near term or are you more focused on building capacity for a future policy debate?

Engaged in Active Policy Debate |—————| *Long-Term Capacity Building*

III. Highest-Value Targets

- Based on your organization's goals and tradeoffs, what groups of Members of Congress are you most interested in tracking?

Step 2: Identify Highest-Value Groups of Members



Directions








- 1 Fill in the blank column at right with your own category of Members your organization wants to track.
- 2 Keeping in mind the high-value groups identified on page 7, allocate 100 pennies across the 8 groups of Members of Congress. Give pennies based on the group's importance to the organization.
- 3 Determine which groups of Members to track with the Congressional Relationship Health Scorecard by setting a cut-off score – our recommendation is to track all groups allotted 20 or more pennies.
- 4 Record the Members that fall in the selected groups in the Member Tracker on page 10.

	Members of Relevant Committee	Members from Geographic Area	Party Leadership	Specific Caucus
Rationale for Tracking	Committee often is the most directly relevant group to lobby when making a policy argument.	Members with direct ties to the organization and/or its constituents often have greatest interest in its policy outcomes.	Leadership's position provides a realistic outlook of progress on issues. Relationships can create bipartisan opportunities.	Caucus focus targets self-selected Members with varied committee assignments and personal reach.
Pennies Allocated	_____	_____	_____	_____
Scenarios	<ul style="list-style-type: none"> • Majority of issues fall under committee's jurisdiction • Track a bill moving through a committee • Assess, maintain relationships with committee members 	<ul style="list-style-type: none"> • Build relationships with Members from districts with facilities, local chapters, vendors, or suppliers • Connect Members with direct ties to the organization based on similar constituencies 	<ul style="list-style-type: none"> • Increase access to Members from a particular party • Assess how top influencers perceive the organization • Find opportunities for bipartisanship 	<ul style="list-style-type: none"> • Engage Members on niche issue • Build network of support across committees or parties • Increase familiarity with the organization's goals within specific population
Limits to Consider	<ul style="list-style-type: none"> • Tracking whole committee can be time consuming—the most relevant subcommittee is a manageable substitute • Single committee focus may neglect other tangentially relevant groups 	<ul style="list-style-type: none"> • Depending on organization size, this may be a small cross section of Congress • Turnover is especially hurtful—relationships are highly personal 	<ul style="list-style-type: none"> • May be difficult to access these Members • Surprises may arise if a majority—or vocal minority—within a party forces leadership's hand on a bill or other action 	<ul style="list-style-type: none"> • Engaging Members with specialized interests risks preaching to the choir • Size and power of a particular caucus can fluctuate often

Less is More

“I told my lobbyists that one of their goals for this year is to build deep relationships with ten Members each. We’ve had to focus on just the highest priority people—a key subcommittee and a few regular swing voters. No one has time to be on a first-name, “how are your kids” basis with every Member.”

- Vice President of Government Affairs, Trade Association

Moderates or Swing Voters	Issue Passionates	Bipartisan Coalition Builders	Add additional category
<p>Moderates often work best across the aisle, and are willing to support a position contrary to party line.</p> 	<p>Members with an interest in / personal tie to an issue, though not on the relevant committee, can act as surprise champions.</p> 	<p>Members whose positions largely align with their party but work across the aisle on certain issues build bipartisan coalitions.</p> 	 
<ul style="list-style-type: none"> • Find opportunities to build bipartisan support for an issue or piece of legislation • Convince swing voters to pass a bill 	<ul style="list-style-type: none"> • Generate energy on an issue or bill • Identify strong, temporary allies who may only work with the organization on certain issues 	<ul style="list-style-type: none"> • Create across-the-aisle support for a bill • Map bipartisan allies of Members who have existing relationships with the organization 	
<ul style="list-style-type: none"> • Few Members of Congress are true moderates • Swing voters may still be constrained by their party or unwilling to expend political capital on organization’s issue 	<ul style="list-style-type: none"> • Some may be unwilling to work with the organization regardless of interest in issue • May not rally sufficient energy or will for actual movement despite strong personal interest 	<ul style="list-style-type: none"> • May be difficult to identify as Members establish their positions on issues • Limited view may offer unrealistic expectations of willingness to move individual issue 	

Member Tracker



Directions

- 1 Complete worksheet for all Members of Congress tracked with the relationship health scorecard.

Member of Congress	State / District	Relationship Owner	Relationship Score <i>(to come)</i>	Target Score <i>(to come)</i>

Tool 1: Target Selection Tool

Step 3: Spot-Check List of Target Members



Directions

- 1 Identify additional Members of Congress not already in the target list whom you would like to track; record why their addition is necessary. Add these Members to the Member Tracker.
- 2 Identify any Members of Congress whom you can remove from the target list; record why you do not need to track these Members. Strike these Members from the Member Tracker.

I. Expand Congressional Target List

Are there any additional Members of Congress whose relationships you would like to measure and who are not captured by any of the selected categories? For example:

- *Congressional Freshmen*: New Members with whom you hope to build relationships
- *High-Potential Members*: Members whose stock appears to be rising; potential future leadership
- *Elder Statesmen*: Seasoned veterans whom other Members turn to for advice; potential kingmakers
- *Members in Need of a Victory*: Members looking for a win to bring home to their constituents

Member of Congress	Rationale for Adding

II. Narrow Congressional Target List

Are there any Members of Congress who fall into one or more categories of Members you intend to track but can be removed from your list? For example:

- *Outgoing Members*: Members who have already announced their retirement or departure from Congress
- *Unwinnable Holdouts*: Members who refuse to support the organization irrespective of any intervention
- *Top-Tier Champions*: Members with whom the organization's relationship is safe

Member of Congress	Rationale for Removing



Tool 2: Scorecard Selection Tool

Objective

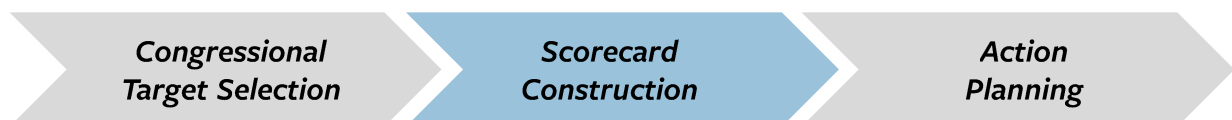
- Evaluate the costs and benefits of both scorecards—the Behavioral Checklist Scorecard and the 5-Point Tiered Scorecard
- Identify highest-priority scorecard features to inform scorecard selection
- Select the scorecard best suited to organizational needs

Outcomes

- Organization selects scorecard

Estimated Completion Time: 10 minutes

Toolkit Progress





Select a Congressional Scorecard



Directions

- 1 For both scorecards, read the description and check all features your organization desires for its scorecard. Place the total number of checks for each scorecard in the blue box below.
- 2 Consider both National Journal Assessment and your own organizational preferences—based on the column with more checks—to select your scorecard. Continue to the correct page.

Behavioral Checklist Scorecard

5-Point Tiered Scorecard

Description

Organization selects 10-15 individual behaviors to track for each Member. Members earn points for demonstrating behaviors; scoring is done by summing points earned for all traits.

Organization builds framework that defines relationship strength on a scale of 1 through 5. Scores are determined by the subjective assessment of relationship health.

Preferred Features

(check all that apply)

- More objective measurement scheme based on observed behaviors
- In depth view of each Member; better for tracking smaller number of Members
- Ability to select specific behaviors to track, based on organization's perception of which traits impact relationship health
- Manager's involvement is minimal, primary burden is on staff to update scorecard
- Best for updating annually or bi-annually
- Option to weight behaviors to create more distinction between individual Members

- More subjective measurement scheme based on Member's attitude toward org.
- Broader overview of each Member's relationship with the organization; better for tracking more Members
- 1-5 scoring scale is highly intuitive, accessible to internal and external stakeholders
- Manager must remain involved to spot check scoring; lesser burden on staff
- Best for updating frequently
- Option to weight organizational relationship or issue relationship more heavily to create distinction between individual Members

Total

Total

National Journal Assessment

Trait selection allows for greater customization and creates narrow focus on encouraging key behaviors, making it simpler to identify and develop congressional champions.

Intuitive grading scheme allows for rapid measurement and streamlines scoring process. Particularly beneficial for taking long-term view of relationship health.

Scorecard Selected: _____

For Behavioral Checklist continue to page 19
For 5-Point Tiered continue to page 24



Tool 3: Scorecard Construction Kit

Objectives

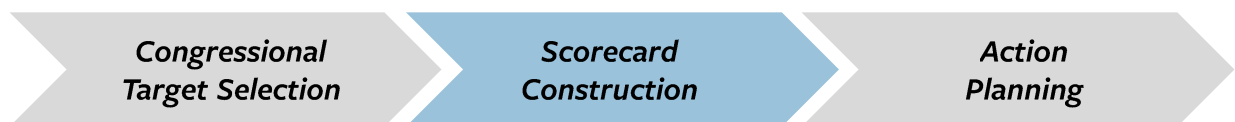
- For those organizations using the Behavioral Checklist Scorecard: Determine behaviors to track that translate to deepening relationships and stronger legislative partnership; practice using grading scheme. Continue to page 19
- For those organizations using the 5-Point Tiered Scorecard: Calibrate scorecard to reflect organization's needs by pressure testing with several example targets; practice using grading scheme. Continue to page 24
- Set overall baseline score and baseline scores for each tracked Members of Congress
- Establish process and assign ownership for tracking behaviors, updating scorecards, and sharing results

Outcomes

- Completed, refined scorecard to begin tracking relationship health
- Baseline relationship health score and goal scores
- Action plan for implementing the relationship health scorecard

Estimated Completion Time: 30 minutes

Toolkit Progress





Scorecard Model #1: Behavioral Checklist Scorecard



Scorecard Overview

- The Behavioral Checklist Scorecard is designed to evaluate both the Member's relationship with the organization, and the Member's relationship with the issue (or set of issues). This distinction separates Members who might support the organization on an individual issue or bill from those who will not support the organization in general.
- Both the organization and issue relationships are divided into three sub-categories that describe progressively stronger relationships. Organizations can identify which level of relationship they have with each Member of Congress based on whether the Member demonstrates the behaviors associated with each sub-category.
- The scorecard yields three outputs: an overall relationship strength score that can be tracked over time or compared across Members; individual scores for the organization and issue relationships to show areas of improvement; level of relationship strength for each Member, allowing for easy categorization.

Components of a Successful Congressional Scorecard

<p>Relationship with Organization</p>	<p>Shows Understanding</p> <ul style="list-style-type: none"> • Is familiar with the organization's lobbyists, acknowledges previous interactions • Knows organization's mission, policy positions, advocacy interests 	<p>Collaborates Actively</p> <ul style="list-style-type: none"> • Follows up on communication promptly and substantively • Engages in exchange on policy, considers organization's opinion or recommendations 	<p>Perceives as Leader</p> <ul style="list-style-type: none"> • Values organization as leading expert and is a trusted source of information and opinion • Publicly supports organization
<p>Relationship with Issue(s)</p>	<p>Demonstrates Willingness to Engage</p> <ul style="list-style-type: none"> • Shows interest in issue, willingness to discuss and be educated • Assigns staff member to cover issue 	<p>Promotes Awareness and Conversation</p> <ul style="list-style-type: none"> • Actively participates in debates on issue • Speaks about issue publicly or with colleagues 	<p>Supports and Incites Action</p> <ul style="list-style-type: none"> • Publicly or privately works to draft legislation or rally colleagues' support on issue • Takes public stance on issue

Step 1: Select Traits for the Behavioral Checklist Scorecard



Directions

- 1 Check up to 4 behaviors from the organization relationship list and up to 10 behaviors from the issue relationship list. Organizations are encouraged to select traits from most or all behavior sub-categories.
- 2 Add additional traits as desired on the blank lines below.
- 3 Copy selected behaviors on the scorecard template found on page 23.

Relationship with Organization

Shows Understanding

- Is familiar with the organization’s lobbyists, acknowledges previous interactions
- Knows organization’s mission, policy positions, advocacy interests

Collaborates Actively

- Follows up on communication promptly and substantively follows
- Engages in exchange on policy, considers organization’s opinion or recommendations

Perceives as Leader

- Values organization as leading expert and is a trusted source of information and opinion
- Publicly supports organization

Pick List (choose up to 4)*

- Says hello in the hallway on the Hill
- Interacts with lobbyists on first-name basis
- Attends event when invited by lobbyist
- Participates in a site visit
- Meets with advocates in district or during a fly-in
- Is receptive to follow-up, policy-focused meetings with lobbyists
- _____

- Returns calls/replies to emails within 24 hours
- Invites lobbyist to an event
- Sponsors briefing on organization’s behalf
- Reveals strategic information when requested
- Attends organization’s event as an invited speaker
- Allows meetings to run longer than time requested
- Participates in organization’s town hall meetings
- _____

- Proactively requests information from organization
- Invites colleagues to learn about or interact with organization
- Makes public comment specifically mentioning organization
- Invites organization to testify at a hearing
- Facilitates lobbyist meeting with party leadership
- Voluntarily and preemptively offers strategic information
- _____

*Note: Pick list is a sample of potential metrics compiled by National Journal Membership research and is neither exclusive nor exhaustive

**Relationship
with
Issue(s)**

**Demonstrates
Willingness to Engage**

- Shows interest in issue, willingness to discuss and be educated
- Assigns staff member to cover issue

**Promotes Awareness
and Conversation**

- Actively participates in debates on issue
- Speaks about issue publicly or with colleagues

**Supports and Incites
Action**

- Publicly or privately works to draft legislation or rally colleagues' support on issue
- Takes public stance on issue

Pick List
(choose up to 10)*

- Joins or actively participates in caucus focused on issue
- Meets with organization to discuss issue
- Member or staff attends briefing on issue
- Votes in favor of legislation related to issue
- _____

- Hosts policy event on issue
- Discusses issue with colleagues or shares educational information
- Speaks favorably about the issue or makes a comment to the press/ on social media
- Makes supportive statements about issue in a party or caucus meeting
- Recruits colleagues to participate in fly-out events
- _____

- Organizes or sponsors hearing on issue
- Asks relevant questions of expert giving testimony in hearing
- Writes Dear Colleague letter on issue
- Signs Dear Colleague letter on issue
- Drafts legislative language consistent with the organization's objectives
- Advocates behind-the-scenes in support of the issue
- Sponsors relevant, positive legislation
- Recruits co-sponsors or garners support for key vote
- Makes supportive floor speech
- Introduces priority legislation
- _____



Tool 3: Scorecard Construction Kit

Step 2: Populate Behavioral Checklist Scorecard



Directions

- 1 Fill in traits selected on pages 20 and 21. Complete scorecard for each tracked Member of Congress.
- 2 You are encouraged to practice assessing a few Members of Congress to learn grading scheme.

Name:		Updated: Quarterly <input type="checkbox"/> Biannually <input type="checkbox"/> Annually <input type="checkbox"/>	
State/District:		Relationship Owner:	
Behavior			Displays Behavior
Relationship with Organization	Shows Understanding	1.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Collaborates Actively	2.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		3.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Perceives as Leader	4.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Relationship with Issue (s)	Demonstrates Willingness to Engage	1.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		2.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		3.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		4.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Raises Awareness and Promotes Conversation	5.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		6.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		7.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		8.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		9.	Yes <input type="checkbox"/> No <input type="checkbox"/>
		10.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Total Score*			
Goal Score			

*Note: Scores may vary depending on selected behaviors.

Acknowledgements: "Champions & Champion-ness: Measuring Efforts to Create Champions for Policy Change," David Devlin-Foltz & Lisa Molinaro, Center for Evaluation Innovation

Scorecard Model #2: 5-Point Tiered Scorecard



Overview of Scorecard

- The 5-Point Tiered Scorecard is designed to evaluate both the Member’s relationship with the organization, and the Member’s relationship with the issue (or issue set). This distinction separates Members who might support the organization on an individual issue or bill from those who will not support the organization in general.
- Each Member of Congress earns a score of 1-5 that indicates the strength of that Member’s relationship with the organization. 5 = the deepest relationship; 1 = the weakest relationship. Members with opposing views who intentionally have no relationship with the organization can be given a score of zero.
- The key to this scorecard’s success is well-defined relationship levels. Organizations should carefully consider whether the sample descriptions below correspond with what they perceive as indicators of strong relationships.

Relationship with Organization

Relationship with Issue(s)

Relationship Health Score

Shows Limited Knowledge of Organization and its Mission

- 1**
- Recalls interaction with lobbyists when prompted
 - Is unable to recall or identify organization’s issue set or previous collaboration

Engages Occasionally with Organization and Its Members

- 2**
- Meets with advocates during fly-in or in district
 - Invites lobbyist to a fundraiser/attends fundraiser hosted by organization

Promotes Casual, Regular Partnership with the Organization

- 3**
- Regularly responds to emails, phone calls, or requests within 24 hours
 - Holds follow-up policy meetings with lobbyists

Collaborates Actively & Supports Organization Objectives

- 4**
- Invites org. to testify at a relevant hearing
 - Publicly comments on organization’s policy work
 - Participates in fly-out, site visit, or local town hall

Builds Trusting Relationship with Organization & Lobbyists

- 5**
- Shares strategic, insider information
 - Facilitates meeting with party leadership
 - Proactively seeks organization’s opinion

Shows Limited Interest or Awareness of Issue

- Asks no questions during meeting with lobbyists
- Demonstrates unfamiliarity with the issue

Expresses Interest in Learning Policy Position

- Joins or participates in caucus relevant to issue
- Attends briefing on issue (or staff attends)
- Takes a meeting focused on issue

Participates in Active Dialogue on Policy Issue

- Comments on issue to press or on social media
- Mentions issue to state delegation
- Asks relevant question of witness during a hearing

Promotes Conversation on Policy Solutions

- Invites colleagues to participate in event on issue
- Facilitates meetings for org.’s staff with colleagues
- Signs Dear Colleague letter

Moves Legislation

- Drafts Dear Colleague Letter
- Works to rally support, earn colleagues’ votes
- Drafts supportive legislative language
- Introduces priority legislation

Tool 3: Scorecard Construction Kit

Step 1: Edit, Populate the 5-Point Tiered Scorecard



Directions

- 1 Select several Members of Congress with varying degree of familiarity and support for the organization to grade as a group. This practice grading exercise should generate conversation over how Members are scored and sets team-wide understanding of the behaviors that correspond to each score.
- 2 Enter member grades into the chart below. Some organizations have elected to use a weighted average to create greater distinction between Members of Congress.
- 3 Edit the behaviors in each score category on the previous page based on organization's preferences.

Member of Congress	Relationship with Organization	Relationship with Issue(s)	Average	Target Score
Insert name	X	Y	$(X + Y) \div 2$	
Overall Average Score				

Calculate a Weighted Average to Create Differentiation

A weighted average highlights the importance of one element of Congressional relationships and creates clearer differentiation between Members. We recommend weighting the issue relationship more heavily. Calculate the weighted average score using the following formula:

$$(0.4) * \text{Relationship with Organization Score} + (0.6) * \text{Relationship with Issue Score} = \text{Weighted Average}$$



Timeline for Using the Congressional Scorecard



Directions

- 1 Calculate baseline score—the average of each Member’s current score—and set a target score.
- 2 Determine as a team who will be responsible for the various aspects of rolling-out your congressional scorecard. Assign each step a phase owner and record that person’s name below.
- 3 Set team deadlines for accomplishing the steps for implementing and scaling up your scorecard. Adjust the process steps according to your office’s needs and internal processes.

Phase 1: Setting a Baseline

- Fill out the scorecard for all tracked Members based on your current relationships
- Calculate organization’s average baseline score for all Members of Congress

Overall Baseline Score _____

Target Score

Stretch Target Score

Phase Owner: _____

10% increase

20% increase

Due Date:

Phase 2: Full Tracking

- Track all Members of Congress for 6 months
- Decide how often to update scorecards: quarterly, bi-annually, or annually
- Ensure all relevant GA team members are contributing information to scorecard

Phase Owner: _____

Due Date:

Phase 3: Results Check

- Pull up after 6 months of tracking; calculate scores
- Compare actual scores to goal scores
- Determine necessary adjustments to meet goals

Phase Owner: _____

Due Date:

Phase 4: Socializing

- After 1 year, calculate new scores, compare to goal scores and assess overall changes in relationship health over time
- Begin to socialize scorecard with leadership, internal stakeholders

Phase Owner: _____

Due Date:



Tool 4: Prioritized Action Plan Template

Objectives

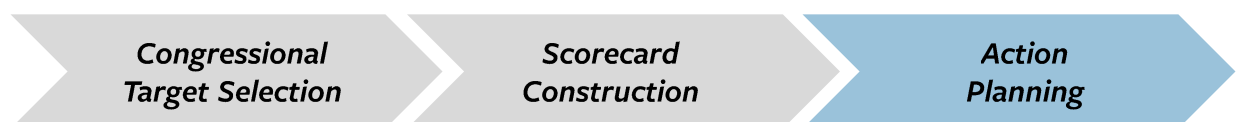
- Rank Members of Congress by level of priority for the organization and identify a subset of high-priority targets
- Develop a customized engagement plan for each high-priority member

Outcomes

- Ranked list of tracked Members of Congress and smaller list/subset of high-priority targets
- Custom engagement plan for each high-priority Member

Estimated Time Commitment: 30 minutes; apportion 90 minutes for building custom engagement plans

Toolkit Progress



Step 1: Prioritize Greatest Opportunities



Directions

- 1 Score each tracked Member of Congress on his or her ability to impact the organization’s policy priorities or issue portfolio, and the potential to improve the relationship. For each, use a 1-3 scale, 1 being the lowest impact/improvement potential, 3 being the highest impact/improvement potential.
- 2 Average* each Member’s policy impact and relationship improvement scores to calculate his or her Influence Score.
- 3 Assign each member a priority tier based on his or her Influence Score using the key below.

Member of Congress	Impact on Policy or Issue Portfolio	Potential to Improve Relationship	Influence Score (Average*)
Insert a name	X	Y	$(X + Y) \div 2$
Example	2	3	2.5

- Key**
- Influence Score 1 – 1.5: Low Priority
 - Influence Score 1.5 – 2.5: Moderate Priority
 - Influence Score: 2.5 – 3: High Priority

***Note:** Some organizations have elected to calculate Influence Scores using a weighted average to create greater differentiation between Members. We recommend weighting a Member’s impact on policy portfolio more heavily. Calculate the weighted average score using the following formula:
 $(0.4) * \text{Impact on policy portfolio} + (0.6) * \text{Potential to improve relationship} = \text{Weighted Average}$

Tool 4: Prioritized Action Plan Template

Step 2: Develop Tailored Action Plans



Directions

- 1 Complete engagement plan for each high priority Member of Congress identified in the previous exercise.

Congressional Target:		
Relationship Owner:		
Baseline Assessment		
Describe the organization's relationship with this Member of Congress:		
What is the organization's current interaction with this Member (frequency and types of touches)?		
Engagement Plan		
What are the Member of Congress's current interests/priorities?		
Next three touches:	1) 2) 3)	
PAC Contribution:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount: _____
Notes & Results		
Notes:		
Results:		



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How May We Help You?

Please contact us if you have...

- ▶ An idea you would like to share
- ▶ An interest in participating in ongoing research initiatives

Current research topics include:

- Breakthrough Advocacy Campaigns
- Value Measurement and GA Performance Dashboards
- Creating Continuous Grassroots Relationships
- Aligning Advocacy and Communications Functions

- ▶ Questions about our research or services

Direct all inquiries to Aaron Young at ayoung@nationaljournal.com

Additional Resources



Website

www.nationaljournal.com/membership



Presentation Center

www.nationaljournal.com/membership/presentations



Available for download on the National Journal Membership Research website:

The following pages are available as single-page downloads at

www.nationaljournal.com/membership/research

- Member Tracker (page 10)
- Behavioral Checklist Scorecard (page 23)
- 5-Point Tiered Scorecard (page 24)
- Tailored Action Plan (page 31)

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