

Grassroots Engagement Turnaround Kit

NationalJournal LEADERSHIP COUNCIL

NationalJournal LEADERSHIP COUNCIL

Research Staff

Project Director
Alec Latimer

Researcher
Ben Leiner

Executive Director
Aaron Young

CONFIDENTIALITY AND INTELLECTUAL PROPERTY

These materials have been prepared by National Journal for the exclusive and individual use of our Member organizations. As always, Members are welcome to an unlimited number of copies of the materials contained within this handout for use within their organization. However, these materials contain valuable confidential and proprietary information belonging to National Journal and they may not be shared with any third party (including independent contractors and consultants) without the prior approval of National Journal. National Journal retains any and all intellectual property rights in these materials and requires retention of the copyright mark on all pages reproduced.

LEGAL CAVEAT

National Journal has worked to ensure the accuracy of the information it provides to its Members. This report relies upon data obtained from many sources, however, and National Journal is not able to guarantee the accuracy of the information or analysis contained in these materials. Furthermore, National Journal is not engaged in rendering legal, accounting, or any other professional services. National Journal specifically disclaims liability for any damages, claims or losses that may arise from a) any errors or omissions in these materials, whether caused by National Journal or its sources, or b) reliance upon any recommendation made by National Journal.

Grassroots Engagement **Turnaround Kit**

This toolkit helps grassroots and grassroots advocacy managers build a plan to better engage their advocates. It begins with a brief explanation of the challenges we face engaging advocates today. Then the tool will help you home in on which problems are driving disengagement at your organization, review and select tactics to address those challenges, and build an action plan.



Outcomes:

- » Diagnosis of engagement challenges
- » List of tactics to improve advocate engagement
- » Action plan to pursue new tactics



Time to Complete:

- » 30-45 minutes.

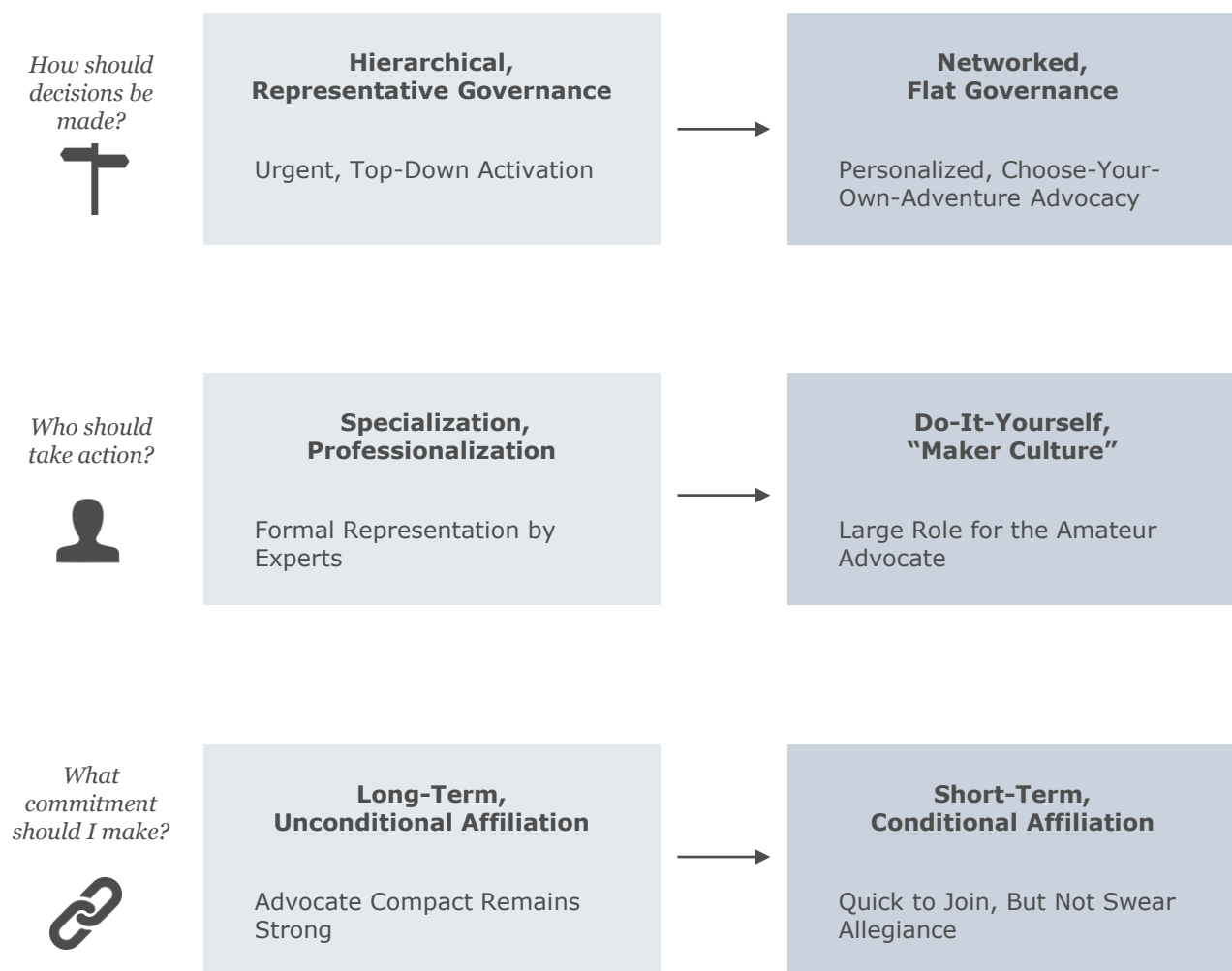
Table of Contents

Reviewing the Challenge	4
I. Problem Diagnostic	6
II. Tactic Selection	10
III. Action Plan	11

Advocate values are changing: they want to shape and create their own volunteer experience.

The last decade has seen a dramatic change in the way individuals engage with their institutions. This change, largely driven by shifts in cultural norms and technological innovations like social media, has not spared advocacy organizations. Today's advocates expect more of a say in how decisions are made. They want to take action themselves. And if it's just not working out, they're more willing to move on.

Advocate Value Shifts



Source: "Understanding New Power," Jeremy Heimans, Henry Timms, <https://hbr.org/2014/12/understanding-new-power>; National Journal Membership Research interviews and analysis.

Grassroots underperformance drivers are more in our control than we typically acknowledge.

NJ Leadership Council researchers often hear from grassroots and grasstops managers that advocate engagement challenges are out of their control – fatigue, apathy, too much email. These are all fair assessments. But organizations that have made significant gains in advocate engagement have broadened their scope, focusing instead on challenges in their control. Shifting our attention to these challenges reveals significant improvement opportunities in advocate engagement.

Common Reasons for Flagging Advocate Engagement

Out of Our Control

Fatigue

- Drawn-out legislative battles
- False alarms

Apathy

- Perceived dysfunction of Congress
- Lack of wins

Information Overload

- More media options
- Inbox clutter

Weakening Institutional Ties

- Drawn-out legislative battles
- False alarm calls-to-action

In Our Control

Disinterest and Disconnect

- Priority issues misaligned with advocate interests

Low-Value Calls-to-Action

- Hard to connect actions to victories
- Many steps removed from outcomes
- *Clicktivism* skepticism

Access to Alternative Outlets

- Easier to find organizations aligned with interests
- Easier to engage directly with Congress

These explanations are most often discounted – but they're also where we see organizations making the most progress to re-engage their advocates.

I. Problem Diagnostic

Advocates' changing values are exacerbating three engagement problem drivers: misalignment with priorities; a lack of trust and connection; and a lack of confidence in one's own skills or ability to contribute.

This tool will help you home in on which problem or problems are constraining engagement in your grassroots or grasstops program.

Advocate Engagement Problem Drivers

Misalignment



Advocates' priorities don't align with organization's priority

Isolation



Advocates don't feel connected enough to trust the organization

Skill and Agency Gap



Advocates don't believe they have the skills or power to contribute



Directions

1. On the following two pages, place a check mark next to each statement that accurately describes your situation.
2. Add the total number of checks for each section, and write that number in the space provided on page 9.
3. Compare the sums for each section. Consult the score key to understand your score. These scores will be used to guide you through the following section.

I. Problem Diagnostic



Misalignment: Advocates do not feel the organization represents their top legislative interests effectively.

Indicators

☐

Email open rates and action rates are regularly below historic rates for at least 3 months in a row.

☐

Action rates are regularly higher for secondary issues than primary issues.

☐

Unsubscribe rates for our advocacy newsletter or action alerts have risen for the last 3 months.

☐

Uptick in frequency that advocates mention peer organizations through which they are also taking action.

☐

Few new recruits are lasting more than 3 months before they unsubscribe.



Isolation: Advocates do not feel connected with other advocates or part of something larger than themselves.

Indicators

☐

Advocates rarely initiate conversations in social media communities (e.g., Facebook groups, LinkedIn forums).

☐

Advocates have few opportunities to build relationships with each other outside the annual fly-in.

☐

Advocates rarely participate in advocacy competitions or seek to earn recognition opportunities.

☐

Advocates who attend a fly-in or legislative conference for the first time rarely return the next year.

☐

Advocates can't name 4 or 5 peer advocates from their state (or their district).



Skills and Agency Gap: Advocates do not feel they have the skills or power to contribute to the policymaking process.

Indicators

☐

Advocates question the impact of their advocacy interactions with policymakers and their staff.

☐

Advocates appear uncomfortable or easily flustered in interactions with policymakers.

☐

Recruitment for fly-ins and in-district advocacy moments is routinely a struggle.

☐

Advocates do not seek out advocacy opportunities at the local level after engaging at the federal level.

☐

Advocates can't identify skills they have developed as advocates that translate into their regular life.

Problem Diagnostic Scoring

Misalignment

☐

Isolation

☐

Skills and Agency Gap

☐

Score Key

0 - 1 Unlikely to be a driver.

2 - 3 Merits your attention.

4 - 5 Likely a major driver.

II. Tactic Selection

Use the following six pages to identify and evaluate tactics for addressing your advocate engagement challenges. Note that some tactics are more appropriate for grasstops programs than grassroots programs, and vice versa.

Each tactic includes a brief description and is accompanied by assessments of cost, implementation time, and which engagement challenge(s) it addresses. Tactics are organized into three broad stages of the advocate journey: recruitment, development and maintenance, and activation.



Directions

1. Review each lever and tactic for its applicability to your organization and your most pressing engagement challenge. Each tactic is evaluated for time to execute, expected cost, and which problem it addresses.
2. Circle the tactics that both interest you and that you believe would your organization could implement this year.

Recruitment

Channeling New Advocates into *Sticky* Experiences



Vet for Commitment

Filtering Out Poor Fits

Tactics	Time	Cost	Problems Addressed
Advocate Pledge. Invite advocates to signify their commitment by signing a “contract” that articulates the expectations of the advocate role, responsibilities, and activities necessary to be a successful advocate.	1 week	Low	• Alignment
Job Description. Similar to the Advocate Contract, but excludes the signature component. Both options help filter out the exuberant but uncommitted, arm grassroots and grasstops managers for difficult conversations with poor performers.	1 week	Low	• Alignment
Admission Application. Require advocates submit an application with short answer explanations for why they want to join. Best used for more resource-intensive experiences, e.g., an advocacy training program or fly-ins. <i>Can be time-consuming for advocates, so appropriate only for Grasstops programs.</i>	1 -2 months	Low	• Alignment

To access a contract template, find the **Advocate Contract** tool on nationaljournal.com.

Advocate Pledge

Introduction

1. Read and pledge to better understand how to be an effective advocate.
2. Sign and then display a prominent pledge to demonstrate your commitment to affecting change.

Attitude and Beliefs:

1. Acknowledge: You have shared the news and want to impact change.
2. Acknowledge: You understand it is your role to...
3. Acknowledge: You understand it is your role to...
4. Acknowledge: You understand it is your role to...
5. Acknowledge: You understand it is your role to...

Role and Responsibilities:

1. Acknowledge: You understand it is your role to...
2. Acknowledge: You understand it is your role to...
3. Acknowledge: You understand it is your role to...
4. Acknowledge: You understand it is your role to...
5. Acknowledge: You understand it is your role to...

By signing this pledge, I affirm that I have read this pledge and will do so, then in support of National Journal's mission, and my community through my advocacy efforts.

Name: _____ Date: _____

Print Name: _____



Onboard New Recruits

Securing a Relationship Early

Tactics	Time	Cost	Problems Addressed
Onboarding Plan. Build a plan to help each new advocates acclimate to the advocacy program and community in the first 90 days. Help them understand their role and a pathway for success. Expose them to a social structure.	1 month	Low	<ul style="list-style-type: none">• Alignment• Isolation• Skills and Agency
Buddy Assignments. Match new advocates with a more experienced advocate who can show them the ropes and initiate a social connection.	1 month	Low	<ul style="list-style-type: none">• Isolation



Learn Advocate Preferences

Identifying Engagement Inflection Points

Tactics	Time	Cost	Problems Addressed
Preferences Survey. Ask your advocates to indicate when, where, and how often they want to receive communications; what kinds of activities they would like to participate in; and what are their issues of interest. Repeat every couple years.	1 – 2 months	Low / Medium	<ul style="list-style-type: none">• Alignment

Researchers' Note

Surveying can be conducted at any point in your relationship with an advocate – but it only gets more difficult after the recruitment stage.

Advocate Experience

Preparing Advocates to Take More Valuable Actions



Cultivate Sense of Belonging

Strengthening Community Bonds

Tactics	Time	Cost	Problems Addressed
Training Cohorts. Assign groups for in-person and remote training exercises. Maintain the same groups over time so advocates can develop relationships with one another.	1 week	Low	<ul style="list-style-type: none">• Isolation• Skills and Agency
Peer Mentors. Match high-potential advocates to accomplished, outgoing individuals that can help show them the ropes and connect them to the rest of the community.	1 week	Low	<ul style="list-style-type: none">• Isolation
Group Competitions. Pit advocates against one another in a friendly competition for who can take the most actions towards a policy goal. <i>(Also a tactic useful for incentivizing action.)</i>	3 – 6 months	Low / Medium	<ul style="list-style-type: none">• Isolation
Community-Sourced Content. Share photos, videos, and stories collected from advocates in newsletters, social media, and other communications with advocates.	1 month	Low	<ul style="list-style-type: none">• Isolation• Skills and Agency

Three Tips for **Sourcing Content** from Advocates

1. Get started by asking outgoing, engaged advocates to provide you with content for a few weeks. Seeing their peers participate will encourage other to share their own content.
2. Advocates (and consumers, in general) have lower expectations for the quality of peer-generated content. Authenticity is more important than quality.
3. Personally thank everyone for submitting, even if you don't end up using that person's submission.



Invest in Skill-Building

Focusing Less on Confidence-Building

Tactics	Time	Cost	Problems Addressed
Homework Assignments. Give advocates short assignments that improve the quality of their advocacy activities, e.g., a worksheet to craft and refine their story.	1 month	Low	• Skills and Agency
Advocacy Academy. Prepare select advocates for larger advocacy role with series of remote and in-person sessions to improve communications, relationship-building, and mobilization skills.	3 – 6 months	High	• Isolation • Skills and Agency



Personalize Messaging

Tailoring Messages to Individual Preferences

Tactics	Time	Cost	Problems Addressed
Segmented Communication. Send different messages to users depending on their preferences, e.g., send different emails to advocates with different issue interests, or append voting information and tailor language to ideological preferences.	1 – 6 months	Low / Medium	• Alignment
Insider Newsletters. Pull back the policymaking curtain for advocates in a newsletter that makes them feel like they have special access to “Washington insider” information.	1 week	Low	• Isolation
Advocacy 201 Sessions. Offer more advanced education sessions for repeat attendees at fly-ins and in webinars. Spend less time on advocacy basics and more time recognizing attendees’ experience and contributions.	1 month	Medium	• Alignment • Skills and Agency

Three Ways to Learn Your Advocates’ Preferences

- 1. Survey** advocates on their preferences.
- 2. Track what they click** in newsletters, online; supply clearly differentiated options to see who prefers what.
- 3. Read what they write** on social media and other watering holes (e.g., blogs)

Activation

Leading Advocates into Taking Authentic Actions



Minimize Burdens to Participate

Easing Advocate Action

Tactics	Time	Cost	Problems Addressed
Actions Menu. Offer advocates more action options on a particular issue; give them choices that differ on time commitment and skill requirements.	1 – 6 months	Low / Medium	<ul style="list-style-type: none">• Alignment• Skills and Agency
Skills-Based Deployment. Ask advocates to contribute only where they are most skilled; use survey data, conversations, and interviews to identify skills.	1 – 3 months	Low / Medium	<ul style="list-style-type: none">• Skills and Agency
User Experience Revamp. Make it easier and simpler for advocates to move from the call to action to the action itself. Reduce the number of steps in between.	1 – 12 months	Low / High	<ul style="list-style-type: none">• Skills and Agency

To learn more, find the **Storyteller Talent Agency** Best Practice Brief on nationaljournal.com.





Apply Test-and-Learn Approach

Refining Practices to Meet Audience's Unique Expectations

Tactics	Time	Cost	Problems Addressed
A/B Testing 2.0. Go beyond testing out different email subject lines: try testing different senders and different content, e.g., writing style, length, and format.	1 week	Low	• Alignment

Tip

Try changing the senders of your emails to someone else in your network – an executive, a policy expert, or an advocate leader. Discover whose voice resonates best.



Incentivize Action

Driving Participation with Status

Tactics	Time	Cost	Problems Addressed
Hall of Fame. Create a system of recognizing star advocates for the actions they take on behalf of the organization and its policy objectives.	1 week	Low	• Isolation • Skills and Agency
Status Symbols. Hand out ribbons or pins to your most accomplished advocates at in-person events so that other advocates learn that actions are valued by the organization, and know who to speak with about getting more involved.	1 week	Low	• Isolation • Skills and Agency
Group Competitions. Pit advocates against one another in a friendly competition for who can take the most actions towards a policy goal. <i>(Also a tactic useful for building stronger community.)</i>	3 – 6 mos.	Low / Medium	• Isolation

Three Key Components to Build Healthy Competition

1. Scoring System

2. Scoreboard Visible to All Participants

3. Early Adopters

To learn more, find the **Ambassador's Hub** Best Practice Brief on nationaljournal.com.

III. Action Plan

Use the following page to build an action plan for improving advocate engagement across the next year. The worksheet gives you space to plan out next steps for three tactics: one this week, one this month, and one this year. For each tactic, you will need to articulate who will need to be involved, what next steps need to take place, the (rough) expected costs, and how you would define success. This will also help you decide if the tactics you selected will be feasible to execute this year.



Directions

1. Select tactics to implement this week, this month, and this year. Write those down in the grey cells on the next page.
2. Fill in the remaining spaces to begin planning how your organization will execute implementation.

III. Action Plan

This Week	<i>Tactic:</i>		
Personnel Assigned and Involved	Steps to Complete Project	Expected Costs and Resource Requests	Metrics and Goals
This Month	<i>Tactic:</i>		
Personnel Assigned and Involved	Steps to Complete Project	Expected Costs and Resource Requests	Metrics and Goals
This Year	<i>Tactic:</i>		
Personnel Assigned and Involved	Steps to Complete Project	Expected Costs and Resource Requests	Metrics and Goals

Take the next step with National Journal Leadership Council.

Consult with an Expert

Leadership Council experts will come to your office to help you diagnose challenges, share insights and tools on best practice in Washington, or simply to serve as a sounding board—all as part of your membership. To have an expert join you in your office, contact your Dedicated Advisor or our service inboxes below:



Email us at service@nationaljournal.com



Call us at **202-266-7900**

Save Time and Be More Effective with Tools and Case Studies

Grassroots Competency Diagnostic																				
Prioritize Improvement Opportunities in Your Grassroots Function																				
Directions:																				
1. Rate your grassroots program on the importance of each of these six key competencies as well as your effectiveness in each one.					Importance			Effectiveness												
2. Circle the competencies that need both 3 or above in importance and 3 or below in effectiveness. These competencies should receive top priority in your improvement efforts.					How important is each competency to your organization?			How effective is your department at meeting each competency?												
					1	2	3	4	5	1	2	3	4	5						
3. Example Competency					1	2	3	4	5	1	2	3	4	5						
Advocate Recruitment																				
1 Recruiting Grassroots Advocates											1	2	3	4	5	1	2	3	4	5
2 Recruiting Advocates Online											1	2	3	4	5	1	2	3	4	5
3 Recruiting Grassroots Leaders											1	2	3	4	5	1	2	3	4	5
Advocate Network Engagement and Maintenance																				
4 Collecting Advocate Information											1	2	3	4	5	1	2	3	4	5
5 Building Community											1	2	3	4	5	1	2	3	4	5
6 Crafting Newsletters and Advocate Communications											1	2	3	4	5	1	2	3	4	5
7 Educating Advocates											1	2	3	4	5	1	2	3	4	5
8 Training Advocates											1	2	3	4	5	1	2	3	4	5

Assess the strengths of your grassroots program.



Enlist advocates to share your perspectives online.

To access these tools, case studies, and more, visit www.nationaljournal.com/

Discuss with Your Peers at an Event Facilitated by an Expert

ROUNDTABLES



Sculpting High-Impact Grassroots Roles

MEMBERSHIP@LUNCH



Producing Effective Advocacy Newsletters

WEBINARS



Social Media in Advocacy - Parts I, II

To learn more and register for an event, visit www.nationaljournal.com/events