

# Planning an Advocacy Campaign

## General Strategy Tips

**NATIONAL TRUST FOR  
HISTORIC PRESERVATION®**

A Chapter from the *Advocacy Training Manual*  
Produced by the Center for State and Local Policy



The Conservation Alliance, of which the National Trust is a lead partner, gives a leadership award to Representative Raúl M. Grijalva (D-AZ). Photo courtesy of American Hiking Society.

To many people, the word “campaign” usually conjures up images of political debates and elections with enormous media attention. What some people do not realize is that campaigns are strong advocacy tools that can be used by anyone to advance or oppose a cause or idea. According to *Webster’s Dictionary*, a campaign is “a connected series of operations designed to bring about a particular result.” For years, the preservation community has used campaigns to further policies and ideas that enhance historic preservation in the United States. In 2007 the National Trust for Historic Preservation launched a campaign to get Congress to establish the National Landscape Conservation System as a way to help protect culturally and historically significant lands owned by the Bureau of Land Management.

This how-to sheet outlines the basic steps organizations should follow in order to build a strong, constructive advocacy campaign. It explains how to work with campaign partners, how to craft a goal

and message, how to define and prepare a campaign timeline, and how to use the internet as a research and advocacy tool.

An organization may decide to launch a campaign after it reviews its priorities and goals and identifies a need to protect or strengthen an idea or policy. Although specific campaign plans may contain different details, the key to success is a focused and detailed plan with a deliberate, coherent course of action. It is important, however, to allow for some flexibility in case the desired results unexpectedly require a different series of actions than originally planned. It is normal to face challenges during a campaign, but the plan should be organized so obstacles can be handled positively rather than distressing the participants and negatively affecting the outcome.

A well-designed campaign not only provides a desired result, but it also expands networking opportunities for the organization, promotes a cause, raises the visibility and credibility of the organization, and may

develop positive relationships for future campaigns.

### CAMPAIGN MEMBERS

Campaign members may be a few individuals, a number of members from one organization, or a larger group of partner organizations. Campaign organizers should reach out to organizations that they have worked with in the past and ask them to recommend other groups that may want to participate. Be sure to invite diverse ideas and approaches. Consider groups that bring a unique perspective the campaign cause, even though they may not have worked together before. Opposition groups should also be identified during this time (but not asked to participate) so that those involved in the campaign can stay updated about the opposite side of the issue.

Try to identify the strengths of individual campaign members and implement them at every stage of the campaign process. Look for campaign participants who are skilled at managing unique personalities or harmful attitudes. To avoid negative behavior, encourage open communication among campaign members from the beginning of the campaign planning process.

### IDENTIFY A CLEAR GOAL

Whether big or small, every campaign needs to identify a common—and realistic—goal or “ask.” An overly ambitious goal only makes your efforts more difficult and potentially fruitless. Rather, tackle a focused issue that will allow a positive momentum for future issues.

When identifying a goal or ask, begin by brainstorming and narrow the field from there. You may find that there is more than one “ask” during different stages of the campaign. The first stage may involve

asking campaign members to schedule appointments with lawmakers to provide background about the campaign. Later, members may be asked to contact lawmakers to encourage their support for legislation that includes language to benefit the campaign's cause.

Campaigns may be ongoing to raise awareness about an issue with intermittent action items, others may be designed to support or oppose an issue with a defined timeline, such as a political race.

## CREATE A CONSISTENT MESSAGE

Develop your message, campaign title, and mission statement around the identified goal. The message should be clear and consistent, but also capable of responding to changing conditions. In addition, a message should be crafted to share and respond to both allies and opponents. Put the message in writing and distribute it to campaign partners to be accepted or endorsed by each group.

Campaign organizers should hire (depending on budget) or designate an action point person and a media point person (which may also include a website person). This will ensure the campaign carries its message not only to the public and its members, but also to decision makers.

## DEVELOP A TIMELINE

The timeline is usually dictated by the campaign's desired outcome. It should list action items and link them to anticipated events and deadlines. For example a position paper may need to be prepared in advance of a city council hearing. The timeline should also list the schedule of campaign meetings.

At the conclusion of the campaign, the groups should provide an evaluation of the venture, celebrate the campaign's victory, and also discuss lessons learned throughout the process.

## SHARE INFORMATION ONLINE

The internet provides the best opportunity to gain and share information. Develop a website to support the campaign message with relevant, trusted information. The campaign website should include the following information:

### Memorable Website Address

The website address should be designed to attract a broad audience—the public, media, and policy officials. It should clearly reflect the campaign message and be easy for supporters to remember.

### Background

When visitors arrive at the website, the front page should include basic background about the issue and why there is a need to act. From there it should allow visitors (including the media and policy makers) to learn more about the issue and the opportunity to take action or share a personal story related to the campaign issue through a blog. The website should be updated as the campaign progresses.

### Links

The website should provide a link to member organizations and contact information relating to the campaign goals. Links to possible information sources, such as colleges and universities, are also useful. In addition, include links to the website for the opposing side so campaign participants and visitors may learn both sides of the issue.

## CONCLUSION

When your group decides a campaign is necessary to favorably change an issue, the steps above should provide a basic formula for such an undertaking. Keep in mind that your passion and knowledge about the campaign issue are your most important tools—so use them to provide positive results that will strengthen your preservation organization and its goals. ■

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## WORKING WITH CAMPAIGN PARTNERS

Sometimes campaign members disagree on how to proceed with a common course of action. During the push to enact a state rehabilitation tax credit for commercial and residential buildings, Preservation Kentucky worked with several coalition members including the state's municipal league. However, when the proposed 20 percent tax credit for the rehabilitation of commercial buildings was in danger of not passing, the municipal league wanted to drop the level of the credit significantly. The statewide preservation organization felt that a lower percentage would not stimulate the much-needed rehabilitation in Kentucky's older communities and made the decision to continue pursuing a 20 percent commercial credit without the support of the municipal league.

On March 18, 2005, Governor Ernie Fletcher signed into law HB 272, the JOBS for Kentucky Tax Modernization Plan. The legislation included a 20 percent state tax credit for the certified rehabilitation of qualifying historic commercial structures and 30 percent credit for owner-occupied residential buildings. Three years later, more than \$171 million has been invested in tax credit approved projects.

Similarly, the Coalition for Neighborhood & Economic Renewal (CNER) in Rhode Island had to decide on a common course of action when the state's 30 percent rehabilitation credit for commercial properties was threatened. The 76-member coalition initially had divergent opinions when Governor Carcieri's administration proposed to retroactively and prospectively cap the historic tax credit program and eventually eliminate it by 2017. Weeks of internal discussions resulted in an agreed-upon course of action. The coalition's resolve led to H-8016 being introduced by Speaker of the House William Murphy (D-West Warwick) and House Majority Leader Gordon Fox (D-Providence).