

Advocacy Tools: 7 Steps to Creating an Initiative

Recipe for creating an initiative

1. **Build a group.**
2. **Create a road map.**
3. **Create an action plan.**
4. **Implement the action plan.**
5. **Measure your progress.**
6. **Update the action plan as needed.**
7. **Repeat 3—6 until the initiative is successful.**



Details

1. **Build a group** by **advocating** for your idea.
 - a. Describe your idea to lots of people who do things related to the issue you intend your idea to address.
 - b. Refine your idea with each telling.
 - c. Collect a list of interested parties as you tell people your idea.
 - d. Send articles to potential group members that help connect the dots from their main issue to your issue.
 - e. Convene the group
 - i. Hold a meeting of the interested parties to discuss your idea.
 - ii. Ask the group to help clarify what you're trying to achieve, and the problem you're trying to solve.
 1. Describe the issue or problem you would like to address with your idea.
 2. State your idea, then ask why (to what end) you want to do that.
 3. Then take the answer to that question and ask "Why?" again.
 4. Repeat until you can demonstrate how and why your idea should create a measurable improvement in the issue.
 - iii. What would success look like?
 1. Envision success in your mind's eye as if you were watching a film.
 2. Write down what the group sees. Lots of detail will help you **advocate** later on.
 3. When you think you've got it, read it out loud. Does it sound finished? Is there more that needs to be included to look and feel like success?
 4. Sleep on it. Then email the issue description and vision of success to the group and ask for feedback.
 - iv. Get buy-in from the group on final vision & ask each member if they want to:
 1. Help lead the initiative,
 2. Contribute time and effort to the initiative, or
 3. Help spread the word.

2. Help the group **create a road map for the initiative**, to take you from the way things are now to the way things will be when the vision of success has been achieved.
 - a. Has your idea been successfully developed elsewhere? If so:
 - i. Get all the information you can on how they did it, including funding and other resources.
 - ii. Adapt their plan to suit your local and unique circumstances.
 - b. Are you the first to develop this idea? Then work backwards from your vision of success.
 - i. What elements have to be in place at the point of success?
 - ii. For each of those elements, what has to be in place beforehand?
 - iii. Repeat question (ii.) until the elements you need are ones you already have.
 - c. Create a road map out the elements of your plan in their order of dependence. Some might happen in parallel.

3. Help the group **create an action plan** to get to the first destination, which can be one element or set of elements.
 - a. The first actions might be to acquire the necessary resources to get started.
 - b. What are the strategies to acquire these resources?
 - c. Then for each element you're trying to reach:
 - i. Decide on a strategy that will deliver that element.
 - ii. Figure out what resources you'll need—people, funding, what else?
 - iii. Figure out a way to measure progress for this element.
 - iv. Assign a person responsible for moving the strategy forward.
 - v. Estimate a date for completion.
 - d. Figure out the places in your action plan where you can and must **advocate**: e.g., recruiting volunteers, acquiring funding, getting official approval where needed.
 - i. Develop clear talking points that show the benefits of the initiative.
 - ii. Connect the dots between your desired outcomes and those of your audience.
 - iii. Have group members show up and speak up at every opportunity.
 - e. Make sure the group feels ownership of the plan and the measurements.

4. Help the group **implement the action plan**.
 - a. Assign someone to track the measurements of progress.
 - b. Communicate with the group often, to cultivate a sense of ownership of the progress and the challenges.
 - c. Divide up the work into small, well-defined tasks, with due dates, so group members are clear on what they've committed to do when they volunteer.
 - d. Celebrate after each step is completed. That gives you energy for the next step.

5. Help the group measure progress.

- a. Develop success metrics that show the group how far they've come with the whole initiative.
- b. Show how the progress measurements in the steps of the action plan add up to the success metrics for the initiative.
- c. Encourage the group by publicizing measurable progress.

6. Update the action plan as needed by referring to the road map and your success metrics.

- a. As action steps are completed, or as conditions make it necessary to change strategies, update the action plan to reflect those changes.
- b. Use the success metrics to see if the initiative is still headed in the right direction on the road map.
- c. Review the road map periodically to make sure it all still makes sense. Update the elements in the road map only if a really big change makes that necessary.

7. Repeat steps 3c through 6 until the vision of success is realized.

Any questions?

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