

ADVOCACY DUE DILIGENCE PLAYBOOK: PREPARE TO MAKE AN ASK



**Best
Friends®**
Save Them All®



CHAPTER 1:

INTRODUCTION

Best Friends Animal Society's advocacy department constructs and executes strategic advocacy campaigns that enact or remove policies to bring about sustainable lifesaving in a community. The advocacy department is comprised of grassroots advocacy campaign master architects, expert digital organizers, political strategy specialists, and legislative attorneys who work closely together to craft comprehensive policy campaigns that result in sustainable lifesaving change in communities. Where the advocacy team focuses is in direct response to the dynamic real-time data Best Friends receives from shelters.

This playbook is a reflection of the intentional research, information gathering, relationship building, and connection making that each member of the advocacy team goes through before building an advocacy campaign and making asks of decision-makers. This document is your inside look into how we conduct our due diligence to Save Them All®.

What is due diligence and who should do it?

Due diligence is reasonable care before, during, and after an action. Due diligence should reduce risks, maximize benefits and opportunities, strengthen weaknesses, build on prior accomplishments, allow for the discovery of information, and identify resource overlap or shortfalls.

Successful advocacy campaigns require familiarity with your area's lifesaving needs, collaboration with local shelters and community members, creativity, and thoughtfulness. After that, you can tackle some of the big-picture concerns that are crucial to dog and cat lifesaving.

Your "ask" will be contextualized by considering the issue's and cause's local history and the community's relevance. Looking at the issue/policy's background and history will help estimate your chance of success. This due diligence will suggest identifying issues and linking them to solutions. Due diligence helps you relate your ask's answers and efforts to the solutions you propose.

"Advocacy" is public support for or recommendation of a particular cause or policy; is the act of building public support for a certain cause or policy.

"Advocacy campaign" the activities supporting making an ask and making sure action is taken to solve a problem.

"Advocacy due diligence" is information gathering to help assess the community's policy environment that decisions are made in.

"Ask" is the specific request or action to be taken that an organized body of people makes to a decision-maker. Sometimes referred to as a request.

"Decision-maker" the person or entity responsible for making strategically important decisions based on several variables, including time constraints, resources available, the amount and type of information available and the number of stakeholders involved (such as an elected official or department head.)

"Due diligence" is the exercise of reasonable care before, during and after an action made.



How this playbook helps you:

This playbook provides tables and sections to help you and others understand the problems and challenges you identified and produce ideas, alternatives, and outcomes to ask a decision-maker or elected official to act upon.

This playbook's many tables and questions shouldn't overwhelm you. They are to aid your advocacy campaign development.

Important: Not all the sections or tables in this playbook may apply to your problem and community, but they may reveal a connection or resource you missed. Always start by defining your problem/issue. After defining your problem/issue, analyze its fundamental causes before proposing solutions and other possibilities to boost your advocacy campaign and ask/request.

When do you have enough information to launch your campaign? While you can always add more information later, it's vital to start with enough information or leads to understand the situation and predict your potential success.

Why should you do due diligence?

Politics, whether in a back room or in a government, corporation, or community, affects all policy. You must build support and eliminate opposition. To be able to do that, you must exercise due diligence. Advocacy is less of a mystery when you know the people, policies, connections, and processes that impact decision-makers.

Advocacy efforts and campaigns should be tailored to the topic and community. Your organization's success depends on understanding the community's political, social, and economic background. A due diligence report helps you, your team, and other organizations/departments work together to solve the community's problem. By analyzing your community's data you are putting together the puzzle pieces to understand it better.

Due diligence helps you understand your community, but you must confront any opposition, counterarguments, counter asks/requests, and hazards too. You don't want to accidentally harm relationships, animals, or the shelter. Gathering crucial facts to identify where your community is now will set your baseline to gauge your advocacy campaign or ask and establish a goal line.

When to do due diligence?

Here are some examples of when you should do due diligence:

- You've established CCP (community cat program) in multiple towns, but the current community you are in won't accept CPP's demonstrated benefits, and you don't know why.
- Your community's animal control program has a new issue and you've never worked with oversight.
- You won an advocacy triumph in this community earlier, but it was hard and rocky.
- You've tried to modify legislation or policy multiple times but failed.
- You want your organization or others to help with an advocacy campaign, but you need to show your campaign's viability.
- You're unsure how to change policy or practice.

By researching your community's demographics, political climate, decision-making process, your organization's relationships, and more, you are doing the due diligence that will help you formulate your ask and campaign.

Due diligence will help you see if there are misconnections holding your campaign or ask back, provide you with more insight into unfamiliar departments or organizations, help you figure out why a win was hard in the past and identify ways to make it easier this time, prove to others that you have the right pieces in place to succeed, or just help you identify the steps you need to take.



Where to start, how to start (best practices):

Start with what you already know. Brainstorm, stream of consciousness, doodling, whatever feels natural. Start by jotting down information you already know. This playbook will help guide you through the rest but this initial memo to yourself will help you from feeling overwhelmed later. Other information you will need to gather will come from people, documents, news articles, etc.

A mental strategy or due diligence information will not help in a crisis or generate credibility. Writing down all this material will minimize generalities and guesses that derail advocacy campaigns. As you write it down, you may be surprised at how much you and your team already know, revealing new connections and a vision or path forward. Without a written plan and due diligence report, your organization and partners cannot use your vital information or see how your ask matches with your organization's purpose to save the lives of shelter animals and end homelessness for pets. A written plan provides focus and context. It allows for everyone involved to know the players, issues, timelines/ deadlines, and strategies. A plan is not a plan and a report is not a report if it is not written down!

A word of caution: While this report must be written down, it is not set in stone. Shelter employees, elected officials, coalitions, and resources turn over and change. This should be reviewed and updated as community and political conditions change. Your plans and due diligence report must be reviewed, appraised, and updated frequently to stay relevant.

While updating or reevaluating your analysis with the latest information is flexible, being objective in your information gathering and analysis is not. Even if some questions require judgment, don't include or allow your biases, politics, sense of humor, or values to influence your report. Your interpretation may not be understood by others.

Need a starting point? A few sources to find information:

- Official government sites
- Social media
- Newspaper archives
- Policy papers
- Community members
- Shelter staff
- Government staff





CHAPTER 2:

DEVELOPING YOUR “ASK” IN 6 STEPS

Why develop your ask? Let’s say that you want to save the lives of shelter animals. How are you going to do that through advocacy? Think about these questions: How can shelters increase lifesaving outcomes? How can your community help with lifesaving outcomes? Your plea “to save shelter animal lives” is very vague for an ask to a decision-maker. Your desire for immediate shelter killing reduction must be clear.

What is an “ask”?

An “ask” is a specific request made to a decision-maker by a group of individuals. Sometimes it will be referred to as your “request” in this playbook.

The next 6 steps will take you through what you need to do before making an ask: you must define your issue, problem, or situation you want to change. Why define your issue? Defining the issue justifies and guides what other due diligence you need. Then you will identify potential solutions based on the problem’s causes and eventually narrow it down to what you will ask decision-makers to do.

An ask could include: Elimination of a harmful policy; updating or amending an existing policy; developing a new policy; allocating or committing resources within a budget; enforcing a policy; demonstrating accountability for policy commitments; carrying out the provisions called for within policies.

Step 1: Define the problem.

What are you hoping to change? What do you want to achieve? What are you hoping to accomplish? The answers to these questions will help define the problem you will solve.

Examples of problems:

- Feral or stay cats (aka community cats) are entering your community’s shelter in high numbers.
- Your city has breed-specific policies in place that target certain breeds of dogs.
- Pet stores selling companion animals in your community.



Starting points to define your problem:

- A single problem/instance or a hypothetical problem will not provide enough evidence for the decision-maker to consider it more than an isolated incident. If you don't have a specific example, don't make one up.
- Anecdotal information from community members, employees, and other residents are helpful, but are not proof of the problem itself.
- Can you measure the issue? To assist others to comprehend the issue, can you provide a range or estimate?
- The problem you identify with your shelter or community's activity may be big or complicated. If you are not detailed and propose a legitimate solution, you may receive the wrong response or solution implemented.
- Breaking the ask into smaller asks/requests may make your greater goal more achievable.

Be careful not to include a solution in your attempt to define your issue.

For example: "Too many pets are homeless" defines the issue, whereas "the shelter is not big enough for homeless pets" prematurely offers a solution (more shelter space).

While you identify something as a problem or issue, others might not even think it exists as a problem. This playbook will take you through steps and tables to create an ask statement with a solution that proves the issue is real and not merely anecdotal.

Get community support!

Identifying your problem should involve the community. If no one in the community agrees, it will be hard to convince decision-makers to address the issue. If a problem and solution are found from outside the community or by groups without community links, the approach will seem self-serving and unlikely to succeed. Bottom line: effecting local change requires local stakeholders.

"Community" includes both residents and local business owners.

Table 1: Define your issue/problem.

1. In 100 words or less, describe the community issue you want to fix and why tackling the problem will reduce shelter killing and increase lifesaving.
2. Which individuals and animals are most affected by the problem? Who needs your advocacy?
3. When did the issue begin? Is it new, continuing, seasonal, or year-round?
4. What evidence or data supports that this issue exists? Do police or animal control reports, numbers, statistics or other data exist?
5. Where is the issue happening? Is this a local, county-wide, statewide, multiple-location, or other regional issue? Is this happening exclusively in private/non-profit shelters, rescue groups, public shelters, or more than one?
6. Is this a sheltering, animal control, or field services issue? Are they government-provided or outsourced?
7. How do others view this issue:

	Agree this is a problem?	See the issue as controversial?	See the issue as partisan or political?	See the issue as divisive or unifying?
The community				
Elected officials				
Department/shelter				
Other organizations in the community				

8. Has the shelter, government, non-profit, or other entity tried to solve this issue in the community before? If so, how long has it been since the last attempt to resolve the issue and what was the result?
9. What is your timeline? Is there a deadline set? Is there an emergency?



Step 2: Identify causes.

After defining the problem, identify its main causes. Causes demonstrate the issue. To identify causes you must determine how the situation occurred and why. Don't make the mistake of confusing correlation and causation.

List out and work through the most likely causes. Most problems have multiple causes and multiple solutions. Make sure you have facts showing the presence, scope, and effectiveness or ineffectiveness of the issue in your community and the proposed remedy to convince the decision-maker that your ask/request is necessary. You'll find causes' answers and prioritize them later. You can start broadly and narrow down as you explore your findings. The more specific and clear you make your issue/problem and cause, the better able you are to develop a solution and ask to reach your goal.

Pro tip: When evaluating causes and solutions, keep in mind that developing a new policy will not help if decision-makers don't follow through. Be prepared to remind and follow up on commitments.

Table 2: Identify the causes of the issue/problem.

1. What causes are preventing the community from solving the problem or from increasing lifesaving?
Are there multiple causes?
2. What causes do the most harm to animals in the community?
3. Of the causes you identified, does one need to be addressed or resolved before the others can be?
Which causes could be solved more easily, which causes would be harder to solve?
4. Do you have evidence or data that these causes created the issue?
5. If the issue and causes are in more than one community, is every cause in every community or location or just some?
6. Are the causes created by a:
 - a. Current policy or law? If yes, what is it and how is it not working?
 - b. Current policy or law not being implemented correctly or effectively?
 - c. Gap between policy and implementation or application?
 - d. Gap in law and policy?
 - e. Cultural difference in the community?
7. Has this cause been attempted to be eliminated before in the community by the shelter, government, non-profit or other organization before or currently?
 - a. If yes, what was attempted? How much time has elapsed since the last attempt to eliminate the cause was made and what was the result or outcome?
8. Does the cause cost money or create a financial burden for the community or is it generating revenue?
9. If there is more than one cause, which cause are you going to try to eliminate now?



Step 3: Find and evaluate solutions and alternatives and predict outcomes.

Remember, decision-makers are often approached with problems in the community or goals the community wants to reach. Unfortunately, not much will change if these issues and goals do not accompany a suggested remedy or solution. A persuasive policy recommendation will help the decision-maker understand your ask/request. The decision-maker must understand what you are asking of them, so be specific as you work through your due diligence process.

Why not ask for every solution to fix a problem? Because if everything is a priority, then nothing is. Long lists of requests or issues without solutions may overwhelm the decision-maker.

Remember: There may be multiple solutions to solve a problem. Due diligence will lead to various causes and solutions. Depending on political and policy developments, you may need to update your “how” to request a smaller, greater, or different action. Besides asking for the right solution, attainability is crucial. If the solution is too big right now, break it down. Also don’t be afraid to increase your ask/request if given the opportunity.

Your solution must be quantifiable. Advocacy and policy changes have many elements, making it hard to quantify success at times. A straightforward ask makes measuring success and improvement easier. Investigate solutions for the causes you found during due diligence. Think through their short-term and long-term impacts. It will help you choose the best solution. Your solution must solve the problem and outperform alternative solution options.

Solutions and asks must include verifiable, measurable milestones. Milestones are short- to medium-term steps you take to attain your final ask or objective, and they can help you assess your timeline for your ask.

As part of your evaluation of solutions you will check the issues’ history. Has your problem been addressed before? Maybe in another city? Successful or unsuccessful attempts to overcome this challenge can provide a lot of information and insights for your own situation. Be honest with yourself and others when evaluating your solutions.

Pro tip: Avoid becoming trapped in an echo chamber that blocks out other possibilities. Make sure your ask is backed by the best solution or action you find to avoid the decision-maker choosing a less desirable option. If your ask is too broad or unclear, you risk push back or inaction.



Table 3: Identify and evaluate solutions.

1. Is the cause you are trying to eliminate simple enough to find solutions for or will it need multiple solutions or actions? Is the solution specific or complex? Will it take multiple actors or actions?
2. What are the potential solutions to eliminate the cause? Will any potential solutions identified eliminate more than one of the problem's causes? What solution(s) will you propose to eliminate the cause? If the solution eliminates the cause, will the problem remain? What causes will remain?
3. Are there existing solutions being implemented to eliminate the cause already? If yes, why is there still a need for a new solution?
4. How long will it take to implement the solutions you pick to solve the problem? Are there incremental solutions that would assist in eliminating the cause? Are there other actions that need to be taken before any of these solutions can be implemented? Is there a temporary solution to any of the causes? If yes, should it be tried first?
5. If the issue and cause are in more than one location, is the solution applicable to all the locations?
6. If any of the causes are created by legislation or policy:
 - a. Have you reviewed the ordinances? Is new legislation needed to implement a solution?
 - b. Is there a workaround solution to the cause that can be achieved without legislative action?
 - c. Is there a specific or general law or policy that should be addressed?
 - d. Can eliminating, amending, or rewriting the current law or policy eliminate the cause? Would implementing or re-interpreting the current law or policy eliminate the cause?
7. What are the programmatic objectives/strategies that need to be put in place to achieve a higher lifesaving rate in this community?
8. How will the solutions improve access and delivery of services to shelter animals or animals in need? Which solution will most improve the lives of shelter animals or the animals in need?
9. What actions or resources are being used to achieve higher lifesaving rates in this community currently?
 - a. Does the best solution cost money? If yes, what is the estimated cost, is it affordable, and is there a funding source identified? If not, are there estimated cost savings?
 - b. Will existing government or shelter resources be able to fund the solutions to the cause?
10. How will the change caused by this solution be measured? For example, an increase or improvement, a decrease or reduction. Is there qualitative or quantitative data to prove that the solution would eliminate the cause?
11. Do you have case studies of policy interventions working in similar situations?
12. Are you certain that acting is better than doing nothing or pursuing a different course of action? Is progress worth the cost of change or doing nothing?
13. Can you think of any unintended consequences or negative outcomes that could be a result of this solution? Do your solutions have any side effects? Any drawbacks? These must be considered when offering solutions.
14. Does your answer solve the problem or just reduce it? Is this okay? If you simply tackle part of the problem, do you have to divide it into phases due to timing or other factors? Steps may help you achieve a goal by taking measures based on timing or resources to be analyzed later.
15. Does the community like it best? As you learn more about the neighborhood and the decision-makers you will approach with your ask, this stage may need to be repeated.
16. Has this solution been attempted before in the community by the shelter, government, non-profit or other organization? If yes, how much time has elapsed since the last attempt to implement this solution was made and what was the result or outcome?
17. Is the community/shelter/governing body aware of the solution? Do you expect them to support the solution?
18. Will the solution meet the deadline if there is one?



Step 4: Identify problem solvers or decision-makers.

How can we be certain that we are approaching the appropriate decision-maker at the appropriate moment if we are unaware of how they operate? If you understand the legislative or regulatory process and how decisions are made in your town's political context, you'll be able to see each phase as an opportunity to influence and engage with decision-makers.

Remember: Each decision-maker, elected official, or government department/agency has specific powers and duties—also known as their jurisdiction. Knowing what they must do to complete their job, what they must not do to abuse their position, and what they may do at their discretion provides you more chances to engage them and make a difference. Likewise, many nonprofits and government agencies have oversight boards, committees, or commissions. Depending on their power, they may make the final decision. Like a legislative body, you need to understand their operations, agendas, and committee procedures. Gathering this information as part of your due diligence will pay dividends for you later.

Decision-making often follows a hierarchy. You often need to convince other decision-makers before the ultimate decision-maker. You need to work through this as part of your due diligence to ensure you are on the correct path. Be open to change as you identify your decision-maker and narrow ask or request.

To figure out who your decision-makers are you will be asking questions like these: Who can solve your problem? Who can enact your solution? Who makes the decision? What's the chain of command?

Basic knowledge of the way the local governing body or department functions is essential to a successful ask and advocacy campaign.

Pro tip: Often there is a chain of command in decision-making. Just because someone is lower in the chain, don't forget they may need to be persuaded too. They're still important and deserve respect.



Examples of what governments typically have control over:

- **Regulations:** Tighten or loosen existing standards of pet ownership.
- **Subsidies and grants:** Modify the conditions of eligibility for public funding for rescue groups.
- **Provide services:** Give people vouchers for services so they can choose to use them when they might not otherwise.
- **Allot budgets:** Increase, cut or shift budgets or staffing of departments.
- **Information:** Require disclosures or ratings for certification for animal services.
- **Create or modify private and public rights:** Property rights or dispute resolutions.
- **Education:** Warn of health dangers or advocate for rabies vaccines.
- **Contracts:** Privatizing public services like animal control.



Table 4: Determine who can solve the problem. Who is the decision-maker?

1. Are you seeking a change at a private/non-profit shelter or public shelter?
2. If a private or non-profit shelter(s):
 - a. Do they have a governing body such as a board of directors who make policy or operational decisions or does the shelter director make those decisions? Does the shelter have a non-profit or “friends of” group that supports the shelter?
3. What department or government agency regulates shelters?
4. Does your solution involve changing public or private shelter, department, government agency policy or regulations or a law? If yes: What department or government agency oversees the shelter, animal regulations, animal services, or animal policy?
5. Does the shelter director, department or government agency director, city manager, mayor, or legislative body have the authority to implement the solution you are seeking?
6. Does a legislative body have jurisdictional control over where the issue is taking place, or is it a combination/joint powers?
7. Is the issue already reflected in any of the legislative, administrative, or department’s agenda or likely to be? Are there any competing law or policy solutions to this issue (existing or likely to be proposed) that you are aware of? Are there other animal welfare policy initiatives being discussed currently, or in the recent past, or expected soon by governing bodies in the impacted community? If so, would they solve the causes and issues identified?
8. Does your solution involve changing policy or activities in contracted services? If yes:
 - a. Are the contracts currently in effect? If yes, when were they approved and when do they expire? Who approves the contracts? Do they have to be voted on by the elected governing body?
 - b. If they have not been approved yet, when are they expected to be approved or voted on?
 - c. Is it an amendment or extension of a current contract or a new contract?
 - d. Is there or has there been a request for proposal (RFP) period?
 - e. Who reviews the proposals to make a recommendation to the person or body who approves it?
 - f. Do you have copies of the current, past, or proposed contracts or RFP?

Step 5: Developing and evaluating your ask statement.

You have now identified your problem, chosen the cause you would like to solve, you’ve picked the best solution for solving the causes of the problem, and you have identified the decision-maker to make all this happen! What’s next? Your ask statement! Like an elevator speech or pitch it is a short summary of the problem, cause, solution, and what needs to happen.

Remember: As you craft your ask statement, just like when attempting to define your issue, do not leave room for ambiguity. Room for others to add their own biases or interpretations won’t get you where you are trying to go.

Start with your main issue or goal, then your desired action, and your proposed solutions. Make it clear. Don’t be afraid to change the sequence a few times to make it more natural if you need to. It does not have to be exactly in the order listed in the table.

Sometimes incremental asks or methods for distinct decision-makers throughout the chain of command may require you to modify your core ask statement.

Pro tip: Focus on what you’d like them to be in favor of rather than only what you want them to oppose.



Table 5: Developing your ask statement

<p>What: The main problem or goal statement.</p>	<p>Example: We have an overabundance of community cats who live in our community. Community cats are being killed at the shelter.</p>
<p>Who: The decision-maker, stakeholder, or institution with the power to act on this issue.</p>	<p>Example: The Jonestown City Council has the power to implement an ordinance.</p>
<p>Why: A short sentence or two that supports the goal and solutions.</p>	<p>Example: Trap-neuter-return (TNR) is an animal-friendly, veterinarian-approved, and cost-effective method for keeping free-roaming cats safe, healthy, and out of shelters while reducing their numbers over time.</p>
<p>How: The specific action you want the decision-maker, stakeholder, or institution to do, or goal you want to achieve. The specific action or change you would like taken to carry out your desired change.</p>	<p>Example: Change the city ordinances to allow for TNR and community cat programs. Sponsor or vote for an ordinance to allow for TNR and community cat programs.</p>
<p>By when: Name or list the measurable outcomes and the deadline or timeline.</p>	<p>Example: June 15th is when the Council votes on new animal control contracts who would implement the CCP.</p>
<p>The ask statement:</p>	<p>Example: Jonestown kills more feral or community cats than other communities which costs more money in the long run than allowing for TNR would. The Jonestown City Council should change the ordinances to allow TNR prior to the next animal control contract approval so that a CCP can be implemented as soon as possible. As a result, there will be fewer cat litters, fewer kittens to fill the shelter, and fewer cats and kittens being killed.</p>

Remember: Too complex or too many asks at once may waste your time. Prioritizing may require choosing between one large request and several smaller ones. Break down large initiatives that need a lot of planning and resources into smaller segments to make them easier to implement.

Just as you might need to rearrange the parts of your ask statement to make it flow more naturally, you must evaluate it to ensure that it is detailed, clear, and will lead to your desired outcome.

Pro tips:

- Use consistent terms, words, and meaning in your ask statement and extra research, documents, statistics, or handouts.
- Avoid unclear or generic words. Be concise. Speak simply.
- Avoid employing rhetoric to denigrate or mislead your opponent or yourself.
- Avoid using animal welfare specific terms, jargon or medical terms the average person wouldn't know.
- When speaking to decision-makers, less is more. If they ask you a question you don't know the answer to, don't make it up. Offer to get back to them with more information.



Table 6: Assess the ask statement.

Assessment criteria:	Yes/No	Why or why not?
1. Does your ask statement clearly express your desired action?		
2. Is it results oriented?		
3. Is it action oriented?		
4. Does it state who can make the decision or action happen?		
5. Does it state why they should make the decision?		
6. Does it give a timeline?		
7. Does it give a measurable outcome?		
8. Does it communicate: a. how the goal will be achieved? b. how the issue will be resolved?		
9. Does it use simple, clear words, phrases, and ideas to avoid misunderstandings?		
10. If completed, will it be: a. life saving for shelter and community animals? b. fulfilling for your organization? c. fulfilling for the community? d. fulfilling for the decision-makers?		
11. If you answered “No” to any of the questions, is that something you need to go back and fix in your ask statement?		

Reminder: Are you advocating or are you lobbying? Make sure you are aware of lobbying laws, rules, and regulations for your city and state. Make sure to follow any registration or disclosure requirements or guidelines.

Pro tip: Rehearse your ask and supporting information several times in front of the mirror and friends until you are comfortable with it. Have friends roleplay objections with you so you can think about how to overcome them.





CHAPTER 3:

ASSESSMENTS

A due diligence report should show how an ask aligns with your organization’s vision to end pet homelessness and other lifesaving goals. Without this alignment, rationale, and facts, your organization cannot allocate proper resources even if it is a meaningful ask.

Pro tip: It’s okay to copy and paste information directly from sources or put the link to information into your due diligence report if it’s factual and a reliable source.

Due diligence highlights the information you need before you make an ask and will give your strategy plan structure and direction. A due diligence report-informed ask and advocacy campaign strategy plans provide benchmarks to hold everyone accountable and improve resource allocation.

Now that you have completed your ask statement, you will move on to assessments of your organization, the community, of decision-makers, external organizations and other aspects that will impact your ask’s success even if they are out of your control. Start with your organization’s involvements in this issue in the past or in other locations. Knowing yourself will guide your ability to interact with others.

Table 7: Your organization’s issue involvement assessment.

1. Are there other organizations working on the cause, problem or solution identified? If yes, would there be a duplication of efforts, resources, or potential for collaboration?
2. Does your organization have a policy statement on the issue? Does it need updating?
3. Has this issue, cause or solution been addressed by your organization before?
4. How does your solution reduce shelter killings and help the community reach a no-kill status? If not, what other of your organization’s programmatic objectives does it address?
5. What are your organization’s capacity and resources to undertake this ask currently?
6. Does your organization have programmatic experience in the solution that you are seeking?
7. Does your organization’s involvement come off as self-serving to the community?
8. Is this a one-time effort in this community or could it naturally lead to similar asks or advocacy in this community or surrounding communities?



Assessing the landscape of the community:

Keep in mind a lot of information you gather about the community, shelter, problems, solutions, and programs will not be well known to others who are not on the ground with you. Every bit of information can be helpful in shaping the overall picture for them.

Remember: Not all the sections or tables in this playbook may apply to your problem and community, but they may reveal a connection or resource you missed. You should still review and make records or notes of information because you may realize later that you do need that information.

Start with the basics: Assess the community you want to make a change in. Use the questions and table that follows to assess the community's demographics, political and policy climate, procedures, and decision-makers to ensure success.

Several tables ask for the awareness and support or opposition of the issue or solution. See the glossary for more information about these labels.

Table 8: Community assessment.

1. Name of the community and levels of government:
2. Basic community demographics and information:
 - a. Overall population and broken down by households.
 - b. Age group, gender, and racial and ethnic breakdown of the population.
 - c. Median household income.
 - d. Average households with pets.
 - e. Primary and secondary languages spoken in the community.
 - f. What is the CDC score for the Social Vulnerability Index (atsdr.cdc.gov/placeandhealth/svi/)? For example, a score of 0.9758 indicates an elevated level of vulnerability.
3. Are there any nicknames or abbreviations for the geographic area, shelter or animal services used or should not be used?
4. Information about who is impacted by the issue in the community:
 - a. What is their demographic information (age, social status, economic status, ethnic or racial backgrounds)?
 - b. Where do they live?
 - c. Who are their elected officials?
 - d. Who among them is willing to participate in solving the problem or support the proposed solution?
5. Animal services and shelter information:
 - a. Are there public or private shelters in the community, or both?
6. Oversight information:
 - a. What local and state agencies regulate animal control field and shelter services?
 - b. Which government department oversees the public shelter or is it contracted out?
 - c. Does a government department provide/administer animal control field services in the community, is it contracted to a private service or contracted to another government?
 - d. Does the shelter or field service provide services to others outside of their immediate jurisdiction? If yes, where? Do you have copies of the contracts and policies/procedure handbook/manuals?
 - e. If animal control services is contracted, who holds the contract and who in the government oversees the contract? Do they contract with any other communities?
 - f. If any animal services are outsourced via contracts, do you have copies of the contracts and their policies/procedure handbook/manuals?
7. List the most influential nonprofits and civic organizations or associations not focused on animals in the community.
8. Who is the most influential or viewed as expert voice on animal welfare individual or nonprofit in the community? Do they support no-kill or no-kill verbiage?
9. What is the level of public awareness or engagement on animal issues in the community historically?
10. What is the public perception of the animal services, the public shelter, the private shelter, and animal control in the area?



Table 9: Your organization in the community.

1. What is your organization's history in the community? What have you done in the past or doing currently to show a long-standing commitment to the issue, the community, and your proposed solution?
2. How is your organization perceived by the community, the shelter, other organizations, and the government?
3. Are there any major donors who are active politically, business owners, elected officials, or other community leaders in the community?
 - a. Are there any known influential supporters or opponents of your organization's mission and programs in the community?
4. Does any data exist to contextualize community support for your organization's objectives and mission?
5. Has your organization done any polling or community-level surveying?
6. Has your organization done any shelter assessments in the community or a nearby community?
7. Has your organization provided any programmatic or financial support (such as grant dollars, technical assistance, or donated resources) to any programs in this community or nearby communities?
 - a. If yes, have you put together a one-page handout that explains your investment in the community and lays out why your organization is a stakeholder?

Earlier, you found the decision-maker who controls policies you want to change or impact. Now you need to research those decision-makers, the organizations, and power of the governing bodies to whom you will submit your ask. This is vital because it will help you decide who to spend the most time convincing and talking to and what will make your ask/request appear more relevant to them personally.

The next tables will help you gather information and describe each decision-maker's, staff's, leadership's, coalition's, and organization's position or awareness of the problem, causes, solutions, and your ask from their perspective.

Remember: You need to think about your situation from your decision-maker's perspective. The most effective campaigns will meet them where they are and move them to your side. Don't forget to keep your own biases and views out of this part of the process.

Other tables will lead you through the information you need to gather about other organizations, coalitions, individuals, governing bodies, etc. Other perspectives will come to light through learning local groups and people's influence. The actual individuals that make up the government body or board or commission will decide your ask/request, thus we need detailed information about them.

Pro tip: It can be frustrating when you have worked hard to establish a relationship and create a champion elected official and the official is either out of their elected office because they chose not to run for reelection, they lost the election, or term limits ended their term. As a result, it's crucial to have numerous connections with various political leaders.



For best results, be realistic and honest in your findings even though opponents will often use fear or unfavorable ideals to create emotional opposition to your ask.

You won't be able to effectively dispute opponents' arguments unless you fully understand their perspectives, you must try to think through their positions and where they are coming from. Researching your opponents or potential opponents should reveal their weaknesses and discrepancies between statements and deeds. Make sure to add that to your due diligence report.

Understanding their objections or intentions helps you estimate their influence and decide how to handle their opposition. Don't forget to add previous tactics or defenses against similar issues in the community. List prior interactions and analyze their pros and cons.

The next set of assessment tables help you assess either organizations/groups of people, start at the first person you will need to contact and then work up the chain of command until you reach the final decision-maker or implementer. For example, when working with a shelter: start by listing the shelter staff members involved in the issue, then their director, who oversees the shelter or shelter contract, the heads of relevant departments or agencies, and city managers, until you reach the elected officials about whom you have already answered questions.

Pro tips:

1. Making a very specific ask of the decision-maker reduces the opportunity of others to fearmonger.
2. Even though it's frustrating, decision-makers like hearing that you tried to compromise or considered the opposition's viewpoint. Also never bash your opposition.

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Table 10A: Assessing a private or nonprofit shelter/rescue group or nonprofit organization.

1. Name of organization:
 - a. Tax Status, phone number, address, email, website, and social media:
 - b. What is their mission/purpose?
 - c. What is their lifesaving gap? What is their lifesaving status?
 - d. Do they use no-kill verbiage or prefer other terminology?
2. Funding:
 - a. Where does their funding come from?
 - b. How much, if any, is from the government?
 - c. Do they have a government contract?
 - d. What does their budget look like? What amount of their budget goes to animal services vs. staff vs. contract services, etc.?
3. Structure:
 - a. How is the organization run?
 - b. How many employees do they have? Are they unionized? What is their staff/employee leadership structure? Include an organizational chart if you can. Do they have staff with decision-making ability? Please list names and titles here and add more information in another table.
 - c. Who appoints their board? You will list more board/leadership information in a later table.
 - d. Do you have copies of their bylaws or policy and procedures handbooks?
 - e. What government agency/department at the city, county or state level oversees the shelter regulations if any?
4. Operational information:
 - a. Do they only have one location or more? Do they have any mobile units for service?
 - b. Are they a stand-alone organization or a chapter of a bigger or national organization?
 - c. What geographic area do they claim to cover/represent?
 - d. Do they have any restrictions on the animals they take in or adopt out?
 - e. What services do they provide/offer?
 - f. Does the shelter provide any services to the government or another organization through a contract? If so, to who and what services are provided? What is the financial amount of the contract? Which government agency or department oversees the implementation of the contract if any?
5. Oversight information:
 - a. What is the governing body of the shelter/non-profit?
 - b. Is there an external oversight board or a governing body that sets policy, approves budgets, approves staff changes, etc. or do they provide advice and support to the shelter/non-profit, or both?
6. Relationships:
 - a. What relationships exist between the shelter/non-profit's governing body or decision-maker and your organization?
 - b. Does this shelter/non-profit have the capacity, expertise, reputation, and established relationships to influence decision-maker? What is their reputation with the community, the government, and other animal welfare organizations?
 - c. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
 - d. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
 - e. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this shelter/organization if they support your ask?



Table 10A cont.

7. Cause/issue/solution background and current information:
 - a. What are their known positions or awareness of current ask/issues, causes, and proposed or potential solutions?
 - b. Do they support your ask?
 - c. Why would they care about the ask/issue? Does this issue connect to their mission and purpose?
 - d. Have they taken a controversial stance on a different or similar ask/issue in the past?
 - e. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
 - f. Can this shelter/non-profit give you what you want? Do you have enough power/leverage to get them to do what you want? If you fail to win them over, do you have recourse?
 - g. Do they have a history of advocacy or lobbying? What advocacy or lobbying tactics have they used in the past? Do they have a lobbyist?
 - h. If they are opposed:
 - i. Why do they oppose this ask/issue?
 - ii. Has their board voted to take a position?
 - iii. Do they have competing priorities? Do they simply lack information?
 - iv. Is their opposition based on an ideological opposition?
 - v. Is a funding reason causing them hesitation and opposition?
 - vi. How does their opposition on this issue connect to their mission and purpose?
 - vii. Is there potential for flipping them to support the ask or neutralizing them?
 - viii. What are their tactics for opposition?
8. Chart out all relevant contact history on this issue and outcomes. List the type of contact, what was discussed, who was representing your organization; if an ask was made at the time, what was the response?
9. Add any other relevant information about this shelter or its leadership.



Table 10B: Assessing decision-makers, leadership or staff of private or nonprofit shelter/rescue group or nonprofit organization.

1. Name, title, any leadership positions, profession:
2. Address, email, phone number, website, social media:
3. Any relevant biographical or family information:
4. Service to the board or employment:
 - a. What committees do they sit on (if there are committees to the board)?
 - b. Do they fulfill any specific interest group representative or designee for the position? Such as representing a union?
 - c. Have they served on any other organizations boards?
 - d. How long have they been on this board or worked there? When were they appointed? When does their term expire? Can they be appointed again?
5. Community engagement and reputation:
 - a. Are they engaged in any other community groups or organizations?
 - b. What is this person's reputation with the rest of the board, the shelter, the community, employees, the government, and decision-makers?
6. Cause/issue/solution background and current information:
 - a. What are their known positions or awareness of current ask/issues, causes, and proposed or potential solutions?
 - b. Do they support your ask?
 - c. Why would they care about the ask/issue? Does this issue connect with their personal goals?
 - d. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
 - e. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
 - f. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this person if they support your ask?
 - g. Have they taken a controversial stance on a different or similar ask/issue in the past?
 - h. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
 - i. Can this person give you what you want? Do you have enough power/leverage to get them to do what you want? If you fail to win them over, do you have recourse?
 - j. If they are opposed:
 - i. Why do they oppose this ask/issue?
 - ii. If their board took a vote on this ask/issue, how did they vote?
 - iii. Do they have competing priorities? Do they simply lack information?
 - iv. Is their opposition based on an ideological opposition?
 - v. Is a funding reason causing them hesitation and opposition?
 - vi. How does their opposition on this ask/issue connect to their mission and purpose?
 - vii. Is there potential for flipping them to support the ask or neutralizing them?
7. All relevant contact history on this ask/issue and outcomes: List the type of contact, what was discussed, who was representing your organization; if an ask was made at the time, what was the response?
8. Add any other relevant information about this individual.



Knowing how your local government works is critical to this process. There are various approaches to determine which of the various elected officials are truly crucial to your goal/ask. Here are some questions and starting points to find the information needed to assess them:

- Who represents the area most impacted by the problem?
- Check related past votes.
- Visit their websites or social media.
- Learn more about the leaders.
- Check whether decision-makers have discussed related issues on social media.
- Check whether they have previously engaged with the issue or shelter.
- Learn which district houses the shelter or animal services.
- Check the committees they serve on and which committees oversee your issues.

Table 10C: Assessing a government or governing body.

1. Briefly describe the structure and how the legislative branch/governing body and administration/executive branch interact, and which powers each branch has.
2. Basic information:
 - a. What is the legislative body in the community called? For example: City Council, Board of Aldermen, County Commission.
 - b. How many members of the legislative body are there?
 - c. What is the legislative body's members' title? For example: Councilmember, Councilor, Alderman, Commissioner.
 - d. Are they a part-time legislative body meaning they have jobs outside of their elected office?
3. Structure:
 - a. What is the relationship of the legislative and administrative/executive branch to its larger governing body? For example: city council to county commission, county commission to state legislature.
 - b. Does the legislative body have staff? Does their staff help develop policy? You will explain more about staff in another table.
 - c. Is there a separately elected mayor or vice mayor or does the legislative body elect them?
 - d. Is there a city manager or city attorney who is actively involved with the legislative/policy development or agenda setting process?
4. Reputations:
 - a. What is the mayor's and vice mayor's reputation in the community?
 - b. What is the reputation of the legislative body in the community?
 - c. What is the city manager's or city attorney's reputation if there is one?
5. Basic electoral information:
 - a. Do they represent individual districts or are they elected at-large? If elected by district, how many people live in each district roughly?
 - b. Do elected officials publicly identify with a political party or are they non-partisan?
 - c. How long is the term in office for each position? Are there term limits? If so, what are they?
 - d. Are the local elections held at the same time as the State or National Elections? Are they held in odd or even years, and in what months? Do these elections have primaries or runoffs?



Table 10C cont.

6. Legislative jurisdiction, meeting, and process information:
 - a. Describe their legislative process. Include a chart if possible.
 - b. Do you have a copy of their rules or procedures? Can legislation be killed in a committee/subcommittee?
Does the legislative body have a specific committee that has authority jurisdiction or oversight over animal regulations, animal welfare issues, animal control, shelter services or the department overseeing such?
 - c. Do they have a committee/subcommittee system or work sessions? When and where are they held?
 - d. Who appoints committee chairs?
 - e. Does the community's budget start with the legislative body or does the executive branch, city manager or someone else put it together first?
 - f. When and where does the legislative body meet? Are there work sessions or committee meetings held separately?
 - g. What are the filing deadlines for ordinances/resolutions/legislation or amendments? What are the public notice requirements for meetings or meeting agendas?
 - h. Are public hearings held on specific legislation, certain types of legislation, or like an open forum?
 - i. Can the executive branch set policy for departments and agencies or only issue executive statements or orders? Do they do this often?
 - j. Can the legislative body set policy for departments and agencies or only pass laws or memorialize resolutions/statements? Do they do this often?
 - k. Can this body give you what you want? Do you have enough power/leverage to get them to do what you want? If you fail to win them over, do you have recourse?
7. Your organization's interactions and relationship(s) with elected officials:
 - a. Is there one or more elected officials that you would consider an animal champion or anyone who is frequently opposed to animal welfare reform efforts?
 - b. Has your organization spoken to or presented to the executive branch or legislative body before? If so, when and on what issue? What was the outcome?

Table 10D: Assessing individual elected officials and their staff.

1. Basic information:
 - a. Name, title, any leadership positions, outside of elected office profession:
 - b. District, or geographic area they represent:
 - c. Email, phone number, website, social media:
 - d. What committees do they sit on relative to their elected office?
 - e. Do they have government or external to government staff?
 - f. Relevant biographical or family information:
2. Electoral information:
 - a. What is their partisanship or party affiliation?
 - b. Have they served in any other elected offices?
 - c. When were they elected? When does their current term expire? If they can run for re-election, have they announced if they will? Are there term limits?
 - d. What groups or influential community members endorsed their candidacy?



Table 10D cont.

3. Community involvement and reputation:
 - a. Are they engaged in any other community groups or organizations?
 - b. Do they serve on any board or commissions for organizations outside of their elected position appointments?
 - c. Any relevant connections between them and your organization or the shelter or other animal organizations?
 - d. What is their reputation in the community, with other elected officials, departments, the shelter, staff, government employees, and other organizations?

4. Cause/issue/solution background and current information:
 - a. What are their known positions or awareness of current ask/issues, causes, and proposed or potential solutions?
 - b. Why would they care about the ask/issue? Does it connect to their own personal, department, or electoral goals?
 - c. Will they support the ask? If yes:
 - i. Will they vote for the ask?
 - ii. Will they sponsor legislation for the ask?
 - iii. Will they influence other elected officials to be supportive too?
 - d. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
 - e. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
 - f. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this person if they support your ask?
 - g. Have they taken a controversial stance on a different or similar ask/issue in the past?
 - h. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
 - i. Can this person give you what you want? Do you have enough power/leverage to get them to do what you want? If you fail to win them over, do you have recourse?
 - j. If they are opposed:
 - i. Why do they oppose this issue?
 - ii. Do they have competing priorities? Do they simply lack information?
 - iii. Is their opposition based on an ideological opposition?
 - iv. Is a funding reason causing them hesitation or opposition?
 - v. How does their opposition on this issue connect to their mission and purpose?
 - vi. Is there potential for flipping them to support the ask or neutralizing them?
 - vii. What are their tactics for opposition?

5. All relevant contact history on this ask/issue and outcomes: List the type of contact, what was discussed, who was representing your organization, and if an ask was made at the time, what was the response?



Table 10E: Assessing a public shelter or government department/agency.

1. Name:
 - a. Phone number, address, email, website, and social media:
 - b. Their mission/purpose:
 - c. What is their lifesaving status? What is their lifesaving gap?
 - d. Do they use no-kill verbiage or prefer other terminology?
2. Funding:
 - a. What is the public shelter's annual budget?
 - b. What percentage is that of the larger department budget and of the government's budget?
 - c. Is their funding solely tax based or do grants and non-profits supplement their budget?
 - d. What amount of their budget goes to animal services vs staff vs contract services, etc.?
3. Structure information:
 - a. How is the shelter run?
 - b. How many employees do they have? Are they unionized?
 - c. What is their staff/employee leadership structure? Include an organizational chart if you can. Please list names and title here and then provide more information in another table.
 - d. Do they have staff with decision-making ability? Please list names and title here and then provide more information in another table.
 - e. Has there been any recent turnover in leadership or staff in animal services or any shelters? If yes, how significant and is there any reason?
4. Operational information:
 - a. Do they only have one location or more? Do they have any mobile units for service?
 - b. What geographic area do they claim to cover/represent?
 - c. What topics, issues, and services does this department or agency oversee and/or provide?
 - d. Does the shelter provide any services to other governments/organizations through a contract? If so, to who and what services are provided? What is the financial amount of the contract, and which government agency or department oversees the implementation of the contract if any?
 - e. Do they have any restrictions on the animals they take in or adopt out?
 - f. What services do they provide?
5. Oversight information:
 - a. Is there a legislative or elected official oversight board, commission, or committee for this department/shelter/agency? If so, list their names and use another table for more information.
 - b. What government agency/department at the city, county or state level oversees the shelter regulations if any?
 - c. Is there an external oversight board or a governing body that sets policy, approves budgets, approves staff changes, etc., or do they provide advice and support to the organization, or both? Is there a citizen oversight board, commission, or committee for this department/shelter/agency?
 - d. Do you have copies of their policy and procedures handbooks?
6. Relationships:
 - a. What relationships exist between the shelter's leadership, employees, and your organization?
 - b. Does this shelter have the capacity, expertise, reputation, and established relationships to influence decision-makers? What is their reputation with the community, the government, and other animal welfare organizations?



Table 10E cont.

7. Cause/issue/solution background and current information:

- a. What is shelter leadership's known position or awareness of current ask/issue, causes, and proposed or potential solutions?
- b. Do they support the ask?
- c. Why would they care about the ask/issue? Does this issue connect to their mission and purpose?
- d. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
- e. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
- f. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this shelter/department/agency if they support your ask?
- g. Have they taken a controversial stance on a different or similar ask/issue in the past?
- h. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
- i. Can this department give you what you want? Do you have enough power/leverage to get them to do what you want? If you fail to win them over, do you have recourse?
- j. Do they have a history of advocacy or lobbying? What advocacy or lobbying tactics have they used in the past? Do they have a lobbyist or liaison to the legislative body?
- k. If they are opposed:
 - i. Why do they oppose this ask/issue?
 - ii. Do they have competing priorities? Do they simply lack information?
 - iii. Is their opposition based on an ideological opposition?
 - iv. Is a funding reason causing them hesitation and opposition?
 - v. How does their opposition on this ask/issue connect to their mission and purpose?
 - vi. Is there potential for flipping them to support the ask or neutralizing them?
 - vii. What are their tactics for opposition?

8. All relevant contact history on this ask/issue and outcomes: List the type of contact, what was discussed, who was representing your organization, and if an ask was made at the time, what was the response?

9. Any other relevant information about this shelter/department/agency or its leadership?



Table 10F: Assessing leadership and staff of a public shelter or governmental department/agency.

1. Basic information:
 - a. Name:
 - b. Address, email, phone number, website, social media:
 - c. Title/leadership positions and job description summary:
 - d. How long have they worked here? Have they worked in another shelter before?
 - e. Any relevant biographical/family information?
2. Relationships and reputations:
 - a. What is this person's reputation with the shelter, the community, the government employees, and decision-makers?
3. Cause/issue/solution background and current information:
 - a. What are their known positions or awareness of current ask/issues, causes, and proposed or potential solutions?
 - b. Do they support the ask?
 - c. Why would they care about the issue? Does this ask/issue connect with their personal goals?
 - d. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
 - e. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
 - f. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this person if they support your ask?
 - g. Have they taken a controversial stance on a different or similar issue in the past?
 - h. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
 - i. Can this person give you what you want? Do you have enough power/leverage to get them to do what you want? If you fail to win this person over, do you have recourse?
 - j. Do they have a history of advocacy or lobbying? What advocacy or lobbying tactics have they used in the past? Do they have a lobbyist or liaison to the legislative body?
 - k. If they are opposed:
 - i. Why do they oppose this ask/issue?
 - ii. Do they have competing priorities? Do they simply lack information?
 - iii. Is their opposition based on an ideological opposition?
 - iv. Is a funding reason causing them hesitation and opposition?
 - v. How does their opposition on this ask/issue connect to their mission and purpose?
 - vi. Is there potential for flipping them to support the ask or neutralizing them?
 - vii. What are their tactics for opposition?
4. All relevant contact history on this ask/issue and outcomes: List the type of contact, what was discussed, who was representing your organization, and if an ask was made at the time, what was the response?
5. Any other relevant information about this person?



Keep an open mind when assessing other organizations and coalitions; political interests can bring together people with otherwise little in common. Think outside your typical professional or social circles as to who needs to be assessed as part of your due diligence. Don't rule anyone out. Be creative!

Think about:

- Who is influential locally?
- Which other groups influence politics?
- Are there unofficial partner organizations?
- Who has the skills, knowledge, status, and connections to help or hurt your ask?
- Are there non-coalition groups with a stake in this issue?

Influencers can grant or restrict access. They may mediate or simply support or oppose. They may also be respected community members who can support or credibly back someone else. Associations, coalitions, interest groups, businesses, individuals, etc. Be creative! Advocacy may unite unusual partners. All types of relationships influence decision-makers—journalists, religious leaders, or health practitioners are a few examples. Community and social mobilization can be used strategically to influence decision-makers. Friendship, economic ties, or neighborhood relationships all can play a role in making a successful ask.

Third-party advocates often help decision-makers see benefits beyond the ones you identify for them. Which is just another reason to research organizations and persons involved and determine their credibility, including if they are trustworthy and whether the people they advocate for are harmed by the problem. For long-term goals, partners will change, but don't forget established links must be considered—positive and negative experiences often have long-term effects on relationships. Sometimes it's beneficial to boost supporters and sometimes to suppress critics.

Consider whether you need new allies to succeed. Any major local civic groups? The following tables will help you reveal potential ally, supporter, or coalition members' strengths and weaknesses and the same with potential opponents. You will be seeking to influence informal authorities who can help you reach out to formal authorities. More information about the people you're looking for and adding to these lists help you create a more targeted and comprehensive strategic plan.

Coalitions are groups of people or organizations working together to make a change and there can be many benefits to joining them. They also help you reach more decision-makers. They can add knowledge and resources and reduce push back or opposition. Researching a potential ally can reveal any downsides or risks to the relationship.



Table 10G: Assessing organizations or coalitions in the community.

1. Organization or coalition name:
 - a. Phone number, address, email, website, and social media:
 - b. What is their primary, specific, or general personal stake in animal welfare or similar issue if any?
 - c. Do they use no-kill verbiage or prefer other terminology?

2. Structure:
 - a. How are they run? What is the governing body? Include an organizational chart if possible.
 - b. Do they have employees? How many and are they unionized? Do they have staff with decision-making ability? If so, list them here and add more context later.
 - c. Who is on their board/leadership? You'll get into more detail later.
 - e. Are they a stand-alone coalition or a chapter of a bigger or national organization or coalition?
 - f. How long have they existed? Provide a brief history:
 - g. Membership and representation:
 - i. Coalitions:
 1. What organizations or people are members of the coalition, or do they represent? You will provide more information about them in another table.
 2. In the coalition(s), who determines who will take the lead for this policy change?
 - ii. Organizations:
 1. How many members or individuals do they represent?
 2. How diverse is the membership?
 - h. For coalitions:
 - i. Is the coalition is formal or informal?
 - ii. Is your organization a member?
 - iii. Are they a stand-alone coalition or a chapter of a bigger or national organization or coalition?
 - i. For organizations:
 - i. Are they a stand-alone organization or a chapter of a bigger or national organization or coalition?
 - ii. Do they belong to any coalitions?

3. Operational information:
 - a. What geographic area do they claim to cover/represent?
 - b. Do they have bylaws?

4. Finances:
 - a. Where does their funding come from?
 - b. What does their budget look like?
 - c. Do they have government contracts?

5. Relationships and reputations:
 - a. What is their relationship with your organization?
 - b. Do they have the capacity, expertise, reputation, and established relationships to influence decision-makers?
 - c. What is their reputation with the community, shelter, other organizations, government employees, and government decision-makers?
 - d. What relationships exist between the organization and its leadership and your organization?



Table 10G cont.

6. Cause/issue/solution background and current information:

- a. What are their known positions or awareness of current ask/issues, causes, and proposed or potential solutions?
- b. Do they support your ask?
- c. Why would they care about the ask/issue? Does this ask/issue connect to their mission and purpose?
- d. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
- e. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
- f. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this organization or coalition if they support your ask?
- g. Have they taken a controversial stance on a different or similar ask/issue in the past?
- h. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
- i. Do they have a history of advocacy or lobbying? What advocacy or lobbying tactics have they used in the past? Do they have a lobbyist?
- j. If they are opposed:
 - i. Why do they oppose this ask/issue?
 - ii. Has their board voted to take a position?
 - iii. Do they have competing priorities? Do they simply lack information?
 - iv. Is their opposition based on an ideological opposition?
 - v. Is a funding reason causing them hesitation and opposition?
 - vi. How does their opposition on this issue connect to their mission and purpose?
 - vii. Is there potential for flipping them to support the ask or neutralizing them?
 - viii. What are their tactics for opposition?

7. List all relevant contact history on this ask/issue and outcomes: List the type of contact, what was discussed, who was representing your organization, and if an ask was made at the time, what was the response?

8. Any other relevant information about the organization/coalitions or its leadership?



Table 10H: Assessing individual community members and staff of organizations or coalitions.

1. Basic information:
 - a. Name:
 - b. Phone number, address, email, website, and social media:
 - c. What is their profession?
 - d. Relevant biographical or family information:
 - e. If they are in a coalition or organization:
 - i. Which coalition or organization?
 - ii. Any leadership positions or committee positions? Boards or commissions?
2. What is their primary, specific, or general personal stake in animal welfare or similar issue if any? Do they support no-kill or no-kill verbiage?
3. Community involvement and reputations:
 - a. What is their relationship with your organization?
 - b. Are they engaged in any other community groups or organizations?
 - c. Do they serve on any board or commissions for organizations?
 - d. Does this person have the capacity, expertise, reputation, and established relationships to influence decision-makers? What is the person's reputation with the community, shelter, other organizations, and government decision-makers?
 - e. If in a coalition: What is the person's reputation within the coalition? Do they have a history of being a good coalition member or have they failed to follow through in the past?
4. Cause/issue/solution background and current information:
 - a. What are their known positions or awareness of current ask/issues, causes, and proposed or potential solutions?
 - b. Why would they care about the issue? Does this ask/issue connect to something they care about?
 - c. Will they support the ask?
 - d. Have they been partners in the past? Do they have a history of being a good partner with your organization or other organizations or have they failed to follow through in the past?
 - e. Are they a potential partner on this issue and ask? What would be the strategic reasons for your organization to partner with them? What is their strategic reason to partner with your organization?
 - f. Are there any potential risks for your organization in partnering with them? Could there be any negative consequences for this person if they support your ask?
 - g. Have they taken a controversial stance on a different or similar ask/issue in the past?
 - h. What has been the actual collaboration with them in the past, currently, and/or anticipated collaboration on this ask/issue?
 - i. Do they have a history of advocacy or lobbying? What advocacy or lobbying tactics have they used in the past?
 - j. If they oppose the ask/issue:
 - i. Why do they oppose this ask/issue?
 - ii. Do they simply lack information? Is their opposition based on an ideological opposition?
 - iii. Is there potential for flipping them to support or to neutralize them?
 - iv. What are their tactics for opposition?
5. All relevant contact history on this ask/issue and outcomes: List the type of contact, what was discussed, who was representing your organization, and if an ask was made at the time, what was the response?
6. Any other relevant information about this individual?



Traditional media, public relations, and social media:

As part of this process you must grasp how the media informs the community. If you want the community to support or engage in your cause, you must communicate with them and receive communications from them.

Social media aids outreach and due diligence. Social media empowers advocacy work. Facebook, Twitter, Instagram, Pinterest, blogs, and other media may quickly raise awareness and support and gauge community and elected official opinion. Take advantage of public Facebook and Twitter profiles!

Local media outlets will likely be interested in what you're proposing for the community. Choosing which issues to cover and how much to do so is the first way journalists become involved. Just those decisions may have a significant impact on voters' perceptions.

Has your ask or issue gained media or community attention? Maybe there have been opinion pieces or publicity? Keep a record of articles and links to track coverage and discussion.

Table 11: Assessing media influence.

1. Where does the community get their news?
2. Where do the people impacted by the issue the most get their news?
3. Who, what, and where are the local media outlets?
4. Who owns the local media outlets? Who controls them?
5. How does the media view the issue you are working on?
6. How does the media cover the issue you are working on?
7. Does your organization have a specific social media presence in the area?
8. Which outlets will be favorable to your position and which will be favorable to the opposition?
9. What are the popular social media networks in the community? Facebook, Nextdoor, something else?

Table 12: Tracking media coverage.

Title:	
Media outlet/type:	
Summary of coverage and if it was favorable or not:	
Highlights or quotes:	
Solicited or unsolicited:	
Date:	
Link:	
Other relevant information:	





CHAPTER 4:

ACTIONS

Timelines and tactics

As discussed throughout this playbook, your ask/request or goal must be achievable within a reasonable time frame or by the decision-maker's deadline. How and when will your problem or request be resolved? Start with the deadline and work backwards; this will help you map out any actions that must be completed ahead of a fixed deadline (e.g., a city budget vote).

Tactics or activities are undertaken to activate the power of your strategies, resources, and people by bringing a degree of attention about your ask or issue to decision-makers or influencers.

When evaluating or selecting advocacy tactics to do, think about these questions:

- How would you use this for advocacy?
- What are the pros and cons of this tactic?
- What do you need to plan to undertake this tactic?
- How would a decision-maker respond to this type of tactic?
- What are some new and creative tactics that will get the attention of decision-makers?

Examples of Tactics:

- Providing fact sheets
- Writing an op-ed for the paper
- Writing a blog post
- Photo exhibit
- Budget impact modeling
- Meetings and phone calls
- Writing letters

Pro tip: Sometimes you must limit the number of activities or tactics. Evaluate and prioritize your options. The best ones will have an immediate and direct impact on your decision-makers.



Table 13A: Tracking past activities, events, tactics.

Activity, event, tactic:	
Date:	
Summary:	
Desired outcome and actual outcome; information or lessons learned:	
Target audience:	
Considered successful or not? Any necessary adjustments?	

Table 13B: Tracking current and future activities, events, tactics.

Activity, event, tactic:	
Date or future date:	
Summary:	
Desired outcome and actual outcome; information or lessons learned:	
Target audience:	
Considered successful or not? Any necessary adjustments?	

Resources

The due diligence report you are writing helps you make precise asks/requests and gather enough evidence to request more support if needed. It can identify resource gaps or surpluses and organize priorities. Resources support your advocacy campaign and ask. Human, material, economic, and technical resources are typical types of resources needed to carry out your ask and campaign. Does your organization have a grassroots or community activist network in the intended community? What resources do you have? Are they depletable or infinite?

Types of resources and examples:

- Human resources: employees, volunteers, contract lobbyists, and other departments.
- Economic or financial resources: does it require funding? This can include money in a bank account, investments, or cash.
- Physical resources: include tangible items that are necessary and available for you to carry out your ask.
- Relationship resources: these could take many forms, depending on the nature of the ask and your organization.



Table 14: Planning and tracking resources.

	What resources have you already used?	What resources do you need?	When will you need these resources?
Human resources:			
Material resources:			
Economic resources:			
Technical resources:			
Relationship resources:			

Assessment of known risks, threats, weaknesses, opportunities, and factors beyond your control:

Due diligence helps us find hidden advantages or opportunities. They could help your ask succeed. How skillfully you use those advantages or opportunities may determine what you desire from a policy or a decision-maker.

Identifying risks that could imperil your ask/request and assessing how they might affect the animals, shelter, neighborhood, and your organization is critical. By being cautious, we can limit danger.

Have you discovered any threats to your ask/request? Have you found a weakness that could derail your ask/request? What risks would your organization face if they make this ask/request to decision-makers?

In the next table you will think through some opportunities and risks that could happen over the course of your ask. But don't just list out opportunities or risk—try to think of ways you can reduce the risk and maximize opportunities.

Opportunity: A chance is anything that unexpectedly happens to you, a potential is something that could be done or gained in the future, and an opportunity denotes that something has a good probability of happening.

Risk: Implies future uncertainty about deviation from expected actions or expected outcomes.

Table 15: Assessing known risks, threats, weaknesses, opportunities, and factors beyond your organization's control.

	Known/identified opportunities/strengths	Known/identified risks, threats, and weaknesses	Known or identified things beyond your control
Your organization:			
Community:			
Opposition:			
Elected officials:			
Supporters:			





CHAPTER 5:

IN CLOSING

Due diligence is your starting point in any advocacy endeavor. While the playbook covered a lot of information, there are many other elements and steps to take for successful advocacy campaigns to get off the ground and move through the process of making a difference.

This playbook took you through steps and tables of how to prepare to make an ask to a decision-maker in your community. While you might not have needed every step or table included in the playbook, hopefully each still assisted you in being more prepared to make an ask and analyze how successful your ask might be.

Finally, many advocates often focus on just one main success of their efforts—achieving their policy solution and advocacy goal. While that success is to be celebrated, don't overlook small steps along the way that make the main success possible. Changes in policy and implementation can take time! Celebrating the small steps will keep you and others motivated along the way. Together, we can create compassionate, no-kill communities nationwide for dogs and cats and the people who love them.

Questions about ordinances and legislation: legislative@bestfriends.org

For general questions about Best Friends Animal Society, please email info@bestfriends.org



DUE DILIGENCE GLOSSARY

Advocacy: Public support for or recommendation of a particular cause or policy; is the act of building public support for a certain cause or policy. While all lobbying is advocacy, not all advocacy is lobbying. Advocacy is any action that speaks in favor of, recommends, argues for a cause, supports or defends, or pleads on behalf of others. It includes public education, regulatory work, litigation, and work before administrative bodies, lobbying, voter registration, voter education, and more.

Advocacy campaign: The activities supporting making an ask and making sure action is taken to solve a problem.

Advocacy due diligence: Information gathering to help assess the community's policy environment that decisions are made in.

Advocacy strategy: A strategy is a means of building power to persuade a specific decision-making body to take a particular action.

Advocates: A self-identified individual or an organizational-identified person who cares about a specific issue or cause.

Allies: A group of more than two organizations, governments, corporations or individuals that have a common advocacy or organizing goal.

Ask: The specific request or action to be taken that an organized body of people makes to a decision-maker. Sometimes referred to as a request.

Assessment: The evaluation or estimation of the nature, quality, or ability of someone or something.

Awareness level: Accurately informed of the issues/causes/solutions: Aware and correctly informed of your issue/causes/solutions.

Awareness level: Aware but inaccurately informed: Has heard of the issue, causes, and/or solutions but may have information that is outdated or inaccurate.

Awareness level: Aware of the issue but mostly uninformed: Has heard of your issue, causes, and/or solutions but may not have much information.

Awareness level: Unaware: Not familiar with your issue, causes, and/or solutions.

Awareness level: Undecided or neutral: The person doesn't have an opinion or position yet. They could just need more information. They may not be opposed to your goal but also not likely to be an active supporter either.

Campaign plan: A plan to achieve an objective, usually of a large-scale, over an extended period of time.

Campaigns: Time-bound activities that drive a specific goal.

Causation: The action of causing something.

Coalition: Usually a group of two or more organizations that are working together jointly on a specific issue or cause.

Correlation: A mutual relationship or connection between two or more things.

Decision-maker: A person who is responsible for making strategically important decisions based on several variables, including time constraints, resources available, the amount and type of information available and the number of stakeholders involved (such as an elected official or department head.) Individuals in positions of power to make policy related changes. For example: legislators and legislative staff in legislative work, agency heads and staff in administrative work, judges in litigation, elected officials, business leaders in work with corporations, or the voters themselves in elections and ballot measures.

Digital Organizing: Digital Organizing is the process of using technology to mobilize people.

Due diligence: The exercise of reasonable care before, during, and after an action made.

Elevator pitch: A brief (think 30 seconds!) way of introducing yourself, getting across a key point or two, and making a connection with someone.



Grassroots: Grassroots refers to a bottom-up approach in which ordinary people, rather than established organizations or leaders, drive change. Grassroots movements often involve community-based initiatives, local activism, and decentralized decision-making processes.

Grasstop: Describes an individual who has extra influence at the campaign level, can mobilize support and has a relationship with politicians of influence.

Initiatives: A concerted or coordinated effort, often in collaboration with other organizations to achieve a specific goal or action.

Legislation: A law begins the process as legislation. It can be a law or set of laws enacted by a governing body, such as Congress or a state legislature. Legislation provides a framework for regulations, policies, and procedures that govern various aspects of society.

Legislative process: The rules, ethics and customs that constitute the decision-making process. The process is the journey of a bill from introduction into the house or senate, through mark-ups, until a vote before the full legislature.

Lobbying: The act of influencing or attempting to influence the decisions of policymakers, typically through direct communication, advocacy campaigns, or other means. Lobbyists may represent various interests, including corporations, nonprofits, trade associations, or individuals.

Media: A person, organization or corporation whose main goal is to share information with the public. This includes traditional media and social networking sites.

No-kill: When every shelter in a community achieves a save rate of 90% (or more) for all cats and dogs, that community is designated as no-kill. This provides a simple, effective benchmark for measuring lifesaving progress in shelters across the country.

Non-traditional allies: A group of two or more organizations or individuals that work together for a common advocacy goal who may not share a similar mission or service-provision agenda.

Opponents: A person who disagrees with or resists a proposal or practice. Organizations, corporations, governments and individuals that work against each other's advocacy or organizing goals.

Opportunity: A chance is anything that unexpectedly happens to you, a potential is something that could be done or gained in the future, and an opportunity denotes that something has a good probability of happening.

Opposed: A person who is clearly committed against your viewpoint. You are not likely to change their mind.

Partisan: Strong, unwavering support for a specific political party or ideology. A partisan individual or group is often fiercely loyal to their chosen party, prioritizing party loyalty over compromise or collaboration. Partisanship can lead to a highly polarized political climate, where opposing parties struggle to find common ground on key issues.

Policy: Plans about how a social, political, or economic vision will be achieved and how ideas will be implemented as actions.

Policy or issue advocacy: The deliberate process of informing and influencing decision-makers in support of evidence-based policy change and policy implementation.

Public policy: A set of guidelines, principles, or courses of action that are adopted by governmental entities to address specific societal issues. Public policies can take the form of laws, regulations, or programs, and are designed to achieve certain objectives or outcomes. The development of public policy involves research, analysis, and input from various stakeholders, including the public, interest groups, and government officials.

Public relations: The practice of managing and shaping the public perception of an individual, organization, or entity. PR professionals employ various strategies to communicate key messages, influence opinions, and build a positive public image. Public relations tactics include press releases, media relations, event management, and social media campaigns.



Regulation: A rule or order that has the force of law that originates from the executive branch (usually from an agency), and deals with the specifics of a program.

Resolution: An official but non-binding expression of a legislative body's will or preference expressed to the public or other governments or agencies. An official communication of an intent by a legislature or a chamber.

Risk: Implies future uncertainty about deviation from expected actions or expected outcomes.

Stakeholders: A person, group, organization, or system who affects or can be affected by an advocacy or organizing action.

Strategic plan: For community organizing, a campaign plan that describes the goals, organizational considerations, support and opposition, targets and tactics to achieve one or more specific goals.

Supporter: You don't need to spend time trying to persuade them because they are in favor of your position.

Tactics: An action or strategy carefully planned to achieve a specific end.

Target: The person or people to whom an organization is advocating or trying to address through their organizing campaign. This may include legislators, administrative officials, the courts, voters, candidates for public office, corporations, segments of the public, etc.

Win: A major accomplishment of the organization. An organization achieves a win when one of its demands is met by a decision-maker.

