



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.

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

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.

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:	

