

# TOOLS FOR NAVIGATING CHANGE

## EQUITY AND THE POWER OF POLICY ADVOCACY

Everyone, regardless of where they live, deserves access to the essential ingredients to lead successful lives: viable housing and transportation choices, living-wage jobs, good schools, strong social networks, safe and walkable streets, services, parks, and access to healthy food. These opportunities are realized when people participate in and benefit from the decisions that shape their environments. Policy advocacy plays a central role in creating these opportunities.

Equity advocates know the power of policy. Policy determines the rules by which opportunities are framed and delivered—what is allowed, encouraged, discouraged, and prohibited. From broad-reaching public policies—such as federal, state or local laws, agency regulations, or executive orders issued by elected officials—to the formal and informal rules at schools, workplaces, and other institutions, community conditions are influenced by the rules that govern them. Advocacy—the art of influence and persuasion—is essential for fostering the creation, adoption, and implementation of promising policy solutions that catalyze social change.

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For the purposes of clarity, we refer to a **campaign** as the connected series of activities and events designed to bring about policy change.

We define **policy** broadly as a course or principle of action adopted by a government, organization, or individual—formally or informally—to guide future decisions or actions.

**Equity** means just and fair inclusion. An equitable society is one in which all can participate and prosper. The goals of equity must be to create conditions that allow all to reach their full potential. In short, equity creates a path from hope to change.

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Policy advocacy can bring tangible outcomes for equity. Getting to those results requires developing the knowledge, skills, and capacity of community members, empowering them to fight for the solutions to the problems they face. Through equity advocacy, community leaders can be cultivated and new leaders born, further strengthening the forces for equitable change. Campaigns for equity can also generate effective new partnerships and alliances, and build momentum for larger movements toward comprehensive change.

## GEARING UP FOR CHANGE

Building on the experiences and expertise of seasoned staff and partners across a range of fields, PolicyLink has identified the essential components of successful equity advocacy for policy change. This information has been assembled in **Getting Equity Advocacy Results (GEAR): a suite of benchmarks, methods, and tools for advocates, organizers, and their allies to track the results of equity campaigns.**

Tracking the results of equity advocacy efforts is important. Tracking helps advocates strengthen the effectiveness of their work, obtain feedback for improvement, identify opportunities to drive change, and demonstrate results. GEAR includes benchmarks for both creating equitable policies—the kinds of policies that ensure fair distribution of resources and opportunity for all—as well as equitably creating policy change—empowering people to have a say in the circumstances that affect their lives. GEAR also includes a visual illustration of equity campaigns to help illustrate how these multiple components work together.

This document introduces GEAR, and related benchmarks, to help advocates navigate the major stages and activities of equity campaigns. More information, including specific benchmarks and strategies for using and measuring them, is available online: [www.policylink.org/gear](http://www.policylink.org/gear).

## GEAR: AT A GLANCE

No two policy change campaigns are alike, even with common goals and participants. Changing social and political environments alter the campaign course, contributing to unanticipated opportunities that advocates must navigate toward and unexpected challenges they must pivot around. Campaigns can move quickly, requiring advocates to be prepared and act nimbly, or they can take decades to progress, requiring patience, persistence, and strategic focus on interim goals. Considering these volatile conditions:

- How can advocates tell, midcourse, if their campaign efforts are making an impact for equity?
- How can advocates elevate, motivate, and sustain their work, when political energies slow or external conditions obstruct planned strategy?
- How do advocates justify their ongoing efforts to advance a campaign, when supporters and other contributors might focus solely on the adoption of a policy proposal?
- What approaches can advocates use to sharpen and refine their equity strategy as they go?

# GETTING EQUITY ADVOCACY RESULTS



**GET READY:**

**Build the Base**

- Identification of the Equity Issue
- Community Visioning and Organizing
- Initial Power Analyses
- Planning the Equity Advocacy Strategy

**GET SET:**

**Name and Frame the Equity Solutions**

- Research and Identification of the Equity Change Objectives
- Framing the Issue and Equity Objectives
- Identification and Cultivation of Allies, Identification and Development of Strategies to Decrease Opposition
- Negotiations with Decision Makers to Develop Change Proposal

**GO:**

**Move the Equity Proposal**

- Introduction of Change Proposal
- Launch of Campaign for Policy Change
- Movement and Modification of Change Proposal
- Success, Redirection or Failure of Change Proposal

**GROW:**

**Build, Advance, and Defend**

- Implementation, Enforcement and Monitoring of Equitable Policy
- Influence of Proposed Change on Other Equity Issues and Objectives
- Further Development of Equity Leadership
- Cultivation and Protection of Equity Improvements

Getting Equity Advocacy Results (GEAR) offers a metaphor and visual depiction of the multiple, interconnected, active components of an equity campaign. Featured on page 2, the GEAR visual provides advocates a way of thinking about their work, as well as a tangible and straightforward means for navigating the markedly nonlinear practice of equity advocacy.

The visual includes four major parts: gray gears, color gears, an interwoven chain, and benchmarks.

### **Gray gears depict the essential, ongoing components of an equity campaign.**

Equity advocacy requires not only assembling the right facts and the right resources and influencing people with decision-making power—like other advocacy efforts—but also much more. It requires building alliances and organizing partnerships between nontraditional partners, researching approaches and strategies that tease out the conditions of affected communities, leadership development and capacity building to empower community leaders, as well as employing strategic communications to connect supporters and policymakers with disenfranchised communities. Equity advocacy fosters inclusion and transfers power to disenfranchised communities not only through the policy outcome, but also through inclusive approaches. Further information about the gray gears is included on page 4.

### **Color gears illustrate the multiple stages of progress through a policy change campaign.**

Dynamic and collaborative efforts to advance equitable policy proposals include iterative and ongoing cycles of assessment, learning, messaging, and alignment of both strategies and actions. Equity campaigns are characterized by four major stages: Build the Base, Name and Frame the Equity Solutions, Move the Equity Proposal, and Build, Advance, and Defend. The four stages of equity advocacy each focus on different developments in a campaign, and each produces different kinds of equity results. Campaigns may

involve one or several stages, and advocates might move between them in different sequences. Regardless of the campaign's ultimate path, these stages help to characterize the focus and intent of associated activities. Further information about the color gears is included on page 6.

### **An interwoven chain demonstrates the connectivity between each gear and all of the others.**

With numerous players and stakeholders, as well as multiple ongoing activities occurring both in sequence and at times simultaneously, campaigns involve a great deal of overlapping and connected factors. The color gears connect—each stage of a campaign is informed by and influences the others. The gray gears connect—each ongoing component feeds and informs the other components. And the color and gray gears connect—each stage of a campaign includes every one of the ongoing components (gray gears). View the connections in the illustration on page 2, or explore it interactively using our animated tool on the GEAR website.

### **Benchmarks illustrate results at each juncture of an equity campaign.**

Equity can result at every turn in the course of a campaign, despite the inevitable ups and downs inherent in the advocacy process. Major equity advocacy benchmarks, listed below the illustration on page 2, show key points of progress at each stage of a campaign (color gears), and includes critical factors for equity campaigns (gray gears). Detailed benchmarks are available on the GEAR website.

GEAR focuses on proactive policy change campaigns as the strategy for generating equity. The emphasis is on public policy change, though other forms of policy change are applicable, as well. Parts of GEAR might also be applicable to other systems change campaigns—such as the appointment or election of community leaders to positions of power—or defensive efforts.

## ONGOING COMPONENTS OF EQUITY CAMPAIGNS

The gears of a policy change campaign are always turning, coordinating together to collectively generate impact. Organizing, capacity building, research, and communications are critical components of advocacy campaigns for equity, and drive equity campaigns from one stage to another. Brief summaries describing the different gray gears are included below.



**Ongoing Organizing** assures that those closest to community challenges are central to seeking solutions and building power to bring them about.

Thoughtful, purposeful organizing must be in place at the outset of a campaign, and must be revisited throughout the campaign. It ensures that the community voice is loudly driving change, and that a strong infrastructure is available for ongoing advocacy and monitoring. It involves forming a collaborative of community members, their allies, and new partners early in a campaign to address a common problem. It requires ongoing work to maintain collaborative functioning and to ensure that campaign actions are guided by both technical expertise and authentic community wisdom. The identification of common objectives, collective assets, and shared power across a collaborative allows for the development of impactful strategy. The creation of a clear governance structure and the building of trust among partners and allies allows for smooth and efficient decision making and coordination throughout the campaign.



**Ongoing Capacity Building** involves strengthening the knowledge and skills of equity advocates and their organizations to effectively engage in efforts for change.

Advocacy capacity must be present from the outset of a campaign, but can be built throughout a campaign by developing community understanding of the policy process and strategies for engagement in the policy process, deepening knowledge of policy facts, and refining skills of strategizing and negotiating with policy-makers. A successful campaign also requires leadership savvy to facilitate diverse partnerships, nimbly navigate changing processes, and broker external agreements. Campaign leaders must understand policy processes, have connections to powerful leaders, decision makers, and other key players, and be willing to take risks and make strategic decisions.



**Ongoing Communications** involves a range of approaches to strategically disseminate ideas and information and to educate stakeholders and decision makers to advance equity.

Equity advocates must make important decisions about how and when to strategically publicize their message, and to whom. Effective communications advocacy delivers the right message to the right audience by the right messenger at the right time. This requires a communications strategy that weaves in and out of each stage of a campaign to address different needs and goals using the right medium—which could be anything from informational flyers and postcards to printed opinion pieces to TV news segments or social media. At the outset of a campaign, communications supports base-building activities by publicizing the issue and recruiting key allies and partners. Before a policy is introduced, traditional and non-traditional media play a key role in naming and framing the issue, and activating support. During a campaign, media-framing analyses provide insight into the changing perceptions of the issue and policy among target audiences, and social media analytics can help advocates track the effectiveness of their online advocacy approaches. Thoughtfulness around the campaign messaging and dissemination strategies ensures that ideas and information regarding the issue and the policy solutions are reaching policymakers and other strategic stakeholders to advance equity.

**Ongoing Research** is needed to inform every aspect of the advocacy process, from documenting conditions and soliciting community participation to assessing prospective solutions and projecting the impact of change.

Research is an ongoing task throughout a policy campaign, and also serves an important purpose in defining the strategy, and potential success, of a policy initiative. The purpose of research in a campaign is twofold. Externally, research is a crucial ingredient to educate the public, the media, and individual policymakers, answering key questions about the problem and the efficacy of the proposed solution. Reliable data and facts about the issue and the conditions contributing to inequity are important to influence and convince policymakers of the need for change. Research is also important internally for sustaining advocacy activities. Internal research, like power analyses, which assess the political landscape to identify winnable issues, help advocates determine the appropriate scale and targets for policy change.

## STAGES OF THE EQUITY CAMPAIGN

Campaigns require advocates to shift among four gears or stages of progress:

**Get Ready:**  
**Build the Base**

**Get Set:**  
**Name and Frame  
the Equity Solutions**

**Go:**  
**Move the Equity  
Proposal**

**Grow:**  
**Build, Advance,  
and Defend**

These four stages are described below. Specific benchmarks for each stage are available on the GEAR website. Strategies for using and measuring the benchmarks and interactive learning tools to further explore GEAR are also provided.



### **GET READY: BUILD THE BASE**

A strong community base of support and leadership lies at the foundation of most equitable advocacy and policy change processes. It includes engaged community residents, leaders, and organizations. A community base is needed not only to advance a policy campaign for equity—a strong base also helps to prevent and reduce inequities by shifting power to the community, and developing leadership that can be applied to prevent future issues or fight in future campaigns. Strategic and careful organizing, research, and communications practices are critical for bringing together new partners and allies to work together. They are also critical for building the leadership and the capacity of the base to take action.



### **GET SET: NAME AND FRAME THE EQUITY SOLUTIONS**

To pursue policy change, advocates must first share a clear understanding of the problem and its equity dimensions, and agree to work together as a collaborative to create change. With a strong collaborative in place, they must work together to determine which solutions are most promising, and get the support of allies to influence policymakers and their constituents. Efforts to name and frame the equity solution involve significant research and communications, as well as ongoing organizing and capacity building throughout the effort.



### **GO: MOVE THE EQUITY PROPOSAL**

Developing a policy proposal requires coming to agreement on the key aspects of the problem and the appropriate solutions. Advocates must build interest, buy-in, and support from allies and partners, including allied policymakers who will sponsor and carry a proposal through the policymaking process. It involves persuading non-allies and those unfamiliar with the issue to become supporters, or at least to refrain from opposing the solution. It also requires strategies for decreasing or diverting the opposition, by either inoculating against opponents, minimizing opposition, or countering oppositional strategies. Tactical maneuvering and agility are critical at this stage, and call for well-oiled ongoing operations.



### **GROW: BUILD, ADVANCE, AND DEFEND**

The campaign for policy change does not stop with the passage of a new policy or regulation. Typically, advocate engagement in, and monitoring and evaluation of, the policy implementation are critical for creating meaningful, equitable change in communities. Sometimes, the small decisions regarding the implementation are what matters most in seeing successful outcomes. At this stage of a campaign, equity advocates must focus on sustaining equity gains by keeping a continued focus on the policy, as well as looking to other opportunities to expand and build momentum.



## NAVIGATING THE COMPONENTS AND STAGES OF CHANGE

GEAR provides advocates and their allies a concrete visual to identify, navigate, and communicate the many equity outcomes involved in policy campaigns, regardless of how varied campaigns might be. A campaign might include one or all of the four stages, and at any point during the campaign, fluctuating emphasis on each of the components. Advocates might shift from one stage to the next and then back again, as circumstances dictate. Likewise, advocates might find the inputs and results of ongoing components of a campaign ebb and flow with varied intensity.

For instance, in one campaign, equity advocates might move sequentially through the stages, starting with efforts to Build the Base, before progressing to Name and Frame the Equity Solutions and to the next stage, Move the Equity Proposal. If the proposal is adopted, efforts to Build, Advance, and Defend the equity gains can follow. Or, the campaign might begin with a strong base intact and ready to respond to a proposal that has suddenly gained public interest. In this case, the campaign might start at the Move the Equity Proposal stage and then theoretically shift gears backwards and forwards, moving back to Name and Frame the Equity Solutions—or even Build the Base—as needed, before advocates could leap ahead to Build, Advance, and Defend equity in an adopted proposal.

During the course of a campaign, the ongoing components may fluctuate depending on need. The focus on **research** might be most intense just before key decisions are made, while the **communications** activities could ramp up just after. **Organizing** might be emphasized during base building and while the proposal moves through decision making, whereas **capacity building** remains a steady focus throughout.

While other scenarios are certainly possible—for instance, efforts to create change might be limited to just one stage—what is important to underscore is not just the path to policy change itself, but also the equity gains to look for along the way.

## GEAR: MOVING AHEAD

Equity advocates are critical for calling attention to the most pressing issues facing low-income people and communities of color, and for lifting up the solutions that work. Equipped with the right tools and techniques, equity advocates can sharpen their work for greater impact. GEAR helps advocates refine their strategies, identify and communicate results, and build momentum to achieve opportunity for all.

For the greatest impact, please visit our website [www.policylink.org/gear](http://www.policylink.org/gear) for detailed snapshots on the GEAR benchmarks, and strategies for measurement.

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To learn more, visit: [www.policylink.org/gear](http://www.policylink.org/gear)