



12 Ways to Build Your Influence

PRACTICAL ADVOCACY FOR SMALL NONPROFITS

Nonprofits have a superpower: we turn ideas into action. Advocacy turns that action into influence. It lightens your load by removing barriers to the work you do every day.

If you have ever vented to a colleague about a barrier—or explained to a donor why a specific program works so well—you have started advocating for your mission. This playbook gives you ideas for reaching **more people who need to hear from you.**

Small nonprofits often fear they don't know enough "policy" to speak up. Remember: **you are an expert witness, not a lobbyist.** Your role is not to write the laws, but to explain how laws work on the ground. When you tell a policy-maker, "This rule is hurting my community," or "This investment helps families thrive," you are doing exactly what your community needs—and exercising a right the IRS explicitly allows.

How to use this playbook: This guide is designed to make advocacy feel doable. Each "play" provides the instructions for **one small step you can take today** to lift your voice for your mission.

- **What this means:** Why the action matters.
- **What you need to know:** The essentials, without jargon.
- **Who is involved:** The people involved in the action.
- **Steps forward:** How to begin.
- **What to practice:** Because confidence comes from doing.
- **Helpful tools:** Worksheets designed to help you organize your thoughts.



We are excited to hear what plays you try—let us know how it goes. **We are cheering you on!**



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12 ACTIONS

Use these actions to make advocacy a part of your day-to-day practice. Once you've tried one, check it off. Make a note about what you learned and how you might implement it differently in the future.

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Safety Check: Education vs. Lobbying Most actions in this playbook are **education**, not lobbying. You can spend 100% of your time teaching policy makers and their staff about your community's needs without ever discussing specific legislation.

Disclaimer: *This guide is for informational purposes only and does not constitute legal advice. Please consult a qualified professional for compliance questions. Your state nonprofit association is an excellent resource for information on rules in your state.*

1

An Executive Director asks: What barriers can we remove—and what solutions can we scale?

What this means

Advocacy begins with the problems you are already solving or opportunities you are already addressing. Every day, your team sees barriers that shouldn't be there. Instead of just reacting to those challenges individually, this step involves pausing to ask: 'Is there a rule causing this?' You are moving from fixing the problem for one group of people to naming the problem for everyone.

What you need to know

- You don't need to be a policy expert to start—what you see every day is valuable information.
- Listening to staff, volunteers, and community members helps you spot patterns and barriers.
- The goal is not to write a policy proposal. It's simply to name a problem that affects many people.
- Stories and real examples help you understand where systems aren't working.
- Talking with partners can confirm whether others see the same issue.

Who is involved

- ☐ Executive Director
- ☐ Staff
- ☐ Partners who observe similar challenges

Steps forward

1. **Ask these questions** during a staff meeting or informal check-in:
 - *What policies affect our ability to achieve our mission?*
 - *What policy change—big or small—would make the biggest difference for the people we serve?*

2. **Listen for themes** in staff, volunteer, and community experiences. Are there recurring barriers?
3. **Gather a few stories or examples** that illustrate why this issue matters.
4. **Identify whether the issue is a practice, policy, or system challenge** (you don't need to know the exact law—just clarify the level of change needed).
5. **Share what you're learning with your board** to begin building a shared understanding of the advocacy opportunity.
6. **Check in with partners** to see if they are seeing the same patterns. If so, you may have the beginnings of a shared advocacy agenda.

What to practice

Practice identifying the system-level issue beneath the surface problem.

Helpful tools

- Story Gathering Worksheet



2

Neighbors talk together about changes to make life better in their community

What this means

Advocacy begins with listening. When neighbors talk with each other about what is working and what isn't, they reveal truths that no report or dataset can capture. These conversations help people feel seen and connected. For a small organization, these moments offer a window into emerging issues and potential solutions.

You don't need a clipboard to do this. This "play" is simply recognizing that the conversations already happening in your lobby, your food pantry line, or your parking lot are advocacy data. You aren't just making small talk; you are tuning in to the patterns within the noise.

What you need to know

- Community conversations can be simple and informal—everyday moments count.
- People open up when questions are warm, genuine, and not rushed.
- The goal is to listen for patterns, not collect personal details.
- These conversations are for learning, not making promises or commitments.
- Staff, volunteers, or trusted neighbors can all help gather insights.
- Repeated themes can point to issues worth raising with decision-makers or coalitions.
- Creating regular opportunities for neighbors to talk builds trust and connection.

Who is involved

- ☐ Executive Director or program lead
- ☐ Volunteers or staff who observe community needs
- ☐ Partner nonprofits

- ☐ Advocacy organizations and coalitions seeking grassroots insight
- ☐ Community leaders

Steps forward

1. **Create easy, informal ways for neighbors to talk** (a whiteboard question, a conversation corner, a prompt during programs).
2. **Ask open questions** like:
 - *What would make life easier here?*
 - *What's getting in the way for people?*
 - *What feels hopeful right now?*
3. **Listen more than you talk**—don't steer or interpret.
4. **Capture themes**, not personal details.
5. **Share back what you're hearing** to build trust ("Here's what people told us last month...").
6. **Discuss themes with staff and board** to see what connects to your purpose.
7. **Let people know** how their insights shaped your understanding and direction.

What to practice

Practice listening without fixing.

Helpful tools

- Conversation Starter List (below)
- Story Gathering Worksheet
- Community Listening Worksheet





Conversation Starters for Community Listening

- ☐ What's something in our community that's going well for you right now?
- ☐ What's one challenge you or people around you are facing these days?
- ☐ What small thing makes life harder than it should be?
- ☐ If one thing could change to make life easier, what would it be?
- ☐ What's something you'd love to see more of in our neighborhood?
- ☐ What strengths do you see in your community that more people should know about?
- ☐ Are there challenges you hear lots of people talking about?
- ☐ Are there services or supports that are hard to reach or confusing to use?
- ☐ Have you noticed anything new or different lately that affects people's day-to-day lives?
- ☐ If someone in public service were listening right now, what would you want them to know?
- ☐ Is there something that feels unfair or unnecessary that gets in the way for people?
- ☐ What's on your mind today about our community?

3

Staff members share a story about someone they serve

What this means

Stories bring your mission to life. When staff share real experiences from the people they serve, they help us understand what is happening on the ground and why it matters. Stories illuminate the human impact behind data, highlight where systems fall short, and point to opportunities for change. When shared with dignity, a single story can focus attention, inspire action, and shape policy conversations.

What you need to know

- Stories help policy-makers understand what life is really like for the people you serve.
- A good story is short, clear, and focused on the person's experience.
- It is important that we gather and share stories with consent and respect.
- A good story follows the classic story arc: setting, challenge, impact, and resolution.
- Patterns across many stories can point to bigger system issues.
- When useful, pair the story with one clear message about what needs to change.

Who is involved

- ☐ Program staff
- ☐ Volunteers or frontline workers
- ☐ Executive Director
- ☐ Communications staff

Steps forward

1. **Listen to the 'water cooler' talk.** Staff naturally share stories with each other. When you hear a staff member say, 'I wish people understood what my client is going through,' that is your advocacy story. You don't need to go hunting for it; just write it down when it happens.
2. **Use the Story Gathering Worksheet** to capture the story with clarity and respect.
3. **Confirm permission** for how the story can be used—internally, publicly, or only in a summary form.
4. **Identify the system or barrier** present in the story (a requirement, rule, gap, or practice that shaped the challenge).
5. **Summarize the story in a few sentences** for easy sharing during meetings or conversations with decision-makers.
6. **Practice telling the story** out loud, keeping it simple, human-centered, and focused on the meaning, not the details.
7. **Store the story safely**—with permission notes—so it can be used later in testimony, meetings, or written materials.
8. **Report back** to the person whose story you used. Let them know how their story was received.

What to practice

Practice telling a story in **three sentences**: What happened → What barrier showed up → Why it matters.

Helpful tools

- Story Gathering Worksheet





Board members subscribe to a policy newsletter

What this means

Board members make better decisions when they understand the environment in which your mission operates. Subscribing to one or two trusted policy newsletters helps board members stay aware of emerging issues, legislative changes, funding shifts, and opportunities that could affect your community. This small action builds a culture of awareness and helps the board fulfill its governance role of looking up and out—not just at internal operations. Over time, this shared knowledge strengthens your organization’s readiness to speak up on behalf of the people you serve.

What you need to know

- Policy newsletters are an easy way for board members to stay aware of issues affecting your community.
- Choose newsletters that match your mission or the systems your organization touches.
- Skimming headlines is enough if time is short—look for patterns or issues that could affect the people you serve.
- Sharing one short insight at meetings helps the board stay informed and prepared.

Who is involved

- ☐ Board members
- ☐ Board Chair
- ☐ Executive Director
- ☐ Governance or Policy Committee (optional)

Steps forward

1. **Choose one or two newsletters** that relate to your mission or the issues your community faces.
2. **Ask board members to subscribe** so updates go directly to them.
3. **Encourage a “scan, don’t study” approach**—they don’t need to become an expert.

4. **Add this question to board agendas:** “*Did anything you read relate to our work or community?*”
5. **Rotate who shares one quick insight** at each meeting.
6. **Share any useful insights with staff** and bring patterns into annual planning.

What to practice

Choose one headline per month and practice naming **why it might matter** for the people you serve.

Newsletter ideas

Give your board members a recommended newsletter list, customized for your sector.

Include a **coalition newsletter** and some of these on the list:

National Council of Nonprofits (NCN):

<https://www.councilofnonprofits.org/>

Bolder Advocacy (Alliance for Justice):

<https://afj.org/bolder-advocacy/>

Independent Sector: <https://independentsector.org/>

State Nonprofit Associations (via NCN directory):

<https://www.councilofnonprofits.org/find-your-state-association>

Snyder Strategies (Bethany Snyder)

<https://www.snyderstrategies.me/>



5

Board members spend five minutes at a board meeting to talk about an advocacy issue

What this means

Setting aside five minutes during a board meeting to discuss an emerging community issue helps your board practice its governance role. This short, structured ritual builds awareness, strengthens alignment between staff and board, and signals that advocacy is part of carrying out your purpose—not an add-on. Over time, these brief conversations help your organization anticipate challenges, understand system barriers, and recognize opportunities to speak up on behalf of your community.

What you need to know

- Five minutes is enough to raise awareness without overwhelming the agenda. It is a good starting point.
- This small practice builds a habit of paying attention to issues beyond the organization.
- Topics come from the previous activity, or staff can share a story, trend, or observation from the community.
- Board members don't need to take action—just listen, reflect, and ask questions.
- Themes that repeat over time can highlight areas where advocacy may be needed.

Who is involved

- ☐ Executive Director
- ☐ Board Chair
- ☐ Board members
- ☐ Program staff (optional, to share a story)

Steps forward

1. **Add a standing five-minute** “advocacy spotlight” to your board agenda
2. **Bring one clear, concise example** from your programs or community.
3. **Share the story or observation** in two minutes:
 - *What happened?*

- *Why does this matter?*

4. **Invite board reflection** with a question, such as:
 - *What does this mean for our decision-making?*
 - *Where else might this be happening?*
 - *What questions should we be asking?*
5. **Close the conversation cleanly**; the point is awareness and learning, not immediate decisions. (However, it is very possible that you decide to add this topic to a future agenda for deeper discussion.)
6. **Share insights with staff** so understanding flows both ways

What to practice

Practice summarizing an example or trend in **60 seconds** so the board gets the “so what?” quickly.

Three conversation starters to keep it easy:

“What change—policy, practice, or process—would make life easier for the people we serve?”

Begins the groundwork for identifying advocacy priorities.

“What are we hearing or seeing that concerns us?”

Keeps the board connected to real-time community experiences.

“Where are people hitting barriers?” Helps shift thinking to system-level issues.

Helpful tools

- Your board meeting agenda





Communicators share real-world examples of community need and opportunity

What this means

Clear, concrete examples of need or opportunity help policy-makers and your wider community understand what is really happening on the ground. You don't need a communications team—just a real, short example that shows a challenge or barrier people are facing. These examples make your message more human, more memorable, and easier for decision-makers to act on. For small nonprofits, sharing examples through newsletters, emails, or brief one-pagers is one of the most accessible and powerful forms of advocacy.

What you need to know

- A single, well-chosen example often teaches more than statistics.
- Examples help people picture the issue, understand its urgency, and see the human impact.
- Sharing the same example across multiple formats (newsletter, meeting, email, hearing) reinforces your message.
- Always gather and share stories with permission and dignity.

Who is involved

- ☐ Communications staff or volunteer
- ☐ Executive Director
- ☐ Program staff who provide story sources

Steps forward

1. **Choose one strong example** that illustrates a barrier, challenge, or opportunity facing your community.
2. **Capture the facts clearly** and respectfully with the Story Gathering Worksheet. Confirm permission and any limits on how the story can be shared.

3. Distill the example into 3–4 sentences:

- **What happened (the moment):** *One of our neighbors, a mother of two, came to us after being turned away from a program because she didn't have the documents they required.*
- **Why this matters (the barrier):** *This requirement keeps many people from accessing services they qualify for, even when the need is urgent.*
- **What this points to (the insight):** *We're seeing this pattern more often, and a small change to the process could help families get support faster.*

4. Pair the example with one short message such as:

We're seeing more families experience this issue, and a small change could make a big difference.

5. Share the example in multiple external-facing formats—such as:

- your organization's newsletter
- a community update email
- a briefing note or board update
- a meeting with a policy-maker

6. Keep your wording consistent across audiences so your message stays clear and strong.

7. Check back with storytellers and staff to share how the example helped shape a conversation or raise awareness.

What to practice

Practice turning any long story into a **3–4 sentence example** using step 3, above.

Helpful tools

- Story Gathering Worksheet



Local partners gather at a coalition meeting

What this means

Small nonprofits do not need to carry advocacy on their own. Coalitions exist because organizations are stronger—and more effective—when they work together. When local partners gather in a coalition, each organization brings its experience, relationships, and perspective. Your voice adds credibility and experienced insight that larger advocacy groups rely on. In return, coalitions help you stay informed, reduce the burden of research and analysis, and amplify your message so you don't have to fight for attention alone. A coalition meeting is one way to connect, learn, and lift one another up while pursuing shared goals.

What you need to know

- Coalitions exist so organizations don't have to advocate alone.
- You don't need to be an expert—advocacy-focused groups help interpret bills, track issues, and guide strategy.
- Your frontline stories and experiences strengthen statewide and national advocacy efforts.
- Even one person from a small nonprofit can meaningfully influence coalition direction.
- Coalitions reduce workload by sharing research, messaging, and coordination.
- Coalitions offer safety in numbers and support when speaking up feels risky to do alone.
- It is okay to be a quiet observer. You don't have to lead the coalition. Just being on the email list and showing up once or twice a year counts.

Who is involved

- ☐ Executive Director or program lead
- ☐ Volunteers or staff who observe community needs
- ☐ Partner nonprofits
- ☐ Advocacy organizations and coalitions seeking grassroots insight

Steps forward

1. **Look for coalitions** using Independent Sector's Coalition Finder below or by asking partner organizations.
2. **Reach out to a coalition organizer** to introduce your organization and learn what involvement could look like.
3. **Attend a meeting** to listen, learn, and share one story or example from your work.
4. **Share what you're seeing** in your community.
5. **Choose one small, manageable role** (e.g., share a monthly story, review messages, sign a letter, attend quarterly).
6. **Let the coalition handle the heavy lifts** such as bill tracking or drafting talking points.
7. **Stay connected** with brief updates so your voice remains in the mix.
8. **Celebrate wins**—coalition success comes from many voices working together.

What to practice

Practice public speaking in a small, safe group.

Helpful tools

- Coalition Connection Tool (Independent Sector): Find existing issue-based or regional coalitions where your voice is welcome:
<https://independentsector.org/community/nonprofit-coalition-connection>



The Executive Director spends ten minutes a month calling someone in public service

What this means

Advocacy is built on relationships. Relationships grow through small, authentic connection over time. A short monthly phone call helps decision-makers stay connected to your mission. These calls are not about making demands or knowing the details of policy. They are about sharing one insight, one story, or one observation that helps them understand what's happening in your community. For a small nonprofit, this habit builds credibility, trust, and visibility without requiring major time or expertise.

What you need to know

- A short call with one clear story or observation is enough.
- Many decision-makers value brief updates from people doing frontline work.
- Staff members who work for elected officials are often your most important contacts—build relationships with them as intentionally as you do with the elected officials themselves.
- Your goal is to share what you're seeing in the community, not to be an expert on policy.
- Consistent, human connection builds trust and makes you a go-to source over time.
- Rotate who you call and use email or voice mail if that's easier.
- When meeting in person, consider bringing a "leave-behind" that summarizes your organization and one example of need.
- Keep a log to track who you contacted, what you shared, and any follow-up needed.
- Remember: If you only make two calls a year, you are still ahead. Don't worry about perfect consistency; focus on building consistency over time.

Who is involved

- ☐ Executive Director
- ☐ Public officials (local, state, or federal)
- ☐ Staff who provide stories or insights
- ☐ Board chair or volunteers (as listeners or co-callers)

Steps forward

1. **Make a short list of public officials** connected to your mission or geography (3–5 people is enough).
2. **Set a monthly reminder** for a ten-minute outreach moment.
3. **Choose one story or example** to share—something recent, clear, and grounded in lived experience.
4. **Use the Ten-Minute Call Script** (below) to guide the conversation:
5. **Keep it brief.** Ending early always leaves a positive impression.
6. **Record one or two notes** before moving on with your day.
7. **Share any helpful insights** with staff or your board so the full organization benefits.
8. **Repeat monthly**—small steps add up.

What to practice

Practice a **30-second opening** that feels natural: "I want to share one quick thing we're seeing..."

Helpful tools

- Ten-Minute Call Script (below)
- Issue-to-Action Worksheet
- Testimony Prep Worksheet



Ten-Minute Call Script

A light, adaptable guide for EDs who want a simple way to connect.

Your Notes

1. Greeting (30 seconds):

“Hi __, this is __ from __. I’m calling with a quick community update — just a two-minute story I thought you might appreciate.”

2. Share one example (1–2 minutes):

Use the Short Example Template:

- What happened
- What barrier showed up
- Why it matters

3. Make it relevant (30 seconds):

“We’re seeing this more often, and it’s affecting families in ways we didn’t expect.”

4. Ask one open question (30 seconds):

“I’d be curious what you’re hearing about this.”

or

“Is there anyone else you think I should share this with?”

5. Close with appreciation (15 seconds):

“Thanks for listening—and thanks for your service. I’ll keep you posted as we learn more.”

Allow 10 minutes for the activity. A shorter call is fine, too.

9

Donors hear how your work connects with the bigger picture

What this means

Donors give because they care about your mission. When you help donors understand how your day-to-day work connects to larger system issues, you deepen their understanding of your mission and invite to be your partners in change. This does not mean asking donors to lobby or take political stances. It means sharing the insights you gather from your work, highlighting the barriers your community faces, and explaining how small policy or practice changes could make a meaningful difference. When donors understand the bigger picture, they can become more invested, informed, and supportive of policy solutions

What you need to know

- Donors don't need policy details—just a clear explanation of why an issue matters.
- Sharing stories and context builds trust and helps donors see the bigger picture.
- When donors understand the barriers your community faces, they can amplify your message.
- Donors often appreciate learning how their support connects to long-term change.

Who is involved

- ☐ Executive Director
- ☐ Development staff or volunteer fundraisers
- ☐ Board members who steward donor relationships
- ☐ Donors and supporters
- ☐ Program staff who provide insights or stories

Steps forward

1. **Choose one system issue** donors can easily understand.

2. **Use a simple message structure** to explain: what's happening, and why it matters to your mission.
3. **Share this information** in a donor letter, newsletter, or conversation.
4. **Pair it with one short, clear example** from your community.
5. **Make the connection explicit:** how donors support both immediate needs and long-term solutions.
6. **Invite donors** to ask questions or reflect on what stands out.
7. **Share back any progress or conversations** this sparked.
8. **Celebrate donors** as partners in change

What to practice

Practice explaining a system issue in **plain language** without jargon.

Helpful tools

- Issue-to-Action Worksheet



10

Volunteers meet with a community leader

What this means

Volunteers often see your community's needs up close. When they meet with a community leader—a city councilmember, tribal leader, school principal, agency staff person, neighborhood association chair—they bring real experiences and authentic voices into the conversation. (In small towns, this might mean running into each other in a supermarket!) These conversations help build relationships, deepen understanding of local issues, and ensure that the concerns of your community are heard by people who can influence change.

What you need to know

- Volunteers don't need advocacy-related expertise—most leaders value hearing real experiences from the community. Their emotions and observations are valid evidence.
- A short meeting is enough to make a difference.
- When volunteers know the story they want to share and why it matters, they are more confident delivering it.
- This 4-step flow works well: introductions → share story → name the issue → ask a question.

Who is involved

- ☐ Volunteers
- ☐ Program staff (to brief volunteers)
- ☐ Executive Director

Steps forward

1. **Identify a community leader** you want to connect with—someone who influences decisions, resources, or priorities affecting your work.
2. **Select one or two volunteers** who have a relevant story or experience to share.
3. **Prepare together** using the Story Gathering Worksheet.

4. **Schedule a brief meeting**—keep it simple and framed as a conversation, not a formal presentation.
5. **Ask about accessibility needs early:** 'Does our volunteer need a quiet room, a ramp, or a Zoom link to participate fully?'
6. **Begin the meeting with gratitude** and a quick introduction to your organization and volunteer roles.
7. **Have volunteers share their story** in 1–2 minutes, focusing on the experience and the barrier they witnessed.
8. **Name the issue clearly** using one sentence: *"We're seeing more families struggling with ____, and we want to understand how we might better help these families."*
9. **Ask one question**, such as:
 - *How is your office approaching this issue?*
 - *What advice do you have for us as we support our community?*
 - *Is there someone else we should talk to?*
10. **Send a follow-up email** thanking the leader and summarizing what you heard.
11. **Debrief with the volunteers**



What to practice

Role-play a 10-minute meeting: Introduction → share one story → ask one question → thank the leader.

Helpful tools

- Story Gathering Worksheet
- Testimony Prep Worksheet (if speaking in a formal setting)



Community members share their story on the record

What this means

Public hearings give decision-makers a chance to hear directly from the people affected by their choices. When community members testify—whether in person, online, or through written comments—they bring real experiences into the room where decisions are made. Even a short statement can shift how elected officials think about an issue. For small nonprofits, helping community members share testimony is a powerful way to lift up real experiences without needing deep policy expertise.

What you need to know

- Effective testimony centers on sharing one clear story or example.
- People don't need policy expertise to testify—just their lived experience.
- Good preparation and emotional support matter more than perfect wording.
- Written testimony counts too and can be easier for many people.
- A few prepared speakers can make a strong impact.
- Virtual testimony is often available and increases access.
- Repeating key themes strengthens the message.

Who is involved

- ☐ Community members
- ☐ Staff or volunteers who prepare speakers
- ☐ Executive Director
- ☐ Board members or partners
- ☐ Elected officials receiving the testimony

Steps forward

1. **Identify a hearing or meeting** where an issue affecting your community will be discussed.

2. **Invite 1–3 community members** with lived experience who feel comfortable speaking.
3. **Help each person prepare one story**, one barrier, and one message.
4. **Practice together**—aim for a short 1-2 minute statement.
5. **Handle logistics**: transportation or tech support, signing in, and understanding the flow of the hearing.
6. **Support the speaker** during the hearing and thank them afterward.
7. **Submit written testimony** as well, even if someone speaks live.
8. **Follow up with decision-makers** briefly to reinforce why the testimony matters.
9. **Debrief with speakers** to honor their contribution and hear how the experience felt.

What to practice

Have speakers **rehearse a 90-second testimony** aloud, focusing on one story, one barrier, one message

Helpful tools

- Testimony Prep Worksheet





Advocacy for every season to build your power and help your voice shape big decisions

What this means

Advocacy isn't seasonal—your voice matters all year. But different times of year call for different types of outreach. By following the rhythm of the legislative calendar, your organization can stay engaged in ways that feel manageable, strategic, and aligned with your capacity.

What you need to know

- Relationship building is a year-round effort. Advocacy is something you do all year, not just during legislative session.
- Different seasons call for different actions.
- It is important to know when your state's legislative session is scheduled.
- You don't have to do this alone. Coalitions and nonprofit associations can help guide strategy and amplify your voice.
- Small, steady actions build influence over time.
- Your community stories and relationships strengthen your impact when decisions are being made.
- Elections shape who represents your community. Nonprofits can educate people about issues but not endorse candidates.
- Ending the year with reflection and celebration keeps people motivated and honors everyone who contributed.

Who is involved

- ☐ Executive Director
- ☐ Staff and volunteers
- ☐ Board members
- ☐ Community members
- ☐ Advocacy partners and coalitions
- ☐ Elected officials and their staff

Steps forward

Every organization's advocacy rhythm is a little different. Federal officials work year-round, state legislatures meet on their own schedules, and local leaders may be accessible at any time. The seasons outlined here offer a high-level framework you can adapt to your own state, community, and organizational calendar. Use them as a guide—not a prescription—to build a steady, sustainable advocacy practice throughout the year.

You don't have to do all of these. Just look at what season it is right now and pick one thing.

SPRING — Listen, Learn & Build Relationships

Spring is often when elected officials are more available and when your community's insights can start to shape future priorities.

1. Hold informal community conversations—listen for themes and patterns.
2. Gather stories using the Story Gathering Worksheet.
3. Make your 10-minute ED call to share one example or insight with an elected official.
4. Debrief the previous session (or recent issues) with partners: What changed? What didn't? What did we learn?

SUMMER — Coalition Work, Issue Analysis & Message Development

Summer is prime time for shaping what comes next. Coalitions are often most active now: setting agendas, refining messages, identifying opportunities, and analyzing issues.

1. Attend a coalition meeting and share trends and stories from your community.

2. Work with partners to refine one priority issue for the next year.
3. Prepare example stories using the Message & Narrative Worksheet.
4. Keep your board informed with a short issue or trend update.

FALL — Strategy, Preparation & Election Awareness

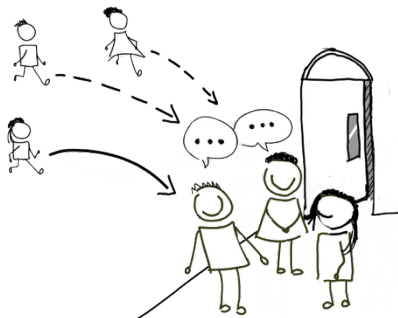
Fall is when the groundwork is laid—both for policy and for representation. Legislative agendas begin to solidify, drafting begins, and elections—local, state, or federal—help shape who will represent your community.

1. Identify 1–2 issues your organization will track or speak to in the upcoming year.
2. Train one or two community members to deliver simple messages or testimony.
3. Visit your state nonprofit association’s website to learn what their policy agenda for the year is.
4. Educate your community about issues at stake in elections (within IRS rules).
5. Update your contact list for elected officials and their staff so it’s ready for quick communication.

WINTER — Legislative Session or Decision-Making Season

For most states, winter means legislative session. But at all levels of government, this is when issues tend to move faster.

1. Share one clear story or example with an elected official or agency staff.



2. Support one community member to testify or submit written comment.
3. Attend at least one coalition briefing to stay aligned.
4. Use your five-minute board spotlight to keep board members updated.
5. Send a short donor update connecting your work to what’s happening now.

ANNUALLY — Reflect, Reset & Celebrate

Advocacy is a long-term, human-centered practice. Celebration sustains it.

1. Reflect with staff and board—What did we notice? What changed? What surprised us?
2. Capture 3–5 insights from the year’s advocacy efforts.
3. Thank storytellers, partners, volunteers, elected officials, and donors.
4. Celebrate wins—big or small.
5. Set one intention for the coming year.

What to practice

Practice matching advocacy actions with the right season.

Helpful tools

- Issue-to-Action Worksheet
- Testimony Prep Sheet
- Advocacy Timeline

Story Gathering Worksheet

Use this worksheet to gather real experiences that highlight needs, barriers, and opportunities in your community. Stories like these can illuminate where policy or system changes may be needed.

1. About the storyteller

Name (optional):

Role/relationship to your organization:

☐ Participant ☐ Family member ☐ Volunteer ☐ Staff ☐ Community member

Consent & Dignity

Before collecting or sharing any story, confirm:

Permission:

- ☐ OK to share internally
- ☐ OK to share publicly (with any agreed-upon changes)

Dignity:

- ☐ Have we asked what parts of the story feel sensitive or should not be shared?
- ☐ Have we offered the storyteller the chance to review or shape how their story is told?

2. What happened? (The situation)

Describe the experience in 2–4 sentences.

- What was happening in this person's life?
- What brought them to your organization?

3. What challenge or barrier did they face?

Focus on the system or policy—not the person.

- Was it a rule, requirement, process, or lack of access?
- Who controlled that barrier (agency, institution, landlord, school, etc.)?

4. What difference did support make—or could have made?

- What changed because support was available?
- What stayed the same?
- What does this show about the larger system?

5. Why does this story matter? (The meaning)

- What human impact does it show?
- How many others might face something similar?
- What does this reveal about the system?

6. What needs to change? (Policy or practice insight)

- A rule?
- A requirement?
- Access to services?
- Flexibility?
- Funding?
- Local, state, or institutional policy?

7. How can we honor this story? (Ethics + next steps)

- What parts should be protected or generalized?
- Do we need to change identifying details?
- Have we followed the storyteller's wishes about how and where the story is used?

Community Listening Worksheet

Use this worksheet to capture themes from conversations with neighbors, participants, volunteers, and community members. The goal is to listen with care, spot patterns, and understand what people are experiencing — not to gather private details or make promises.

1. Date & Setting

Where and when did the conversation happen?

2. Who shared their experience?

Names are not necessarily, unless for internal tracking.

3. What did you hear? (Key insights in their own words)

Use short phrases, not full narratives. Capture the heart of what was shared.

- ☐ What's going well?
- ☐ What's getting in the way?
- ☐ What feels confusing, unfair, or harder than it should be?
- ☐ What would make life easier?

4. What themes or patterns are emerging?

Examples: transportation issues, delays in benefits, childcare availability, language access, housing instability.

5. What system or structure seems connected to this?

If clear: transportation, school policy, state benefits process, local ordinance, agency requirement, landlord practice, etc.

6. What surprised you or stood out?

Something new, repeated, urgent, or particularly meaningful.

7. How might we honor what we heard?

Consider sharing back themes, inviting people to future conversations, or raising insights with staff/board partners.

8. Follow-up (if any)

- ☐ Is a next step appropriate? (Only if the person welcomed it.)
- ☐ Share themes back with community
- ☐ Bring to staff meeting
- ☐ Bring to board meeting
- ☐ Add to advocacy or coalition notes
- ☐ No follow-up needed

Notes:

Issue-to-Action Worksheet

Use this worksheet to sharpen how you talk about an issue, why it matters, and what change is needed. This helps prepare staff, board members, and community advocates to communicate with clarity and confidence.

This is also a framework for a document to leave behind with a policy maker or their staff.

What is your issue?

What's the problem?

Tell me a story about it.

How do we fix it?

Who can act? What is the action?

Contact information

Testimony Prep Worksheet

Use this worksheet to help community members prepare clear, grounded testimony for public hearings, council meetings, or listening sessions.

LOGISTICS

- Time needed (goal: 1-2 minutes):
- Hearing date & link/location:
- Order of speakers (if known):
- Support person:
- Accessibility or language needs:

PLANNER

1. Who you are (10 seconds):

“My name is _____. I am a resident of _____ and connected with _____ organization.”

2. What happened (30–60 seconds):

Describe one story, moment, or experience that illustrates the issue.

3. What the barrier was (20–30 seconds):

Name the rule, requirement, process, or gap that made the situation harder.

4. Why this matters (10–20 seconds):

State the impact on people, families, or the community.

5. What you hope to see (10 seconds):

“I hope you will consider _____ so families can _____.”

AFTER THE TESTIMONY

- How did it feel to speak?
- Is there anything we should follow up on?
- How would you like your story used in the future?

Advocacy Timeline

Use this planning sheet to capture your priorities and develop a calendar of activities.

Month	What are you working on?		Who is involved?
	This year	Next year	
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			



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We help people run nonprofits with joy, confidence, and results.

Over the past 10 years, we have created advocacy curriculum for nonprofit state associations and networks across the country. We believe deeply in the power of nonprofits to lift community voices and shape the systems that affect our daily lives. As educators, we know people take action when the task feels doable and they're confident they can succeed. We hope this resource helps small nonprofits make the change they want to see. **Your voice matters.**

Also available from the Nonprofit Learning Center:



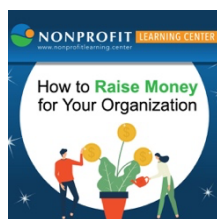
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