

Recreational Therapy Licensure Grassroots Lobbying Campaign Checklist

This checklist is a walkthrough of four phases of planning a recreational therapy licensure grassroots lobbying campaign. Each phase has specific considerations.

Phase 1: Assessment

It's critical to understand the lay of the land before launching the RT campaign and to understand the assets and vulnerabilities. Advocacy campaigns may be won or lost before they begin based on the lack of planning and strategy. To develop a coherent strategy there is a need to know where the campaign is starting from and the overall landscape of the campaign environment. An assessment of the process on the front end of the advocacy or campaign effort will help ensure the strategy is grounded in the political and resource realities that are needed to win. This work sheet will help to clarify the recreational therapy licensure campaign's goals, identify clear targets, and engage the most impactful tactics.

Things to Consider in the Assessment Phase:

- Trying to pass a bill during this legislative session.
- Have a solid understanding of the legislation process and how a bill becomes a law.
- Determine allies are in the campaign.
- Assess opposition and its strengths.
- Mapped out the resources, i.e. political, financial, and people that may be utilized for this legislative battle, and assessed them in relationship to target districts?

Phase 2: Targeting

Identifying and targeting key legislators, allies and opponents is critical. It is vital to the success of the campaign to determine which elected officials and what districts that need to be targeted for successful passage. Targeting in a legislative advocacy campaign isn't just about understanding the head-count, it's about matching grassroots resources to those needed to influence and understanding where the need to invest in building support.

Targeting helps determine who, where, and at what scale. This may include working with staff, lobbyists, and key stakeholders to identify legislators or other elected officials who are critical to persuade in order to achieve a win, as well as identifying specific constituencies and influencers who have the ability to move these individuals.

Things to Consider in the Targeting Phase:

- What legislative committees may be involved?
- Which elected officials already support your issue and which do not?

- Understand which elected officials need to be on your side and which ones you need to neutralize?
- What is needed to influence these elected officials and their positions?
- Have you assessed the resources that you or your partners have in each of the legislative districts that can be used to pressure state legislators where they live?

Phase 3: Planning

Create a strong plan that includes actionable goals, core strategies, tactics, benchmarks, budget, and a realistic timeline to execute a successful campaign. Grassroots advocacy plans should include a mix of recruitment and engagement strategies.

To have a successful grassroots campaign, we must engage key staff and partners in a vigorous planning process, that incorporates findings from an initial grassroots assessment and targeting.

Things to Consider in the Planning Phase:

- Set specific, measurable, actionable, realistic, and timely (S.M.A.R.T.) goals or outcomes for the campaign.
- Draft a written plan that includes goals, strategies, tactics, messaging, and roles of coalition members or other partners.
- Establish a clear timeline for your advocacy efforts that matches up with key dates in the legislative session.
- Establish a budget for your advocacy efforts that is realistic and based on what needs to be done.

Phase 4: Execution

Execution of a campaign involves management and training of volunteers, and ensuring all of the logistical and organizational aspects of the campaign plan come together.

Things to Consider in the Execution Phase:

- Do we need to hire staff for the campaign?
- Who will be coordinating and managing all the moving pieces of the campaign?
- Who will working with a coalition or create one? If so, how will that coalition be managed and make decisions?
- Do we need to incorporate paid communications, i.e. phone calls, emails, online organizing, mail or canvassing? If yes, do you we have the right vendors and someone to manage those vendors?

Assess the resources that we have or our partners have in each of the legislative districts that can be used to influence state legislators where they live?