

By Marc Porter Magee, Ph.D.

December 2020

Goals, Strategies, Tactics, People and Money: Insights from a Decade of Education Advocacy



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Advocacy
Labs_

A collaboration between



About the Author

Marc Porter Magee is the founder and CEO of 50CAN. Over the past decade, Marc has led 50CAN to more than 100 policy victories through advocacy campaigns in more than a dozen states. He previously served as the COO of ConnCAN, research director for the Partnership for Public Service and founding director of the Center for Civic Enterprise at the Progressive Policy Institute. Marc holds a B.A. from Georgetown University and a Ph.D. in Sociology from Duke University. Email Marc at marc.magee@50can.org or follow Marc on Twitter at [@marcportermagee](https://twitter.com/marcportermagee).

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About AdvocacyLabs

AdvocacyLabs is an initiative of 50CAN and FutureEd that provides fresh thinking and rigorous insight into how change happens in education policy, using reports, briefs, interviews and events grounded in both academic research and exclusive data from the field. Follow us on Twitter at [@AdvocacyLabs](https://twitter.com/AdvocacyLabs).

About 50CAN

50CAN: The 50-State Campaign for Achievement Now is a locally led, nationally supported nonprofit education advocacy organization committed to a high-quality education for all kids, regardless of their address. Follow us on Twitter at [@FiftyCAN](https://twitter.com/FiftyCAN).

About FutureEd

FutureEd is an independent, solution-oriented think tank at Georgetown University's McCourt School of Public Policy, committed to bringing fresh energy to the causes of excellence, equity and efficiency in K-12 and higher education. Follow us on Twitter at [@FutureEdGU](https://twitter.com/FutureEdGU).

Foreword

We launched AdvocacyLabs in 2019 to help education advocates address real-world challenges by drawing upon what is a substantial but not widely known body of research on policy advocacy.

Our first three reports included a comprehensive review of the academic literature on effective advocacy, interviews with leading academics about what they have learned in studying advocacy and findings from the growing field of experimental studies of advocacy campaigns.

In this fourth report, we make use of exclusive data from a decade of education advocacy campaigns at 50CAN to explore the connection between the inputs in campaign plans—goals, strategies, tactics, people and money—and the outcomes local leaders seek. The results help shed light on what works and doesn't work in education advocacy and on the ways that advocates can use these insights to increase their odds of success.

With schools severely disrupted by the coronavirus pandemic, effective education advocacy on behalf of disadvantaged students is more important than ever. We hope that this report helps local education advocates secure the policy changes that America's students need to thrive in the years ahead.

Marc Porter Magee, Ph.D.
CEO and Founder, 50CAN

Thomas Toch
Director, FutureEd

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Introduction

50CAN, a network of state and local education advocacy initiatives, launched in January 2011 to help advocates win policy changes that expand the educational opportunities of America's students. In the decade since then, 50CAN's local leaders have carried out 274 advocacy campaigns in 17 states.

50CAN has tracked the evolution of each of those initiatives using a comprehensive campaign-planning platform called ExpeditionAdvocacy.org. The information gathered through this platform has provided AdvocacyLabs a unique opportunity to understand the ingredients of winning campaigns. This report shares the results of that research, along with a detailed analysis of what worked and what didn't work in the 50CAN campaigns. The report also discusses how 50CAN's local leaders have evolved their advocacy approaches to increase their odds of success.

Each chapter in the report explores a key dimension of the 50CAN campaigns over the past decade—their goals, strategies, tactics, people, budgets and outcomes. Here is a high-level summary of our findings:

1 *Goals.* Across 274 campaigns, 50CAN campaigns achieved their objectives 49 percent of the time.

2 *Strategies.* Campaigns using a social movements strategy—where a large number of people build power to secure change by joining together around a common goal—were successful 57 percent of the time, or eight percent more frequently than average. As a result, the use of the strategy more than doubled—from 22 percent of campaigns in 50CAN's first three years to 54 percent of campaigns in the three most recent years.

3 *Tactics.* 50CAN's teams have deployed 28 distinct tactics, the specific steps taken to secure a goal. The most successful tactic proved to be grassroots organizing, where a group of people work together to identify shared problems and find solutions. The use of this tactic also increased over time: 19 percent of campaigns used grassroots organizing in 50CAN's early years, while 51 percent of campaigns have used it more recently.

4 *People.* 50CAN's local advocacy leaders with political experience were more successful than those with backgrounds strictly in the world of education. The share of local leaders with political experience has increased from 21 percent at the outset of 50CAN's work to 81 percent today.

5 *Money.* The cost per win of smaller campaigns (with budgets of less than \$350,000 a year) was half that of larger campaigns (with budgets of more than \$750,000 a year). There was a four-fold increase in the share of small campaigns from 50CAN's first three years to its last three years, while the share of large campaigns was reduced from 69 percent to 30 percent.

The evolution of 50CAN's advocacy campaigns over the past decade toward social movements, grassroots organizing, political leadership and smaller campaigns has been a key factor in the more than four-fold increase in annual policy wins by the network, from five in 2011 to 23 in 2019. These successes point to the potential for research to improve win rates.

Insight 1 Goals

Advocacy efforts are often organized into campaigns, with clear goals that leaders aim to achieve in a specified amount of time. If a campaign is a hike up a mountain, the goal is where you aim to plant your flag at the top.

The 50CAN network has pursued a wide variety of education policy changes since its first campaigns in January 2011, from increasing teacher diversity to expanding school options to promoting more equitable education funding systems. Before embarking on a campaign, each team submits plans detailing the policy goal and the specific result that would count as a victory. At the end of each year, these local issue campaigns are scored by national team members as wins, losses or progress made.

In total, campaigns pursued 274 goals between 2011 and 2019, across 17 states. For example, in 2011, the local team in Minnesota set the goal of expanding access to high-quality preschool through the implementation of a quality rating system and an increase in funding for families. By the end of the year, this effort was rated a success because the team had secured a four-star rating system by the governor and \$49 million in new funding for preschool scholarships.

Across all state campaigns, teams secured a win 134 out of 274 times, for an average win rate of 49 percent. Although policy change is often thought of as something that can stretch for decades, the average time from the start of an issue campaign

until victory ranged from 1.0 to 2.2 years, with an overall average of 1.6 years.

Some policy goals are harder to achieve than others. 50CAN uses four education policy categories to describe its policy goals: 1) Options, which includes all efforts to provide families with more educational choices, 2) Innovation, which includes new uses of technology to personalize education, 3) Equity, which includes funding reform and teacher diversity, and 4) Excellence, which includes more rigorous content and a high bar for success. There is a 16-point range in the win rate across these categories: Options (40 percent win rate), Innovation (50 percent), Equity (53 percent) and Excellence (56 percent).

The scope of the desired policy goal also affects win rates. Small policy goals—such as making AP exams free for low-income students—were achieved at twice the win rate (56 percent) of large policy goals (22 percent) like a comprehensive reform of the school funding system. The win rate for medium-sized policy goals (49 percent)—such as an increase in school facilities funding—fell in between the two.

Not all state efforts were equally successful. In fact the greatest variation in win rates is found between

the local campaigns themselves. Over the past decade, two local campaigns (in Florida and Virginia) had no policy wins, while three local campaigns (in New Jersey, South Carolina and Tennessee) had win rates of 70 percent and above.

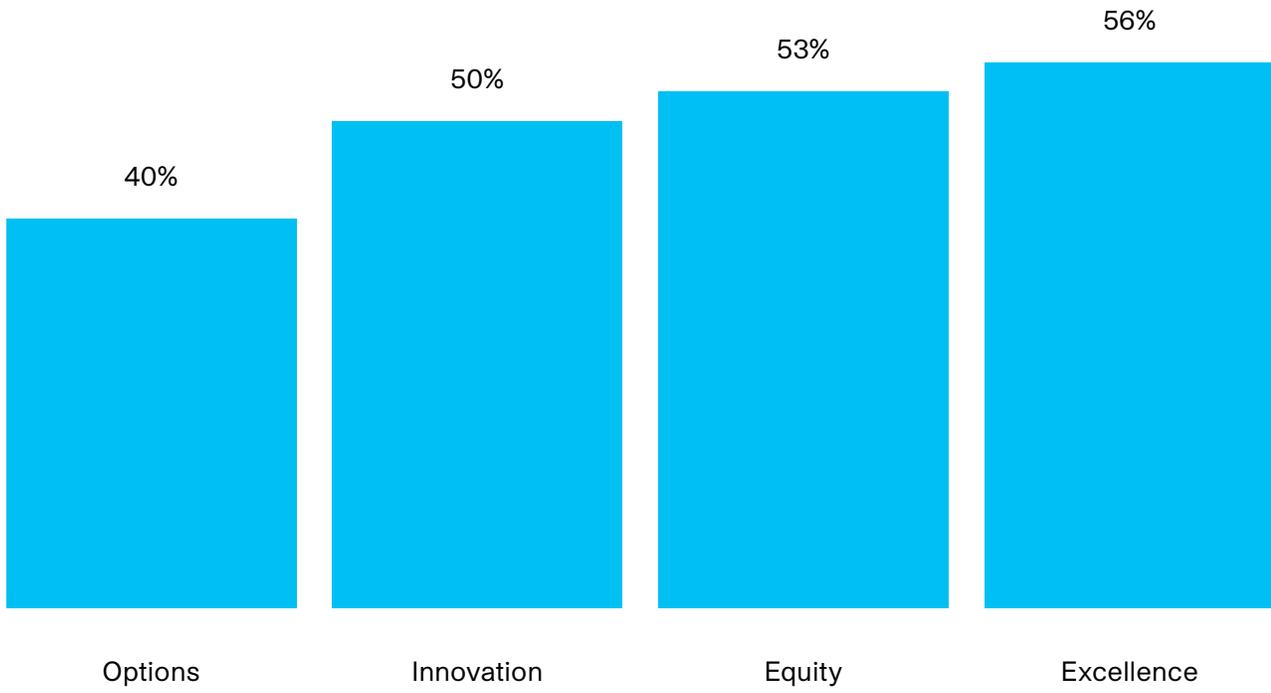
Finally, even when faced with changes in the political landscape, most campaigns successfully adapted their approaches. While the passage of the Race to the Top program in 2010 created strong incentives for state-level education policy change in 50CAN's first three years (2011–13), the average number of wins per year was actually twice as high in the last three years (20.7) as in the first three (9.3). To understand how wins increased even as the policy environment became less hospitable it is important to take a closer look at the strategies, tactics, people and money in the campaigns themselves.

First person

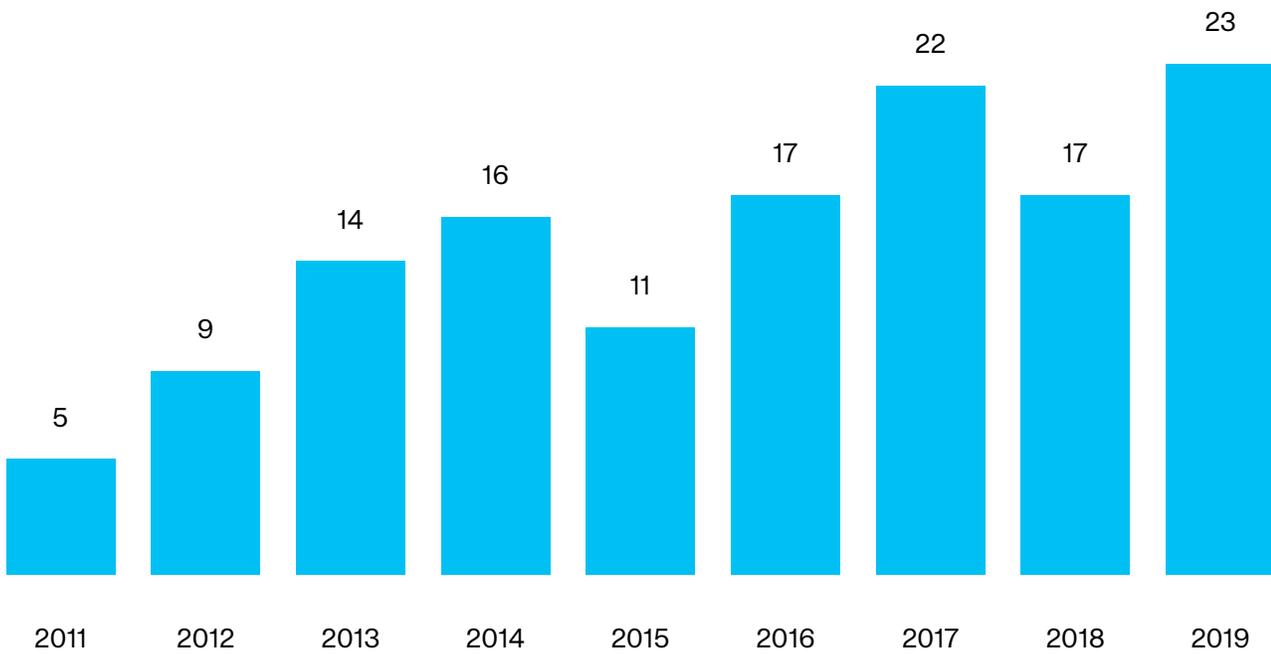
“When advocacy leaders fail it is usually because they don’t have a fully mapped out plan. Getting wins for kids means ensuring that all the pieces are considered. You need to know your specific goals, strategies and tactics and clearly communicate them with your team, your partners and your community. Most importantly, you can’t afford to stand still. The landscape is always shifting so if you are standing still, you will fall behind. We are always gathering data, measuring everything in our campaigns and adjusting our approach so we can stay one step ahead.”

Victor Evans, Executive Director,
TennesseeCAN

Win Rate by Goal Type



Wins per Year



Insight 2 Strategies

If a campaign goal is where you aim to plant your flag at the top of the mountain, strategies are the different paths you might take to reach your destination.

While the local policy campaigns at 50CAN over the past decade have taken a number of different forms in pursuit of a wide range of objectives, all have shared a common planning system and a common system for tracking outcomes. These shared systems make it possible to tease out the effects of different strategies on the odds of success.

Through ExpeditionAdvocacy.org, local leaders choose among four main campaign strategies. Sometimes a strategy is used on its own, while other times it is used in combination with a second strategy:

1 *Elite negotiations.* Advocates work to influence people who already hold power. By tapping into the interests of public officials, this approach secures change through trading and compromise.

2 *Expert communities.* Trusted individuals with authoritative knowledge change the public debate by reaching consensus. By translating consensus into advice on solutions, they influence policy and practice.

3 *Social movements.* A large number of people build their power to secure change by organizing around

common goals. By operating outside of the existing system, this approach can change the status quo in profound ways.

4 *Emergent networks.* People use trial and error to discover solutions to a problem. By testing and refining their approach over time, they develop proof points for widespread change.

The rate at which a strategy was used in a campaign varied significantly across the 274 issue campaigns examined. Elite negotiations were used in 78 percent of all campaigns, followed by social movements (45 percent of campaigns), expert communities (30 percent) and emergent networks (7 percent).

Nearly two-thirds of campaigns (64 percent) deployed more than one strategy. For example, in 2019 the New Jersey team set out to increase both the diversity and quality of the state's teaching workforce. To do so, they adopted a dual strategy of elite negotiations and expert communities. For the elite negotiations path, they focused on making the issue feel urgent to policymakers in the state and creating credible options that these policymakers could

champion. To strengthen their negotiations, they deployed an expert communities strategy focused on research-based consensus around the importance of diverse, highly-skilled teachers. Advocates linked the two strategies by providing expert guidance to policy-makers interested in taking action.

Drawing upon the results explored in the last chapter, it is possible to match up the different combinations of strategies with campaign outcomes. Two patterns emerge from this analysis. First, when it comes to strategies, more are better. Campaigns that utilized more than one strategy secured their goal 52 percent of the time, compared to a win rate of 40 percent for campaigns using only one strategy.

Second, looking at the three strategies that appeared in at least 10 percent of campaign plans, it becomes clear that the social movements strategy is connected to high levels of success. By building power outside the halls of the capitol building, campaigns increased their win rate by eight points compared to average. By contrast, campaigns using the expert communities strategy had win rates three percentage points lower than average and campaigns using the elite negotiations strategy fell one percentage point lower than average.

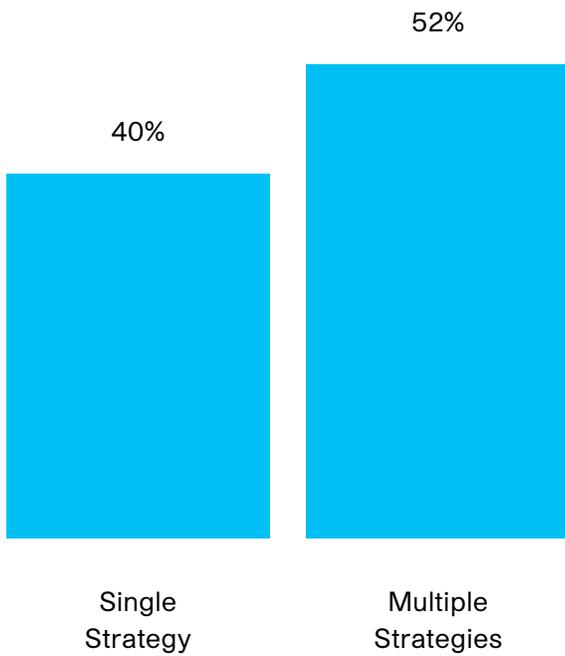
Finally, in a network of campaigns, success leads to learning. Both the use of multiple strategies and the use of the social movements strategy increased over time. In the first three years examined (2011-13) only half the plans contained more than one strategy. However, in the last three years examined (2017-19) that number had climbed to 78 percent of all campaigns. Similarly, while only 22 percent of campaigns in the first three years used a social movements strategy, by the last three years that number had more than doubled to 54 percent.

First person

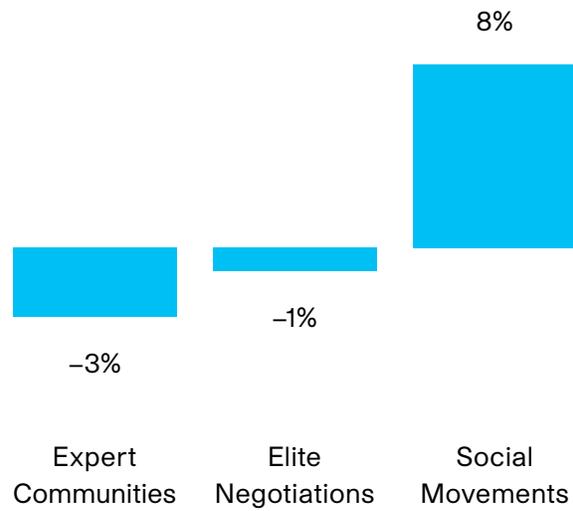
“Including people in our campaigns from the start makes us effective organizers. When you get more people involved you not only get more attention, but you also get closer to solutions that will actually make a difference. However, in order to have a real social movement, it is not enough just to have a lot of people involved in your campaign. It has to be led by the people most affected by the problems. For us, that’s students and their families. One reason advocates have avoided a social movements strategy is the belief it takes too long. It is true that building trusting relationships takes time but once you have that trust you can move incredibly quickly when opportunities arise to get wins.”

Nicholas Martinez, Co-Executive Director,
Transform Education Now (TEN)

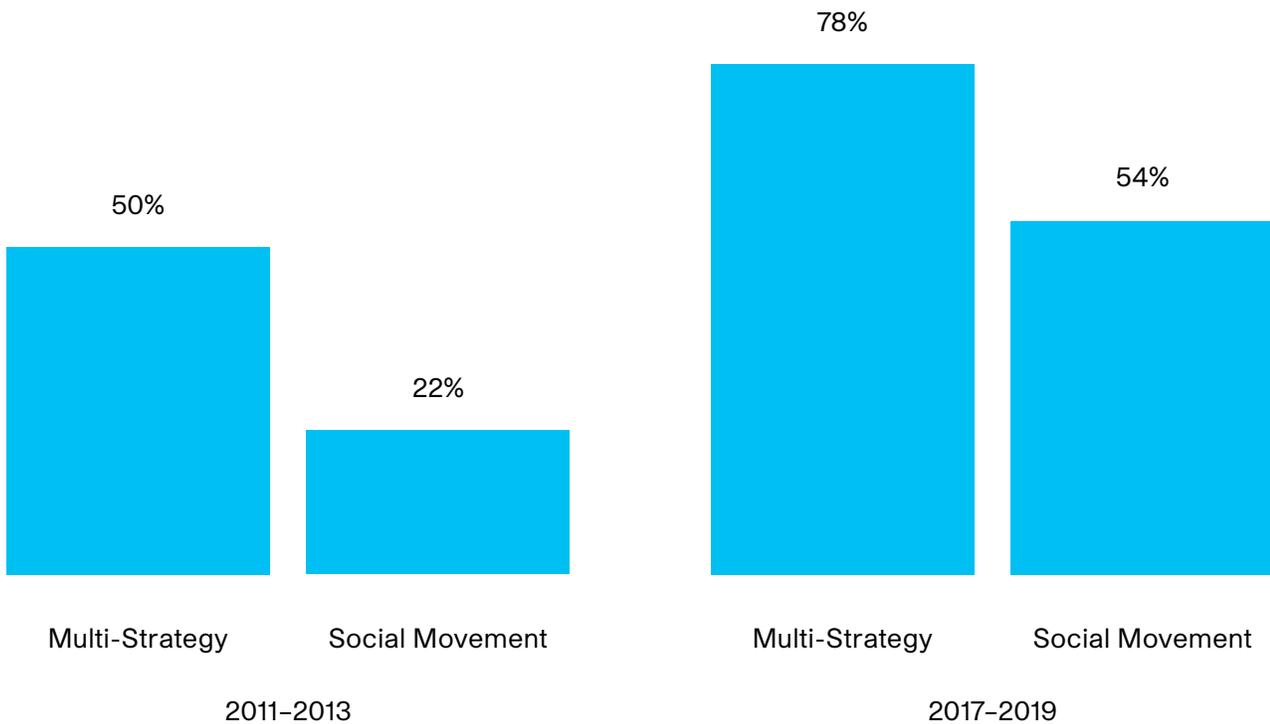
Win Rate by Number of Strategies



Win Rate by Strategy Compared to Average



Strategies Utilized: First Three Years vs. Last Three Years



Insight 3 Tactics

If strategies are the different paths you might choose to reach your goal, tactics are the steps you take to move forward on your chosen path.

The last chapter demonstrated how an analysis of campaign plans can uncover hidden patterns in the relationship between strategies and campaign wins. The same is true for tactics. In the ExpeditionAdvocacy.org system, local leaders choose up to three tactics per strategy from a common menu of options, which allows these tactics to be tracked over time and connected to campaign wins.

While ExpeditionAdvocacy.org offers many choices, local advocates returned to a handful of tactics time and time again. Of the 28 top tactics deployed by campaigns over the past decade, nine appear in at least 15 percent of all campaign plans: lobbying (used in 72 percent of all campaigns), coalition building (39 percent), policy analysis (29 percent), grassroots organizing (26 percent), storytelling (24 percent), training spokespeople (18 percent), research studies (16 percent), policy proposals (16 percent) and negotiation (15 percent).

For example, in 2019 the team in Georgia set out to provide better support to students with dyslexia through universal screening, additional services and better teacher preparation. They created a campaign that combined inside tactics like lobbying and

policy analysis with outside tactics like grassroots organizing and storytelling. The campaign built upon years of work with parents from across the state who had identified a lack of policy and programs on dyslexia as a real problem in their communities. The result was an energetic campaign that turned the key elements of their policy goal into law.

Comparing the tactics included in a campaign plan to the eventual outcome reveals the connection between specific tactics and the odds of success. The three connected with higher than average win rates are lobbying (3 percentage points above average), coalition building (7 percentage points), and grassroots organizing (13 percentage points). The other three are connected to lower than average win rates: training spokespeople (–4 percentage points), storytelling (–5 percentage points) and policy analysis (–13 percentage points).

As was the case with strategies, organizational learning across the network appears to be driving adoption of the most successful tactics. Grassroots organizing, which had the highest win rate of any tactic measured, was used in just 19 percent of campaigns in 50CAN's first three years (2011–13) of

operation. In the last three years studied (2017–19), that percentage grew to 51 percent.

First person

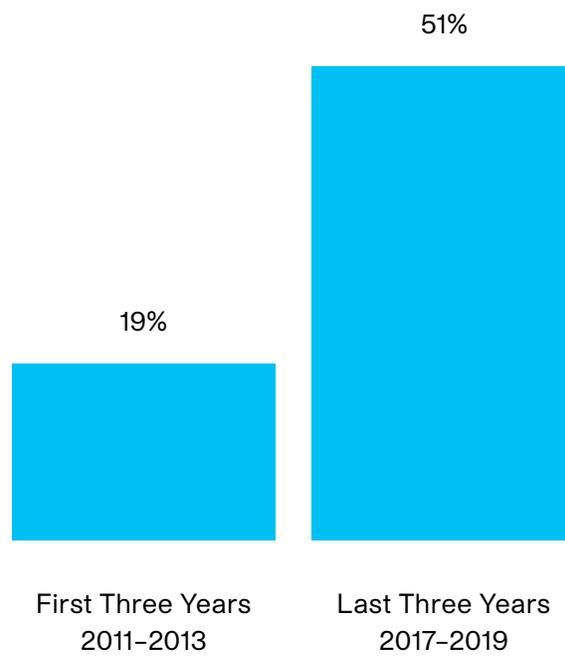
“Not all tactics are created equal. Some take much more time than others but also have the promise of being much more effective over the long run. That is particularly true of grassroots organizing. The kind of investment you have to make goes far beyond the typical 9-to-5 workday. You really have to spend time with people, get to know them, get to know their children. It is just so much more personal than policy analysis. But what it allows for are goals that emerge from the ground up and when we help parents speak directly to lawmakers it is clear that they can make the case for a policy in a way we never could.”

Steven Quinn, Outreach Director,
GeorgiaCAN

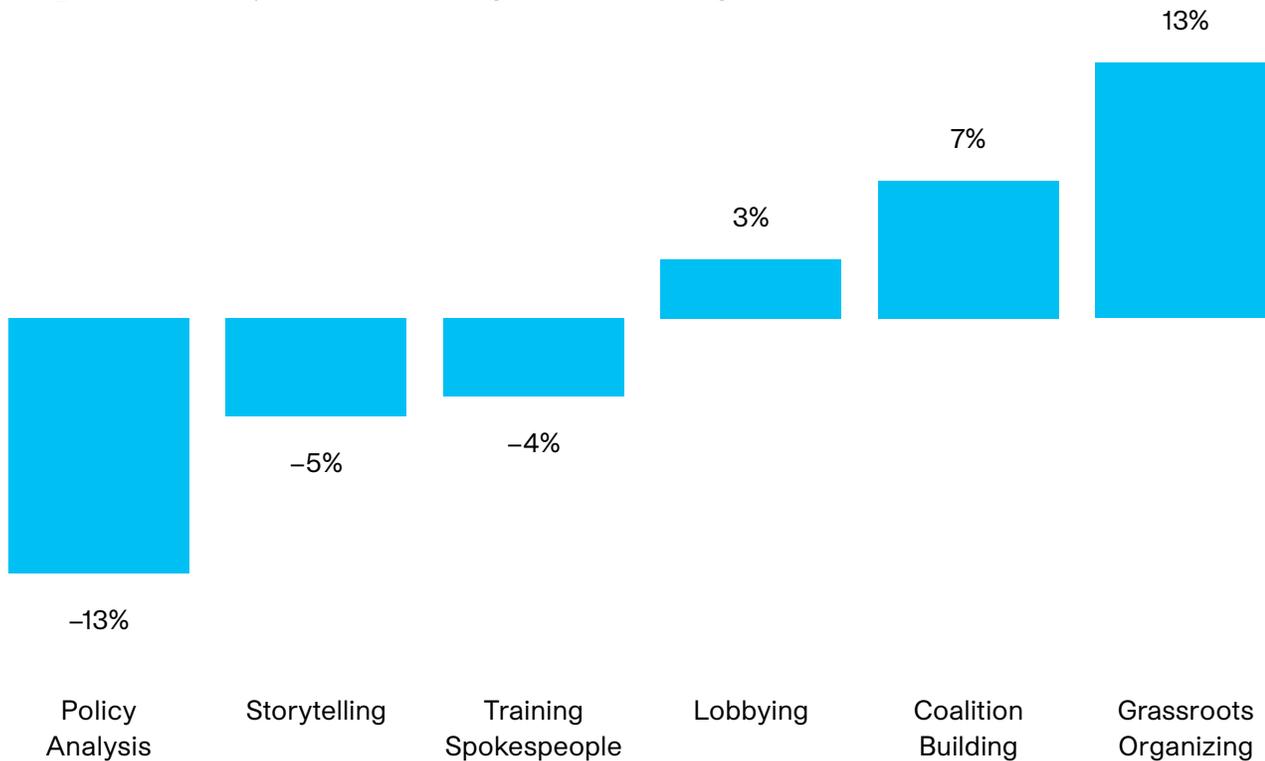
Most Frequently Used Tactics



Use of Grassroots Organizing



Top Tactics by Win Rate Against Average



Insight 4 People

Even the best goals, strategies and tactics in a campaign plan won't matter without the right people to lead the way forward on the journey.

It is clear that there are patterns in the relationship between goals, strategies and tactics in the win rates for campaigns. Is the same true for the people supporting and leading these campaigns? To shed light on this question, campaign outcomes must be connected to the characteristics of the people working on these campaigns.

At the end of its first year, 50CAN had 24 full-time staff working both on the ground and in a national office supporting the local campaigns. By 2019 the total number of full-time staff had grown to 42. Over a decade of work, 144 people were employed in these campaigns. The average length of time spent working on a campaign or in support of a campaign was 3.3 years.

Most of 50CAN's staff members have a background in education or politics. The majority (60 percent) was recruited from the education sector and the majority of those who left the organization (54 percent) returned to the education sector. A little under one-quarter (23 percent) went on to another advocacy position after leaving 50CAN.

The organizational model adopted by 50CAN is built around locally led, nationally supported

campaigns. Both local and national support staff work on campaign plans developed by local leaders, who have the authority to determine goals, strategies and tactics for each issue campaign. Consequently, hiring the right executive director in each state is critical to success.

In 50CAN's first decade, campaigns were led by executive directors from education backgrounds 60 percent of the time, compared to 40 percent from political, legislative and government backgrounds. A little over three-quarters (76 percent) of executive directors were affiliated with the Democratic party, more than half were women (57 percent) and half were people of color (52 percent).

When comparing the demographics of executive directors to the win rates of their campaigns, the results show that women and men as well as leaders of color and white leaders had nearly identical win rates for their campaigns (between 47 and 50 percent across the four categories). However, executive directors with political backgrounds had a win rate that was 16 points higher than executive directors with education backgrounds (57 percent versus 41 percent). Success also varied by political affiliation. Executive directors

with ties to the Republican party had a win rate 15 points higher than executive directors with ties to the Democratic party (60 percent versus 45 percent).

The higher win rates of campaigns led by executive directors from political backgrounds has informed the hiring process across the 50CAN network. For example, when ConnCAN's board embarked on the search for a new executive director in 2018, they looked for a candidate with deep understanding of the legislative process, policy expertise, strong advocacy skills and long-standing ties with key partners and community groups. After a six-month search, they selected Subira Gordon, who was serving as the executive director of the Connecticut General Assembly's Commission on Equity and Opportunity. Gordon had previously worked as manager of political campaigns in Connecticut and a grassroots organizer with SEIU.

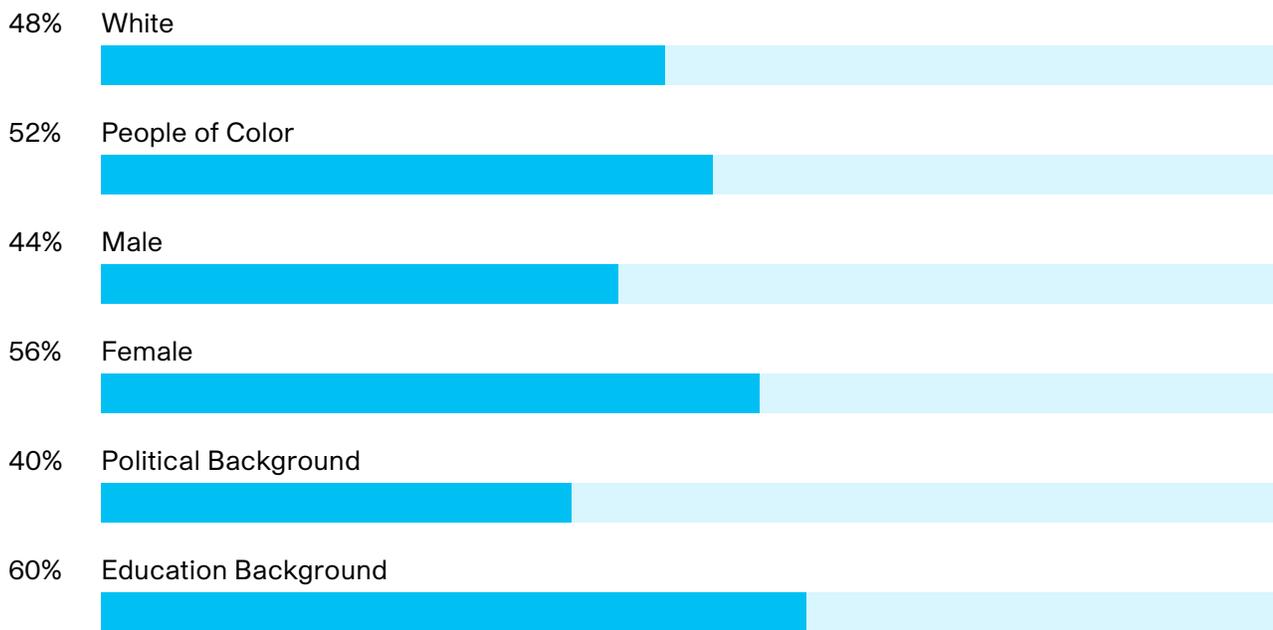
This shift toward leaders with political expertise has become more pronounced over time. In its first three years, only 21 percent of 50CAN's campaigns were run by executive directors with political backgrounds; by the last three years that number had increased nearly four-fold to 81 percent. Likewise, while in the first three years no executive directors with ties to Republican politics were running local campaigns, by the last three years that number had risen to 35 percent of all local campaigns, with a concentration in red states where Republicans held key leadership posts.

First person

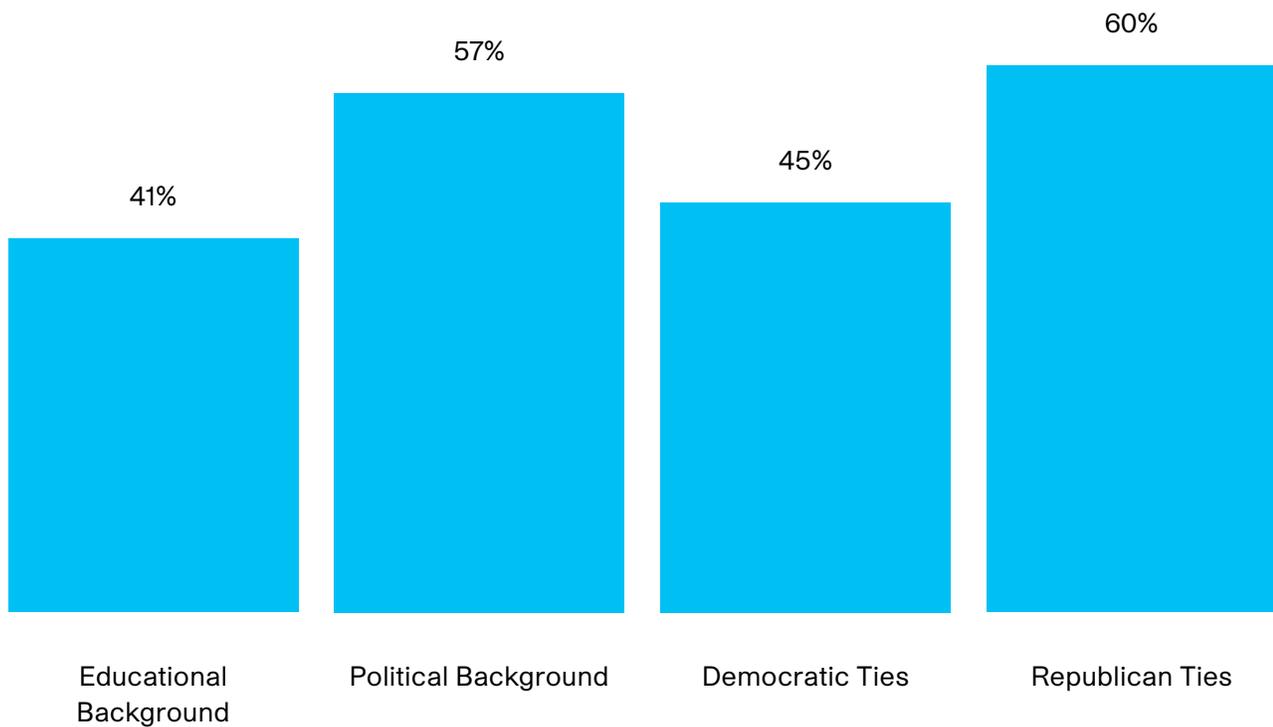
“The process isn't set up to be democratic. The reality is that policy happens behind closed doors. Successful advocacy is about opening those doors for the people you represent. To do that, you usually need a guide with experience navigating the halls of power. The best advocacy leaders know how to build trust with officials and help them navigate the murky waters of state and local politics. In order to win on the policy, you first must win on the human connection. Every meeting you take is part of the journey to getting that policy win.”

Subira Gordon, Executive Director,
ConnCAN

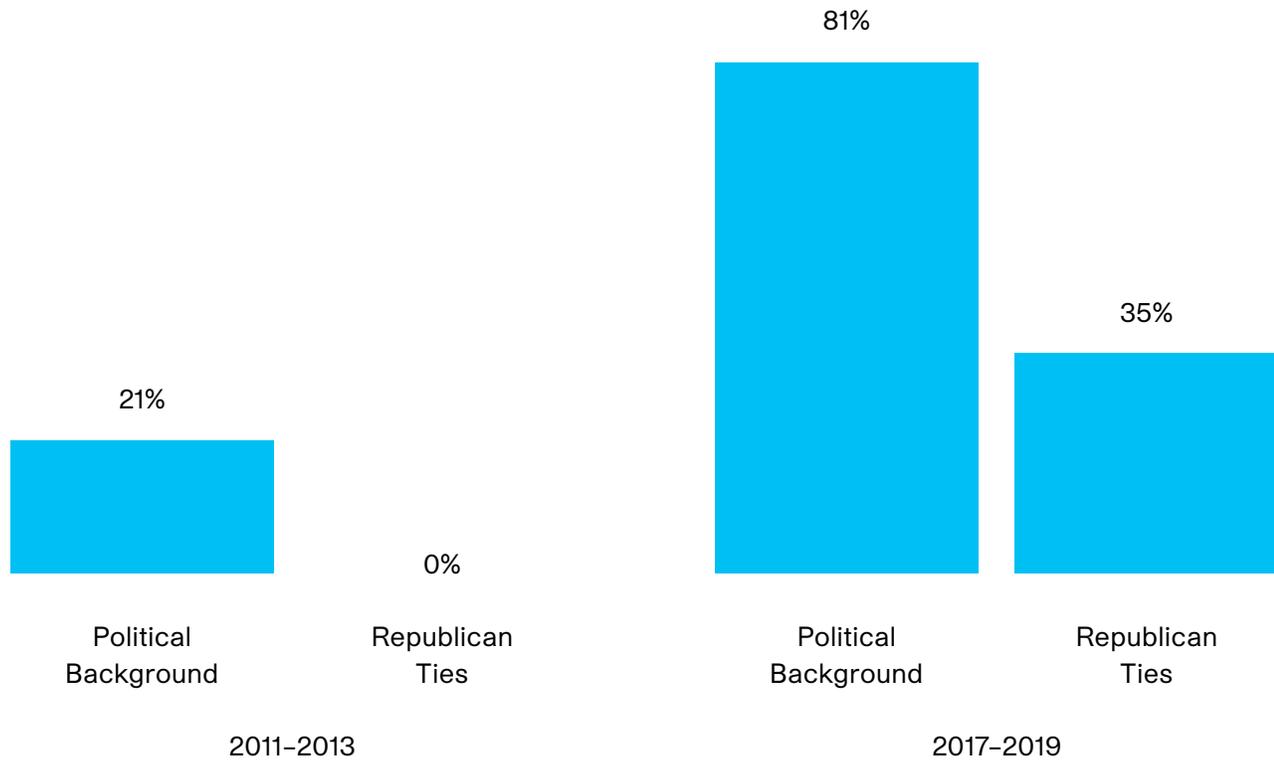
Executive Director Demographics 2011–2019



Win Rate by Executive Director Background



Change in Executive Director Background



Insight 5 Money

With the wrong plan and the wrong leaders, no amount of money can buy success. Yet, in the right hands, with the right goals, strategies and tactics, resources help a team reach their destination.

Advocacy leaders spend a lot of their time fundraising. However, often they lack hard facts about how much money really matters in shifting the odds toward success. The ExpeditionAdvocacy.org planning system includes campaign budgets which can be connected with campaign outcomes to uncover patterns in fundraising, spending and wins. These patterns can then inform smarter choices in advocacy investments.

On average over 50CAN's first decade, the mean cost of a year-long, multi-issue campaign in a city or state was \$667,944, while the mean cost per specific goal pursued within a city or state was \$165,519. In terms of the distribution of campaigns by size, 37 percent of state or city campaigns met the 50CAN criteria for a large budget (\$750,000 per year or more), 41 percent had a medium-sized budget (\$350,000 to \$749,999) and 22 per had a small budget (less than \$350,000).

Consider the 2018 state campaign in Delaware, which set four goals that year: make the state's educational funding formula more equitable, secure additional funding for early childhood centers, allow the state to take over persistently underperforming

schools and streamline the school choice application process. The \$392,968 budget (on the low end of a medium-sized campaign) included salaries for three full-time state employees, plus a share of the national staff's time on communications, policy, technology, finance and other supports. The budget also provided for events, publications, social media and trainings for local volunteers. At the end of the campaign, the team had secured two of their four goals.

Would a bigger budget result in more wins? Over 50CAN's first decade, large campaigns had a win rate of 56 percent, while medium-sized campaigns won 48 percent of the time and small campaigns won just 33 percent of the time. However, in terms of bang for the buck, funding a number of smaller campaigns makes good sense. The data show that the mean cost per win in a large campaign was \$390,377, compared to \$313,075 in a medium-sized campaign and \$219,397 in a small campaign. Large campaigns do win more often, but they also spend nearly twice as much per win as the average small campaign.

Given these findings, has the network seen a shift toward smaller, more efficient campaigns? Yes. In

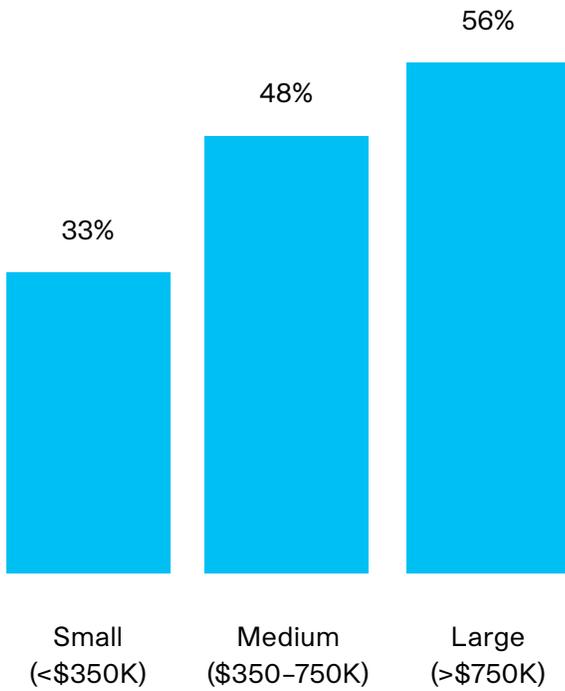
50CAN's first three years (2011–13), more than two-thirds (69 percent) of campaigns had large budgets, while 26 percent had medium-sized budgets and only 5 percent had small budgets. In the last three years (2017–19), large campaigns had dropped by more than half as a share of the network to just 30 percent, while the share of medium-sized campaigns nearly doubled to 48 percent and the share of small campaigns grew more than four-fold to 22 percent.

First person

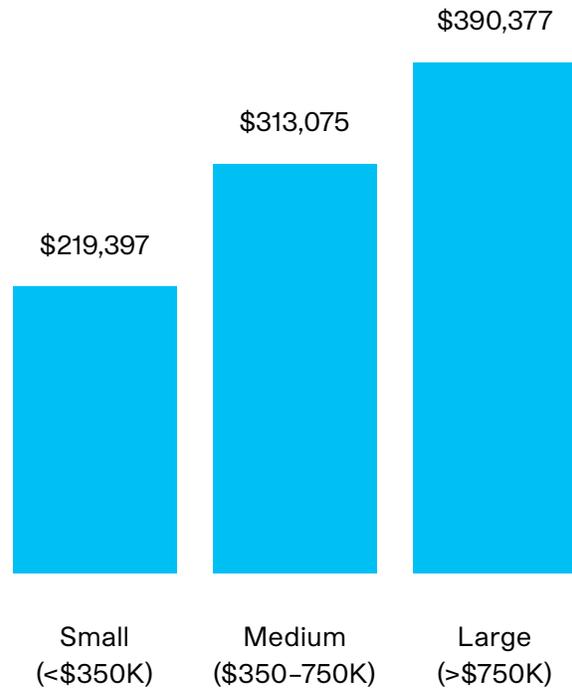
“The most important element of any campaign is your own personal effort. You can always go the extra mile with your own commitment to getting a win. This is particularly true if you focus on being there when the decisions are being made. Proximity to the action—whether it is a school board meeting or a hearing at the capitol—is critical. The beauty of a lean budget is we can't afford to get attached to anything that isn't essential to getting wins. The pressure of a small budget makes us relentless about hitting our annual goals. We can't afford to have a down year, which forces us to use every tool, resource and relationship available to optimize our impact.”

Amanda Aragon, Executive Director,
NewMexicoKidsCAN

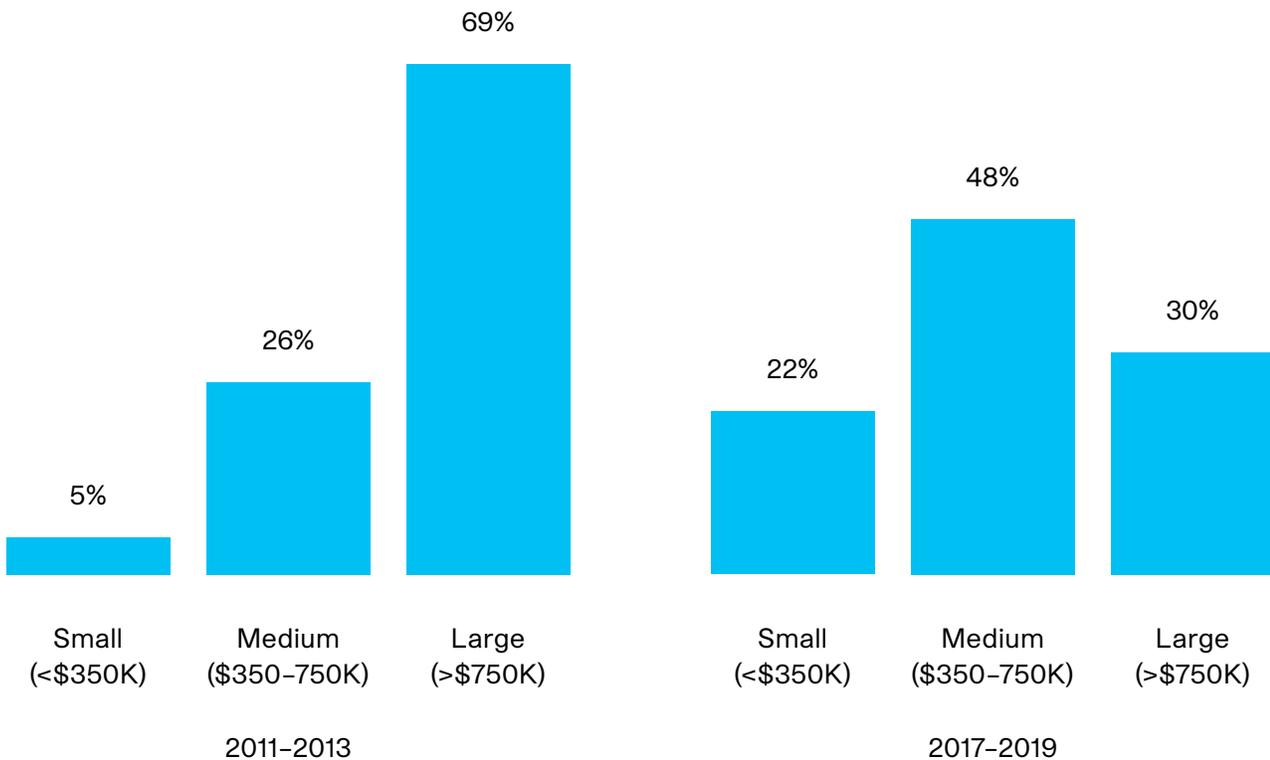
Win Rate by Campaign Size



Cost Per Win by Campaign Size



Change in Distribution of Campaigns By Size



About AdvocacyLabs

AdvocacyLabs is an initiative of 50CAN and FutureEd that provides fresh thinking and rigorous insight into how change happens in education policy, using reports, briefs, interviews and events grounded in both academic research and exclusive data from the field. Follow us on Twitter and Facebook at @AdvocacyLabs and visit us on the web at AdvocacyLabs.org