



THIRD
SECTOR

Superior Region Champions Council Advocacy Plan

An Advocacy
Planning Guide



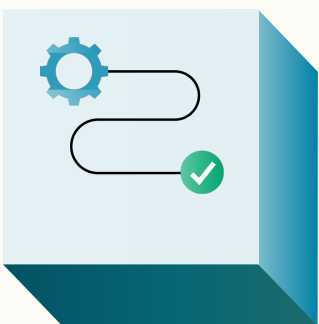
Introduction

Building and maintaining relationships with individuals with lived experience in the behavioral health and/or criminal-legal system is a crucial element of successful stakeholder engagement. From December 2024 to April 2025, Third Sector formed and supported the Superior Region Champions Council, comprised of community advocates in Northern California, to elevate their voices, amplify their advocacy efforts, and strengthen connections between state and local agencies to better serve the Superior Region's behavioral health and justice-involved population.

The Superior Region Champions Advocacy Plan Workshop is a guiding document designed to support community members and local groups engaged in advocacy efforts at the local or state level. This resource helps advocates clarify their short- and long-term goals and identify supporters, allies, opponents, and decisionmakers, while reflecting on various tactics that will move them closer to achieving their objectives.

While this resource was originally created for community members with lived experience with criminal-legal and behavioral health systems, we hope that groups engaged in advocacy with stakeholders in any service area and at any level will find it useful. We encourage state and county agencies to share this resource with individuals, local groups, and/or coalitions to help strengthen and amplify their advocacy efforts more strategically and effectively.

Developing long-lasting change is a multi-step process. **This toolkit provides an outline for government agencies and advocacy groups to initiate and cultivate meaningful objectives that will lead to opportunities for the community.**



About Third Sector

Third Sector is a national technical assistance nonprofit helping to unlock possibility, confront inequity, and catalyze change to the benefit of the people and places our government, community-based, and philanthropic partners serve. It advises our government agencies on effective ways to reshape their policies, systems, and services toward better outcomes for all people no matter their race, background, and circumstances. Founded in 2011, Third Sector is a 501(c)3 organization that has worked with more than 50 communities to deploy more than \$1.8 billion of government resources toward outcomes.

Advocate's Name: _____

Date: ____/____/____

Issue Statement:

What problem are you trying to solve? Why is this important?

Research:

**What is the history of the problem? What is creating the problem, what are the root causes?
(List 3-4 resources/data points)**

Your objective/goal should be in the SMARTIE framework (bit.ly/3DwYFgZ):

Specific, Measurable, Achievable, Realistic, Timebound, Inclusive, and Equitable. (Example: By 20xx, we will advocate for _____ County officials to allocate ____% of the funding needed to develop a new crisis center behavioral health initiative by collaborating with communities whose experiences are often overlooked.)

What is your ultimate goal or north star? (This is usually your long-term goal). What specific things do you want those in power to do to solve this problem? These should also address the root causes of the problem.

Short Term (3-6 months)

Key consideration:

- Highly encouraged to stick to 2-3 goals per quarter to be mindful of group capacity and sustainability.

Intermediate (6+ months)

Key consideration:

- Highly encouraged to stick to 2-3 goals per quarter to be mindful of group capacity and sustainability.

Long Term (12+ months) (*START HERE*)

Key consideration:

- Highly encouraged to stick to 2-3 goals per quarter to be mindful of group capacity and sustainability.
- Start with your long-term goal, move to intermediate, then short-term.

People power

Who are your potential supporters and opponents? How much power do they each hold? Identify and list people, organizations, and local coalitions that care about or are working on this issue.

Allies/Supporters

What other groups or people would be able to help you or your group? Who else wants to see this problem solved? What is your current relationship with these identified people or groups?

Blockers/Opponents

Individuals or groups who will oppose or advocate against your ultimate goal. Who will stand in our way?

Key considerations

- Who are the people most directly affected by this problem? And how do you plan to include them?
- Who else does the group need to invite that's usually not centered in these advocacy spaces? Are BIPOC folks being included? Are folks with disabilities being considered?
- How can the group create the necessary infrastructures for folks across different lived experiences to feel welcomed and ready to join your advocacy efforts? (Space, language access, food, transportation, stipend, etc.)

Skills/Resource Sharing

What resources and skills do allies/supporters bring? (e.g., legal expertise, funding, advocacy skills, relationship with primary targets, etc.)

- Name of person or organization and the skills/resources they'll contribute.

Key considerations

- What resources do we currently have at your disposal to help us achieve our goal(s)? List it by person's name or organization.
- What resources do we need in order to achieve our goal(s)? (e.g., funding, specific skills, physical venue, messaging plan, etc.)

Decisionmakers (Targets)

Who are your targets?
Who are the key decisionmaker(s)
who can solve the problem and have the
power to give you what you want?

Target decisionmaker(s)

Person or people who can make a decision without conferring with others.

Champion(s)

Someone with vision, legitimacy, stakeholder knowledge, and subject-matter knowledge). Your champion is the person who will likely agree and align with your position and demand. They will be the person with whom you or your group will collaborate closely to reach your ultimate goal/north star; therefore, they're often a decisionmaker.

Gatekeeper(s)

Hold power, information, relationships, or other. Can be a barrier between you and decisionmaker(s). Treat as a resource, not an obstacle. (e.g., chief of staff, secretary, scheduler, etc.).

The Influencer(s) or Secondary Targets

Lacks the authority to make the final decision, but can influence the decisionmaker(s) and their respective network. (e.g., funder, faith-based leader, important person in their lives).

Self-proclaimed decisionmaker(s)

Be wary. May volunteer too much information about their authority or gatekeep information.

The Blocker(s)

Often shares the qualities of an influencer. Actively obstructs progress or prevents a certain outcome.

Key considerations

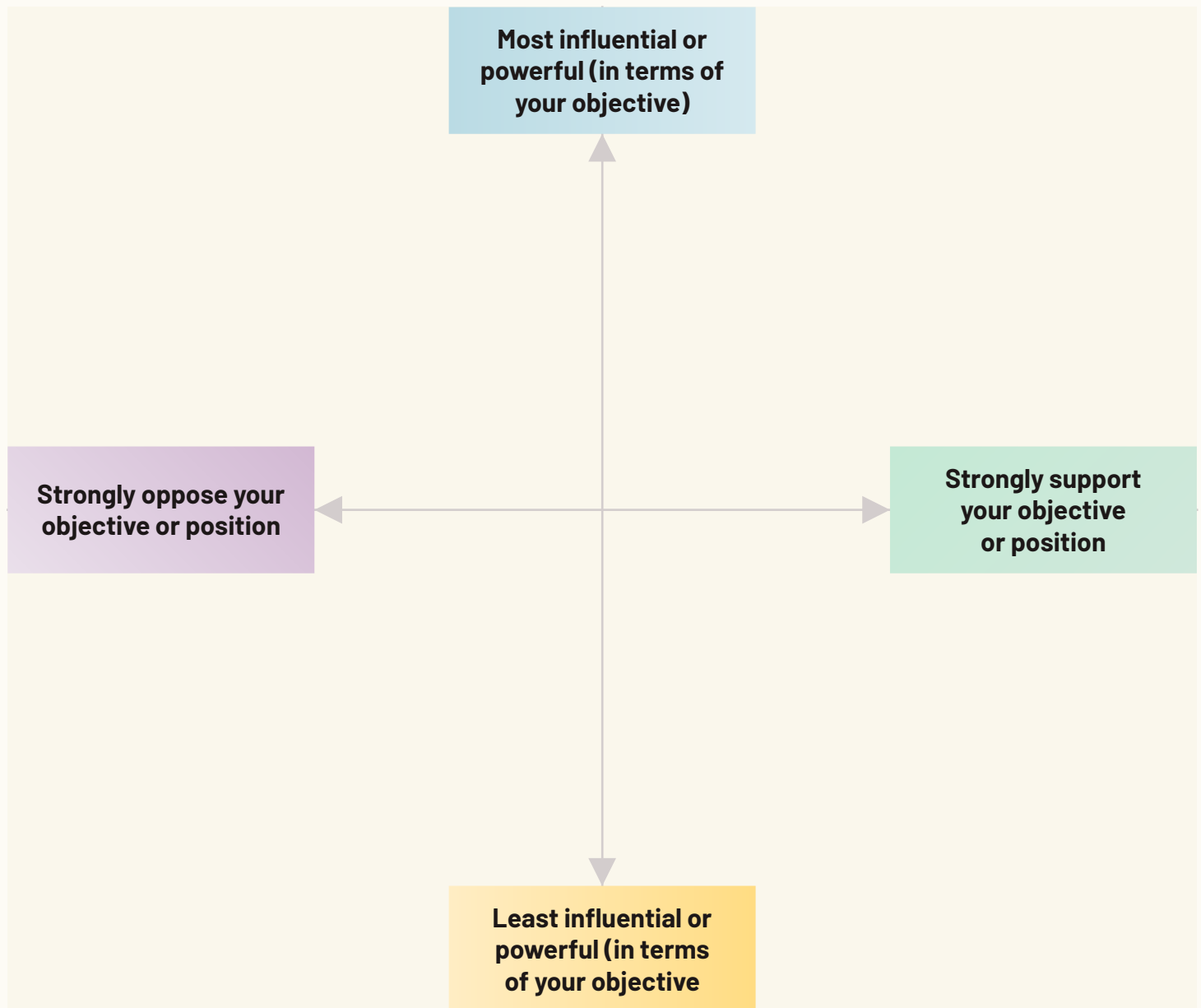
- What does your champion/decisionmaker value?
- Who controls access to your champion/decisionmaker?
- Do you have a relationship with the potential champion?
Who has a relationship with them that you have a relationship with?

Advocacy level

(Local, state, federal?)

Power Map

A power map is a strategic tool that helps us understand who has influence, how that influence flows, and what relationships we can leverage or build to move closer to our goals. It reminds us that power is necessary, time is limited, relationships matter, and power is attainable—even for those with limited resources or no formal authority.



Tactics

How will you show power to your target decisionmaker(s) so they will say yes to the goals?

Direct advocacy tactics

The purpose of direct advocacy tactics are to show power directly to the decisionmaker. (Examples: Phone calls, public comments/testifying, face-to-face meetings, petitions, sign-on letters, day of action, social media storms, press conferences, etc.).

What direct advocacy tactics or methods will you or your group use?

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Indirect advocacy tactics

The purpose of indirect advocacy tactics is for public education and organizing/base building. (Examples: in-person community gatherings, educational webinars, infographics, story sharing, messaging guides, one-pagers, op-eds, social media, etc.).

What indirect advocacy methods or tactics will you use?

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-
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Key considerations

- Reflect on which tactics will make the greatest impact and get us closer to achieving our goal with the limited resources and time we have.
- Keep it to 2-3 specific direct or indirect tactics.
- What do you expect will happen as a result of this tactic?

Activities/ Action Plan

Short-term activities

Long-term activities

Key considerations

- List three activities to help advance your tactics per quarter to be mindful of group capacity and sustainability.
- Be specific (refer to your SMARTIE goal) and name particular individuals within your group responsible for each activity.
- If possible, have 2-3 committees that will be responsible for advancing these activities.
- Status check: How often will you and your group check in on your progress? (e.g., during monthly meetings, etc.).

Messages & Communication

Think back to your 2-minute story. What are your key messages or talking points? When you consider your SMARTIE goal, how might you need to adapt your story/message to different audiences in order to achieve your SMARTIE goal?

Key messages from your 2-minute story:

- 1.
- 2.
- 3.

Brainstorm how you might (or might not) need to adapt different aspects of your story to move your audience. Are there words you want to use, or data you want to include?

Key considerations

- What's your unique value-add? How does your story build on what others in the room might be saying?
- Remember, you're not trying to convince everyone; you're trying to nudge the people who are convincible
- (Values-based messaging structure - VPSA: Values, Problem, Solution, Action).

Internal Factors	Strengths What skills do you have to leverage?	Weaknesses What skills do you want to improve?
What is within your control to leverage?		
External Factors	Opportunities Who might be valuable partners? Who might benefit from your skills and experience?	Threats What could go wrong? How can we be prepared to navigate?
What is out of your direct control?		

Notes

Notes



Sources

ADAPTED from SOUL Political Education Workshop Manual

Adapted from BiteSizeLearning

ADAPTED from The Commons Social Change Library: Building An Advocacy Campaign



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This work was funded by the Council on Criminal Justice and Behavioral Health (CCJBH) and the Mental Health Services Act (MHSA) for the Lived Experience Project under the contract number 23-00287.