



Affiliate Operations Manual

Advocacy

Revision history

Date	Explanation
August 2014	Version 1 released.
January 2026	Version 2 released. Major revisions were made in all sections, with updated language and links.

Revisions to the January 2026 edition

Category	Summary
New sections	1. Introduction : This section explains Habitat's call to action and collective advocacy approach.
	2. Engaging in advocacy at your organization : Provides practical guidance for affiliates and affiliate support organizations to engage in advocacy as a core part of Habitat's work, organized around the five network-proven advocacy tactics outlined in A Path to Greater Impact on Housing.
	3. Sustaining commitment to advocacy at your organization : Offers strategies to ensure advocacy is well-resourced and recognized as an integral part of the way Habitat serves communities.

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1. Introduction

1.1. Understanding our call to action

The scale of the global housing need is staggering. In the U.S. alone, millions of people struggle to find safe, affordable homes, and the gap between what is needed and what is available continues to grow. For people with low or moderate incomes, the fluctuating dynamics of the housing market create ever-changing barriers to increasing construction and accessing affordable housing, even with the dedication of builders across the housing sector. Because of the systems in place, construction can't keep pace with the demand.

This is why public policy matters. The systems that govern housing — how housing is built, financed, accessed and maintained — determine what gets built, where and for whom, and how resources and opportunities are distributed to communities. When these public policies fall short, they deepen the barriers. When they are strengthened, they can open doors, making it possible to build more homes, reach more people and create lasting change.

Habitat for Humanity is uniquely positioned to help drive this change through advocacy. We are a movement of people, working together to build more prosperous and vibrant communities by making sure everyone has a decent, safe, affordable place to call home. In the United States, this work is carried forward by affiliated organizations in urban, suburban and rural communities across all 50 states, the District of Columbia and Puerto Rico. Habitat touches nearly every congressional district, state legislative district, municipality, town and county across the country.

We are a trusted brand with bipartisan appeal, rooted in strong community relationships. Our work as builders gives us firsthand knowledge of housing needs, and our long history of partnership means we are seen as credible allies in shaping solutions. We have a moral obligation to leverage this expertise to inform policymakers of the challenges to home affordability and to be a partner in finding solutions. Each year, nearly a million volunteers are compelled to join us on the build site, and millions more donate to Habitat because they care deeply about access to housing and want to act. These assets allow us to be trusted messengers for public policy solutions that invest in the pressing needs of the communities we serve.

These strengths represent extraordinary potential. The full power of our network has not yet been realized in advocacy — but it can be. We've already seen the power of Habitat's advocacy voice when we unite around shared priorities. Through Cost of Home, Habitat's five-year national advocacy campaign launched in June 2019, the Habitat network influenced more than 450 public policies that increased access to affordable housing for 9.5 million people. These wins prove our voice can help shape systems at every level.

This manual is designed as a starting point to help us unlock our full potential together by equipping local affiliates and affiliate support organizations with foundational tools and strategies to engage in advocacy as a daily part of how we serve communities. Inside, you'll find guidance on core advocacy tactics, along with practices to strengthen and sustain long-term advocacy efforts. We encourage you to explore the [U.S. Advocacy collection on MyHabitat](#) to find additional resources and dive deeper into the materials covered in this manual.

Definition

Habitat for Humanity defines advocacy as “efforts to influence policies and systems to create a world where everyone has a decent place to live.”

1.2. Habitat's advocacy approach

The impact of our advocacy will be greatest when we have a shared commitment to clear goals, defined roles and close coordination across the network. This section of the manual provides both the governing policy context for Habitat's U.S. advocacy work and the shared approach that guides how Habitat engages in this work.

1.2.1. Habitat's U.S. advocacy policy

[Policy 1: Advocacy](#) from the [U.S. Affiliate Organization Policy Handbook](#) sets forth the requirements that apply to all advocacy efforts by Habitat for Humanity affiliated organizations. Policy 1 was last updated in fiscal year 2026 through a process led by Habitat's U.S. Council with input from the U.S. affiliated network. Policy 1 strongly encourages every affiliate and affiliate support organization to engage in advocacy and emphasizes the importance of ensuring those efforts are coordinated throughout the network and conducted in accordance with applicable laws and regulations.

1.0 Purpose

This policy sets forth the requirements that apply to all advocacy efforts made by Habitat for Humanity affiliated organizations participating in activities to change systems, policies and attitudes to achieve decent, affordable housing for all.

2.0 Policy

2.1 Advocacy

[Habitat's advocacy activities](#) can include conducting policy research, identifying public policy solutions, building relationships with policymakers, working in coalitions to advance shared priorities, communicating about advocacy issues publicly, rallying supporters to advocate, being involved in nonpartisan election engagement efforts, and more. Lobbying is a form of advocacy.

- Affiliated organizations are strongly encouraged to integrate advocacy as a core component of their operations. Habitat's advocacy can and should influence all levels of public policy decision-making — local, state, federal and international — and should align with Habitat's mission and strategic priorities.
- Affiliated organizations must comply with all applicable federal, state and local laws regarding advocacy, including, without limitation, laws with respect to lobbying, political campaigning, registration, disclosure, and the substance and quantity of the activities.
- Before engaging in advocacy with respect to legislation, ballot issues or referendums, etc., affiliated organizations must adhere to the following:

2.2 Lobbying

For IRS purposes, lobbying is generally defined as attempts to influence legislation, either directly (communicating directly with a legislator or legislative staff member — federal, state or local — to express a view on specific legislation) or through grassroots efforts (broader communication with the general public on specific legislation to express views and urge the public to contact their legislators). See [Section 3.1](#) for details.

- Lobbying is a permitted type of advocacy for nonprofits, including Habitat affiliated organizations, so long as it is not a "substantial part" of the activities. Additionally,

affiliated organizations engaging in lobbying must track lobbying activities. See [Section 3.2](#) and [Section 3.3](#) for details.

- Lobbying efforts must serve the public interest and not be for the private benefit of any individual or group.
- Affiliated organizations are prohibited from using any federal funds for the purpose of influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract; the making of any federal grant; the making of any federal loan; the entering into of any cooperative agreement; and the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan or cooperative agreement. Also, employees whose salaries are paid from federal funds may not engage in any such activities during official duties.

2.3 Election engagement vs political campaigning

- So long as conducted in a nonpartisan manner and carried out to fulfill the Habitat mission, affiliated organizations may [engage in election-related advocacy activities](#) such as voter education, voter registration drives, candidate forums or questionnaires.
- Affiliated organizations may never engage, directly or indirectly, in any political campaign activity in support of or against any candidate for public office or make any donations to such a candidate.

2.4 Network coordination

- An individual affiliate wishing to propose, endorse or oppose a citywide, countywide or regional initiative must first make a good faith effort to communicate and coordinate with other affiliates in the city, county or region, as applicable to promote alignment and shared impact.
- An affiliate support organization planning to form a legislative agenda at the state level must first make a good faith effort to communicate and coordinate with the affiliates in its state or states to promote alignment and shared impact. An individual affiliate wishing to propose, endorse or oppose a statewide initiative must first make a good faith effort to communicate and coordinate with its affiliate support organization or the other affiliates in its state if an affiliate support organization does not exist to promote alignment and shared impact. Individual affiliates must not take a statewide position that is inconsistent with one taken by their affiliate support organization, unless otherwise approved by their affiliate support organization.
- Affiliated organizations must consult with [Habitat for Humanity International's Office of Government Relations and Advocacy](#) before proposing, endorsing or opposing any federal policies or legislation. Affiliated organizations must not take a position that is inconsistent with one taken by Habitat for Humanity International unless otherwise approved by Habitat for Humanity International.
- Affiliated organizations must clearly identify their local organization name (e.g., "Your Town Habitat for Humanity") when proposing, endorsing or opposing any policies or legislation.

3.0 Additional notes

3.1

This policy focuses on the IRS definition of lobbying (as referenced in [Section 2.2](#)) because it pertains to all affiliated organizations; however, organizations that are subject to registration, disclosure or other requirements must apply the definitions under the applicable laws, which may require tracking and reporting other types of activities.

3.2

When determining if lobbying constitutes a “substantial part” of an organization’s activities (as referenced in [Section 2.2](#)), the IRS would consider all relevant facts and circumstances, including without limitation, the time (by both compensated and volunteer workers) and expenditures devoted to the activity. Habitat for Humanity International generally advises keeping any lobbying below 5% of activities and expenditures. Alternatively, an affiliated organization could use an “[expenditures test](#)” by making a 501(h) election by filing a form with the IRS. Affiliated organizations are strongly encouraged to seek the advice of legal and tax advisers with expertise of tax-exempt entities when determining whether their lobbying activities constitute a “substantial part” of their activities and whether to make the 501(h) election.

3.3

For affiliated organizations that have not made a 501(h) election, volunteer activities supported or organized by the organization should be considered activities of the organization. For example, if an organization recruits volunteers to distribute flyers asking members of the public to call their representatives and urge them to vote a certain way on a proposed piece of legislation, this would be considered grassroots lobbying.

4.0 Rationale

Advocacy enhances Habitat for Humanity’s ability to carry out its mission, vision and strategy. Advocacy is a powerful strategic tool that has the potential to drive transformative changes and increase impact in communities, nationally and on a global scale. Habitat for Humanity’s vision of a world where everyone has a decent place to live will be furthered when we lift our collective voices through aligned, coordinated advocacy efforts, in addition to our home-building strategies.

Supporting resources

- [U.S. Advocacy collection](#)
- [Advocacy activities](#)
- [Advocacy Affiliate Operations Manual](#)
- [Guidance Memorandum: Lobbying and 501\(c\)\(3\)](#)
- [State definitions of “Lobby” and “Lobbyist”](#)
- [Engaging in elections](#)
- [Guidance Memorandum: IRS Restrictions on Political Activities](#)
- [Measuring lobbying: Substantial part test](#)
- [Measuring lobbying activity: Expenditure test](#)

1.2.2. Advocacy principles

Across our global network, we follow several advocacy principles that guide how Habitat engages in advocacy everywhere, local to global. Our principles are consistent with Habitat's core values of courage, humility and accountability and shape the character and boundaries of our advocacy engagement.

- **Network-aligned:** What one Habitat entity does has ripple effects on other entities. It is important that Habitat organizations ensure that their policy positions are aligned with global, regional and national agendas and that they will not harm other Habitat entities.
- **People-centered:** Advocacy processes are inclusive, prioritizing and incorporating the needs, experiences and voices of individuals and their communities, including women and vulnerable groups.
- **Contextually adaptable:** Habitat recognizes that communities around the world have different and unique needs. Rather than addressing a need the same way across all contexts, Habitat for Humanity contextually adapts advocacy tactics and policy solutions that consider variations in specific circumstances and can be tailored to more effectively meet the needs of particular communities.
- **Courageous:** As a leader in the global housing community, Habitat has a responsibility to use its voice to advocate for better outcomes for the people we partner with around the world. Taking into account local context, Habitat should not avoid taking strong policy positions that urge governments to take action to increase equitable access to adequate, affordable housing.
- **Nonconfrontational:** Habitat is not confrontational in its advocacy. This does not mean Habitat for Humanity is averse to taking controversial positions, but the manner in which those positions are voiced and explained is important. Rather than using conflict as an advocacy strategy, Habitat works to create meaningful conversations and increase government accountability by promoting evidence-based understanding and knowledge-sharing.
- **Outcome-focused:** Outcomes of collective advocacy activities must contribute to sustainable, long-lasting change that equitably benefits individuals, neighborhoods and communities.
- **Evidence-based:** Research and background information from multiple sources are used to inform advocacy work and to understand the broader implications of the related facts and figures.
- **Nonpartisan:** When building relationships and directly engaging with the government, Habitat's advocacy efforts should be nonpartisan. They should be issue-focused, not focused on promoting candidates or specific political parties.
- **Housing-oriented:** Addresses policies and systems that directly impact housing's components, including habitability, affordability, secure tenure and basic services.
- **Program-oriented:** Habitat's advocacy and direct service programs should inform each other. Learning from issues affecting the families with whom Habitat works directly strengthens the overall effort.
- **Market-oriented:** Habitat recognizes the critical nature markets can play in getting housing solutions to scale. At the same time, Habitat recognizes that housing can't be addressed through market solutions alone and that public policies and governments must create enabling environments for markets to work and provide resources to support those most in need.
- **Coalition-oriented:** Changing systems and policies is very difficult to do alone. Whether coordinating with local community leaders or national platforms, Habitat joins, participates in and leads coalitions, informal and formal, to achieve advocacy success.

By living out these principles, we ensure our advocacy is both consistent with our values and responsive to the public policies, systems and communities that shape our housing landscape.

1.2.3. Habitat Voices in Action

Real change depends on a groundswell of advocates pursuing a common agenda.

Achieving Habitat's vision requires the involvement and commitment of the right combination of stakeholders in a community, supported by local, state and federal policymakers.

Habitat Voices in Action is the unifying identity for Habitat's advocacy across the United States, aligning our diverse network around shared priorities to achieve greater impact. Under this banner, we come together as one network — affiliates, affiliate support organizations and Habitat for Humanity International — to drive public policy and system changes at every level of government, so that affordable housing is within reach for more individuals.

All U.S. Habitat entities are strongly encouraged to integrate in advocacy as a core part of their operations, as each organization has a role to play in Habitat Voices in Action. As a guideline, affiliates lead locally, affiliate support organizations lead statewide, and Habitat for Humanity International leads nationally. In circumstances where there is no affiliate support organization, affiliates can coordinate statewide advocacy efforts. These roles depend on coordination and mutual support: sharing knowledge and resources, providing training and technical assistance, and amplifying local voices so that together we speak with one strong, trusted voice. Habitat's [U.S. National Policy Platform](#) provides a unified direction for the entire Habitat network by outlining our promising public policy themes that promote affordable homeownership. Developed with input from affiliated organizations, it provides strategies to advance affordable homeownership at the local, state and federal levels. The platform is built around three pillars to promote affordable homeownership:

- Increasing affordable homeownership **supply**.
- Ensuring equitable homeownership **access**.
- Improving homeownership **resilience**.

The policy platform also speaks to other issues of importance to Habitat, such as addressing needs across the housing continuum, supporting the nonprofit sector, and taking global action on inadequate housing and informal settlements.

Each pillar includes public policy solutions with relevance to communities small and large, urban, suburban and rural. These pillars and public policy solutions may be explored and implemented differently in every community, as the platform is intended to be a flexible framework to identify and prioritize public policy actions that address housing affordability in your area.



1.2.4. A path to greater impact on housing

While the U.S. National Policy Platform defines our collective public policy interests, [A Path to Greater Impact on Housing](#), sometimes referred to as “the pathway,” illustrates how we, as a network, work to influence those interests. The pathway outlines a shared approach to conducting advocacy across the Habitat network. It highlights the activities, resources and engagement needed to advance housing policy solutions in communities across the country. Together, these two guiding documents provide a national strategy for our U.S. advocacy under the banner of Habitat Voices in Action.



How to understand and use the pathway as a tool

The pathway is designed to unify and guide Habitat's advocacy efforts to address housing challenges nationwide and identify opportunities for continued growth. It is intentionally built to be a common but adaptable structure that supports affiliates and affiliate support organizations in implementing advocacy within their specific contexts and capacities. This manual serves as its companion, offering practical guidance for putting the pathway's strategies into action. The recommendations included are offered as a starting point, acknowledging that your affiliate or affiliate support organization is in the best position to determine which public policies and approaches will meet your community's needs.



2. Engaging in advocacy at your organization

Organized around the five network-proven advocacy tactics outlined in [A Path to Greater Impact on Housing](#), the following sections provide practical guidance for affiliates and affiliate support organizations to engage in advocacy as a core part of Habitat's work.

Although presented separately, the tactics below complement and reinforce one another, working together to advance housing affordability in the communities Habitat serves. Advocacy is rarely a linear process. It is iterative, dynamic and participatory, adapting to constantly changing circumstances and new insights. Recognizing that each organization has unique strengths and priorities, the guidance is designed to help build skills across all five areas in ways that feel achievable and aligned with local goals. The breadth of activity for each tactic is scalable, allowing organizations to apply them in ways that align with their specific circumstances and fit their capacity.



2.1. Advocacy planning and implementation

2.1.1. Developing a plan to advance your public policy goals

Developing a plan of action is a key first step for any advocacy initiative and supports the intentional use of the five tactics covered in the following sections. The planning steps outlined below help establish a road map for your advocacy while remaining flexible enough to respond to emerging opportunities. The sections of the manual that follow provide tools and strategies to further guide both the development and implementation of your advocacy plan.

Centering diverse and impacted communities in the policymaking process

At every stage of advocacy planning and implementation, it is essential to engage diverse and impacted communities as partners in shaping solutions. From identifying issues and setting goals to designing strategies and evaluating outcomes, those most affected by the lack of housing affordability or other barriers to accessing housing should be recognized as leaders and drivers of advocacy efforts.

Involving impacted communities in decision-making helps ensure that public policies are equitable, responsive to real needs and priorities, and informed by a range of perspectives, including those historically excluded from policymaking.

Steps to advocacy planning

1. Identify the key public policy issue.
2. Determine the desired outcome or goal.
3. Identify targets.
4. Develop the key message.
5. Build your team.
6. Design a strategy.
7. Monitor progress and evaluate results.

Power mapping

Power mapping is a strategic exercise that helps assess connections to stakeholders when planning advocacy around a specific issue. It can inform multiple aspects of your advocacy strategy, including building relationships with policymakers, mobilizing supporters, identifying allies and building coalitions. Because it highlights relationships and influence across your network, it can be applied wherever understanding connections strengthens your approach.

Resource

Use [these power mapping templates](#) from the Midwest Academy to analyze stakeholders when planning advocacy efforts.

2.2. Developing solutions to housing needs

Understanding local needs and opportunities is the foundation for developing effective housing policy solutions. This process involves listening to residents most affected by housing challenges, analyzing data to uncover gaps and disparities, and learning from successful approaches in other communities. With this insight, you can explore potential public policy solutions, engage partners and stakeholders, and define clear priorities that guide your advocacy efforts.

Thinking about developing housing solutions in stages can help structure your planning and build momentum:



2.2.1. Understanding housing needs, systems and legacies of racially discriminatory policies

Effectively addressing housing challenges requires an understanding of how housing systems function, whom they serve and where they fall short. Across the U.S., rising costs, limited supply and uneven access to opportunity have deepened disparities in who can secure stable, affordable homes. These challenges are shaped by market forces and public policy decisions that influence where resources are invested, what types of housing are built, and which communities have access to infrastructure and economic opportunity.

Without an intentional focus on equity, housing solutions risk perpetuating disparities, such as those stemming from legacies of racially discriminatory policies that continue to shape current housing conditions. Public policies like redlining, exclusionary zoning and discriminatory lending have historically limited opportunities for underrepresented communities to build wealth, secure stable housing and access neighborhood resources. These legacies persist today in patterns of segregation, unequal homeownership rates and concentrated poverty.

By viewing housing issues through a systems lens and accounting for inequities, advocates and decision-makers can design solutions that:

- Address structural barriers instead of inadvertently reinforcing them.
- Prioritize equity by focusing solutions and public policy changes on the communities most affected.
- Design interventions that are responsive to community needs.

Applying this lens promotes fair and just housing solutions that expand equitable access to safe, affordable homes for all community members.

Resource

Resources to [learn more about housing equity](#) can be found on MyHabitat.

2.2.2. Partnering with impacted communities to develop solutions

Engaging residents directly impacted by housing policies is central to developing meaningful solutions. When communities are active partners, public policies are informed by lived experience and shaped by those most affected by them. This might include Habitat homeowners and applicants, homeowners getting help with repairs, or participants in neighborhood revitalization programs. Advocacy often affects populations beyond those directly served by Habitat, so it's important to engage broader groups of community members in the policymaking process as well.

Key steps to partnering with communities

- **Build relationships** to establish trust and open lines of communication.
- **Listen** to understand community needs and aspirations.
- **Engage** early and often to identify critical issues and potential solutions.
- **Co-create** public policy recommendations.

Practical tip

To expand community engagement, seek to partner with organizations that work closely and have already established trust with impacted populations.

2.2.3. Conducting research to identify housing issues and solutions

Conducting research helps create a clear picture of local housing conditions, highlight gaps, and assess the effectiveness of existing public policies. It is also a critical step in developing solutions once housing needs are identified. **Qualitative** information from community members, partners and other stakeholders sheds light on key issues and their root causes, while **quantitative** data provides measurable evidence. Together, these methods create a comprehensive understanding that grounds your advocacy in facts and strengthens your case.

Understanding and assessing housing needs and opportunities

Before identifying solutions, it is essential to assess the needs, barriers and challenges residents face in accessing safe, affordable homes and to recognize what may be working that could be built upon. Engaging community members throughout this process is key to understanding the issues that matter most to the community.

Start with a needs assessment

When beginning to explore local housing conditions, a needs assessment is a practical and scalable starting point. Whether your team is small or large, you can adapt your approach to gather fewer or more insights in ways that match your capacity.

A housing needs assessment includes qualitative and quantitative data on:

- Demographic and economic characteristics.
- Current housing inventory.
- Status and demand of existing community services and government programs.
- Promising public policies being considered or implemented.
- Potential partners and people already working to advance housing solutions. Input from various members of the community, such as residents, business leaders, faith communities, educators, etc.

This information provides the basis for housing solutions that respond to the needs of current and future residents.

Resource

The [Local Housing Solutions needs assessment tool](#) can provide a quick initial analysis of your community's housing data, helping you explore local housing challenges and opportunities.

Resource

Visit MyHabitat for [recommended tools and resources](#), including:

- National reports from leading housing experts.
- State Fact Sheets that describe affordability challenges and the housing supply shortage in each state, D.C., and Puerto Rico.
- Ideas for where and how to access local data sources.

Researching housing solutions

Once you understand your community's housing needs and assets, researching potential solutions helps identify approaches that can effectively address challenges or build on opportunities. Exploring strategies that have worked in other communities can help you determine what might work best in your local or state context.

Engaging community partners and other nonprofits

Other nonprofits, residents and stakeholders can be allies and contributors in all aspects of the advocacy process. A starting point for engaging community partners can be soliciting input from partners, coalitions and community organizations that can provide valuable context on how public policies interact with local rules and dynamics. This is particularly important when considering how housing policies may affect other sectors, such as health and education. By consulting with partners, Habitat organizations can better prioritize solutions that are both feasible and responsive to the unique needs of their communities while building cross-sector support.

Resource

Visit MyHabitat for tools to help you research solutions, including [Habitat's State and Local Policy Solutions collection](#).

2.2.4. Establishing public policy priorities

After identifying housing needs and possible solutions, narrowing your focus to a few key issues can help your organization have the greatest impact. Starting with a singular or small set of achievable goals allows organizations with varying staff sizes to drive meaningful results. Concentrate efforts where you have capacity and influence to ensure your advocacy is strategic and aligned with the most pressing community needs.

A **policy priority** describes the specific change you are seeking, such as enacting a new public policy or changing an existing law. For example, your organization might set a policy priority to promote equitable land use and zoning policies in your city. Setting clear priorities provides a road map for your advocacy, aligning your staff and leadership around common goals.

Resource

Visit MyHabitat for [detailed guidance on developing a public policy agenda](#), including templates and network samples.

Internal and external factors to consider when selecting policy priorities

- **Potential impact and mission alignment:** Will progress produce measurable results that advance Habitat's mission?
- **Timeliness and achievability:** Is there opportunity to move this forward now and is the goal realistic given current conditions?
- **Public policy landscape:** Is there a current political window that makes this issue viable?
- **Community support and advocacy potential:** Can stakeholders be mobilized to support this priority?
- **Organizational capacity:** Do you have the staff, expertise and resources to act?
- **Coordination with affiliates, coalitions and other organizations:** Can you align with other organizations to strengthen impact?

2.2.5. Taking positions on issues

Policy priorities set the direction for your advocacy, while **policy positions** define your organization's stance on a specific issue. Positions indicate how your organization will approach proposals, decisions or challenges and may be proactive (driving new public policy efforts) or reactive (responding to others' proposals). For example, if your policy priority is to

promote equitable land use and zoning policies, then you might take a position opposing a restrictive city zoning ordinance that limits affordable housing development.

When to take a policy position

- When an issue directly affects your policy priorities and your stance can influence outcomes.
- If there is opportunity to proactively advance your policy priorities, such as during legislative sessions, public comment periods or major planning efforts.
- When there is sufficient clarity. Avoid taking positions if facts or consequences are unclear until research and stakeholder input are gathered.

Key considerations when taking a policy position

- **Approval process:** What internal steps are needed to formally adopt a policy position? Refer to the [HFHI Policy Position Adoption Process](#) as an example.
- **Alignment with Habitat's common public policy objectives:** Does this position support the collective goals of the Habitat network? Consider state and local policy issues along with the federal policy issues included in [Habitat's U.S. National Policy Platform](#).

How to take a position

1. **Review your public policy agenda.** Ensure that the position advances your established policy priorities.
2. **Gather information.** Use research, data and input from staff members, stakeholders and affected community members to inform the position.
3. **Assess impact and feasibility.** Determine whether the policy position is achievable, impactful and aligned with Habitat's advocacy principles.
4. **Establish your position and communicate it strategically.** Document and share your position with policymakers, partners and the public to support your organization's advocacy efforts.

Report your policy positions for collective impact

As your organization takes positions on public policy issues, remember to report them on the Affiliate Statistical Report or the Supplemental Affiliate Support Organization Survey.

Resource

Learn more about [advocacy reporting](#) on MyHabitat.

2.3. Connecting with policymakers

Policymakers set the laws, public policies and funding decisions that shape our communities. They include elected officials, government agency staff members, appointed committees, regulators, and others with the authority to create, modify or enforce housing-related policies and systems.

Engaging policymakers at the local, state and federal levels provides an opportunity to highlight community housing needs, demonstrate the impact of Habitat's work and propose meaningful solutions. Effective engagement involves building ongoing relationships, making specific asks to advance policy priorities, and positioning Habitat as a trusted resource on housing issues.

Before engaging with policymakers, affiliated organizations should consult with other members of the Habitat network that could be affected by the advocacy efforts.

2.3.1. Building relationships with local, state and federal policymakers

Communicating with policymakers often focuses on specific public policy goals, but building relationships can and should start before you have a formal “ask.” Your organization may already be engaging with policymakers in small, informal ways that feel like everyday relationship building rather than advocacy. This is especially true in rural areas and small towns where close-knit community connections are part of daily life. Introducing yourself, creating connections and sharing your community’s housing story lays the groundwork for meaningful interactions when public policy needs and opportunities arise.

Understanding policymakers across levels of government

Legislators, such as city or town council members, state representatives, and members of Congress, create and vote on laws. Agency or regulatory officials interpret and implement those laws through programs, funding mechanisms and administrative rules. Advocacy with legislators often focuses on influencing legislation, budget priorities or resolutions, while engagement with agencies and regulatory bodies may center on how public policies are carried out, funded or enforced. Both play essential roles in shaping housing outcomes and benefit from Habitat’s perspective as a trusted community partner.

When engaging at various levels of government, it helps to understand key distinctions between local, state and federal policymakers and how they may impact one another. For example, in Dillon’s Rule states, local governments only have powers that the state government explicitly grants them.

Local officials	State officials	Federal officials
• Are a frequent presence in the community and are often easy to connect with through community events and direct outreach. • Focus on local policies, budgets, regulations and programs affecting the community.	• Have a moderate presence across districts and are typically engaged via district offices, public meetings and state advocacy events. • Focus on statewide laws, policies, regulations and budget priorities.	• Have limited direct presence locally and are primarily engaged through staff members or district offices. • Focus on national laws, regulations, programs and funding decisions.

Practical strategies for engaging policymakers

Getting to know your policymakers

The first step in gaining support for your policy priorities is getting to know those who have authority to change public policies and systems. Researching policymakers before reaching out helps you understand their priorities, values and past actions. This allows you to tailor your message in a way that resonates with them but also keeps your expectations for the conversation realistic. For example, if your policymaker already cares deeply about housing, they might be eager to champion your issue; if they have little history of supporting home affordability, you might need a different approach to build your case. It can be helpful to highlight intersections with other priorities, such as education, economic development or community health, to connect the message to their existing interests. Being prepared in this way sets you up for the most productive conversation possible. The following tips can help you get started:

- Review backgrounds, committee memberships, key issues and prior positions or campaign platforms on housing.
- Follow them on social media and note what they post about.
- Keep up to date with their office by joining their mailing list.
- Introduce yourself via email or at community events.
- Check with your board of directors and staff for any existing connections.

Monitoring key public policy opportunities

Meeting with policymakers during key points in the year, such as budget processes, legislative sessions or other important public policy discussions, can make your advocacy more effective and timelier. Simple ways to stay informed about these opportunities include:

- **Checking city and county websites** for council, commission or committee sessions with agenda items that pertain to your policy priorities.
- **Reviewing state legislative calendars** on your legislature's website to track session schedules when key public policies are being considered.
- **Following policymakers' communications** through mailing lists or social media channels for updates on votes, hearings and events.
- If applicable, **signing up for your affiliate support organization's newsletter** to receive updates and opportunities to engage with state policymakers.
- **Regularly reviewing the [U.S. Advocacy collection on MyHabitat](#)** for information on federal engagement opportunities.

Setting up meetings with policymakers

At all levels of government, face-to-face meetings are an effective way to communicate the most critical issues to your affiliate or affiliate support organization. Contact your policymaker's office by phone or email to request a meeting. Clearly state the purpose of your meeting, including the issue you want to discuss and how it relates to your work. Meetings with staff members can be equally valuable, as public policy staff members often hold influence and play a central role in shaping policy decisions.

Once you have a meeting scheduled, planning your agenda and deciding on speaking roles (if others will attend with you) will help ensure the conversation flows smoothly. During the meeting:

- **Introduce yourself** and the purpose of the meeting.
- **Present the problem and explain why it matters to you** using data or community examples.
- **Make your ask** using no more than three main points.
- **Leave materials** to support your ask.
- **Thank policymakers** and take a photo (with permission).

Tracking engagement with policymakers

Keeping track of interactions with policymakers helps maintain continuity, reference past conversations and coordinate with colleagues who also may interact with the same policymaker. Consider:

- **Documenting every engagement.** Note meetings, calls, emails, event invitations or other touchpoints. Include the date, attendees, topics discussed and follow-up actions.
- **Using a tracking system**, such as an Excel spreadsheet or, for larger teams, a CRM — customer relationship management system — or advocacy-specific platform to maintain a centralized record.

Resource

Use this [sample meeting request](#) as a starting point for scheduling with your policymaker's office.

Inviting policymakers to Habitat events

Inviting policymakers to a build site, home tour, dedication or other event offers a firsthand look at Habitat's work in action. These experiences are an effective way to demonstrate our impact and motivate policymakers to support public policies that expand housing opportunities. In addition to elected officials, consider including agency and regulatory representatives whose programs intersect with your work. These relationships are often instrumental and can be strengthened through engagement in community celebrations. When deciding whether to host your policymaker:

- Consider your goals for the visit and what you want them to take away. Does the event align with your public policy goals or a specific policy ask?
- Ensure coordination across the Habitat network to maintain a unified approach.
- Take timing into account. Is there adequate lead time for scheduling and logistics?
- Consider the audience, location and format of the event. Will it allow the policymaker to engage meaningfully?

Example event ideas include:

- **Build site visits or home tours:** Invite policymakers to visit a build site or tour completed homes.
- **Legislative build days:** Organize a bipartisan volunteer day where policymakers work side by side on a new build or home repair.
- **Established events:** Extend invitations to home dedications, groundbreakings or other community celebrations to engage policymakers and leverage the work you're already doing. In addition to in-person events, consider inviting them to other virtual events or programming, such as a podcast or online webinar.

Engaging with candidates before they become policymakers

Elections offer a prime opportunity to engage with future policymakers, ensuring they understand the need for increased access to affordable homes and elevating the solutions Habitat supports. Activities might include:

- Engaging candidates on social media about their housing positions.
- Asking housing-related questions at town halls.
- Inviting candidates to Habitat events.
- Circulating questionnaires to gauge positions on housing issues.
- Presenting public policy solutions supported by Habitat.
- Hosting a candidate forum.
- Planning voter registration drives.

Learn the rules before getting started

- When engaging in elections — and especially with candidates — nonprofit organizations must take care to remain nonpartisan and unbiased in favor of or in opposition to a particular candidate or political party. For example, if you are inviting a candidate to an event, all candidates must be included to remain nonpartisan.
- **Before engaging with candidates, refer to the [Learn the Rules](#) page of the Engaging in Elections toolkit for detailed information on staying nonpartisan.**

Resources

- Visit MyHabitat to [explore examples of how network members have included policymakers](#) in their events.
- Planning to host a site visit or event? Visit MyHabitat for [helpful resources to get started](#).

Resources

Guidance on these activities for candidates and newly elected officials, including planning tips and templates, can be found in the [Engaging in Elections](#) guide. This resource also spotlights examples from the Habitat network of [candidate engagement](#) activities.

2.3.2. Making asks of policymakers and monitoring outcomes

As you strengthen relationships with your policymakers, developing thoughtful “asks” will help move your policy priorities forward. An advocacy ask is a specific request you make of a policymaker to take concrete action, whether that’s supporting legislation, allocating funding, voting against a harmful measure, etc. It’s the outcome you want from your engagement. An effective advocacy ask is clear, compelling and realistic. It tells a policymaker exactly what you want them to do, why it matters and how it affects the people they represent.

When developing your ask

- Understand your policymaker’s role, responsibilities and how much decision-making power they have.
- Tailor the ask to the specific decision maker you are trying to reach.
- Share how it directly affects the policymaker’s constituents.

Lobbying and reporting requirements

As 501(c)(3) nonprofits, affiliated organizations must track any lobbying activities to ensure they remain an “insubstantial part” of their work (or fall within the 501(h) expenditures limits, if elected), and to comply with any applicable state or federal registration requirements. Organizations might also need to report these activities on Form 990.

It’s important to note that lobbying is always advocacy, but not all advocacy is lobbying! For help understanding what constitutes lobbying and the related reporting requirements, see [Policy 1: Advocacy](#).

Key elements of delivering a compelling ask

- **Engage your audience.** Open with a compelling statement or fact that grabs attention.
- **State the problem.** Describe the scale of the problem, whom it affects and why it matters.
- **Personalize the issue.** Share a personal story, data point or community example to show how the public policy affects you and the people you serve.
- **Make the ask.** Clearly state what you want the policymaker to do and offer a specific solution. Your ask should be directly related to your policy priorities.

Example ask

In *[your community]*, we are facing an estimated shortage of *[number]* homes attainable for low-and moderate-income homebuyers. This shortage affects *[who it impacts, e.g., teachers, essential workers, seniors]*, causing them to face difficult choices between housing and other basic needs such as food, health care and child care. At *[your Habitat organization]*, we’ve seen firsthand how access to stable housing changes lives *[brief homeowner or community example]*. That’s why we’re asking you to *[specific ask, e.g., vote a certain way on upcoming legislation, co-sponsor an ordinance or legislation, support funding for a program, etc.]*. This action would *[describe benefit, e.g., create access to more affordable homes, increase existing homeowners' ability to stay in their homes, etc.]*.

Tip

Keep it focused and concise! If you are delivering your ask in person, your policymaker may have 15 minutes or less to meet with you.

Following up after your ask

After delivering your ask, follow up with your policymaker to restate your position and increase the likelihood of them taking action.

Suggested steps for following up:

- Send a thank-you email after the engagement.
- Restate your ask, attach a leave-behind and include any additional information needed.
- Include your contact information in case the office needs to reach you.
- Post a thank-you for meeting on social media, mentioning the policymaker by name and tagging them when possible.
- Follow up with another meeting or phone call when appropriate.

Crafting a leave-behind

A leave-behind is a one-page document that summarizes a public policy ask and provides relevant supporting data. Leave-behinds are typically shared with policymakers or their staff after a meeting to ensure they have an overview of your request to reference for later. A well-crafted leave-behind typically includes:

- Your public policy ask at the top or emphasized within the document so that it's easily visible.
- A brief description of the problem or issue you seek to address.
- Key data, research or personal stories to support your ask.
- Highlights of Habitat's work for context and to demonstrate impact in the community.
- Contact information so that the policymaker's office can be in touch as needed.
- Clear headings, bullet points and visuals for quick scanning.

Resource

[Example leave-behinds](#) developed by members of the network can be found on MyHabitat.

Monitoring outcomes

Tracking your policymaker's actions can help you determine whether your advocacy was successful and let you know when you might need to follow up about your ask. You can:

- Reach out to the policymaker's office to check in about the status of your request.
- Monitor how they vote on your issue.
- Track their public statements to see if they align with commitments made during your meeting.
- Thank them when they take positive action.

Maintaining the relationship

Once you have developed a relationship with your policymaker, consider reaching out to them to maintain this relationship, even when you don't have a specific public policy ask. For example, you could send your policymakers a letter when a new Habitat homeowner moves into their district to let them know they gained a new constituent.

2.3.3. Positioning Habitat as a thought leader

When Habitat is regarded as a thought leader in the community, decision-makers actively seek our counsel and perspective because they recognize us as experts on housing. By sharing knowledge, providing data and serving as a reliable resource, we can establish Habitat as a leading voice on housing issues. Positioning Habitat as a thought leader helps advance access to affordable homes by providing policymakers with the information and expertise needed to make informed decisions.

Giving legislative testimony

Giving testimony at a hearing or other public meeting is a powerful way to convey your perspective on housing issues directly to policymakers, while also delivering your message to the broader audience.

Tips for preparing legislative testimony

- Check meeting protocols beforehand. If attending a public hearing, you might need to sign up to speak. When it's your turn, be sure to address the governing body correctly and adhere to time limits for speaking.
- Understand the policymakers' stances to tailor your message and anticipate questions.
- Draft a written statement of your position to give to policymakers and/or refer to during the meeting. Depending on the committee, there may be requirements for how to submit your written testimony.

Example outline for legislative testimony

1. Introduce yourself and your position on the issue under consideration.
2. Tell a compelling story to illustrate your point and personalize the issue.
3. Share one or two additional points to back up your position, citing experience, statistics or research.
4. Make a clear ask or recommended action in support of your position.
5. Thank the policymakers for their consideration of your request.

Resource

Visit MyHabitat to find a [template for developing legislative testimony](#), along with network examples.

2.4. Partnering with the community

Partnering with the community involves working together with community members, partners and organizations to advance shared priorities. This includes attending meetings where housing decisions are made, centering diverse and impacted communities, and participating in or convening coalitions to influence collective public policy goals. These activities are scalable, and organizations can prioritize the most impactful opportunities that fit their capacity.

These efforts strengthen advocacy by building relationships, amplifying underrepresented voices and creating opportunities for coordinated action. By embedding community perspectives into policymaking and working collaboratively with partners, we can increase Habitat's influence, align on shared goals and drive systemic change that reflects the needs and expertise of the communities we serve.

2.4.1. Attending housing meetings

Attending meetings where key housing issues are being discussed is a practical strategy for Habitat organizations to join the community conversation. Participating in these convenings allows you to:

- Build understanding of local housing issues, public policies and priorities.
- Connect with others active in the space (community members, advocates, partners and policymakers).
- Identify opportunities for future collaboration and engagement.
- Ensure that Habitat's perspective and expertise are represented, helping to shape housing-related discussions.

Types of meetings where housing decisions are made

- **Nonprofit or advocacy network gatherings:** Connect with other organizations working on housing, share knowledge, and identify coalition opportunities.
- **Task forces or advisory committees:** Observe or participate in working groups focused on affordable housing.
- **Town, city or county council meetings:** Hear debates and decisions on local housing policies, zoning, budgets and development projects. Share your perspective and highlight Habitat's work during public comment periods as appropriate.
- **Neighborhood or community association meetings:** Understand residents' concerns, priorities and local perspectives on housing issues.

2.4.2. Ensuring that diverse and impacted communities have a voice in policymaking

Engagement with diverse and impacted communities in policymaking should go beyond outreach and consultation, creating space for genuine decision-making power in shaping the public policies that affect their lives. This requires recognizing and addressing common pitfalls that can limit participation or reinforce existing power imbalances.

The chart below illustrates a shift in mindset and practice, outlining how community engagement can evolve from transactional interactions to a participatory approach.

Transactional approach	Participatory approach
Reach out to community groups only when we need them.	Reach out regularly to community groups as equal stakeholders.
Collaboration is short-term and issue-based.	Collaboration is built on long-term relationships.
Wait for the community to come to us.	Go to the community and meet them where they are.
Tell the community about our issues and concerns.	Listen and incorporate community issues and concerns into our public policy agendas.
We are the experts and develop proposals for change on our own.	Community members are experts, too, and we develop proposals together.
We hold power locally and at the state level.	Use our position to help communities build and share power.

Source: Chart adapted from the [American Federation of Teachers Paradigm of Community Engagement](#)

Resource

Visit MyHabitat for [more resources and guidance](#).

Scalable examples of involving impacted communities in advocacy

Community partnership can take many forms, depending on your organization's capacity, relationships and local context. The ideas below are not exhaustive but illustrate how engagement can grow over time from initial involvement to shared leadership and long-term collaboration.

Foundational engagement	Collaborative involvement	Shared leadership
Build awareness, relationships and trust within the community. • Invite community representatives to speak at Habitat events or meetings. • Gather feedback through surveys, listening sessions or informal conversations to understand housing challenges. • Get to know organizations and individuals who are trusted among the communities that you are seeking to engage in, and ask them about their housing concerns, needs and priorities.	Deepen participation and create opportunities for shared problem-solving. • Engage community members in advocacy planning, inviting input on policy priorities and strategies. • Partner with community advocates to elevate personal experience in outreach to policymakers.	Develop sustained partnership and shared decision-making. • Establish community advisory groups to guide advocacy priorities and strategies. • Support training and other initiatives that strengthen the advocacy skills of community members.

Supporting community participation

To build authentic partnerships, Habitat organizations may first need to understand and address barriers to participation. Providing practical support can make engagement more feasible and help participants feel prepared. Examples include:

- **Offering stipends** for time and expertise.
- **Supplying meals** during their engagement.
- **Providing transportation or child care** to reduce logistical barriers to participation.
- **Securing interpretation and translation services** so everyone can fully engage.
- **Preparing participants in advance** (if desired) for meetings or public testimony, including explaining the process, providing templates, etc.
- **Considering timing of events and meetings** to accommodate varied schedules. Meetings during business hours may not work for everyone.
- **Providing community advocacy training** so that participants feel confident in their advocacy skills and can carry the message themselves.

Embedding community engagement into organizational operations

In addition to supporting community member participation, engagement is more likely to succeed when it is intentionally planned in an organization's operations. Strategies include:

- **Budgeting** for stipends, transportation, child care, language interpretation and other supports, and understanding employment and tax law implications (e.g., providing 1099 forms if stipends exceed the relevant threshold).
- **Setting up dedicated lines of communication**, such as an advocacy listserv or email group to keep community members informed and involved.
- **Integrating community engagement** into staff roles and planning, ensuring that it is part of work plans, meetings and organizational priorities.
- **Establishing participatory evaluation processes** to actively involve community members in the evaluation of advocacy efforts.

2.4.3. Participating in and convening coalitions

Coalitions bring together organizations, community groups and other stakeholders to amplify shared policy priorities and strengthen advocacy efforts. Coalitions can help ensure that policymakers hear from multiple sectors in the community — business, education, economic development, the workforce and more.

By joining or forming a coalition, your organization can:

- **Build collective power.** A unified voice is more likely to influence policymakers.
- **Leverage diverse expertise.** Members contribute a range of knowledge, from public policy analysis to grassroots organizing to lived experience.
- **Expand reach.** Coalitions engage broader audiences and strengthen relationships with new partners.
- **Share resources.** Members can exchange data, research and communication tools, reducing duplication of effort.
- **Spread political risk.** Speaking out on sensitive issues carries less risk when responsibility is shared across multiple organizations or groups.
- **Sustain momentum.** Regular collaboration helps maintain focus on long-term public policy goals, even when individuals and organizations face changes in capacity or leadership.

Quick tips for getting started with coalitions

- Look for existing coalitions in your state or community that align with your housing priorities and attend a meeting (e.g., housing justice networks, affordable housing alliances).
- If none exist, consider forming one. Start by bringing together trusted partners, setting clear goals, and agreeing on roles and decision-making processes.
- Be intentional about inclusivity. Ensure resident voices, grassroots organizations and underrepresented groups are part of the coalition from the beginning.

Resource

Visit MyHabitat for [additional guidance and considerations](#) on how to join or form a coalition.

Levels of coalition participation

The level of participation in coalitions will vary depending on your organization's needs and advocacy engagement. There is a spectrum of coalition involvement, which may vary across different coalitions your organization may be a part of and evolve over time.

- **Active participation:** Attend community meetings where housing is discussed.
- **Collaborative action:** Join and participate in an existing coalition aligned with your housing advocacy goals.
- **Advocacy leadership:** Form or lead a coalition to advance shared housing policy goals.

2.4.4. Leveraging coalitions to advance shared public policy goals

Tips for effective coalition partnerships

Regardless of the structure, the most effective coalitions are those where partners share a common purpose, define roles clearly and maintain open communication. The following practices can make working in coalition more successful.

- **Agree on ground rules,** including decision-making procedures. Are decisions by consensus, majority, led by a steering group, etc.?

- **Focus on shared priorities.** Member organizations rarely align on every issue. Agree to disagree and avoid unnecessary conflicts by concentrating on a common agenda.
- **Clarify roles and responsibilities** based on the strengths and interests of each organization and what they can contribute.
- **Participate actively.** Regularly attend meetings, share your organization's perspective, and contribute to coalition initiatives.
- **Establish clear, measurable goals.** Agree on how progress will be tracked and identify key checkpoints along the way.

Building a shared public policy agenda

1. **Start by setting a collaborative vision.** What common purpose unites the group?
2. **Surface priorities and areas of alignment.** Identify overlapping issues that everyone agrees are important. Acknowledge areas of disagreement, but focus on where consensus exists.
3. **Translate broad goals into concrete public policy targets.** Prioritize specific policy priorities that the coalition can realistically influence given current political, social and organizational contexts.
4. **Develop a plan for coordinated action.** What strategies will the coalition use to advance collective public policy goals?

2.5. Spreading the word

Communicating about housing advocacy helps build awareness, shape public opinion and inspire action. By sharing stories and messages to influence housing issues, Habitat organizations can rally supporters, move policymakers and create momentum for change.

This section provides guidance on how to incorporate advocacy into existing communications, create messaging to advance policy priorities and leverage media to influence key stakeholders.

2.5.1. Advocacy communications

Advocacy communications refers to the strategic use of public messages to influence community members, policymakers and others to invest in a cause or drive public policy change. Communicating publicly about advocacy reinforces Habitat's identity as both a builder and a changemaker, positioning the organization as a thought leader in the housing space.

Well-targeted advocacy communications can also reach new supporters who might not engage with Habitat purely through homebuilding, broadening the organization's network and increasing its influence.

Effective advocacy communications:

- **Define the message:** Keep it simple, fact-based and aligned with advocacy goals.
- **Speak to a specific audience:** Tailor messages to build trust and engagement.
- **Include a clear call to action:** Make it easy for audiences to take one specific step.
- **Are timely and authentic:** Share relevant information and reflect genuine stories.
- **Align with [Habitat's advocacy principles](#):** Keep messages nonconfrontational, collaborative and solutions-oriented.

2.5.2. Incorporating advocacy in your communications plans and speaking engagements

Advocacy can be included in communications by connecting updates about Habitat's day-to-day work, such as building and repairing homes, to the larger housing picture. This might include highlighting home affordability as a key issue, raising awareness about the challenges faced in your community, and pointing to public policy solutions that could address barriers. This approach helps audiences see how Habitat's local impact ties to broader systemic change.

Examples of events and materials that could be leveraged for advocacy

Many Habitat organizations already have established communications channels and opportunities that can be leveraged to incorporate advocacy messages, such as:

- **In-person:** Build sites, groundbreakings, home dedications, fundraisers, community gatherings and Habitat ReStore marketing.
- **Stakeholder meetings:** Volunteer orientations, homeowner education, board retreats, and other gatherings with partners and supporters.
- **Publications:** Annual reports, donor communications and newsletters.
- **Online:** Websites, social media and digital campaigns.

In practice, this can look like:

- Including talking points in remarks at a home dedication that elevate the government programs and public policy changes that helped make the homebuilding or homebuying process possible.
- Highlighting goals and information related to public policy changes on social media and appealing to followers to join advocacy efforts.
- Placing advocacy materials in Habitat ReStores to reach and engage new audiences who might support our mission and vision.

Resource

Visit MyHabitat for [guidance on spreading the word](#) through advocacy events.

Considerations for incorporating advocacy into communications and events

Advocacy communications often differ from general communications, focusing on specific audiences such as voters, community members or decision-makers. When planning advocacy communications, consider:

- **Purpose and objectives:** What is the goal of the communication? What key messages or calls to action are needed?
- **Audience:** Whom are you trying to reach? What appeals to them?
- **Timing and methods:** When is the best time to communicate? Which channels will be most effective?

Leveraging Habitat's brand in advocacy communications

A consistent and emotionally resonant brand helps organizations like ours stand out, grow and strengthen our reputation. Habitat's new [brand platform](#) is informed by significant research to ensure it connects with our primary audiences. For advocacy, you can use the [brand user guide](#) as a flexible tool for presenting a unified, credible voice across the Habitat network, helping our policy messages stand out and carry greater influence.

Person-centered storytelling

Involving community members and homeowners as storytellers and ambassadors helps ensure that advocacy communications reflect community perspectives. Always consider social and cultural context to keep messaging respectful and thoughtful of others' experiences. Providing opportunities for community members to share stories on their own terms, such as through essays, art or video, preserves agency and protects authenticity.

2.5.3. Using communications channels to advance public policy priorities

Leveraging your organization's existing communications channels is an efficient way for teams of any size to share advocacy messages and engage supporters in taking action. The examples below provide ideas for how to do this using a few of Habitat's most common channels, but any platform your organization owns can be employed creatively to advance policy priorities.

Newsletters and email campaigns

- Provide public policy updates, highlight advocacy successes and include clear calls to action, such as contacting policymakers or signing petitions.
- Feature homeowner stories or community examples to illustrate the real-world impact of public policies.

Website

- Offer awareness-raising information on barriers to housing and actionable steps that supporters can take to advance solutions.
- Use blog posts or news updates to spotlight housing policy issues and efforts to address them, such as coalition activities or ongoing campaigns.
- Dedicate a page to your advocacy work and highlight advocacy priorities or public policy issues.

Social media

- Amplify advocacy messages and calls to action quickly and broadly.
- Use visuals, short videos or infographics to make content engaging and shareable.
- Highlight milestones, community stories or upcoming events tied to your advocacy goals.

Sustaining your advocacy communications

Advocacy messages have the greatest impact when they are consistent and sustained over time. Practical ways to sustain advocacy communications include:

- **Sharing consistently across channels:** Post updates, calls to action and stories on a regular schedule.
- **Elevating a range of voices:** Feature homeowners, young people, partners and other stakeholders to highlight multiple perspectives.
- **Connecting to broader communications:** Include the same advocacy messages across newsletters, events and other touchpoints to reinforce key issues.
- **Monitoring and adapting:** Track engagement, audience response and public policy impacts to adjust your messaging for relevance and effectiveness.

2.5.4. Leveraging external media coverage

What is media advocacy?

Media advocacy is the strategic use of mass media to support community organizing and advance public policy initiatives. It involves framing issues, amplifying community voices and engaging stakeholders to influence decision-makers.

When leveraging media for your advocacy efforts, it is important to note key differences from traditional media, as the strategies are not always the same:

Media relations	Media advocacy
Builds brand awareness and public support for the organization.	Creates understanding of systemic issues, motivates action and builds momentum.
Responds to immediate needs or opportunities as they emerge.	Planned in advance as a tactic to advance policy priorities.
Relies heavily on press releases, event announcements, news stories and interviews.	Focuses more on opinion pieces, civic engagement, education and storytelling that connect local needs to public policy solutions.
Reaches a diverse audience through multiple channels.	Addresses a specific audience where they are most likely to see it and take action.

Media advocacy methods

Common formats for media advocacy include:

- **Letter to the editor, or LTE:** Shares perspective on a current issue or event.
- **Op-ed:** Offers a persuasive argument to shape public understanding.
- **Press release or media alert:** Announces advocacy news or events to gain media coverage.
- **Earned media coverage:** Generates news coverage through stories or interviews.
- **Broadcast media:** Reaches broad audiences through TV and radio.

Audience strategies for effective media advocacy

Media advocacy looks different depending on whom you are trying to influence, and it is important to match your strategy to the audience:

- **Public (voters):** Broad media outreach such as press releases, broadcast interviews and social media raise awareness and inspire community support for public policy changes.
- **Policymakers:** More targeted strategies, such as op-eds, letters to the editor or guest columns, frame the issue constructively and reinforce shared goals. These approaches use the media to highlight key issues without appearing confrontational.

What to consider before engaging in media advocacy

Before using media to advance advocacy goals, careful planning ensures your efforts are strategic, effective and relationship-conscious. As a rule of thumb, media advocacy planning should occur three to six months in advance. Your media advocacy plan should include a media outlet list, which can track coverage by topic, spokesperson and outlet.

Consider the following questions:

- What specific public policy objectives are you trying to influence?

- Who are the target audiences (voters, policymakers) and what do you want them to know or do?
- Where is your target audience likely to get their news?
- Who will speak on behalf of your organization and share stories?
- Have all spokespeople, partners and storytellers been vetted, prepared and briefed on confidentiality or safeguarding considerations?
- What existing relationships do you have with journalists or outlets?
- Have media outlets and reporters been researched for relevance and effectiveness and to ensure diverse representation? Are the “who, what, when, where, why and how” established?
- Does the broader team understand the strategy, goals and plan to achieve them?
- Is there a plan for handling misinformation, negative press or unexpected backlash?
- Is the information timely, fact-checked and free from implicit bias or stereotypes?
- Is the tone positive, constructive and nonconfrontational?

2.5.5. Developing materials on housing to educate and influence policymakers

Rather than aiming to inform a broad audience, materials developed for policymakers are designed to provide evidence, context and actionable information needed to understand an issue and consider public policy solutions. These materials are tailored to the audience (concise for elected officials or more data-driven for public policy staff) and can also be shared with community leaders or partners who influence local decision-making.

Formats for this type of content range from concise one-pagers or fact sheets and policy briefs to more interactive materials such as infographics, visuals and videos.

Resource

Visit MyHabitat for [network examples of educational materials](#) for policymakers.

2.6. Motivating supporters to take action

Motivating supporters to take action involves rallying individuals and communities to advocate for public policies that advance affordable housing. Often referred to as “mobilization,” this tactic complements efforts to connect with policymakers and work in coalition by adding collective power to Habitat’s advocacy.

Policymakers are accountable to the people they serve, and when constituents speak out in support of issues they care about, their voices have influence. Habitat’s broad reach and deep community connections make us uniquely positioned to harness the collective power of our supporters, turning their passion for housing into action that drives public policy and systemic change.

By inviting supporters to take action, equipping them as advocates and launching public-facing advocacy campaigns around specific issues, we can amplify Habitat’s influence, demonstrate widespread public support and create momentum that cannot be ignored.

2.6.1. Inviting supporters to take action to advance public policy priorities

Whom to mobilize and how to recruit them

Habitat engages with a wide range of audiences, including homeowners, community residents, volunteers, young people and young professionals, donors, and more. Many already care deeply about housing, making them strong potential advocates. At the same

time, cultivating new advocates can broaden the organization's reach and build long-term capacity by increasing the number of informed advocates ready to take action.

Leveraging your existing network

Organizations can identify those most likely to take action by reaching out to key stakeholders to gauge interest and invite participation. Ideas for engaging current stakeholders in advocacy include:

- Sending broad invitation emails to affiliate lists, such as existing volunteer lists.
- Incorporating advocacy actions or updates during build days or events.
- Sending a survey to an existing list to gauge interest on broader housing issues.
- Partnering with Habitat campus chapters to conduct elections engagement.

Building a list of advocates

As supporters express interest and engage in advocacy, developing a dedicated list of advocates who can be called upon to take action helps you move quickly when opportunities arise. This might involve maintaining a separate email list or, for more advanced tracking, recording advocates' interests and interactions in a CRM.

Expanding to new advocacy volunteers

Advocacy offers an entry point for people passionate about housing who may not be interested in traditional volunteer roles, such as build days. This includes a rising generation of community-minded individuals who are motivated by joining a cause, contributing to a movement or engaging in local activism. By providing advocacy opportunities, Habitat can engage a new segment of supporters while expanding its capacity for public policy change. Examples of ways to recruit new advocates to engage with Habitat include:

- Social media and website promotion.
- Encouraging board, committee and staff members to invite members of their networks to participate.
- Outreach to affected residents via neighborhood groups, canvassing, etc.
- Personal invitations to community leaders or faith groups.

Resource

For more [in-depth guidance on activating supporters to take action](#), visit MyHabitat.

Meeting advocates where they are

Not everyone will engage in advocacy in the same way or to the same degree. In general, about 10% of overall supporters may participate in advocacy, and only a small percentage will be deeply engaged ambassadors.

The key is to match advocates with opportunities that fit their level of engagement. For example, quick online actions might be best for infrequent participants, while highly engaged advocates may participate in meetings with policymakers or take on leadership roles.



Ladders of engagement

One way to manage this process is by considering a ladder of engagement to show how advocates can progress from smaller to larger actions. By meeting advocates where they

are, Habitat can guide them to contribute meaningfully at every level and deepen their engagement over time in ways that feel manageable.

Common tactics for mobilizing advocates include:

- **Entry-level actions:** Quick, accessible activities that allow supporters to participate with minimal time and preparation. These are ideal for large numbers of people and help demonstrate broad support.
Examples: Signing petitions, amplifying messages on social media, emailing, writing postcards or calling policymakers in support of policy positions.
- **Mid-level actions:** Activities that require more time and personal investment, often involving direct contact with decision-makers or participation in public processes.
Examples: Participating in a training or public policy briefing, speaking during a city council or public comment period, or joining a legislator meeting with other advocates.
- **High-engagement actions:** Deeper commitments where advocates take visible leadership roles, influence public debate or directly advocate to policymakers.
Examples: Participating in state or national lobby days, sharing personal stories in the media, or serving as a spokesperson at rallies or other events.

Resource

Visit MyHabitat for guidance on [developing an advocacy call to action](#).

Balancing online and offline mobilization strategies

Digital tools enable quick, wide-reaching action, and in-person actions build visibility, credibility and stronger relationships with policymakers. Using both together amplifies advocacy efforts and allows advocates to participate in ways that fit their capacity and context.

Equipping advocates to take action

Once advocates understand the context, providing practical resources will help them feel prepared and supported in their advocacy. Examples include:

- **Messaging resources:** Talking points, call scripts, email templates and social media graphics and images for digital advocacy.
- **Action guides:** Step-by-step instructions for contacting policymakers (online and offline), participating in meetings or organizing local events.
- **Issue toolkits and one-pagers:** Concise materials summarizing key issues and how advocates can help advance them.
- **Training opportunities:** In-depth preparation, equipping advocates with a range of skills to engage in advocacy.

2.6.2. Educating supporters about housing issues

Supporters are more likely to engage in advocacy when they understand the housing challenges their communities face and the public policies that can address them. By making these connections in a clear, accessible way, Habitat can convey how individual efforts are part of a larger, collective movement.

Informing supporters about housing issues and solutions

Education does not need to be complex or time-consuming. Focused, well-crafted content can give supporters the knowledge and confidence to act, showing how specific public policies relate to Habitat's mission and impact communities. Highlight why actions matter now, such as upcoming votes, budget cycles or public policy windows. This information

can be delivered through a variety of channels, including newsletters, email alerts, websites, fact sheets, social media posts, infographics, videos and constituent stories.

Keeping advocates engaged

Regular communication is key to maintaining engagement with advocates. Reaching out at least once a month with email updates, educational content, constituent stories or highlights helps sustain interest, even when there's no immediate call to action.

Tips for long-term engagement:

- Engage supporters outside of urgent mobilization moments.
- Offer regular, manageable ways to participate through calls to action.
- Celebrate wins that reflect the impact of their efforts.
- Solicit feedback on what works and where improvements can be made.

2.6.3. Centering the voices and experiences of community members in conversations with policymakers

As with other tactics, it is important to partner with diverse stakeholders and members of impacted communities when mobilizing advocates to engage with policymakers. Below are examples of how community voices can be centered in advocacy efforts at varying levels, allowing organizations to scale engagement as they deepen partnerships with community members:

- **Entry-level:** Invite homeowners or tenants to attend city council meetings, watch hearings online or submit brief written comments.
- **Mid-level:** Support residents in delivering public comments on public policy proposals, joining virtual town halls or participating in small-group meetings with policymakers.
- **High-engagement:** Train and empower community members to co-lead advocacy campaigns, speak at press events or legislative briefings, or coordinate broader community organizing efforts to influence public policy decisions.

Community partnership example

Habitat for Humanity Portland Region established a Homeowner Leadership Council to advise their affiliate and support their advocacy efforts in a variety of ways, including:

- Attending the affiliate's local lobby day at the Capitol in Salem, Oregon.
- Presenting on a [panel at Housing Oregon](#) on the Community Land Trust model.
- Attending a build day with local elected leaders.
- Attending a press conference with the governor.
- Participating in advocacy trainings, such as Habitat on the Hill.

2.6.4. Launching issue- or public-policy-focused advocacy campaigns

What is an advocacy campaign?

An advocacy campaign is an organized effort to influence policymakers and mobilize supporters around a specific issue or public policy. Campaigns help coordinate actions, focus messaging and maximize the impact of grassroots engagement.

When to launch a campaign

Launching a public-facing advocacy campaign can be a strategic tactic for advancing your policy priorities. They are most effective when timing and readiness align. Consider the following factors when assessing whether the moment is right:

- **Clear opportunity:** A new public policy, legislative decision or emerging issue provides a time-sensitive opening.
- **Stakeholder readiness:** Supporters, coalition partners and other allies are prepared, informed and motivated to participate.
- **Political environment:** Current public opinion, policymaker priorities and external pressures create conditions where a campaign could advance public policy goals.
- **Potential impact:** Potential to make a difference in advancing the policy priority or issue. Prioritize efforts where advocacy can produce measurable results.
- **Organizational capacity:** Staff and resources are sufficient to plan, execute and sustain the effort.

Resource

[Examples of advocacy campaigns](#) launched by members of the network can be found on MyHabitat.

Components of a campaign

A successful advocacy campaign is built around several essential components that guide objectives, outreach and timeline. Campaigns are typically time-bound, with a clear start and finish that help concentrate energy, attention and resources around a defined goal:

- **Goal:** A clear, specific outcome the campaign seeks to achieve.
- **Target audience:** Policymakers, community members or other stakeholders who can influence the outcome.
- **Strategy and plan:** A road map connecting goals, audiences, actions and outreach to guide your efforts and ensure coordination.
- **Key messages:** Simple, compelling statements that communicate why the issue matters. Consider supporting messages with branding and visuals to unify materials and build recognition.
- **Timeline and milestones:** Plan for when actions will occur and when to set deadlines for key moments.
- **Evaluation plan:** How success will be measured and lessons will be captured.
- **Budget and resources:** Staff, funding and materials required to execute the campaign effectively.

3. Sustaining commitment to advocacy at your organization

A sustained commitment to advocacy keeps efforts consistent over the long term, building lasting capacity to influence public policies and systems that align with Habitat's mission. This commitment involves a deliberate investment of time and resources, embedding advocacy into organizational culture at every level, and regularly evaluating progress.

Fully integrating advocacy is achievable for organizations of any size or funding level. The table below outlines broad stages of integrating advocacy within your organization, reflecting increased prioritization and investment toward advocacy. Use it to identify where your organization may be today and what growth could look like in your context.



Emergent	Intentional	Integrated
- Organization begins developing awareness of the value of advocacy. - Advocacy action is ad hoc and/or reactive. - The focus at this stage is around establishing foundational awareness across the organization.	- Advocacy becomes highly consistent and visible across the organization, forming a foundation for deeper integration. - The focus of advocacy at this stage is building systems and consistency.	- Advocacy drives organizational impact and informs program design, partnerships and resource development. - The focus of this stage is on embedding advocacy across functions and ensuring sustainability.

The following sections offer approaches that can be scaled to fit your organization's context, providing ways to ensure advocacy is well-resourced and recognized as an integral part of the way Habitat serves communities.

3.1. Embedding advocacy into Habitat's culture

Creating a culture of advocacy means embedding it into the organization's identity, goals and operations. This fosters a shared belief that influencing public policy is as essential as building homes, because it allows us to address the broader challenges that affect homeownership at scale.

3.1.1. Cultivating organizationwide support for advocacy

Strong external advocacy begins with strong internal commitment. Sustained advocacy depends on shared ownership of advocacy activities throughout the organization. Without broad support, efforts can lose momentum when leadership changes, budgets tighten or competing priorities arise. When advocacy is embraced organizationwide, it gains stability, credibility and the ability to influence decision-making over the long term. Internal champions at every level help ensure advocacy goals are consistently advanced, regardless of who carries them forward.

Habitat staff members, board members and volunteers can be powerful champions, but only if they understand advocacy as a central strategy for advancing the organization's goals. For some, this buy-in already exists, while others may need to build engagement

from staff and board members over time. Making it a regular part of internal planning and communications helps create this alignment.

Cultivating buy-in is an ongoing process rather than a one-time training or presentation. You can approach this work by:

- Connecting advocacy to the broader mission as critical work that complements construction and program activities.
- Demonstrating how public policy change at all levels of government removes barriers that staff members and volunteers encounter daily.
- Recognizing and celebrating advocacy contributions from all roles to reinforce collective ownership.

The goal is to create an environment where everyone understands how advocacy connects to Habitat's mission and feels empowered to play a role in advancing it.

Resource

Explore [resources available for building organizationwide support](#) for advocacy on MyHabitat.

Keeping advocacy visible

A simple way to cultivate support for advocacy is by making it a regular feature of internal communications. Consider:

- Including advocacy updates in newsletters and staff meetings.
- Sharing advocacy-related successes.
- Using these stories to build the case for sustained investment in advocacy.

Educating and engaging staff across the organization

Building commitment begins with identifying and understanding advocacy roles throughout the organization:

- **Executive leadership:** Their endorsement sets the tone for the organization. Leaders who speak confidently about advocacy signal that it is part of strategic decision-making, not an optional activity.
- **Board members:** As stewards of the mission, board members shape priorities and resource allocation. Their support legitimizes advocacy as a key pathway to impact.
- **Staff members at all levels:** From program managers to communications teams, staff members are often the first to see systemic barriers affecting homeownership. Their perspectives strengthen advocacy strategies and ground them in lived community experience.
- **Volunteers and homeowners:** As trusted messengers, they can share firsthand stories that demonstrate why public policy change matters, reinforcing the organization's advocacy credibility.

Regardless of whether a staff member has formal advocacy responsibilities, everyone can play a role in advancing public policy solutions and embedding advocacy into the daily work of your organization. For example, staff members without dedicated advocacy roles might contribute by:

- Identifying trends in housing needs and flagging systemic barriers to homeownership.
- Offering perspectives on advocacy priorities and/or ideas on public policy solutions.
- Incorporating advocacy messages into affiliate communications and events.
- Responding to invitations to take action, such as contacting legislators or posting on social media.

Keeping your staff informed of public policy priorities

Educating staff members about your policy priorities keeps everyone on the same page and empowers team members who want to be involved. Start by ensuring your staff is aware of policy priorities as they are set and understand how they connect to your broader work. Providing basic messaging points for discussing policy priorities helps everyone communicate consistently. As you engage in advocacy tactics, share updates so that team members are informed and remain invested.

Investing in training to build advocacy capacity

By supporting advocacy training opportunities for their staff, organizations empower their team to confidently advance policy priorities and engage stakeholders effectively. Foundational training helps all staff members build a basic understanding of your organization's policy priorities and advocacy tactics, while those who dedicate significant time to leading and coordinating advocacy efforts will benefit from more intensive training.

Resource

Visit MyHabitat for [learning opportunities and training resources](#).

3.2. Allocating resources for advocacy

Sustaining advocacy requires dedicated resources, even if those resources evolve over time. This includes allocating staff time, engaging board members and establishing a budget to build the infrastructure necessary to support your efforts.

3.2.1. Dedicating staff time for advocacy

By including advocacy responsibilities within a staff position at your affiliate or affiliate support organization, you can shift advocacy efforts from ad hoc activities to a strategic part of your work. Even small allocations of time, whether part of a staff member's existing duties or shared across multiple roles, keep advocacy momentum strong.

Determining how much staff time to dedicate will depend on a variety of factors, including your organization's size, location, budget, staffing and strategic priorities. Across the network, a wide range of staffing structures successfully support advocacy, and no single model works for everyone.



Habitat for Humanity International CEO Jonathan Reckford and representatives of Habitat affiliates from the Washington delegation meet with Senator Maria Cantwell of Washington at her office during the Habitat on the Hill conference in Washington, D.C.

The examples below illustrate one possible tiered approach to incorporating advocacy into staff roles, starting with smaller commitments and growing as investment and opportunity increase:

Emergent	Intentional	Integrated
Advocacy responsibilities are shared across leadership and/or program staff as part of other duties.	Advocacy responsibilities are formally assigned, with clear ownership and consistent coordination.	Advocacy is a fully supported, strategic function with dedicated capacity and alignment across departments as relevant.
Example staffing structures at this stage: - Executive director, CEO or program director leads advocacy as part of their broader leadership portfolio. - Occasional contributions from volunteer leaders or board members with policymaker relationships. - Administrative or communications staff assist with logistics (e.g., RSVP for advocacy days, sharing calls to action). - Advocacy tasks are performed as capacity allows.	Example staffing structures at this stage: - A percentage of time (such as 10–20%) is dedicated to foundational advocacy activities. - A designated staff point person (often a program manager, resource development manager or communications specialist) has defined advocacy duties in their job description. - A board advocacy liaison or advocacy committee has been established.	Example staffing structures at this stage: - One or more dedicated advocacy staff members coordinate the advocacy strategy full time. - All members of your leadership team (executive director, communications director, program director, etc.) have dedicated a portion of their staff time to advocacy.

Resource

Explore [additional samples of staffing structures and job descriptions](#) on MyHabitat for guidance on incorporating advocacy into staff roles at your affiliate or affiliate support organization.

Tips for small organizations

While some affiliates and affiliate support organizations may have multiple staff members, it may not be feasible for small organizations to dedicate a staff role to advocacy. Some ideas for growing capacity with limited staff include:

- Integrating advocacy into daily responsibilities rather than creating a separate role.
- Leveraging volunteers and board members to extend your reach.
- Focusing on high-impact advocacy activities that don't require a large time investment.
- Participating in coalitions to share advocacy responsibilities and activities.
- Using networks and shared resources (like MyHabitat tools) to streamline efforts.

3.2.2. Developing board capacity for advocacy

While often untapped, an affiliate or affiliate support organization's board of directors is a valuable resource for advocacy. Getting your board's buy-in and support for advocacy is crucial since board members are key decision-makers who often engage in strategic planning and setting annual priorities.

Ways to get your board involved

There are many ways to get board members involved in advocacy, including:

- Inviting them to events where community housing needs and solutions are discussed.
- Scheduling or joining an in-person meeting with a legislator.
- Leveraging them as spokespeople in media and on social media.
- Soliciting their support for advocacy as part of the organization's overall strategy and allocating resources to sustain it.
- Developing an organization advocacy policy for the board to review and approve.
- Leveraging their networks to build relationships with policymakers and other community partners.

Making advocacy part of the board's role

Board members should be included in advocacy planning and activities as much as possible. As advocacy evolves within your organization, the aim is to make it a regular part of board operations. Practical steps for embedding advocacy within your board include:

- Incorporating advocacy into regular board meetings.
- Recruiting board members who bring advocacy expertise or connections.
- Covering advocacy in board trainings and orientations.
- Including advocacy activities in board position descriptions.
- Designating a board member to act as a liaison for your advocacy work.
- Establishing a committee of the board that focuses on advocacy.

Resource

Visit MyHabitat for details on the ideas at left and [additional guidance on engaging your board in advocacy](#).

3.2.3. Allocating funding support and budgeting for advocacy

Dedicating funding to advocacy ensures that it is a sustained, strategic part of the organization's work. Just as with programs, fundraising and operations, advocacy benefits from clear budget lines and thoughtful planning.

Including advocacy in the budget

Setting aside even modest funds positions your organization to respond quickly to public policy opportunities, participate in coalitions, and maintain consistent engagement with decision-makers. Consider accounting for the practical costs of advocacy, such as:

- Staff time.
- Mileage reimbursement.
- Registration for public policy conferences and trainings.
- Public policy or advocacy research projects.
- Lobbyists.
- Advocacy events and meetings.
- Communication tools.
- Technology to support digital advocacy campaigns.
- Leadership development for community advocates.

Similar to staffing structures, advocacy funding is likely to scale over time. Organizations just starting out might budget for occasional needs, but even as investment grows, advocacy is not expected to become a major portion of an organization's overall expenses. A percentage of funds allocated in compliance with lobbying laws will support meaningful and effective advocacy. A tiered approach to funding advocacy might include:

Resource

Visit MyHabitat to view [sample advocacy budgets](#) from Habitat affiliates and affiliate support organizations.

Emergent:	Intentional:	Integrated:
Limited but intentional funding	Investment in advocacy infrastructure	Fully integrated and sustained funding
- Advocacy is included as a small line item in the annual budget (e.g., dues to a coalition, travel to state advocacy days). - Funding relies primarily on unrestricted donations or a portion of general operating revenue. - Budget supports participation in foundational advocacy activities.	- Advocacy has a designated category in the budget (e.g., "Public Policy & Advocacy"). - A modest percentage of general operating revenue or special fundraising is allocated to advocacy-related costs. - Budget covers intermediate activities such as staff training on advocacy, communications tools and community engagement in advocacy efforts.	- Advocacy is a fully recognized line of work with stable funding levels. - Dedicated funds support full- or part-time advocacy staff, robust participation in coalitions, and proactive advocacy communications strategies. - Organization invests in leadership development for staff, board and community advocates, ensuring advocacy is sustainable through transitions and growth.

3.2.4. Incorporating advocacy into your strategic and annual plans

Integrating advocacy into your strategic and annual plans ensures it is recognized as a core part of your organization's work.

- Within a **strategic plan**, organizations establish a long-term vision for how advocacy advances your mission and shapes the external environment.
- Annual or operational plans** then translate that vision into concrete steps that staff, board members and volunteers implement each year.

Components	Strategic plan	Annual plan
Goals	Define long-term, measurable advocacy goals.	Set short-term, time-bound steps aligned with strategic goals.
Strategies	Outline high-level approaches and initiatives to advance advocacy objectives.	Detail specific plans to make progress toward advocacy goals during the year.
Roles and responsibilities	Assign ownership and drivers for advocacy initiatives.	Translate responsibilities into incremental goals for the year.
Capacity building	Identify skills, knowledge and resources needed.	Plan for specific trainings, mentorships and recruitment.
Resources and budget	Estimate overall needs for multiyear advocacy.	Allocate staff time and funding for this year's activities.
Timeline and milestones	Define metrics and multiyear benchmarks for long-term impact.	Set deadlines, checkpoints and milestones within the year to monitor progress.

Resource

Visit MyHabitat to [view network samples of strategic plans and annual plans](#) that incorporate advocacy.

Setting advocacy goals

The chart below shows tiered examples of advocacy goals that organizations might include in strategic and annual plans. These examples are illustrative, and goals should align with your policy priorities and with any advocacy planning you have conducted to advance them. Note that strategic goals may have multiple corresponding annual goals.

	Strategic plan	Annual plan
Emergent: Foundational goals	Position Habitat as a trusted resource for policymakers on issues related to affordable housing.	Meet with five local policymakers to introduce your organization and its mission.
Intentional: Intermediate goals	Grow and mobilize a network of partners and community members to advocate for public policies that make housing more accessible and affordable.	Build a digital list of 100 advocates, including homeowners, volunteers and other supporters, to activate as needed.
Integrated: Advanced goals	Advance two to four local or state-level public policy changes that directly support affordable housing.	Plan and launch an advocacy campaign to advance at least one local or state-level public policy solution.

Planning for capacity development

Incorporating capacity development into planning cycles helps build the skills, knowledge and resources needed for effective advocacy. Investing in capacity early lays the groundwork for sustainable efforts and positions the organization to pursue more ambitious objectives over time.

Examples of capacity-building goals include:

- **Strategic:** Strengthening the organization's knowledge and expertise in housing policy and advocacy by providing access to advocacy training for staff and board members.
- **Annual:** Recruiting at least two board members with public policy or government relations experience by next year.
- **Annual:** Developing an advocacy training calendar for the staff and board by Quarter 2.

3.3. Measuring advocacy impact

Evaluating your advocacy efforts provides a clear picture of what's working, where adjustments are needed, and how your strategies contribute to both short- and long-term objectives. This process involves establishing metrics that align with your goals; consistently tracking progress; and sharing insights with staff members, board members, volunteers and community stakeholders.

3.3.1. Establishing meaningful metrics

Metrics define what success looks like for your advocacy efforts. Setting metrics that tie to the advocacy goals in your strategic and annual plans allows your organization to understand its impact while providing a basis for evaluating outcomes over time. Evaluating advocacy progress can be challenging because political processes are unpredictable and public policy wins often result from multiple factors, making it difficult to attribute outcomes to specific

activities. Because every Habitat organization works in different political, organizational and community settings, there is no one-size-fits-all way to track success.

Metrics should provide insight into the organization's progress while being feasible to collect and maintain. Tracking too many metrics at once or focusing on ones that are hard to measure can be cumbersome, limiting their usefulness and consuming staff time. Prioritizing a small set of practical, achievable metrics ensures that monitoring remains realistic and sustainable.

Practical tip

Advocacy metrics should provide practical checkpoints to evaluate efforts while remaining flexible enough to adapt to changing circumstances or new opportunities. When setting metrics, consider balancing those that measure progress toward specific policy priorities with ones that stay relevant across different issues.

Resource

Listen to the podcast episode [Evaluating Advocacy](#) from Alliance for Justice for guidance on using evaluation to strengthen your organization's advocacy.

Measuring outputs and outcomes

Because successful public policy change is often a long-term effort, clearly stating your desired outcomes and setting milestones along the way helps determine whether your tactics are working. When evaluating advocacy, track:

- **Outputs:** Tangible activities your organization carries out toward your goals, such as meetings with policymakers, advocacy events, social media campaigns, etc.
- **Intermediate outcomes:** Benchmarks that track progress toward long-term outcomes, such as securing the support of key policymakers or gaining endorsements from partner organizations.
- **Long-term outcomes:** The results achieved through advocacy, such as the number of people affected by a public policy change.

3.3.2. Tracking advocacy metrics

Tracking progress

One person should take the lead in logging progress toward your advocacy metrics, tracking the status of outputs and targets regularly, such as on a weekly basis.

Establishing a tracking system

Creating a system to track advocacy metrics helps you stay organized and view progress over time. A simple spreadsheet or dashboard can capture both outputs and outcomes, offering a clear snapshot of activities and results.

Key practices include:

- Using a consistent tool (spreadsheet, dashboard or database) to record activities and results.
- Assigning a staff member with advocacy responsibilities to oversee tracking.
- Reviewing and maintaining data regularly to ensure accuracy.

Resource

Find a [sample tracking document](#) on MyHabitat.

Using metrics to inform strategy

Metrics provide insight into whether your tactics and overall strategy are working. If the organization is not meeting its metrics, this signals a need to adjust approaches, shift resources or try different tactics. When used in this way, metrics are a tool for learning and course correction, rather than a simple record of activity.

Practical tip

Encourage staff members, board members, volunteers and partners to report back to you when they take action in support of your policy priorities. Capturing these activities gives your organization a clearer picture of its collective influence, ensures efforts are coordinated, and highlights where follow-up may be needed.

3.3.3. Reporting advocacy updates and impact to board, staff, volunteers, and community members

Regularly sharing updates on advocacy progress highlights accomplishments, shows where further effort is needed and demonstrates how advocates' actions contribute to meaningful results. Updates should reach volunteers, donors and the broader community, just as you would highlight achievements in other areas of work, like homebuilding.

Tailoring updates to your audience

Different groups need different levels of detail in advocacy reporting:

Audience	Focus of reporting	Frequency
Board and leadership	Big-picture progress toward public policy goals, outcomes achieved, risks or challenges.	Quarterly (align with board meetings/other reporting cycles).
Staff	Practical updates on tactics, connections to program work and opportunities for involvement.	Monthly or during regular team meetings.
Advocates, volunteers and community	Clear, story-driven updates that celebrate progress and explicitly connect back to actions taken by supporters.	Ongoing (newsletters, events, social media, personalized communications).

3.3.4. Contributing to Habitat's cumulative impact reporting

Reporting advocacy on the affiliate statistical report and affiliate support organization survey

Each quarter, HFHI encourages affiliates and affiliate support organizations to share their advocacy progress through a dedicated section of the Affiliate Statistical Report and supplemental Affiliate Support Organization Survey. This collective reporting provides a clear view of the network's impact on housing issues across the U.S. and contributes to Habitat's global impact targets. Comprehensive reporting increases the value of these insights for learning from and strengthening our collective advocacy.

Learning from impact reviews

Capturing the full range of Habitat's U.S. advocacy activities allows Habitat for Humanity International to provide affiliates and affiliate support organizations with resources to learn from efforts across the network. Quarterly impact reviews highlight reported public policy wins and track key metrics, offering lessons that strengthen advocacy strategies, drive system-level changes in home affordability, and build public policy knowledge.

Resource

For details and [guidance on reporting your advocacy](#), visit MyHabitat.

Resource

Explore current and past [advocacy impact reviews on MyHabitat](#) to learn from successful efforts across the network.



Volunteers gather for the morning briefing at the 2025 Jimmy & Rosalynn Carter Work Project in Austin, Texas.

Equipped with this guidance and accompanying resources, let's take bold action to remove housing barriers and expand access for millions of households across the U.S. Go forth and advocate!





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