

## When does the tripod need to kick things up to LT for a final decision?

Decisions to:	For example:
Pursue new work in a given state	We have decided to work in Georgia in 2020.
Stand down or not work in a given state or on a piece of relevant policy	We have decided not to work in CT in 2020. We chose not to engage in New Mexico on voting restoration.
Work to pass, improve or defeat a piece of legislation	In Maryland we have decided to work on pre-paid postage.
Amend legislation or change strategy in response to a substantive change in the policy language	We decided to proceed in Washington even though there was no viable path to amending the list maintenance provision.
State a position on a piece of legislation	Secure Democracy registered an official position with the California legislature in on ACA 6.
Go on the record or speak on background to the media as Secure Democracy or Voting Rights Lab	Vox asked for a comment on FL A4 and we decided to give her an interview on background.

The first step to deciding our organizational position, or whether or not to work to pass, amend, or defeat something, always begins with a review of the policy by the Law & Policy team. They analyze the potential impact of a policy or how to approach a policy in order to have the intended impact, State Affairs advises on what is legislatively and politically possible and defines the legislative strategy, and Campaigns & Partnerships brings into the conversation the movement implications, perceptions and priorities of partners on the ground, as well as what mobilization/outside pressure is possible.

All three players in the tripod should bring these inputs together in order to recommend a path forward or share their best assessment with the Leadership Team. The Leadership Team will make a final decision, taking into account organizational risk and capacity, implications across states and nationally, and viability of the proposed strategy.

### How do campaign plans get approved and funded?

The assessment that it's appropriate to deploy campaign activity in a state legislative campaign rests with the tripod, and is approved by the Director of Campaigns & Partnerships in consultation with the Director of State Affairs.

The state affairs tripod member defines the legislative strategy. This includes who the targets are, an assessment of what will effectively influence them, and what the legislative/political opportunities and challenges are. The Campaigns & Partnership tripod member defines the campaign strategy that will realize the legislative strategy, including the plan for mobilization, partnership engagement, and communications.

Together the two should define the goal and craft campaign plans collaboratively. Each of them should consult, as needed, with their respective Directors and team members to bounce around ideas and make sure they're heading in the right direction. Once the concept is complete, it should go to the Director of Campaigns & Partnerships for approval, who will assess the strategy, weigh the plan against the defined goals, allocate funds and consult with the Director of State Affairs to see if there are any flags or concerns with the plan.

These plans should concisely answer, in bullet format or 1-2 sentences each:

- Who are the targets? What is the strategy to persuade/pressure them?
- What tactic(s) are being proposed? If they're digital tactics you might want to include answers to [these questions](#) too.
- On what timeline/for how long?
- Why is now the right moment to deploy the tactic(s)?
- How will we know we were successful/assess the impact of the strategy (or series of tactics)?
- What is the proposed budget?

### **How do we determine what policy materials are needed?**

As part of regular tripod coordination, the Law & Policy team should not be assigned "document requests." By pre-determining the end product, there's a good chance State Affairs or Campaigns & Partnerships staff won't get what they actually need. Instead, the conversation should be about communicating a problem for the trio to collaboratively and strategically solve.

For example, State Affairs might identify that the sponsor has heard that a bill will create opportunities for fraud and we need to figure out how to alleviate the concern. Or Campaigns and Partnerships might identify a need to explain to the coalition what a bill does and why it is bad because the coalition doesn't see a problem with it currently. A solution to either scenario might be to create a document, but it might also be to schedule a call with the sponsor or the coalition, or to draft an explainer email.

If there is alignment on the goal, and agreement that a policy material or document is needed, then the following questions must be answered before document creation can begin:

- What is the simplest product needed in order to accomplish the goal? What is the purpose of the document?
- Who is the audience?
- How will it be distributed? Does it need to be branded, professionally designed, etc?

- By when is a final product needed and why? What are the interim deadlines to get to the final product?

### **How do documents and other work products get produced and what's the approval process?**

Every work product, be it a set of talking points, a press release or digital ads, has an owner who is responsible for doing most of the writing and ushering the product through to completion. Typically the owner is in the tripod or a communications or digital team member.

Everything is reviewed by Megan before they are final for organizational consistency. Furthermore, Law & Policy is always the last reviewer to check for factual accuracy.

**What's the difference between "consulted" and "consulted with buy-in?"** Anyone who is consulted is asked to provide comments, feedback and suggestions based on their knowledge and expertise. This input should be carefully considered by the owner and the approver, but is not always followed. Consulted with buy-in is reserved for situations where a stakeholder should be in agreement before the owner or approver proceeds. This is most commonly reserved for situations where the owner is not in the same department as the end user. For example, Law & Policy owns the production of policy documents. Depending on whether the document is intended for legislator/lobbyist or partner audiences, the respective State Affairs or Campaigns & Partnerships staff person should be consulted with buy-in.

**What's the role of the approver?** The approver is responsible for giving the green, yellow or red light to the product. Green means go. Yellow means there is more work to do. Red means it's not going live. They also make choices when there is conflicting input during the feedback phase, and decide when the process and workflow should be adjusted. For example, when producing talking points or an op-ed for partner use that won't be attached to one of our brands, the approver might give the owner permission to skip a few steps in the workflow. This is most likely to happen if the work product is based off an established set of message points that have already gotten the appropriate level of input from other internal stakeholders and have already been approved.

**How should the owner set deadlines to keep the workflow moving?** Deadlines should always be clearly communicated throughout the process, and everyone should adhere to them. That does not mean, however, that deadlines can be arbitrary or can't be negotiated.

Deadline-setting Best Practices:

- **Build the timeline off an external reality & share that context.** For example, if the vote is on X date, calls should start on X date.
- **Use deadlines throughout every step of the process not just the end product.** For example, "Can everyone please add their thoughts to this brainstorm document today by 2pm ET?"
- **Ask, don't tell. And get confirmation.** For example, "Christian, the hearing is next X date so we're hoping to get the op-ed out the door by X date. Can you review it

by 5pm today?" When you get confirmation, it's much more likely that the person will be able to adhere to the deadline than if you tell them.

**See the workflow grids below or:**

- Inside the Dome Product Workflows [here](#)
- Outside the Dome Product Workflows [here](#)
- Press Product Workflows [here](#)

Inside the Dome Product Workflow		
<b>Product</b>	Legislative Leave-Behind or Policy Explainer	Talking Points
<b>Audience</b>	Legislators or Lobbyists	Legislators or Lobbyists
<b>Owner</b>	L&P	SA
<b>Consulted with buy-in</b>	Colin	Liz
<b>Approver</b>	Liz	Colin
<b>Workflow</b>	<p>(1) Creation: Tripod aligns on purpose, audience, format, deadline, substance. L&amp;P does draft, consults with Liz &amp; other L&amp;P as needed.</p> <p>(2) Feedback: Draft is shared with tripod and Colin for consultation using comments-only setting; deadline for feedback given. L&amp;P does revision based on feedback; this will often require a conversation between L&amp;P and SA. Liz is the approver. If needed, she decides on conflicting input in consultation with Colin.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy. If needed, document goes to digital for design and layout.</p>	<p>(1) Creation: Tripod aligns on purpose, audience, format, deadline, substance. SA does draft, consults with Colin &amp; other SA as needed.</p> <p>(2) Feedback: Draft is shared with tripod and Liz for consultation using comments-only setting; deadline for feedback given. SA does revision based on feedback; this will often require a conversation between L&amp;P and SA. Colin is the approver. If needed, he decides on conflicting input in consultation with Liz.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy. If needed, document goes to digital for design and layout.</p>

Outside the Dome Product Workflow			
<b>Product</b>	Policy Document	Talking Points	Digital & Ad Content (e.g. web copy, phone scripts, social/ TV/ billboard/ other advertising content)
<b>Audience</b>	Partners	Partners	Decision-makers & action-takers
<b>Owner</b>	L&P	C&P	C&P
<b>Consulted with buy-in</b>	Christian		Colin
<b>Approver</b>	Liz	Christian	Christian
<b>Workflow</b>	<p>(1) Creation: Tripod aligns on purpose, audience, format, deadline, substance. L&amp;P does draft, consults with Liz &amp; other L&amp;P as needed.</p> <p>(2) Feedback: Draft is shared with tripod and Christian for consultation using comments-only setting; deadline for feedback given. L&amp;P does revision based on feedback; this will often require a conversation between L&amp;P and C&amp;P. Liz is the approver. If needed, she decides on conflicting input in consultation with Christian.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy. If needed, document goes to digital for design and layout.</p>	<p>(1) Creation: Tripod &amp; Malia align on purpose, audience, format, deadline, substance. Malia does draft.</p> <p>(2) Feedback: Draft is shared with tripod for consultation using comments-only setting; deadline for feedback given. Malia does revision based on feedback. Christian is the approver. If needed, she decides on conflicting input.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy. If needed, document goes to digital for design and layout.</p>	<p>(1) Creation: Tripod &amp; digital align on purpose, audience, format, deadline, substance. Digital does draft copy, images, graphics.</p> <p>(2) Feedback: Draft is shared with tripod for consultation using comments-only setting; deadline for feedback given. Digital does revision based on feedback. Christian is the approver. If needed, she decides on conflicting input in consultation with Colin.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy.</p>

<b>Press Product Workflow</b>			
<b>Product</b>	National Messaging	Press Materials (e.g. press release, advisory, op-ed, LTE)	Poll
<b>Audience</b>	Partners	Press	Primary: Legislators Secondary: Press
<b>Owner</b>	C&P	C&P	SA
<b>Consulted with buy-in</b>		Colin	Christian
<b>Approver</b>	Christian	Christian	Colin
<b>Workflow</b>	<p>(1) Creation: Tripod &amp; Malia align on purpose, audience, format, deadline, substance. Malia does draft.</p> <p>(2) Feedback: Draft is shared with project team for consultation using comments-only setting; deadline for feedback given. Malia does revision based on feedback. Christian is the approver. If needed, she decides on conflicting input.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy. If needed, document goes to digital for design and layout.</p>	<p>(1) Creation: Tripod &amp; Malia align on purpose, audience, format, deadline, substance. Malia does draft.</p> <p>(2) Feedback: Draft is shared with tripod and Colin for consultation using comments-only setting; deadline for feedback given. Malia does revision based on feedback. Christian is the approver. If needed, she decides on conflicting input in consultation with Colin.</p> <p>(3) Polish: Malia reviews for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy. If needed, document goes to digital for design and layout.</p>	<p>(1) Creation: Tripod aligns: purpose, audience, format, deadline, substance. SA does draft, consults with Colin &amp; other SA as needed.</p> <p>(2) Feedback: Draft is shared with tripod for consultation using comments-only setting; deadline for feedback given. SA does revision based on feedback. Colin is the approver. If needed, he decides on conflicting input in consultation with Christian.</p> <p>(3) Polish: Malia does a review for flow. Megan reviews for organizational consistency. L&amp;P does final review for factual accuracy.</p>