State Rail Advocacy: Starter Kit Summary

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Overview

The starter kit guides a state rail advocacy organization as it develops, from its first meetings to a self-sufficient organization with paid staff. Most organizations pass through five levels along the way:

- **Level 0:** exists on paper only, or as a name for a small group of volunteers.
- **Level 1:** active and making some progress, but needs to grow significantly to reach its goals.
- **Level 2:** active and effective, but mostly volunteer-run, without the fundraising to pay full-time staff.
- **Level 3:** a full-time paid executive director and the fundraising to sustain the role, with enough volunteers that the organization does not depend on any one leader.
- **Level 4:** self-sufficient, with more paid staff. The executive director leads strategy and the board focuses on governance.

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Organizational development steps

The table below lists the work in each area across three phases: the first 90 days, the rest of the first year, and beyond. The first two phases bring an organization to Level 2.

Area	First 90 days	Minimum viable (Level 2)	Next level (Level 3+)	Minimum is done when
Organization setup	Incorporate as a 501(c)(3) and a 501(c)(4); adopt bylaws; open a bank account; set a first budget	Annual budget, filing calendar, core policies, and insurance in place	Annual financial review; personnel policies once there is staff	The board approves a budget and filings are current
Systems	Shared drive, team chat, website, and membership platform set up	A CRM holding every contact; work requests flowing through one pipeline	Automations and a progress dashboard	Every contact and request is logged in one place
Know your state	Landscape assessment and a listening tour with someone who knows the statehouse, a friendly legislator or two, friendly local officials, and reporters who cover transportation	A map of the players across the state, with meetings kept up	Relationships in every region, each with an owner	Key players are in the CRM, each with an owner
Strategy	Agree on what to work on first	A strategic plan with mission, vision, goals, and legislative priorities, shared with members and the public	A yearly planning cycle and annual goals the executive director is held to	The board adopts a plan and a legislative agenda
Advocacy in government	Learn how a bill moves; first meetings with friendly legislators	Bills tracked, testimony given, legislators met regularly, lobbying registered and reported	Member mobilization at scale and a research agenda; work with the congressional delegation and government funders	Relevant bills are tracked and legislators are contacted regularly
Brand and communications	Brand and social channels set up; first newsletter sent	Regular newsletter and social media; someone responsible for press; rules for approving statements	Media relations, with reporters who know you and stories built from your priorities; an annual statewide event	Regular social media and newsletter, with someone responsible for press
Members and money	Membership structure and dues set up	Renewals on schedule; first appeals; every gift acknowledged	Major donors, grants, sponsors, and events on one fundraising plan	Renewals and fundraising asks run on a set schedule
Coalitions and partners	Likely partners drawn from the allies in the landscape assessment	Working relationships with cities, planning agencies, businesses, and allied groups	A statewide coalition	Each partner has one owner in the organization
Volunteers and chapters	A small core team in place	Volunteer process running; at least two active chapters	Chapters across the state and a training library	New volunteers get a role within a set time, and two chapters are active
Board	Board meets on schedule; terms recorded	Skills and diversity matrix with gaps identified; recruiting and onboarding to fill them	Oversight committees running; yearly board review	The board meets on schedule
Staff and HR	Not yet	A plan for the first hire, including contractors versus employees	First full-time executive director with payroll and HR basics, then more staff as revenue allows	A hiring plan the board has approved

Part 1: Start here

Grounding questions for the leader to discuss before acting.

- **Where do we stand?** A short self-assessment that places the organization at a Level, and shows which deliverables are already done.
- **What is the landscape in our state?** A landscape assessment that sets the starting point for the Know your state area:
    - **Advocacy:** other groups working on rail and transit, what they do, and where they overlap with us.
    - **Political:** where the governor, legislative leaders, key committee chairs, the state transportation department, transit agencies, and planning organizations stand on passenger rail, and how they talk about it.
    - **Public:** how people across the state see passenger rail, from polling and local media coverage, and how views differ between regions.
    - **Allies:** who already supports passenger rail and could work with us, including friendly legislators and local officials, allied advocacy groups, cities and planning agencies that want service, and businesses that would benefit.
- **Who can I learn from?** Leaders of state rail advocacy organizations elsewhere, and the people in your state who know how the statehouse works. The landscape assessment is where you find them.
- **What do I do in my first 90 days?** One ordered checklist, drawn from the first column of the table above: listen, build a core team, incorporate, set up tools, make a budget, set up dues, settle the brand, and start meeting people.
- **Who is my team?** How to recruit the first few people and who does what before there are committees.
- **How do I track progress?** The project view: deliverables by phase, kept in the shared work tool and reviewed at board meetings.

Part 2: The playbooks

Each playbook gives guidance on one area of the organization's work. They are listed in the order a leader usually needs them, with the questions each one answers.

The full playbooks are included in the full starter kit. This summary lists each playbook and the questions it answers.

1. **Organization setup.** How do I incorporate, and do I need a 501(c)(4)? What goes in our bylaws? How do I make a budget? How do I keep up with filings?

2. **Systems.** What tools do we use, and how do I set them up? What goes in the CRM, and how do work requests move between people?
3. **Know your state.** Who knows how our statehouse works? Which legislators and local officials are friendly? Who covers transportation in the media, and what issues are big right now? How do I meet everyone and keep track of them?
4. **Strategy.** What are our mission, vision, goals, and priorities, and which planning framework gets us there? How do we share the result with members and the public?
5. **Advocacy in government.** How does a bill move in our state? How do I testify? How do I run a meeting with a legislator? What are the lobbying rules? This playbook is backed by a series of trainings.
6. **Brand and communications.** What is our brand and voice, and what do we post and send? How do I work with reporters and do interviews? Our priorities from the strategy playbook become the stories.
7. **Members and money.** How do we set up dues and renewals? When do we move to appeals, major donors, grants, and sponsors?
8. **Coalitions and partners.** Who should we partner with, and what do we ask of them? Who in our organization owns each relationship?
9. **Volunteers and chapters.** How do we recruit, place, train, and review volunteers? Where should chapters go, and who leads them?
10. **Board.** Who is on our board, and what are we missing in skills and in diversity, such as geography, age, ethnicity, and professional background? How do we recruit and onboard new members?
11. **Staff and HR.** When are we ready to hire, and should it be a contractor or an employee? What HR basics do we need once we have employees?

Every playbook follows the same structure, covering:

- **Why it matters**
- **First steps** (first 90 days)
- **Minimum viable** deliverables and when they count as done
- **Next level**
- **Resources** from the toolbox
- **Who to learn from**, in your state and in other states
- **Common pitfalls**

Part 3: Toolbox

In addition to the playbooks, a set of tools and templates are available to kickstart results. Each entry shows the area it supports and its current status. Links will be added as each resource is published.

Item	Supports
Incorporation guide for a 501(c)(3) and a 501(c)(4)	Organization setup
Document templates: bylaws, budget, policies, committee charters, and role descriptions	Organization setup; Board
Google Drive template: folder structure and starter documents	Systems
Slack template: channels and conventions	Systems
Work request pipeline: how one team asks another for help	Systems
Website template on Wix	Systems; Brand and communications
CRM for every contact and relationship	Systems; Know your state
Tools from the shared technology team	Systems
Landscape assessment template	Know your state
Strategic planning framework	Strategy
Advocacy trainings	Advocacy in government
Lobbying compliance guide: nonprofit lobbying limits, state registration, required reports, and tracking lobbying hours	Advocacy in government
Mobilization templates: calls to action and letter drives	Advocacy in government
Research agenda template	Advocacy in government
Branding and social media templates	Brand and communications
Media relations guide	Brand and communications
Membership management platform	Members and money
Membership structure guide: classes, dues, and voting rules	Members and money
Member engagement toolkit: welcome steps, follow-up scripts, and a member survey	Members and money
Fundraising and stewardship templates	Members and money
Volunteer toolkit: role descriptions, intake, matching, and reviews	Volunteers and chapters
Volunteer and chapter-lead training	Volunteers and chapters
Chapter events guide	Volunteers and chapters
Community outreach guide	Volunteers and chapters
Board skills and diversity matrix	Board
Executive director hiring guide	Staff and HR
Contractor and employee guide, with HR basics	Staff and HR

Part 4: References (separate documents)

- **Jobs list:** the exhaustive list of tasks a functioning organization does at its base level, from keeping the books each month to renewing members and tracking bills. Each task is tagged to its area, with the list of traits for an owner and how often it happens.
- **Organizational structure:** the board and its committees, the executive director and the teams, chapters, and how the structure works before there is a paid executive director.
- **Role profiles:** about 30 leadership roles, with default team sizes.
- **Function setup guides:** the nine-step setup sequence for every function.
- **Shared rules:** how committee chairs are chosen, who places volunteers, and the other rules every function follows.
- **The chapter model:** what a chapter is, how to open one, and what happens when a lead leaves.
- **Measures:** how each area’s progress is reviewed.