

# HCAN Evaluation: Executive Summary

An overview of the comprehensive qualitative evaluation of the Health Care for America Now campaign.

*Prepared for The Atlantic Philanthropies by*



# I. Introduction

The 2008 elections presented an historic opportunity. The balance of political power in Washington seemed poised to shift decisively as prevailing popular sentiment called for change. For the first time in more than a decade, the goal of enacting meaningful health care reform appeared within reach. In order to seize the moment, AFL-CIO, AFSCME, SEIU, Americans United, Campaign for America's Future, Campaign for Community Change, Move On, and USAction joined together in early 2008 to build a national coalition whose top priority was health care reform. With unusually early and sizable funding from The Atlantic Philanthropies, the Health Care for America Now (HCAN) campaign was launched with the goal of winning affordable and comprehensive health care for all Americans.

Prior to the passage of the health care bill, The Atlantic Philanthropies (Atlantic) contracted with Dan Cramer of Grassroots Solutions and Tom Novick of M+R Strategic Services (M+R) to conduct an independent evaluation of the HCAN campaign. This Executive Summary provides an outline of the methodology used and a brief overview of the 12 major qualitative findings. The Executive Summary represents a redacted version of the full Evaluation report.

## II. Methodology

This evaluation was designed with two purposes in mind: to inform future grant-making for Atlantic and other funders, and to spark ongoing strategic conversations within the broader advocacy field. The evaluators relied on the following methods to conduct the evaluation: Initial framing interviews with Atlantic staff on the history of the campaign and Atlantic's involvement; a thorough document review of HCAN campaign materials to gain an understanding of campaign objectives and to measure plans against activities conducted; and phone and in-person interviews with nearly 70 individuals to capture feedback and lessons learned. HCAN online strategies were also compared to industry standards. Once the discovery phase was complete, the evaluators began to identify key themes and lessons which formed the basis of the 12 qualitative findings.

## III. Findings

- 1. HCAN's work made a difference. In a crowded health care reform ecosystem, HCAN is seen as having played a valuable role in helping pass health care reform, earning particular praise for building a strong field operation and keeping its progressive coalition together.**

Given the incredibly crowded health care reform ecosystem, it is hard to assign credit for ultimate passage of the bill to any one individual entity or campaign – a point that was made repeatedly during our interviews. However, with this caveat in mind, our major conclusion in this evaluation is that HCAN played an important and valuable role in passing health care reform. It was crucial in mobilizing the progressive base, assembling a progressive coalition, and keeping it united and engaged through a long and arduous campaign. HCAN generated an enormous volume of Congressional contact, which was needed to keep up with the opposition. In addition to thousands of lobby visits (in-district and on Capitol Hill), events and town hall meetings, HCAN produced more than 873,000 calls to Congress and more than 600,000 faxes. It is also credited with helping formulate and advance an anti-insurance frame, critical for final passage of the legislation. The field operation HCAN built helped keep momentum for reform moving when it could easily have stalled.

The consensus of those interviewed for this evaluation is that HCAN was a positive and important player in the efforts to pass health care reform. Although a number of factors contributed to its success, two stand out as the most important: 1) HCAN's skill at assembling and maintaining a progressive coalition of groups that could mobilize their own collective members, as well as a broader base that was able to work together over time; 2) HCAN's recognition that an organizing presence in Congressional districts would be necessary for success led to the wise, strategic choice to invest in and build a national field operation.

However, we recognize that no campaign, including HCAN, is perfect. In this campaign, areas that had challenges included: the general campaign communications effort; the campaign's efforts to balance its inside-the-Beltway strategy and outside mobilization and coalition work; the overall diversity of the coalition; and campaign fundraising. Throughout this report, we conduct a detailed analysis of the parts of the campaign that worked, and unpack elements where there was room for improvement.

**2. HCAN's coalition effort was exemplary. HCAN successfully built and sustained an expansive, high-functioning and strategically unified coalition. Clear principles, an action orientation and strong coalition management contributed to cohesion. However, coalition diversity and communication between national and state coalition partners could have been improved.**

**A. Coalition Principles:** The cornerstone of the HCAN coalition, and the single factor most consistently cited to explain its durability and ongoing cohesion, was the set of principles developed in 2008 – well before there was even a health care bill to debate. Many coalitions attempt to articulate core principles; what makes HCAN's Statement of Common Purpose significant is that it was actively used in the formation and management of the entire coalition campaign. At the outset, these principles played a valuable role in attracting members and shaping the coalition. It allowed HCAN to bring together groups and organizations that did not trust each other and that may have had disagreements in the past, but could recognize mutual beliefs and goals embodied in the principles.

**B. Unified Action-Oriented Coalition:** A distinguishing aspect of this particular coalition – one of the things that helped keep it together in defiance of expectations – is that it was action-oriented, and that the action was informed by collaborative strategic planning. Many individuals we interviewed compared this positively with previous coalition experiences, where groups signed on but never worked together in a meaningful way. HCAN was a very different model. Partner organizations not only worked together in developing campaign strategies, but also came together to execute the strategies and revise them over time. HCAN's requirement that core Steering Committee partners “buy-in” through significant dues also contributed to the coalition's feeling of ownership of the campaign; exceptions were carved out in a few limited instances, but nearly all of the Steering Committee members made this required investment.

**C. Strong Coalition Management:** Coalition management demonstrated exceptional communication with partner organizations (especially at the national level). This meant that groups consistently felt informed and empowered to help shape strategic responses to new developments. An even more crucial element in managing the coalition was HCAN staff members' commitment to listening to partner organizations and understanding their needs. Many partners compared this favorably with previous coalition experiences where they believed that they were listened to during the recruitment process, but felt as though their voices and opinions no longer mattered once they had signed on. HCAN's responsiveness was noted and praised.

***D. National/State Connections and the Role of Labor:*** In some cases, a coalition asset also had an accompanying downside. An example is the relationship between the national coalition (and its national partners) and parallel state coalitions that often included affiliates of the national partners. On the one hand, the strong national coalition is widely credited with making it easier to form and strengthen state coalitions and unify diverse organizations across many critical states. On the other hand, as much as people applauded the strong link between national and state coalitions, many spoke of profound communication challenges between national organizations and their state affiliates.

Labor's role within the coalition was also a strength that came with concomitant challenges. Union involvement in HCAN is overwhelmingly seen as a net positive, and early philanthropic investment was perceived as critical to attracting labor and keeping unions involved. In many efforts, labor is treated as the "bank" for progressive coalitions. The fact that labor organizations were not asked to be the dominant funding partner made HCAN a stronger coalition because there was no sense that other progressive groups were going to labor "hat in hand." That said, there was a fairly strong sense externally and internally that HCAN was a "labor-dominated" coalition. This raised concerns among some partners, who worried that the external perception of labor's leading role may have obscured the breadth the coalition – to the detriment of the overall effort.

***E. Diversity of Constituencies:*** Consistently, interviewees noted room for improvement in the coalition's work among communities of color, seniors, and with groups representing children. There is not complete consensus on this point, as some feel the campaign conducted aggressive outreach in minority communities through its partner organizations. However, the majority agree that the campaign could have been more creative in its cultivation of organizations that work in communities of color. Some also raised concerns that organizations representing children were underrepresented in HCAN, and that it was challenging for the coalition to actively engage the children's groups who were part of the coalition.

### **3. Starting early was strategically important. HCAN's early start in 2008 was critical for later success. Its work around the elections appears to have had a positive impact in helping frame the health care debate.**

***A. Laying the Foundations:*** With an early investment from The Atlantic Philanthropies, HCAN developed a comprehensive plan and launched its campaign efforts in 2008. The early start meant that HCAN had time to build a solid infrastructure for its advocacy campaign. HCAN was also able to conduct extensive polling, message testing, policy work, and field and capacity assessments, all of which were beneficial in the long run. The message testing and framing was especially valuable as it allowed HCAN to not only begin injecting the issue into the 2008 electoral cycle, but also prepared it to hit the ground running in early 2009, as Congress was just getting going. HCAN also used its time in 2008 to cultivate relationships within the coalition, engage in tough conversations that were necessary to get partners on the same page, create a culture of shared understanding among partner groups, and build trust among organizations and national staff.

***B. 2008 Election Work:*** HCAN developed and executed a comprehensive strategy during the 2008 elections, which helped establish health care as a legislative priority, frame the debate, and build momentum for reform efforts early in the subsequent Congressional session. The electoral strategy had two primary components: a "Which side are you on?" sign-on effort and a "Star District" effort, which targeted five Congressional races and one U.S. Senate race.

Across evaluation interviews, a general consensus emerged that one of the more successful aspects of HCAN's 2008 work was the "Which side are you on?" strategy. The goals of this strategy were to: demonstrate a clear mandate for real change on health care; keep health care reform a top priority on the national agenda; frame the health care debate for voters; and systematically challenge members of Congress to pick their side on health care reform.

As part of its Star District effort, HCAN launched a series of targeted paid advertisements including TV and mail and conducted strategic field work during the election. In a study of the districts where HCAN concentrated its efforts, Lake Research Partners concluded that "HCAN's communications during a two-week campaign in October made a dramatic impact on the knowledge and attitudes of voters in five Congressional Districts in which HCAN is active." However, that conclusion should be taken with some caveats. First, many observed that HCAN was not the only organization focusing on health care. In addition, when asked for lessons that could improve future efforts, people noted that HCAN spent significant resources, about \$3.8 million across six races, proving that serious investment is required to make an impact.

**4. Investment in the field strategy was critical. From the outset, HCAN made an investment in a robust field operation, which is unique for large national advocacy campaigns. In doing so, the organization made a strategic decision to build off of its strengths as a coalition.**

*A. Early Strategic Decision:* At the outset of the campaign, the HCAN Steering Committee took a realistic measure of the opposition to health care reform, and built a campaign that was designed to undercut the opposition's strengths. HCAN's decision to invest heavily in field operations should not be glossed over. Field campaigns are labor intensive, challenging to build and manage, and usually require patience before seeing a return on investment. It is far easier to raise money and put it directly into television or other paid media, or hire subcontractors to run state-by-state grasstops campaigns to generate letters and calls from influential constituents, than it is to design and implement a field program that mobilizes the grassroots. For these reasons and others, large-scale national advocacy campaigns do not often invest in building strong and broad field operations.

*B. Field Program Supported Other Strategies:* HCAN's investment in field operations also provided a firm foundation for subsequent strategies that were crucial to establishing HCAN's identity and paving the way for its success, such as cultivating legislative champions and collecting personal stories. The strong field program enabled HCAN to promote a national champion strategy. HCAN's field operations also allowed the campaign to put a human face on reform. With strong support from the field, HCAN built a bank of compelling stories from Americans injured by the broken health care system, identified spokespeople, and took personal messages to targeted district offices and Washington, D.C.

**5. The "network" field program model was largely effective. The decentralized "network" field model adopted by HCAN was largely seen as effective, but there are important lessons to be drawn from this model for future advocacy efforts.**

*A. Initial Debate on Field Program Model:* Two models were contrasted for HCAN's field program – the first a more traditional electoral campaign model, which would hire national staff and organizers to "parachute" into states,

the second a network model where investments would be made to support existing networks of organizations in states to work on HCAN's agenda. The discussion about the two models was a major early debate and critical decision for the fledgling HCAN campaign. The campaign ultimately adopted the network field structure, as it supported both the philosophical stance of many leaders within the Steering Committee as well as the pragmatic needs of the coordinated field structure. To many, the deciding factor was this: while the campaign's central goal was to win on health care reform, a clearly stated secondary goal was to build progressive capacity on the ground.

### ***B. Managing and Leveraging the Network Model:***

Structuring the Model: At the outset of the campaign, HCAN invested in an extensive state assessment process to identify lead partner organizations on the ground and to create a national field plan. Lead partner organizations convened the local table and were responsible for driving HCAN's plan in their respective states. In some states, multiple local organizations were engaged; however, in these instances one group was almost always designated as the lead partner.

HCAN partnered with a number of national networks including ACORN, the Center for Community Change (CCC), Northwest Federation of Community Organizations (NWFCO), and USAction. There were challenges, however, within certain states that had very low capacity, and questions about the threshold requirements to become a lead HCAN organization arose in other states as well. In states with less capacity or a lack of clear consensus on which organization to designate as lead partner, HCAN placed a staff person on the ground to act as a campaign director in that state.

Coordinating diverse organizations with different skills, capacities, networks, and entry points into the national campaign was another significant challenge and the HCAN field structure was not always a perfect fit for lead organizations. It was a real stretch for some organizations to adapt to the context of a national campaign, both from a theory of change perspective and a pragmatic one. Additionally, some partner networks were accustomed to receiving grants rather than contracts; this created tension when it came to accountability. And while building capacity at the state level was a clearly stated goal within HCAN, this objective was not always made clear to state partners at the outset of work.

Rapid Scale Up: Investing in national networks with state-based organizations allowed HCAN to maximize the benefits of local knowledge and pre-existing infrastructure in the states. In most cases, where there was existing capacity on the ground, state partners came to the HCAN table with their own membership, existing relationships with local organizations, and at least some level of existing relationships with their Congressional district and Senatorial offices. This infrastructure allowed HCAN to build to scale quickly, with local knowledge on the ground informing campaign strategies and targets.

Accountability: As channels of accountability are more opaque in a network model than in a traditional model, state partners were asked to join the HCAN campaign through a contractual agreement as opposed to a grant process. This allowed HCAN to explicitly specify deliverables. The release of funds under the contract was tied to results reported at check-ins. Additional accountability was built into the structure of the field operation. In cases where national partners had state affiliates serving as lead state organizers, HCAN contracted with both the national organization and the state affiliate to ensure accountability on both levels. National partners were also charged with assigning a regional

field manager to serve as an intermediary between the national field operation, the network partner organizations, and organizers on the ground. This created a clear reporting structure enhancing ownership and responsibility. Despite the many checks built into the campaign's structure, reporting inconsistencies persisted. State partners had mixed feelings about reporting requirements: Additional training to contextualize requirements within the larger picture would have been useful.

Planning and Flexibility: While many national campaigns often take a one-size-fits-all approach, the network structure functioned to transfer knowledge and feedback in two directions: from national leadership to the field and vice versa. Opening two-way channels of communication brought local groups into the field planning process, incorporated local knowledge into national plans, and created buy-in from organizations on the ground. On the whole, HCAN leadership tried to strike a dynamic balance between setting goals and deliverables that would advance a national strategy while leaving room for states to implement plans in ways suited to local political contexts. Due in large part to feedback from state partner organizations, this dynamic evolved over the course of the campaign.

**6. Questions remain about sustainability of capacity building. The network field model helped build longer-term field capacity, but there is some uncertainty about its sustainability. States with little existing capacity remain a real challenge for the progressive community as a whole.**

*A. Capacity Building:* There is real evidence that capacity was increased through the network model. State partner organizations overwhelmingly reported that participation in HCAN raised their profiles, strengthened relationships with partner organizations and members of Congress, and in many instances helped forge new relationships. HCAN shared data with state partners and fed them local supporters who were recruited online, helping partners grow their lists. HCAN also appears to have helped reinforce existing coalitions in some states. State partners also gained new skill sets and experience working on a major national campaign.

*B. Sustainability Concerns:* There is substantial evidence that state partners benefited in myriad ways through participation in the HCAN campaign. However, many observers noted that the sustainability of this new capacity remains to be seen. Now that reform has been signed into law, a small HCAN staff remains in D.C. and HCAN continues to play a convening and connecting role with state groups, but there are no longer funds available to contract with state field partners. While capacity can be built through many other channels, money is usually what keeps an organization viable and at this point it is not clear what type of resources HCAN will have going forward. Given that building progressive field infrastructure was a secondary though important goal, there is some feeling that there should have been a transition plan ready to implement at the campaign's conclusion.

*C. Target States with Low Capacity:* Although a great deal of time was invested in assessing state-level capacity and developing the network model at the outset of the campaign, there seems to have been somewhat less attention to developing strategies for states with key legislative targets but little progressive infrastructure. Although some measures were prepared to address these states' needs, implementation was inconsistent. Weaker states would have benefited from extra support on the ground, including additional organizers to bolster staff, as well as greater oversight and management from regional and national field staff. Legislative targets in these states will be important for future fights, providing impetus to find long-term solutions to the lack of progressive infrastructure. Ideally, a multi-year strategy to begin to build capacity would lay groundwork for future campaigns.

**7. HCAN's communications program encountered some challenges, but improved over time. Shaping the national narrative proved difficult, though HCAN is seen as playing a role in establishing the anti-insurance frame and helping define an enemy. HCAN's online program successfully recruited activists and served as an important communications vehicle.**

**A. Influencing the Narrative:** January 2009 brought both great opportunity and challenges when it came to attempting to shape a national narrative around health care reform. A new president who championed health care and pledged to pass legislation within the year put the issue front and center. But this also meant that the White House drove the narrative and in this environment HCAN's initial attempts to promote the anti-insurance frame failed to get much traction. Meanwhile, HCAN's coalition debated message strategy internally. Some felt the focus on the insurance industry competed with the health care for all access frames.

In September, after an August Congressional recess marred by noisy Tea Party protests, the dynamics on reform shifted. It was clear that the insurance industry would do all it could to defeat reform legislation. Congressional leadership and the President began going after the insurance industry. HCAN is given credit for helping lay the groundwork and frame the anti-insurance argument and driving it forward when it was embraced by Congressional leaders and the White House. Observers cite it as one of HCAN's most effective strategies. HCAN's increased focus on the anti-insurance narrative was part of a deliberate effort to narrow the organization's message focus on creating a public enemy. This included adding anti-insurance actions to the field program and creating greater alignment between the messaging of the field and national earned and paid media communications. To support this work HCAN added a senior staff person to coordinate the anti-insurance field work, hired a public relations firm dedicated to driving this narrative, replaced its paid media firm and added a new pollster who focused on the insurance frame.

**B. Paid Advertising:** HCAN invested just under \$20 million in paid media, or 42 percent of expenditures. An additional \$3 million in ads co-branded with HCAN were paid for by others. It is important to put HCAN's media spending in context. According to the Campaign Media Analysis Group, special interest groups spent a combined \$200 million on television ads on health care in 2009. Given these figures, HCAN's media spending was not sufficient to compete with opponents or substantially change the narrative. Instead, its objective was to influence discrete targets, including Congressional leadership and individual members.

Because of the spending levels and absence of polling or research, it is difficult to judge the efficacy of HCAN's paid media in 2009 and 2010. However, outside observers believed that HCAN's messages tried to accomplish too many things and did not stick to a consistent theme, although several felt that the paid communication effort improved after August of 2009. HCAN staff acknowledge the difficulty of measuring true impact, with much anecdotal information but scarce hard data. The thank-you ads in November 2009 and March 2010 were universally viewed as positive and worthwhile.

**C. Earned Media:** The campaign implemented a successful earned media strategy. Report releases, creative events and significant local outreach received widespread coverage in various states. This resulted in thousands of media hits. Some of the elements that made the earned media effort successful included: putting a human face on the issue in the



states; developing an effective rapid response operation; conducting a broad-based letter to the editor program; publishing national reports with customized state versions released at the state level; training local partners to become more effective media advocates; and staging earned media events, such as protests outside of insurance companies.

However, some attempts at generating media around events at the local level were not as successful. State partners felt that they got adequate support from the national campaign around media, but that national communications consultants on contract with HCAN were not particularly helpful at the local level. There was also a general impression that HCAN's communications apparatus was understaffed, and that the campaign could have used a more robust in-house communications effort.

***D. Online Advocacy and Communications:*** In order to evaluate the effectiveness of HCAN's online efforts, M+R online experts interviewed HCAN online staff, reviewed exit memos (including the summary of list recommendations and recommendations for future internal communications), and reviewed available data on the results of online efforts. We also compared HCAN online data to industry benchmarks from M+R's 2010 eNonprofit Benchmarks Study. Based on this information we came to the following summary conclusions:

Strengths: HCAN's online effort was able to grow a fairly sizable and highly responsive list in working with coalition members, despite some missteps in the way the program was set up. Overall, the program saw higher than industry average response and open rates (20-30%) throughout the campaign, even as the list grew dramatically. HCAN campaign directors empowered new media staff to go and do. This approach worked well: the small online team was able to test several new, and often integrated, tactics, including call tools like a toll-free directory of Congress, which patched activists directly through to voicemails and offices, bypassing the switchboard. The online effort also added value to existing organizations working on health care reform, rather than competing with them.

Challenges: Messaging that worked online sometimes got the campaign in trouble offline. Offline integration with the online program was at the discretion of offline field staff, which cut off opportunities for the online program to support the field program. Some field staff members who worked closely with the online team benefited, but in other states where the online program went untapped, coalition members could have benefited if there had been better communication to the field about the value of online work.

**8. Though most praised HCAN's outside strategy, reviews of its inside game vary. Perceptions of how well HCAN played the inside and outside game vary dramatically. Although there is a general sense that HCAN was more adept, experienced and comfortable working the outside game, there is a broad range of strongly held opinions on its effectiveness working the inside game.**

***A. HCAN Perspective on Inside Strategy:*** Staff and members of HCAN believe that the coalition played the inside game well on Capitol Hill. Both state-based field operations and coalition partners felt that lobbying efforts were effectively coordinated and executed. Regular meetings of the coalition's legislative committee, which included HCAN staff and lobbyists from member organizations, meant that targets were strategically divided up and assigned to specific organizations based on pre-existing relationships or on-the-ground presence. Coordination with lobbyists also ensured that members of Congress were hearing a consistent message.

In contrast with near-consensus on HCAN's effectively managed relationship with Congress, internal views are divided on the campaign's relationship with the White House. Coalition partners expressed strong feelings on this point. Many felt that HCAN vacillated between working with the administration and following their lead, and engaging with them more adversarially. In retrospect, there is general agreement that following the lead of the White House and not pressuring the Senate Finance Committee during its deliberations was a mistake.

**B. Congressional and Administration Views:** Congressional staff views were mixed – some very positive while others less glowing in their assessment – but the general perception was that HCAN was not as effective as it could have been working its inside strategy. Criticism of this type is natural and is often voiced in similar evaluations. Most Congressional staff members we spoke with praised HCAN's outside efforts and viewed the coalition's role as a net positive, but divergent views emerged on its effectiveness as inside-the-Capitol lobbyists and partners. A strained relationship with the White House hampered HCAN's abilities as an inside player. The first goal of HCAN's 2009 strategic plan was to “build a relationship with the Obama Administration that helps President Obama continue to be a health care champion and ensures HCAN and partners are able to work effectively with the new administration.” But balancing its dual roles as an inside campaign partner and an outside entity caused tensions for HCAN.

**9. Views on HCAN's legislative strategies are mixed. The choice to focus on developing and supporting legislative champions was viewed as successful and strategic. While opinions on HCAN's decision to focus on the public option span a broad range, we conclude it was a net positive contribution to strengthening the health care bill.**

**A. Champions Strategy:** Advocacy campaigns typically lack the funding to support broad field operations, and thus often choose to focus efforts on influencing swing votes. Because it had adequate resources, HCAN made a strategic choice early in the campaign to cultivate and support champions for health care reform while also moving swing votes into the pro-reform column. Observers note that while other groups concentrated efforts in hotly contested swing districts, HCAN was the only entity doing work in supportive members' districts, and that its impact was felt. Numerous examples of Congressional supporters becoming aggressive and outspoken advocates for reform were recounted.

**B. Public Thank-You Campaign:** A corollary to the champion strategy was a focus on publicly thanking members who voted for the legislation. When the House passed the bill, HCAN organized events in home districts and ran ads within 24 hours, and met members at the airport with flowers, signs and cheering crowds thanking them. We heard repeatedly that individual members loved the events and that it bolstered their ongoing commitment to ensuring the bill passed.

**C. The Public Option:** Opinions on the impact of HCAN's support of the public option span a broad range. HCAN leaders, partners, staff, and consultants agree that advocating for the public option was not just important tactically, it was the right thing to do on policy grounds. The push for a public option was instrumental in keeping the progressive coalition together, and drew a bright line to gauge where members stood on health care. It was also an effective organizing tool for mobilizing grassroots and grassroots pressure in the states. HCAN also contends that sustaining its call for a public option for the near-duration of the campaign was a smart strategic choice. It notes that it nearly achieved its goal of including a public option in the bill, while forcing opponents to spend time and resources fighting it. The public option became a lightning rod for opponents of reform. This in turn created space for Congress to include other reforms that might have been more difficult absent the fight over the public option.

Others agreed that it was important to advocate for the public option, but thought that HCAN held on too long, pursuing this policy even after it was clear the battle was lost. There was concern that the intense focus on one aspect of the reform detracted from HCAN's ability to shape other parts of the policy debate. Others argued that progressives' call for a public option allowed opponents to more effectively mischaracterize reform as the government takeover of health care. Moreover, many coalition partners noted that championing the public option made it difficult to induce supporters to back the final bill. Activists and others came to see the public option as synonymous with health care reform.

**10. HCAN was able to quickly adapt and respond to events. Its ability to maintain a strong field operation and shift strategies as circumstances changed was widely commended. Its ability to respond to buffeting events was a crucial factor in maintaining momentum to successfully pass reform legislation.**

Effective advocacy campaigns are resilient to buffeting events. The effort to pass health care reform had more than its share of twists and turns. First and foremost was the length of the campaign. The general perception is that HCAN was adept at reacting to a shifting and volatile political situation. Several individuals noted that building a large field operation was itself a nine-month campaign; keeping it active and functioning over a 15-month period was a substantial challenge that HCAN met admirably. Others pointed to the thank-you events for members who had voted for the bill. These were not anticipated or planned for, but HCAN was able to reallocate resources – both field and financial – to pay for ads to implement the program.

HCAN and its coalition's ability to respond rapidly to changing circumstances is perhaps best seen in light of two unanticipated political challenges: the Tea Party's ugly disruption of August Town Hall meetings and Scott Brown's Senate victory in Massachusetts. In each case, HCAN was able to pivot quickly and respond effectively. Observers point to the strong coalition and the integrated field campaign as key components that allowed HCAN to react appropriately. HCAN is given significant credit for helping keep momentum for reform moving in the wake of these difficult events.

**11. Overall management and staffing of the campaign is given high marks. Campaign management was of high quality, although many observed that additional high-level staff would have proved beneficial. Fundraising was an overall source of disappointment throughout the campaign.**

*A. Management and Structure:* A long-standing, ongoing debate concerns the appropriate balance between national and state infrastructure. The tension lies between getting sufficient resources out into the field while still being able to centrally manage the campaign –and its budget. HCAN appears to have largely succeeded at threading this needle. The vast majority of resources were spent on campaign execution, with 80 percent allocated to field and media. Only nine percent was dedicated to central payroll and overhead. Even with this relatively light investment in a centralized national operation, the general sense is that HCAN staff members were highly responsive and attuned to the needs of partners and the various field networks.

*B. Fundraising Operation:* Fundraising for HCAN was almost unanimously considered a disappointment. This may seem strange to say in the context of a national advocacy campaign that raised more than \$47 million, (\$27 million came from The Atlantic Philanthropies, \$6 million from other foundations, approximately \$9 million from organizational partners, and the remaining \$6 million from individual fundraising.) HCAN did attempt to aggressively fundraise. Still

the general consensus is that HCAN could have done a better job soliciting additional resources – especially from organizations, other foundations and individual donors. Across the evaluation interviews, a number of concerns and observations were raised that help inform the fundraising challenges. These are worthy of further discussion in relation to planning future advocacy campaigns.

**12. Atlantic’s role in HCAN is praised. Atlantic is widely credited with taking a calculated risk by funding HCAN early. Atlantic’s ongoing role with the campaign is viewed as positive and appropriate for a funder.**

Atlantic’s decision to fund a major mobilization campaign on health care early in 2008 is viewed by most observers as a calculated gamble that paid off. When Atlantic decided to award the grant, it wasn’t clear who the next president would be and where healthcare would fit on the Congressional agenda. Atlantic’s early and significant pledge of resources allowed HCAN and its coalition to become an important player over the next year and a half. The campaign became a center of gravity, a place for disparate groups to come together to work on health care.

## V. Conclusion

There is a strong consensus that HCAN’s efforts helped make health care reform a reality. Given the number of players in this space, it is difficult to gauge HCAN’s precise impact and influence on the legislation. However, based on our evaluation, we can say with certainty that HCAN was a major contributor to passing health care reform. Areas where the campaign was particularly worthy of praise include its effective and disciplined strategic planning, decision-making and implementation; well-thought-out benchmarks; strong and effective internal leadership; efficient allocation of resources to staff and fund a wide-ranging field program; resilience to buffeting external events; and its creation of opportunities for supporters to meaningfully engage with the movement for reform through multiple points of entry during the campaign.

There were areas that presented a greater challenge to the coalition. These included the campaign’s communications efforts; the sometimes unsteady balance between its inside game and its outside mobilization work; the overall diversity of the coalition; and its partial success in identifying and working to overcome capacity gaps in order to maintain a diverse coalition. Fundraising beyond a few big donors was also very challenging.

# Appendices

## *Lessons for Future Coalition Work*

HCAN's coalition efforts offer a number of specific lessons for future campaigns.

- √ Begin building the coalition well in advance of the campaign to allow time for relationship and trust-building.
- √ Work with initial partners to create a clear set of coalition principles that can be used to attract additional partners and to clarify who should not join the coalition.
- √ Involve lead coalition partners in establishing goals and developing strategies to create a sense of ownership over direction, but do not expect partners to do this planning on their own – recognize the importance of staff direction and involvement.
- √ Establish an action orientation among lead coalition partners, and make it clear that signing-on is not sufficient – work and resources – both financial and human – are expected from all partners. Organizations on the HCAN Steering Committee contributed to the campaign financially by paying dues.
- √ Invest time, staff and resources in coalition management.
- √ Listen closely to partners to identify what they need out of the coalition – their own enlightened self-interests – in addition to determining what they bring to it.
- √ Sustain regular and consistent communication and dialogue (not just one-way information sharing) throughout the campaign, especially during times of high pressure or low morale.
- √ Involve partners not only in developing the initial plans to help maintain coalition ownership over the campaign, but also in ongoing strategic decisions.
- √ Create spaces for ongoing discussion about difficult issues, and use the principles to help navigate these discussions.
- √ Have up-front discussions about how to best handle situations when a coalition partner disagrees with more dominant partners.
- √ Clearly articulate goals for coalition diversity develop plans to meet those goals, and make sure that coalition materials and messages match diversity objectives.
- √ Work to ensure clear communication between national coalition partners and state affiliates that are participating in parallel state coalitions.

## *Lessons from Field Program*

HCAN's experience using a network model for offers a number of lessons for future efforts.

- √ Early in the campaign planning process, ample time must be allotted for a thorough assessment of state-based resources and targets.
- √ An accurate and complete assessment of the capacity of the networked groups and a thorough vetting of lead organizations on the ground must be conducted prior to launching a field effort.
- √ A state director should be hired where there is not a local partner that is able to coordinate the state work or if disagreements between national partners on an appropriate lead partner can not be resolved.
- √ Not all groups are an exact fit for the national campaign structure. While lead groups with organizations that matched the campaign's overall structure appeared to serve as stronger leads, more time could be spent bridging the gap with organizations that do not mirror the campaign structure. Bringing those groups into the process earlier and is critical to maintaining the diversity of groups in the coalition.
- √ Discussions with support partner organizations on the ground (groups that were not serving in a lead role) must occur early in the planning process in order to establish a clear understanding of responsibilities.
- √ In order to effectively work within the framework of a national campaign and meet its demands, state organizations need training and assistance. This includes but is not limited to assistance with: rapid response, communications, high-volume organizing tactics (call-in days, large-scale events), reporting, and shifting focus from state priorities to national priorities.
- √ A regional management structure with clear guidelines should be created (e.g., local organizers ⇒ field coordinator on the ground ⇒ regional manager ⇒ national field director).
- √ Additional national field staff could be added to support the regional field manager structure and to alleviate some of the pressure on the organizations that are not as sure a fit within the national structure.
- √ Strong accountability mechanisms in terms of contracts, goals and deliverables must be set.
- √ Consistent reporting mechanisms must be established, including training and national assistance on reporting when needed.
- √ The right balance of systems needs to be put in place, with room for flexibility to move off the model (within the context of national goals) when state partners determine that strategies or tactics are not suitable for the local political context.

- √ Legislative and policy support helps organizations on the ground adapt to working on a national campaign on a national issue, a departure for many organizations used to focusing on local or statewide issue work.
- √ More opportunities for state partners to interact with national organizations can help build greater trust and accountability. Visits by national staff can help bolster state efforts and connect support on the ground to the national campaign.
- √ A plan must be created well in advance of the campaign's launch to address states with low capacity but important legislative targets. Resources should be allotted for hiring additional organizers in states with inadequate capacity.