

Part III

Getting Started

Once you are persuaded that more people need to be involved in advocacy, and you have reminded yourself how the policy process works, it is time to start. It would be great if there were some easy rule to apply in deciding which issues to take on and how to go about winning them but, unfortunately, there is no magic formula.

However there is a lot of useful advice around. It draws from a combination of common sense and the experience of an increasingly effective advocacy community.

The first piece of advice as you are getting started is simple. Remember that as a general rule, anything involving major change, significant costs, or controversy, will be relatively more time-consuming and difficult to achieve. Similarly, it is generally the case that anything involving only modest (or incremental) change, little or no cost, and a minimum of controversy, will be relatively easier to achieve. Either way, the size and complexity of the advocacy task have to be compared with the size and complexity of the re-

sources you and your group can bring to bear. (That is not an argument for avoiding big issues, just a quick reality check.)

The next piece of advice is equally straightforward: think. Any time you take to think through your issues, your goals, and your capabilities, will always be time well spent. An ill-considered effort can cost your group more than just disappointment. It can reflect poorly on your organization, demoralize your members, and may even establish bad precedents. A carefully considered effort will provide useful lessons whatever the outcome.

Now, just in case you or your colleagues are new to advocacy, or have not done much policy advocacy in a while, here is an Advocacy Fitness Plan – with low impact, medium impact and high impact exercises – to get you in shape. (Like the material in the Appendix section of this guide, this Advocacy Fitness Plan can be copied and used as a handout at future gatherings.)

An Advocacy Fitness Plan

Becoming politically fit is a lot like becoming physically fit. Team sports and exercise classes have their place, but sometimes it is just you and the TV – and nothing you can do about it. Even if others are theoretically available to run or shoot baskets, they may not be available on the same schedule. One way or another, being on your own (living in a rural area, leading a busy life, or just being shy) is no reason not to keep your advocacy fitness level high.

Physical fitness is a useful analogy to keep in mind for another reason. Just as your flesh-and-blood muscles need regular use and increased activity over time, so do your political muscles. Stop using them altogether and you will quickly become politically flabby; use them regularly and your level of advocacy fitness will soar.

So, what follows is a quick and easy, 10-step advocacy fitness plan, a kind of aerobics for advocates. And, like those aerobics workouts on early morning TV, it has three levels: low, medium and high impact (impact on you, that is, not on your issue or cause).

Level I

Low Impact –Every MONTH do at least one of the following:

1. Get on the mailing list of an advocacy group that focuses on an issue you care about.

This is good because it supports advocacy efforts monetarily (usual annual costs run between \$10 and \$40). At the same time, you will become better informed about the issue, and you will learn when citizen action is most needed.

2. Enlist a friend.

Get someone you know interested in your issue and excited enough to do something – anything – about it (learning more counts, as does attending a meeting or showing up to volunteer on a one-time basis). Do not worry about what they do; once hooked they will figure out for themselves what is most comfortable.

3. Inform a stranger.

You can have an impact just by carrying on a conversation in a place where others are sure to hear: the subway, a checkout line, or elevator. You could post a Fact Sheet on the bulletin board in your apartment complex or local grocery store, put an informative bumper sticker on your car, or post something on a computer bulletin board for other subscribers to read. Or, you could ask that a group you belong to (e.g., Rotary Club, church, mosque, or synagogue, PTA, professional association) consider forming a task force on the issue you care most about.

This level is like the exercises where your feet do not leave the floor and your movements are quite gentle. But even if you get no farther than Level I, by the end of a year you will be better informed, and will have gotten a few more people thinking about others in your community.

Level II

Medium Impact –Every WEEK do at least one of the following:

4. Write a policy-maker (federal, state or local).

Practice what you already know; exercise those political muscles. Once you have done it a few times, it will get easier. As with most things in life, the first time is usually the hardest. If your elected officials like getting messages by e-mail, use it.

5. Call a policy-maker (federal, state, or local).

Ditto. It helps that U.S. senators and representatives all have local offices with local telephone numbers, and some have toll-free lines as well. You may find yourself talking to a machine, but that is easier for some people, and your message will be conveyed.

6. Visit a policy-maker (federal, state, or local).

Ditto again. It is not enough to read about making a visit; sooner or later you need to use what you learned. Try it, you may like it. Those who start out feeling the most timid, the most reluctant, frequently turn out to be the best converts once they try. Sometimes novice lobbyists use words like “seductive,” “ad-



dictive,” and “intoxicating” to describe the experience.

This level is comparable to those exercises where the body movements are more energetic, the pace is faster, and a lot more bending and stretching is involved. But the impact can also be far more dramatic. If everyone who claimed to care about others wrote, called, or visited a policy-maker every week, their issues would fare very differently in the political process. So long as most of the people who claim to be concerned keep their concern to themselves, social issues/the environment/the arts will continue to get only a fraction of the public dollars and political attention afforded to just about everything else.

Level III



**High Impact –
Every WEEK,
in addition, do
at least one of
the following:**

7. 8. 9. Write, call, or visit other voters.

Every week, automatically re-cast your letters, calls, and visits for use with a larger audience: the voting public. Every time you write, call, or visit a policy-maker, think of a way to get the same message across to other voters. Re-write the letter to your legislator as a letter-to-the-editor; call a radio call-in show with the message you left on your council member’s message machine; repeat what you said to the mayor at the Rotary Club or with your exercise group. That way you will double (or triple) your impact with only a fraction more investment of energy and time.

This level is like the exercise routine where you jump up and down, fling out your arms and legs, and

quickly work up a sweat. At this point you will be a true citizen activist, with advocacy muscles that are taut and working at their peak. Go for it.

Bonus Points

10. Work for a visionary goal.

While every effort counts, groups still have a greater chance of success than individuals working on their own. That said, even very effective groups can sometimes get so caught up in responding on an immediate, practical level that they lose perspective. It is essential, as the old civil rights refrain goes, to “keep your eyes on the prize.”

So, for the greatest impact, join with the advocacy group of your choice to work for at least one visionary goal. It is important for people organizing food drives to think of ending poverty, not just alleviating hunger; important that domestic violence advocates work toward creating a less violent society, even as they fight for increasing the sensitivity of police or expanding shelter capacity.

Management objectives, organization charts, and interagency agreements all have their place, but good advocates must never forget that a better world, not the next annual report, is what these efforts are all about.



Six Critical Steps

Conditions will vary from place to place, but a 5-10 person committee is usually a good place to start. (It helps if each person is already part of a group or network that might be activated.) Sometimes they will come together out of a shared concern, or because they are looking for new ways to be effective against old problems. Other times you will find yourself drafting people.

Once they are assembled, you will need a plan. When it comes to working out an advocacy plan, there are probably as many formulas as there are advocates, but most include the following ingredients in some form or other.

1. Identify your issue and goal(s).

A problem is a cause for concern, a matter needing action. Elder abuse is a problem.

An *issue* is just the problem framed as something you can do something about. For example, you may determine that elder abuse often goes unreported in your community because the people who care for vulnerable elderly are not taught how to identify the signs of abuse and thus do not report it. "Elder abuse" is very broad and hard to organize around, but "a campaign to improve reporting through training" sounds do-able. An issue always contains a solution or partial solution; it affects people, is specific, and theoretically winnable.

Your *goal* is what you specifically hope to accomplish, the objective toward which your advocacy efforts are directed. Ending all abuse of the elderly – physical, emotional, financial, psychological – is a laudable long-term goal, but it is too sweeping for most groups to build an advocacy plan around. For starters, few could command the resources required, or even know where to begin.

Convincing the legislature to require – and fund – the training to increase accurate reporting by caregivers, on the other hand, is a narrower goal, but it is one that could help many vulnerable older people. Moreover, it is specific enough to build a plan around (with short and long-term goals) and possibly win – and it is consistent with the long-term goal. From an advocacy perspective that makes it a better choice. (You will save yourself a lot of grief if, early on, you define your issue and goals as clearly and specifically as possible, and relate both to your resources.)

2. Be accountable and representative.

As you plan, it is important to be sure you represent those you are speaking for, and not just your own ideas of what is needed. Good advocates – like the tobacco free group that included the widows of long-time smokers and teens tempted to smoke – do. What their constituents wished is what they pursued. Nobody likes to be spoken for without being consulted.

This is something every good advocate grapples with; it is especially sensitive if the people involved are mentally competent but frightened and overwhelmed (for example, someone who has just been diagnosed as HIV-positive), or unable to speak for themselves (developmentally delayed infants or adults with dementia).

Who can speak for them? One answer is to rely on surrogates, like family members or a group whose members are similarly affected. A good test is to ask whom YOU would want as your advocate under similar circumstances – a doctor? your family? a court-appointed ethicist? an advocacy group? your peers? And what if you were just unsure how the policy process works – would that give someone else the right to speak for you? *This is one issue you have to think through carefully and plan for in advance.*

3. Get the facts.

There are few worse advocates than people with good intentions and bad information. Good advocacy plans are based on solid facts, not anecdotes, guesses, or whatever happened to make it into the media. A first discussion of elder abuse may reveal that some think the most pressing concern is a failure of police to respond when abuse is suspected (not the failure of caregivers to make reports), while others believe the real issue is unregulated businesses that prey on the elderly. Fail to get the facts first, and you may find yourself organizing around the wrong issue.

It is easy to assume the worst (about the mental health system, government bureaucrats, local schools), based on an anecdote or two. As a *Washington Post* editorial noted so succinctly: "...the plural of anecdote is not data." A quick fact-finding effort can help establish whether the anecdotes are the exception or part of a pattern.

It is also important to establish where you need to intervene to alleviate the problem. It will not help to complain to your United States senator about under-reporting elder abuse; that is a responsibility of local agencies. Nor does it help to fuss at state legislators over whether nicotine may be treated as a controlled substance – because that is a federal responsibility.

Make a checklist of what you need to know to proceed, and make assignments for getting it. Collecting information about a problem or its possible solution is not all drudgery. It can be a good way to get your volunteers invested in an issue, and fact-finding is something even shy people can do.

Getting the facts may require some research, a focus group, or survey of your own, but there is a staggering amount of information already available. Try that route first. There are studies, reports, surveys, planning documents, testimony, task force proposals and commission recommendations on a myriad of topics. They are available from state legislatures, government agencies at every level, universities, public

libraries, and in the files of countless nonprofit groups. Librarians are a great potential resource.

Local advocates and chapters of national groups are another good place to start (for example, your state's chapter of the American Cancer Society would have good statistics related to children and smoking in your state, and the state chapter of the AARP would have good information on needs and services related to the elderly), as are state chapters of professional organizations (the American Public Health Association or the National Association of Social Workers).

And today, anyone with access to a computer will find a world of information available on the World Wide Web.

4. Develop a strategy.

Once you have got your issue clearly defined, and you have learned as much as you can about the problem – including who is responsible for it – it is time to map out a strategy.

Advocates spend a lot of time reacting to others, but good advocates are proactive as well. Both require a *strategy* – an overall approach, an action plan.

Framing the issue one way or another is a critical step. Framing the elder abuse issue as a need for caretakers to be trained in better reporting helps determine your strategy – in this case, a campaign to win a law to require training – along with necessary funding. In this case the overall strategy is *legislative*.

If the issue had been framed as a need for better public understanding of the problem, you would pursue an *educational* strategy; if individual elderly were denied protections already afforded by law, you might pursue a *legal* strategy through the courts; if there is already a law but the regulations to carry it out are inadequate, you would pursue an *administrative/regulatory* strategy; and if there is a requirement in the law that just is not being funded, your strategy might be *budgetary*.

Developing an advocacy strategy is a lot like the process you would go through to organize a fundraiser or put on a show. You would draw up a plan, set some interim goals, and make a calendar with deadlines for achieving them. You would make lists; think through who is good at what; get a good committee; and recruit volunteers for the other jobs needing to be done. Early on you would figure out how much you can spend, where it will come from, and who will be responsible for the practical details – like budgets, signing correspondence, keeping records. (See *More Ideas For Making A Difference* for a year-long advocacy calendar.)

As you develop your advocacy strategy, be honest about your capacities. Suing the department responsible for elder abuse might seem appealing, but it is a costly strategy that requires a large budget, attorneys on staff, or attorneys willing to work for free. You need to consider the personnel and dollars required for various strategies, as well as how long they would take before showing results. A small group that is new to advocacy might do better to begin with something time-limited and very specific, whereas a group with well-established community ties and an experienced staff could consider something more ambitious and long-lasting. (Working in coalitions is one way to include elements of both.)

Think through what you can do alone, and also what kind of help you might recruit if that is what is needed. (See page 61 for an *Advocacy Readiness Checklist*.)

Finally, you need to consider the less tangible but ever-so-critical matter of style. The Grey Panthers and the Junior League both care about elder abuse, but their styles in approaching the issue will be different. Your advocacy efforts reflect on you and your group; plan your strategy accordingly.

5. Get to know the decision-makers and their staff.

Knowing the players is not just a matter of being able to list their names.

Decision-makers are like anybody else: they do not like to be approached only when you want something, and they are appreciative if you take the time to understand the constraints they face. It always helps to recognize their needs. In your own time: offer to do research, help in a campaign, pitch in when they need extra hands. It will not go unnoticed. Effective advocates cultivate relationships with decision-makers and their staffs over a long period of time, and understand the process well enough to know when to ask for something (or not). You should not try to get a bill introduced at the end of a session, for example, or seek funding for a project after the budget has been set.

Getting to know the decision-makers has another clear advantage: it teaches who has what kinds of power at varying levels of government, so you will not be asking for things they cannot deliver.

For years a statewide Human Services Coalition in Utah held monthly meetings with key staff from the Departments of Health and Human Services. Over the years those Friday afternoon sessions have provided an effective form of feedback about program operation to the policy makers. But they also offer a way for advocates and policy makers to get to know one another in a collegial and non-adversarial setting, while learning what different staff can – and cannot – do. This is not about getting chummy, and it will not guarantee agreement on the issues. But it is a key element of developing mutual respect for all concerned.

6. Broaden your base of support.

Senior organizations may be the logical place to start if you are trying to improve elder abuse reporting, but younger relatives also feel outraged by elder

abuse, and many people would be interested in policies to protect their grandparents. So might public health professionals, faith communities, academic gerontologists, or veterans. These are all likely allies.

But others are also concerned – like local merchants with elderly customers or the police officers who get called to investigate. These are your unlikely allies—and they can be very important. Think how striking it is when insurance executives join forces with consumer groups to press for better health care policies, when loggers join forces with environmentalists, or when sheriffs testify in support of domestic violence shelters. Alliances like that are striking be-

cause they are unexpected, and signal that voter support is broader than previously supposed.

At some point you might wish to form or join a bigger coalition, so that is discussed in the next section. For now it is enough to note that in the world of public policy, success often depends on being able to show a broad range of support (lots of “butter”), and an absence – or neutrality – of the likely opposition.

You have gathered your information. You have developed a personal citizenship fitness plan. Now it is time to think once again in terms of your group.

Who Else to Involve

As you think about whom to involve in advocacy, you may be thinking about people with lobbying experience, or those who are known for having strong opinions. They should be included, but you will miss a lot of talent if you stop there. In politics there are two rules – Rule # 1 is: nothing happens overnight; and Rule # 2 is: you cannot change Rule # 1.

So when you think about the traits that produce good advocates, look for perseverance.

Good advocates, it is often said, can always be recognized by their running shoes: they are the marathon types who pace themselves and never give up.

Next, look for a couple of noodges, sticklers for detail.

A lot of advocacy turns on small details and basic courtesies, like thanking every city council member who supports your position, or following up meetings with state legislators with a personal note. Those details count: that is why many politicians try to add brief personal notes to the form letters sent out by their staff.

A third trait to look for is passion.

That is not the same as volume or drama – it is possible to feel passionately about something while speaking softly and working quietly. Think of all the times you have seen an issue pushed to the forefront by someone directly involved – a student who survived a gun attack, relatives of someone killed by a drunk driver, persons with a physical or mental disability, victims of domestic violence. They are not experts or professional lobbyists, but they know their issue first-hand, as family members, victims, or ser-



vice consumers. This is not a job for them; all too often it is a matter of life or death.

Fourth, seek modesty, people who do not need the spotlight.

You can accomplish a lot in politics, the old saying goes, if you do not care who gets the credit. Often the advocates are working behind the scenes doing the legwork, making the phone calls, drafting the speeches and letters-to-the-editor while the elected officials are getting their pictures in the paper and the plaques on their walls. Some of the best advocacy is felt rather than seen.

And do not be afraid to start small.

That is normal. It would be great if half the people in your group wanted to join in your advocacy effort from the start, but that is neither likely nor necessary. Most advocacy efforts begin with, and are sustained by, small groups of dedicated people. You do not have to start with big numbers; you do need to start

with big commitment. That, not quantity, is what counts:

- One grieving mother started M.A.D.D.;
- Two people – one English, one African – started the movement to free poor nations from debt; and
- A handful of (mostly young) environmentalists started Earth Day.

Sociologist Aldon Morris notes that only about 10-15 percent of the population sustained the civil rights movement. Others note that in any self-interested group about 5 percent can be counted on to be activists. That is not surprising. There is never a time when most people are counted as activists, nor is that needed. What is needed is a core group of people serving as catalysts; they will do the detail work and infuse other people with their passion.

Your job is to find and cultivate your group's 10 percent: the people needed to sustain the effort over the long haul.

A Special Word About Boards

There is a tendency in the nonprofit world to think of a board of directors in terms of their ability to raise money, look good on a letterhead, and/or offer expert advice. That is not bad, it is just shortsighted. Nonprofit board members' greatest assets may be their access to decision-makers, their credibility in the broader community and their power – all of which can be harnessed on behalf of the agency's mission and clientele. Valuable board members often have an easier time getting appointments with legislators or a governor's staff person and are likely to know other community leaders.

Every nonprofit board should have an advocacy plan of its own, to spell out the ways the board will act as advocates for the group and its members. Board members can educate their peers in the com-

munity, work with the media, help deflect community fears, organize public forums, testify, and lobby. In addition, they can make the case that nonprofit groups represent jobs and income to their communities, as well as valuable services. That alone is a form of power, but one that is too often overlooked. For a time the Oklahoma legislature was allocating more money per capita to nonprofit youth-serving groups than any other legislature in the country. That became true after the groups began requiring that all new board members be willing to lobby on behalf of their programs and their young people. Potential board members who felt uncomfortable with the requirement were helped to find service on some other board.

Do Not Forget

Even though there is much about advocacy that is common to many other undertakings, there are a few special things worth keeping in mind.

- Whatever your long-term goal, try to build in an early, easy victory that is related to it. Nothing motivates like success, and nothing discourages like inaction. Since advocacy efforts often move slowly, it helps to involve your fledgling group in anything that is consistent with your larger goals and likely to happen (or easy to win) – a small victory, but a victory. They will share some of the credit and be more willing to press on.
- Sort out which parts of your goal need government action and which can be accomplished without it. The strategies and personnel involved in each are often different, and the two should not be confused. Besides, elected officials do not like being asked for help that is available through the private sector, and vice versa.
- Expect to compromise. Evelyn Burns, who taught social policy for many years at Columbia University, used to remind her students that compromise is part of politics; the trick comes in knowing when a compromise is acceptable. A small version of something good was usually all right, she argued, because you could always build on it in the future. But it is never good to agree to institutionalize something bad; once begun, bad practice is hard to stop.
- Remember what motivates you. Some advocates have a tendency to cite one terrible statistic after another, piling up every grim possibility imaginable. You will need facts to be credible, but people are rarely moved by statistics, no matter how dramatic they may be. Michael Harrington, a great anti-poverty advocate, once wrote, “A fact can be rationalized and explained away; an indignity cannot.”
- Humanize your facts. Talk about people you know, not faceless categories. Hardly anyone would say “yes” to helping a statistic, but the reverse is also true – most people have a hard time denying help to someone they feel they know.
- And never forget to point out the good that will be accomplished; beating policy-makers up with bad news is more likely to paralyze than persuade.

What moves people is not just grim statistics but “a cocktail of fear and hope.” The bad news may all be true, but good advocates offer policy-makers and fellow citizens the hope that something can be done to turn it around.



Successful Techniques

As you may already have guessed, all through this manual you have been learning effective techniques to adapt for use in your own advocacy efforts. They have three broad purposes.

To Inform

You can use the Advocacy Quiz at the beginning of Part I to help others understand how natural it is to be engaging in advocacy. Use it when conducting a workshop on advocacy, or when trying to get others to join your advocacy efforts.

An easy variant on that idea is to develop a different sort of quiz, one based on the most common misperceptions of your issue. When you do presentations to community groups on your issue (as compared with presentations on advocacy), begin by having the audience take The Quiz, and then discuss the answers. If you want to develop materials to accompany your talk, you might consider the format used in a New York State pamphlet which began: "In 1492 everyone **knew** the world was flat. In 1917 everyone **knew** the Titanic was unsinkable." "Today," you might continue, "everyone **knows**...[and here you fill in a myth related to your issue]." "Myths die hard [insert the correct information here]."

To Get Action

If plans are already underway and legislation is already pending, but the legislators just are not paying much attention, you might try to devise an attention-getting gimmick like the ones described through this manual (for example, using "Take Five Tables"[page 10-11], or delivering mock paper "cigarettes"). Gimmicks generally do not work on their own, but they can be very effective as part of a larger, well-considered strategy.

One February a family planning group in New

Hampshire followed up some of its public education efforts by sending every state legislator a valentine. It contained the results of a statewide poll showing widespread citizen support for family planning. They described their mailing as "linking romance with responsibility", but they were also making an important political point. By calling the legislators' attention to public support for this once-controversial service, they were able to win the necessary funds.

To Win Policy Changes

A well-established group could decide to set up a *legislative network*. The Florida Nurses Association built one by identifying a current or retired nurse in each state legislative (state) and congressional (federal) district willing to work on and respond to health-related questions, and get other nurses in their area to do the same.

Similarly, many groups around the country have formed CANs (e.g., a Children's Action Network, a Congregation Action Network). Organizers in one state began with just a few dozen congregations and eventually had a few hundred. Each congregation had a coordinator who agreed to be the conduit for all legislative alerts and related activity. Coordinators agreed to recruit members to be part of the network, and to generate 5-15 calls or letters on a limited number of issues (no more than five) while the state legislature was in session. When that ended, CAN coordinators agreed to do the same for one or two issues pending before the U.S. Congress.

The Children's Action Network in one mid-size state began in 1998, had about 1,000 members by the end of 1999, and 3,300 by the end of 2000. A chart on their wall showing the CAN numbers by county is updated regularly. CAN members pledge to "speak up for kids" during the state legislative session: they promise to read a weekly legislative

alert, and “take five” (minutes) for kids each week by contacting a policy maker with the message for that week.

Yet another network revolves around two large public meetings each year that have grown to attract several hundred local advocates, their local and state legislators, and the local media. The forums are designed to put key decision-makers together with voters twice: in the fall when the next year’s budget is being developed, and again in the spring when the budget is being voted on.

Each of these legislative networks has some common elements. The expectations of participants are time-limited and relatively modest (for example, 5-15 calls or letters on a limited number of issues; five minutes a week; two public events). There is a staff person whose duties include nurturing the key contacts in the legislative network, and devoting time to them: answering their questions, helping them get what they need to be effective. In each case sample materials are prepared to make network participation easier – sample e-mails/letters, sample telephone scripts, sample fact sheets and issue papers.

Developing a legislative network is not a one-shot or short-term effort. It requires knowledge and a degree of political sophistication, as well as an ongoing commitment to advocacy. But it is within the reach of most organizations that follow policy issues, and it should be within the capabilities of any state-wide coalition (e.g., on environmental or women’s issues, the arts or human services). Ambitious advocates might combine several models. They could ask churches, mosques, and synagogues to provide the calls and letters (since they meet weekly), while depending on organizations with quarterly or annual meetings to arrange for citizen/decision-maker forums.

However, whether as an individual or as part of a group, it helps to remember: good advocacy does not always take money or sophistication, but it does take creativity and thought to come up with something that a lot of people can participate in, and that has the desired effect.

Across the country, groups with shoestring operations and political novices filling their ranks are making up in commitment and creativity for what they lack in money and sophistication. And they are pulling off minor miracles – changing laws and budgets, winning better policies for vulnerable people and causes. You can be part of that. All you need to do is try.

Notes: