

Part IV

Nuts and Bolts

You've got your issue, you've put together a committee, you've drawn up your strategy (ready to be revised as needed), and you've reminded yourself how the process works.

Now it is time for the practical details, the nuts and bolts of serious policy advocacy: building coalitions, testifying, lobbying, and becoming part of the process.

Take a deep breath. Here we go.



Building Coalitions, Broadening Your Base

A **coalition** is *an organization of organizations*. Coalitions are not just lists of individuals; they represent the combined influence and support of multiple organizations – each of which may have dozens or hundreds of members.

give, will not have to do everything.

Coalitions are particularly well suited to advocacy strategies. They show a commitment to think ahead, anticipate alternatives, and achieve political results.

The most obvious reason for building a coalition is to increase your numbers. But there is a subtler reason as well. Life often feels hectic, disjointed, or too busy. Modern communities are full of families with busy lives and no close relatives living near by. That proves especially hard when tragedy or trouble strikes. This also takes a toll on the neighbors and friends who would like to help but are not sure how to get involved.

State and local coalitions:

- Combine community resources;
- Offer a forum for thinking about community problems;
- Reduce competition for funding and volunteer time;
- Provide an efficient way to work with community organizations; and
- Offer support and expertise to small groups, as well as a network for families with special needs.

If public policies are involved, coalitions offer a way. They can provide a means for communities to come together, to learn about common problems, and set some priorities for policies of mutual benefit to everyone. And because they represent bigger numbers, there are more people to share the work. One small group, or working people with limited time to

By working through coalitions, your group can do more than you could do on your own. Three steps will get you started.

1. Identify a Convener and Likely Coalition Members.

You may want to be the convener – calling others to join in with you. Or you might consider whether there are other groups with more experience, community standing, or staff (for setting up meetings, keeping notes) that would be better suited to the role.

The committee you have formed should help decide who should convene the coalition, and which groups are likely to be potential coalition members. It also helps to decide on basic principles that all coalition members must support. That way, organizations with wildly different goals or approaches will decline to join – and you will not be in the position of telling some group you do not want them.

First, use your committee to list all your likely allies, every group with an obvious interest in the issue at hand. One idea will lead to another: once someone mentions one faith group or professional group, others in the same general category will spring to mind.

Once you have listed all the likely allies, next think of some groups that are not so obvious, some odd couples, or unlikely allies. You will not get as many of these, but you do not need as many: having even a few “odd couples” in your coalition sends a political signal that you are reaching out and talking to more than those who already agree with you.

Then, as you consider who should approach each of the groups about joining your coalition, keep in mind something known to all organizers, the **peer-to-peer** rule: people respond most readily to those they regard as their peers. It makes sense. If you want to involve lawyers, it helps to have the lawyer in your core group make the approach to other lawyers. Want health professionals? Send in a health professional. Want to involve low-income parents? Ask a low-income parent in your group to do the recruiting. If your core group includes all the critical stakeholders, you should have built-in peer recruiters.

Policy makers know they need the support of 51 percent (of their colleagues on a committee, the members of the House or Senate, the voters in their district) to make anything happen. When we come to them with an idea or request, they will automatically start to consider whether it is something capable of winning 51 percent of the relevant vote. That is why it helps if from the outset if your list of coalition members suggests breadth as well as self-interest – like the Florida police officers who teamed up with after-school-care advocates because children in organized programs are less likely to get in trouble with the police (their slogan: Cops Care for After-School Care). The organization Fight Crime: Invest in Kids involves the same politically effective combination of child care and law enforcement on a national scale.

2. Select a Good Issue.

Some issues are too narrow (or too localized) to warrant a coalition, and you do not want to get a reputation for calling for coalitions any time you cannot handle a job. But anything that affects the community at large (environmental hazards, Medicaid eligibility limits, whether food is taxed, affordable housing, support for an array of performing arts) might be a good issue for a coalition.

3. Call an Organizing Meeting to Set a Goal.

If you think you’ve got a good issue, and you want to see community groups work together to resolve it, try the idea out on some key community players and invite them to join you at a brown bag/brain-storming lunch. You will quickly discover whether there is enough interest in your issue – or whether there is something else on which you all can work together.

The Other Side

Despite the many benefits of working together in coalitions, some groups hesitate to join. *Drawbacks include:*

- Logistics become more complicated. It is hard enough to set up a meeting with six people you know. Convening meetings of thirty organizations, some of whom you only know slightly or by reputation, is much harder.
- Getting agreement is harder, such as on who votes, who takes responsibility for what, and matters of style.
- Credit, as well as blame, gets shared. Your group may not get as much visibility; alternatively, if one member of the coalition behaves badly, all may be tarnished. There is also the fear (unfounded) that everyone in a coalition has to agree with everything every member says or does.
- Decision-making must be shared. Some organizations have by-laws or Board structures that make it hard to submit to group decision-making.

Happily, there are good answers to most of the above. For example:

- Responsibility for logistical support can rotate among groups.
- Key contact lists can identify decision-makers from key groups who can speak for their members on short notice, and can quickly disseminate information throughout their networks.
- It is possible to set up a time-limited, single-issue campaign rather than an on-going, multi-issue coalition.
- Endorsements can be structured so that member groups can opt in or out, provision-by-provision. Or participants can agree that for purposes of a particular campaign, every group on the list will promise not to work AGAINST any other group on the list. They do not have to work FOR what someone else wants, they just will not allow the politicians to pit one against another for now. (This device has occasionally enabled even pro-life and pro-choice groups to work together in coalitions, around the need for good maternity care, or very discrete issues.)

Working With the Media

Whether an issue gets the attention of the politicians may depend on whether it has the attention of the media. Good advocates regard the media as deserving as much attention as working with elected officials and working with the grassroots. As noted in Part II, there are three reasons: politicians pay attention to the media (it provides a way to check the community pulse); media can be used to reach other

voters; and misinformation that appears in the media needs to be challenged.

Childcare standards provide a good example of how this works. They got very little attention until some dramatic stories turned up in the media of children harmed while in unregulated care. That drew attention to the issue, and also gave worried parents a forum in which to express their concerns. Legisla-

tive hearings followed, as did many more state laws requiring that childcare providers meet basic health and safety standards.

There are so many issues competing for the attention of decision-makers that good advocates need to work with the media to get action. That is not as hard as you may think.

In some communities the broadcast media still get together to solicit the views of the community, at sessions known as “ascertainments.” (These used to be required by the Federal Communications Commission; now they are voluntary.) The broadcasters invite in a variety of individuals to speak for elements of the community. But you can also call or write and ask to be included in the next ascertainment – that gives you an opportunity (albeit brief) to educate the media and encourage better coverage of your issue. If the media in your area do not do this – suggest it.

The media include:

- Newspapers, magazines, newsletters (including those put out by your faith community, professional organization, or any groups you belong to);
- Television (news, features, cable access, and Public Service Announcements – PSA’s);
- Radio stations (especially news, features, talk shows, and PSA’s);
- Web Sites (your own, or the links you provide on your web site to advocacy groups you trust; both can be used for position papers, fact sheets, even lengthy reports).

Ultimately, “the media” are just individuals, including people you know. If you watch for the names at the top of news stories and regular columns on issues you care about, and listen for the names of the producers and editors of any radio shows that might be interested – then you can ask for them by name. If you cannot get an individual’s name, use a title. “Assignment editor” is one that will often get you the right person, or “Producer.” You need to get your issue

known and talked about as much as possible, and the media are your route to that end.

It helps to realize that the media are like most institutions: white men still hold most of the high-ranking positions, so they get the preferred, weekday hours. On the weekends, women and minorities are more likely to be in charge. If the regular assignment editor rejects your story, try again on the weekend – you may get a different response.

If you can afford to assign a staff person to work at least part-time with the media, effective media work for that person will include:

- Learning how to write a press release.
- Making calls directly to news organizations.
- Establishing a relationship with reporters who cover your issues.
- Hosting or co-sponsoring a media event.
- Observing deadlines (do not call a TV station at 4:00 p.m. for the 6:00 p.m. news; do not call radio reporters just before airtime; give everybody plenty of lead time for a complicated story).
- Considering their needs (TV needs something to film; radio needs something with good sound; newspapers are more likely to use tables or charts and do interviews by phone).
- Recognizing their limitations (e.g., TV news is now primarily a headline service for stories that can be told in 60 to 75 seconds – they do not do well with complicated or subtle issues; for that, you need to approach newspapers or radio).
- Being accurate (you will not get trusted as a source or called a second time, if you feed reporters unchecked or shaky information).

If you don’t have staff assigned to work on media, be creative. A supporter of the arts in Illinois noticed that when his daughter became editor of her high school newspaper, she was eager for story ideas to assign her reporters. Guessing that might be the case for others as well, he invited the editors of his

community's three high school newspapers over for a brainstorming conversation. Over pizza he suggested they do a five-part series on "Youth and the Arts," and he suggested ideas for some elements in the series. In particular, he suggested that they interview the state and local elected officials from their communities, to learn their positions on public funding for performing and visual arts. When the various series were published, he urged the editors to send copies to elected officials from their area, so they would see themselves in print on the topic. Bright young high school seniors (most of an age to vote for the first time) got engaged with their elected officials, plus elected officials knew that teachers, parents, and other school personnel were reading their replies to the students' questions. That's a great example of low-cost, creative media work.

The advocacy community itself is a good resource when it comes to working with the media. Some have publications to help members present particular issues to the media. Many put on workshops and role-playing sessions on how to deal with the media. OMB Watch has an online list and contact information for media at the local, state and national level. (See the OMB Watch web site under "Take Action.")

Savvy national advocacy groups try to help local advocates win media attention – as when the Food Research and Action Center sent local hunger advocates advance copies of a report on childhood hun-

ger, and worked with them to set up local press conferences pegged to the release of the national data. In that way, advocates all across the country were ready when network affiliates and local newspapers wanted a local angle on the national story, and the media coverage was better than it would have been, without this advance work. (State-level advocates can use the same approach with their local affiliates, to get better statewide coverage.)



Do not Forget

As intimidating as the idea of working with the media may seem at the outset, you are media consumers. That means you can invite someone from the local media to explain to your group how they work. Remember also that they are always looking for good stories, and you may have one. (More on this topic is in More Ideas For Making A Difference.)

One word of warning: Never say anything to a member of the working press that you would not want to see attributed to you in the news the next day.

Techniques for the Politically Shy

Across the country, community groups have been developing their own, easily adapted ways of influencing policies. Often they serve more than one end. Here are examples of techniques that can be used.

For those who are just getting started, or trying to get other advocacy novices involved, it helps if the advocacy effort has elements that are:

Easy Fun Low cost
&
Able to attract the media.

Folders

A Junior League member in Denver noted that when she began spending time at the City Council and State Legislature, no one had any reason to know who she was or the group she represented. But she

quickly realized that whenever she went to a Council meeting or the Capitol, she always carried a folder with her fact sheets and other basic information about the issues on her group's legislative agenda. So, she made up clear, large-type labels identifying her group and/or key issue (e.g., Support Health Care for Women – We Do), to put on her folders. Then, she just had to remember to carry her folder so the label and message were visible.

Folders with a message are something anyone can carry, including people with limited education or knowledge of English, and people too shy to speak out. This way, even an absolute newcomer who does not say a word (e.g., residents from a group home, immigrants, homeless youths) can tag along with someone more experienced, while being a visible presence, a first-time advocate.

Badges/T-Shirts

Badges can serve a similar function. That is why the real pros make them large, in bold colors, and easy to read. Badges with tiny print and a complicated message cannot be read from a distance.

Some groups and coalitions try to have a few members at the legislature every week on the same day. They use common badges (in a bold color, with the coalition name as well as space for the member) to make the point that they are a persistent, consistent presence – even though they cannot afford to have a professional lobbyist or the same people at the Capitol every week.

A Healthy Mothers/Healthy Babies advocate in Michigan had a similar notion: on weekends and every day during summer vacation she makes a point of wearing a T-shirt with a message promoting her issue... and encourages others to. For them, just walking through the grocery store becomes an advocacy opportunity.

Educational Petitions

Advocates for the hungry and homeless in Phoenix used an annual holiday fund drive to gather names

on a petition. Every time a donation was made, the donor was asked to also sign their petition. It read something like, "We the undersigned are doing our part to meet food and shelter needs in our community. Now we are calling on our legislators at all levels to do their part and adequately fund the programs to help vulnerable people." They made the point that charity alone is not enough – in a way that educated the voting public, and sent a message to their elected officials.

Contests

Want to generate a lot of letters or postcards in favor of your issue? Stage a contest. Advocates at one children's hospital offered "Comp Days," donated NBA tickets, restaurant vouchers, and other prizes to the staff that turned in the most accurately filled-out postcards (signed, personalized, with voters' home addresses). Before long the various units (nurses, Emergency Room, clerical staff, laundry, trustees...) were competing with one another. The "young docs" even set up a dunk tank in front of the hospital – with completed post cards for the campaign as the price for throwing balls to "dunk the docs."

Phones

Advocates in several states are using "telephone receivers" cut from brightly colored card stock, that contain the telephone number of their state capitol (or in some cases, the names and numbers of the legislators from their district), the hours the switchboard is open, and their state legislature's web site. At gatherings of any size they pass the paper "phones" out to everyone. First they do one role-play of a call to the Capitol for all to see, and then they ask everyone present to pair up with the person next to them to try a sample legislative "call." One plays the part of the operator, and the other plays the constituent. Participants take the paper "phones" home to perch on their telephones or computers, to serve as a reminder each time a legislative alert comes in.



When the pastor of one small, inner-city congregation learned about paper “phones,” she quickly grasped a use for them. As she explained, many of her congregants were elderly and poor, but they had time, and they had telephones. She organized about 10 who felt willing to try making calls, and now when a legislative alert comes in, they are poised and ready: one calls at 9:15, the next at 9:30, another at 9:45.... They’ve become well-known to their legislators’ offices, and they even have a name: the *Call Girls*.

Advocacy Linked to Other Opportunities

A common way to raise money for local services is to get pledges for every mile someone walks or runs. A group in Milwaukee used one such occasion for a little lobbying. At the rest stops they had post cards, and the names and addresses of local legislators. Anyone stopping for juice or water could also write a quick note in support of the object of the run. The group in charge got the names and addresses of those who wrote cards (individuals who may be in-

terested in taking a next step), as well as a possible media story.

A different pledge tack was taken when hate-mongers announced plans to disrupt an event featuring gay/lesbian/transgender student leaders. Supporters of the students asked people to pledge money for every minute the hate-mongers carried on – and then gave the proceeds to an advocacy group working for gay/lesbian/transgender rights. That way the award ceremony was not disrupted by a shouting match, and civil rights advocacy was supported.

Techniques for Working With Policy Makers

When you are ready to deal directly with policy-makers, the same general rules apply. Whenever possible make it easy to do, low-cost, and enjoyable for people to participate. But also:

Be informed *Be concise*
&
Be clear about what you want.

Do not be embarrassed to be direct – as a citizen and advocate, your job is to *ask*; their job is to *be asked*. And do not worry – if you are asked a question to which you do not know the answer, that is no problem. Just say: “I do not know the answer to that, but I’ll find out and get back to you.” Then do.

Tuesdays on the Hill

A large urban Council of Churches wanted to make it easier and more comfortable for members to come and lobby their state legislators. They could not eliminate the distance or time involved (two major barriers), but they could eliminate the other reasons people stay away: feeling inexperienced or uninformed.

They advertised through congregation bulletins that anyone who wished to lobby on social justice issues could come to the Capitol on Tuesday mornings, about two hours before most meetings were set. The time would be used to make people smart: do briefings, explain bills, provide fact sheets, and answer questions.

They also did something very reassuring: *they paired beginners who had never lobbied before with an experienced “buddy,”* someone who spent a lot of time at the Capitol. That way first-timers did not need to say anything unless they wanted to; just being there was a learning experience and a contribution. After tagging along with a more experienced person a few times, almost anyone feels competent to lobby on their own – and even take someone else who is less experienced.

Anything can be intimidating the first time (tying your shoes was hard the first time). Letting advocacy newcomers tag along to watch the veterans has enormous value. It is something all good teachers – coaches, trainers, bosses, parents – understand: children learn by example; medical students learn by observing; old farmers show young farmers how to operate the machinery. Policy advocacy is no different. It is possible to read a book and just plunge in, but watching someone more experienced the first time or two makes learning much easier.

Legislators as Moderators or Panelists

If you already know your legislators’ positions, but wish they knew more about yours, there are several models to draw from.

A human services coalition in Connecticut invites key legislators to moderate panels (not as speakers), and uses the panelists for what amounts to a *seminar* for the legislator. (This is well suited to explaining some complex community issue not easily summarized in a fact sheet.)

A South Carolina group used the workshop period of their annual conference to hold mini-hearings at which their members were the witnesses, and key legislators were asked to serve as moderators. The participants got a brief – three minute – opportunity to practice giving testimony, after which the legislators gave tips on what makes for good testimony, and everyone learned from each other – including the legislators who were, in effect, being lobbied.

(This same device could be used when inviting a legislator to a university class or to a group’s membership meeting.)

In North Carolina, a mental health organization used the workshop sessions at their annual conference for specially constructed panels. Each panel consisted of three consumers of state services, plus two legislators and a moderator. Among the consumers was the parent of an emotionally disturbed child, a recovering alcoholic, and someone with a mental illness. The legislators learned first-hand how the laws were being implemented, and also got a glimpse of needed changes. It was another effective way to use a conference workshop session to educate (and in some cases lobby) elected officials.

Announce a Call-in Day

Often the people you would like to involve as advocates cannot get to the Capitol or a meeting with their legislators. That might apply to anyone with a limited income, young children, demanding job, physical disability, or troubled family member. But it is very important that their voices be heard, and call-in days are one way to make that possible.

Texas groups representing people with disabilities were among the first to use their newsletters and e-mail lists to announce that the day after a “Lobby Day at the Capitol” would be a “Call-In Day.” Everyone was urged to make three phone calls: to the governor, their legislator, and the speaker of the House. A sample script was provided. That way, members of the legislature spent one day in personal visits from those who could get to the Capitol, and another day on phone calls/phone messages from those who could not visit personally. It was doubly effective without being twice as costly.

This same device is increasingly used on items before the U.S. Congress. It is hard for most people to get to Washington, D.C., and in any case there is often too little time to arrange for letters or visits. This is especially true when there is a need to call attention to some small item in a large, complex budget bill – or when votes come up with little notice. And,

it is a good use for a call to members to “Take Five...”

When e-mail was new (and little-used) it was common for advocacy groups to urge a mass e-mail campaign. Now that e-mail is so common it can be less effective. governors, members of Congress, and even some state legislators are increasingly likely to require that e-mail correspondents send their letters through a web site – one that requires a name and address in the legislator’s home district – where it may not be noticed or responded to for several days. The sheer volume of e-mail can make it problematic. On the other hand, people sitting in the visitors’ gallery at most state legislatures can look down and see legislators with their laptops open, reading and replying to their e-mail messages between votes.

The best advice is to always ask your legislators whether or not they like hearing from constituents by e-mail. If they say, “Yes,” use it; if they say, “No,” use the phone or regular mail.

Send Thank-You Notes

Elected officials deserve to be thanked for policies that work and budget decisions that help make a difference. Since they most often hear from those who want to complain, they are likely to remember those who say “thank you.”

A multi-service agency in Northern Wisconsin encourages the beneficiaries of one program each month to write thank-you notes to the legislators who determine their fate. In mid-winter the recipients of energy assistance write, and in summer the youth in summer jobs write. Twelve times a year the legislators learn about the consequences of their votes, as well as good reasons to support the programs again.

A retired couple in another state sent their state legislators a simple two-part message. Part one was brief, it read: “*Thank You. We know this is a difficult year, and we are asking you to make difficult choices. We appreciate it.*” Part Two read: “*Tax us. We’re for gas taxes, luxury taxes, and ‘sin’ taxes. If casino and other gambling taxes are on*

the table, include them. And yes, we think the main source of governmental funding that is not now taxed is the wealth of us at the top...” One legislator replied: “*You cannot imagine how welcome – and rare – your letter was.*”

Reward Good Government Action

If policy makers only hear from those who want less government, they will think cutting back is always the best response. Advocates can help provide another perspective.



In North Carolina, a child advocacy group gave awards to the counties doing the best job of serving eligible children. Counties with the best records in reaching the most Medicaid-eligible (WIC-eligible, child care eligible, summer lunch-eligible...) children were honored at their annual conference. Program administrators, media representatives, and local elected officials were invited to attend from the winning counties, and bring a five-minute power point or video presentation to display their winning techniques. That sent a powerful message to officials and voters alike about the value of the programs.

Compile Success Stories

Politicians cannot afford to be identified only with losing causes, which is how most complicated issues appear when they are first proposed. That is why good advocates take care to compile success stories – stories of streams saved, gang members turned poets, mural projects that change lives along with urban vistas.

Success stories can be compiled about juvenile offenders or teen parents, about revitalizing neighborhoods or new immigrants, about the benefits of local theaters or urban gardens – about all those

people and causes whose futures are changed by the actions of nonprofits. *Success stories carry a powerful message that "at risk" need not mean "doomed."*



Web site Links

Fight Crime: Invest in Kids
<http://www.fightcrime.org>

Success stories can be used to great effect during lobbying visits or when making presentations in the community (for example, before the local Association of University Women or Chamber of Commerce). It is not enough to try and scare policy-makers and policy-shapers with grim statistics, they need some proof that what you are asking for works, that the resources they commit will have results. It is that "cocktail of fear and hope" that prompts action, and hope comes in the form of evidence that we can make a difference.

Moral: As each example illustrates once again, advocacy is as much a frame of mind as it is a set of skills or knowledge. Advocates have a way of seeing opportunities and using them to get important issues before the policy-makers and their staff.

But working directly with legislators and policy-makers is only one part of the job to be done. Getting the attention and understanding of the voters and the media are the others. Good advocates are always seeking ways, large and small, to do all three. They use information, fear, guilt, whatever helps... along with the evidence that what they are asking for *works*.

Policy analyst Steven Kelman says that political decisions "are the collective choices of people who disagree. Behind them stands the power of government." It is up to us to shape those "collective choices" behind which our government stands.

Notes:

THE 3-LEGGED STOOL AT WORK

Parent Power. In the fall of 1999, The Children's Hospital (TCH) in Denver hosted a day of advocacy training for members of the community. Among the 130 or so who came that day was the parent of a child with a rare, inherited metabolic disorder (IMD), along with a staff person from the IMD clinic.

Their goal was both simple and daunting: to convince insurance companies to cover the cost of the expensive, prescribed formula that is the only possible treatment for IMDs. For years they had tried various tactics: legal action, writing to insurance companies, attempting to negotiate with individual insurers and their representatives. So far, none of it had worked.

Now they had come to an advocacy training, not sure it would help but unwilling to leave any stone unturned. As luck would have it, a Colorado state representative joined the training on a panel of state experts. At the next break, the two IMD advocates shyly put their newly acquired training to the test: they approached the representative and told their story. A few months later yet another parent of an IMD child joined the effort and before long, helping IMD families win insurance coverage became a TCH legislative priority for 2001.

Capitol Activity. By January, the representative who would attend the fall event had agreed to sponsor a bill to deal with the problem. But this apparently simple bill quickly encountered serious obstacles: the governor, many legislators, and the state's insurance companies all made clear their opposition to any insurance mandates. Plus, only about 100 people in Colorado have an IMD – so legislators wondered whether it was worth their time and effort.

Grassroots Activity. TCH activated its Grassroots Advocacy Network – staff, trustees, patients, and patient families — in support of the bill. IMD families rallied the support of anyone they could. Soon hundreds of people were writing and calling their legislators.

Media Activity. The hospital helped by coordinating media stories to draw attention to the issue. One story ran three weeks before the legislature convened. Ultimately, 11 stories ran in state and local newspapers; another 13 stories were broadcast on TV. Coverage ran the gamut – from feature stories to news to editorials.

Throughout, professional lobbyists and parents alike worked to win the governor's support, meet with insurers' representatives, forge coalitions, and lobby. At every point, families with IMD children played a critical role: testifying, conducting interviews with the media, meeting with legislators, negotiating with insurers.

One key legislator was heard to say that he had never been lobbied so hard on a proposal before and "...you claim that it only affects 100 people... I just do not think it is possible for me to hear from so many people about a bill that only affects 100 people." That is the power of grassroots.

RESULT: success! After months of work, the bill passed the legislature and was sent to the governor – who had become convinced of its importance. He signed the bill at the hospital, surrounded by IMD clinic patients and their cheering families.