

Action Alert Network



- Develop & maintain Action Alert list
- Monitor key policy developments
- Summarize key points, pros and cons, actions
- Mail, e-mail, fax, call to alert network
- Maintain copies of action responses

Organizing vs. Mobilizing



- *Mobilizing*
 - Shorter-term
 - For particular action
 - Less time commitment
- *Organizing*
 - Longer-term, for the long haul
 - More involved in decision-making
 - Greater time commitment

Leadership



- Inspire and help people work toward a goal
- Can be shared
- Differing roles:
 - *Visionaries*
 - *Strategists*
 - *Historians*
 - *Resource mobilizers*
 - *Statespersons*
 - *Communicators*
 - *Outside sparkplugs*
 - *Inside negotiators*
 - *Generalists*

Key Leadership Qualities



- Effective communicators
- Good listeners
- Develop team spirit & cohesiveness
- Understanding & aware
- Recognize accomplishments
- Constructive criticism
- Encourage & motivate
- Facilitate resolution of disputes
- Delegate & build others
- Accept responsibility, take initiative
- Offer help, information
- Ask for help
- Make things happen, but don't have to be the center of attention

Leaders Problem-Solve



- State problem simply & clearly
- Gather & organize relevant info & resources
- List potential solutions
- Evaluate each one
- Select the best one
- Design a plan to use
- Evaluate outcomes & readjust when needed

Leaders Know Themselves



- Who am I?
- What am I doing here
- What are my:
 - Goals, purposes
 - Expectations
 - Motivations?
- What strengths & challenges do I bring?
- How can I best use my leadership skills?
- How can I make space for others?

Leadership Development

- Individual advocacy



- Peer advocacy



- Public policy advocacy



Advocacy Leadership Knowledge



- Laws & regulations
- How institutions work
- Key decision-makers
- Formal & informal decision-making
- Facts; current status
- Barriers & solutions
- Qualities of effective systems
- Existing resources

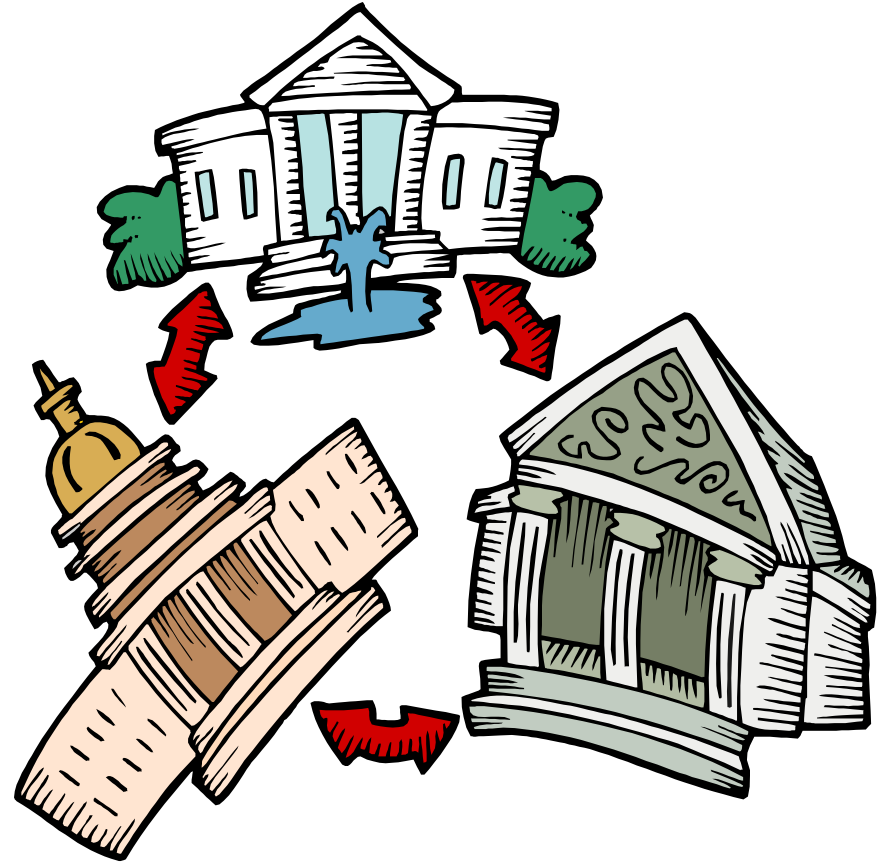
Advocacy Leadership Skills



- Empathy
- Listening
- Written & oral communication
- Critical reading & thinking
- Collaboration
- Consensus-building
- Problem-solving
- Conflict resolution
- Strategic planning
- Growing leadership

How Policies are Made

- Legislature/laws:
 - Introduced
 - Referred to committee
 - Considered by committee
 - Hearing/public comment
 - Reported out with amendments/changes
 - Passed by one house
 - Referred to next house
 - Passed by 2nd house
 - Goes to Governor



How Policies Are Made

- Executive/Governor:
 - Signs into law as is
 - Conditionally veto (return for specific changes)
 - Veto (overridden by supermajority of both houses)
 - Pocket veto within last 45 days of session



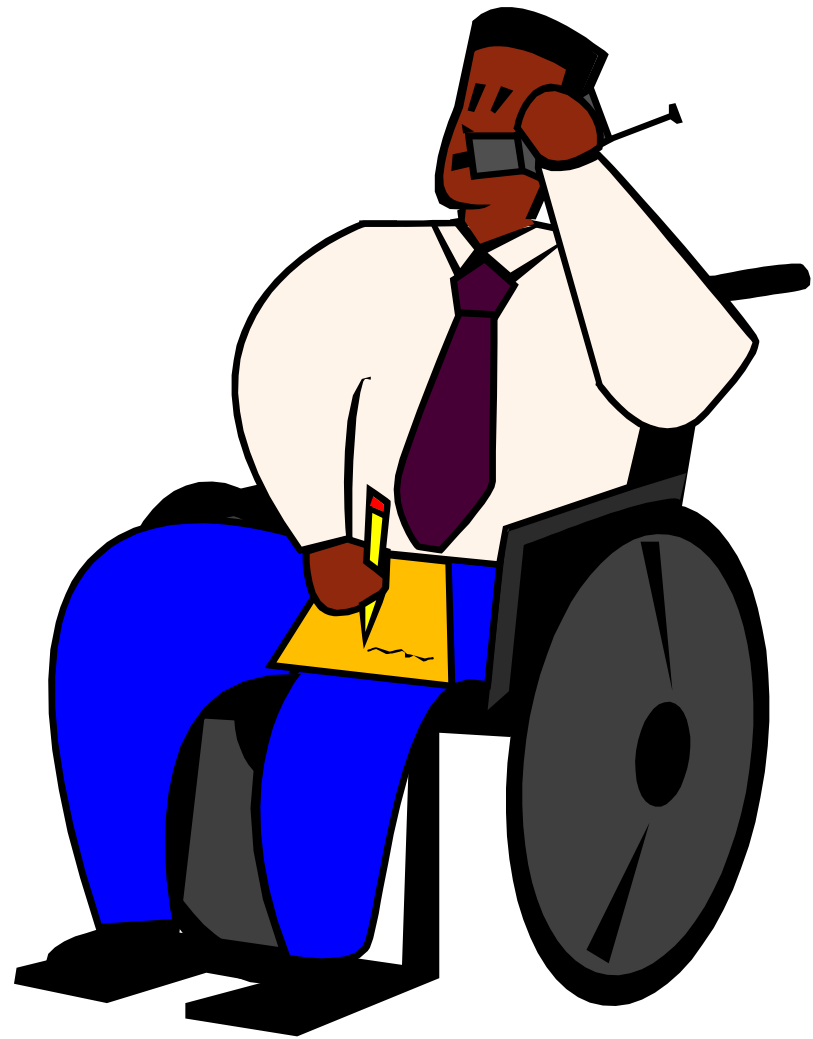
How Policies Are Made

- Regulations:
 - Draft regulations based on law
 - Publish in Federal or State Register
 - Public comment/public hearing
 - Respond to comments
 - Make revisions
 - Publish in Register
 - Go into effect
 - Implemented by agency



Reaching Policymakers

- Call * Write * Visit
 - Brief and to the point
 - Stick to one subject
 - Identify yourself
 - How will you and others be affected?
 - Be clear about what you want
 - Be accurate & specific
 - Be polite & positive
 - Offer your help
 - Follow up!



Reaching the Grassroots

- Call * Write * Visit
 - Letter sent to a legislator can be a letter to the editor
 - Message on a legislator's message machine can be called in to radio talk show
 - Testimony at hearing can be presented at church, PTA, community group meeting



Phone Calls, E-Mail, Faxes

- Ask to speak to the legislator or aide
- Note your legislative district
- Give bill # & name
- Explain why the issue is important to you
- Jot down speaking points in advance
- Write notes on your conversation
- Follow up!



Letters and Postcards



- Handwritten neatly or typed
- Use own words
- Personalize
- Be brief
- Stick to key point(s)
- Avoid form letters
- Develop sample letters with messages
- Identify yourself
- Use bill # & title
- Be timely
- Follow up!

Effective Advocacy Writing

- Be clear about what you want to say and how it will be heard
- Be careful about your tone
- Understand that communication is filtered and may be blocked
- Communication is never value-free



Purpose of Advocacy Writing

- Share facts
- Guide reader to a clear understanding of issue
- Persuade/convince reader to think the way you do
- Persuade/convince reader to act the way you want them to



Types of Advocacy Writing

- Op-Ed piece
- Letter to editor
- Press advisory/release
- Letter to policymaker
- Letter of complaint
- Public testimony
- Investigative report
- Letters to inform & mobilize others
- Activity notices



Questions of Advocacy Writing

- Who is the audience?
- What is the issue & message?
- When can you convey the message?
- Where can you convey the message?
- Why are you writing?
- How can you most effectively convey your message?



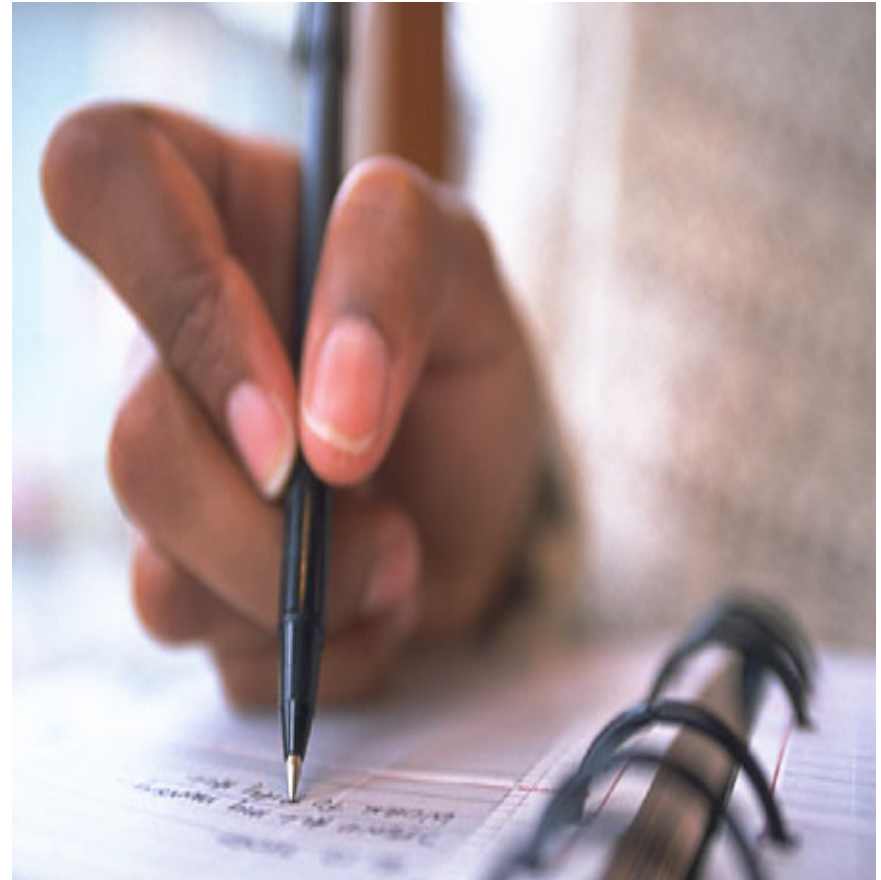
Advocacy Writing “Tricks”

- Challenge with a thought-provoking question
- Open with quotation
- Offer a sip of your conclusion
- List all main points
- Dramatic or eye-opening statement
- Use an angle your readers haven't seen



Advocacy Writing Tips

- Keep it short & simple
- Watch punctuation, spelling & organization Know intended recipients
- Have a clear goal
- Understand the context
- Catch them in the beginning
- Summarize/introduce, explain, summarize/conclude
- Communication is a process
- Have someone review your work



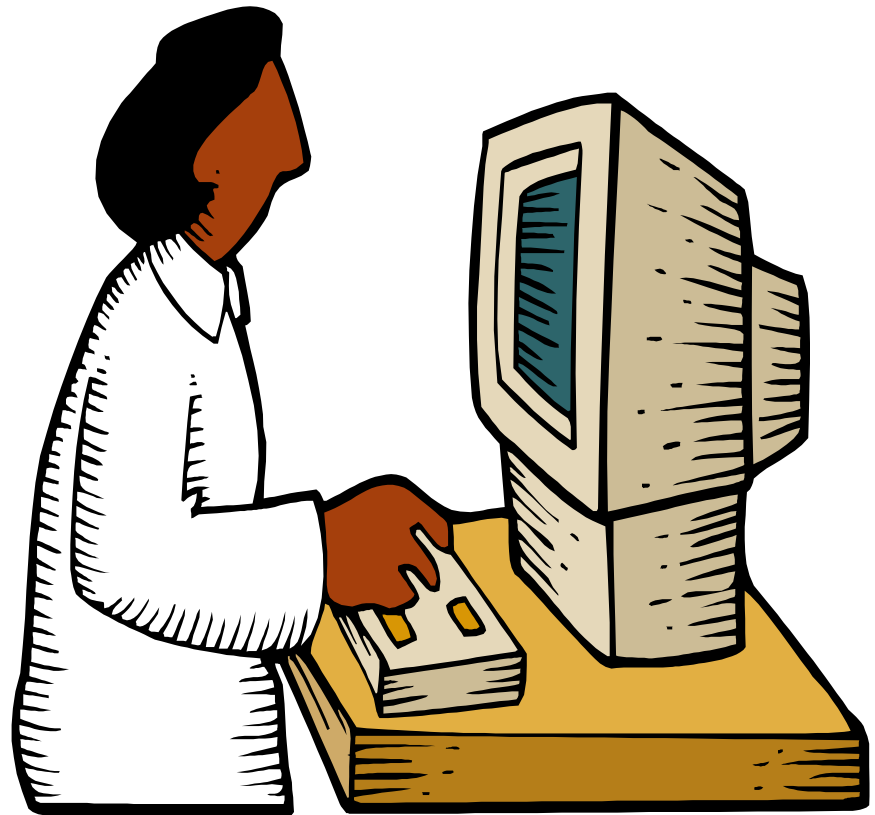
Testifying – In advance

- Monitor Federal and State Register
- Mobilize authentic & expert voices
- Mobilize diverse constituencies
- Call to request time
- Find out how much time and how many copies to bring



Writing Testimony

- Be brief & concise
- Written is longer than oral
- Have a purpose
- Identify yourself
- State position, reasoning, and request
- Personalize
- Use your own words
- Be substantive & give examples
- Single space for them, double space for you
- Make extra copies
- Practice presentation & rehearse questions!



Presenting Testimony

- Dress properly
- Arrive early
- Be prepared to shorten testimony
- Relax
- Speak slowly & clearly
- Avoid monotone
- Look up, make eye contact
- No disparaging remarks
- Thank them for the opportunity



Speaking in Public



- Prepare content and delivery
- Know your audience and tailor to them
- Emphasize key points
- Establish eye contact
- Use visual aids
- Be brief
- Leave your opponent with dignity intact

Meeting with Elected Officials

- Speak up
- Be part of a group
- Go with someone who has experience
- Don't be afraid
- Don't lie if you don't know
- Practice helps; role play beforehand!
- Be yourself



Preparing for Legislative Visits



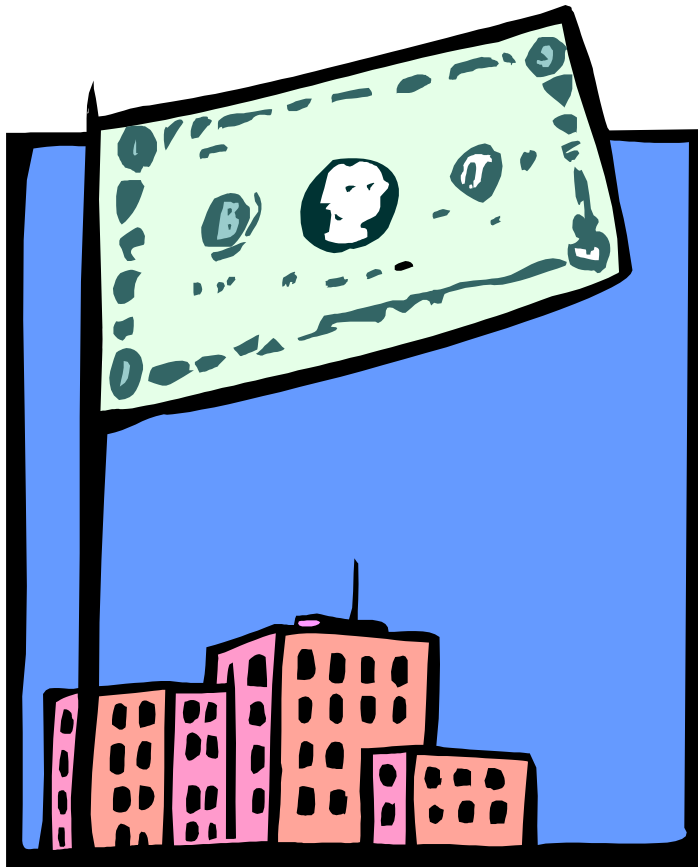
- Decide who you will visit.
- Establish agenda & goals.
- Plan your visit.
- Determine group composition.
- Listen well.

Preparing for Legislative Visits



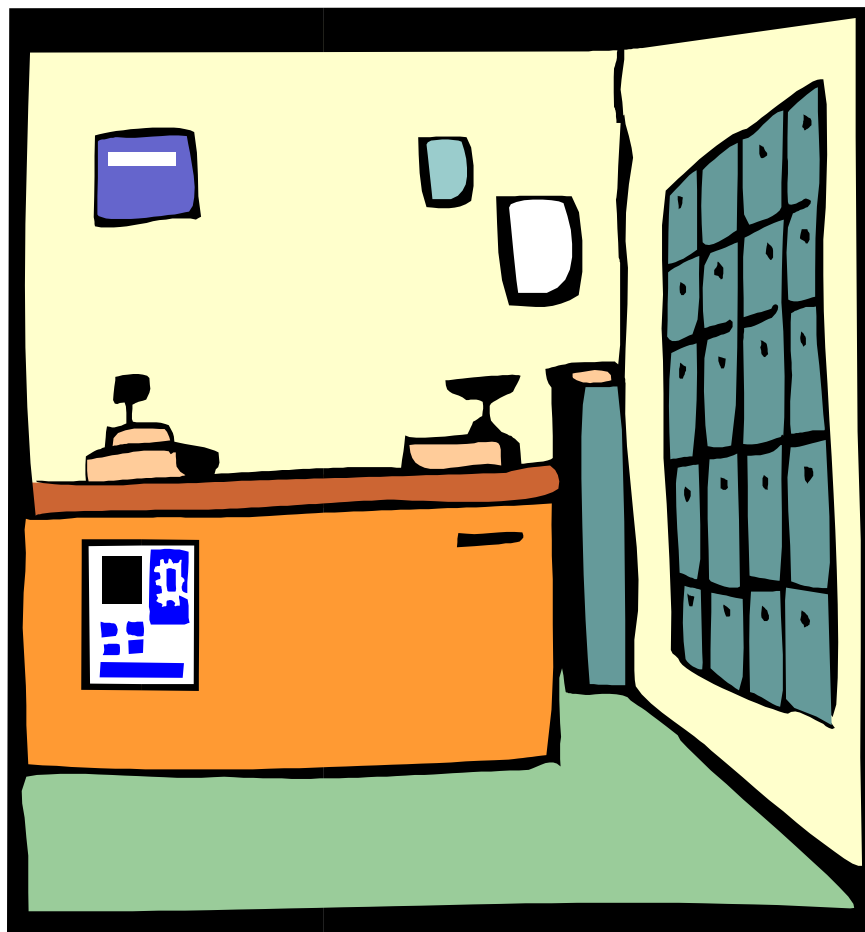
- Be prepared, but don't feel everyone has to be an expert.
- Don't get intimidated or frustrated.
- Be on time, and don't stay too long.
- Build a relationship.
- Follow up!

IRS Rules for Non-Profits



- No supporting or opposing candidates
 - Can do candidate surveys & disseminate results
- Limits on lobbying
 - No appreciable amount
 - IRS election: 20%
 - Funder restrictions
- Lobbying involves specific legislation
- Regulatory advocacy is not lobbying

Regulatory Advocacy



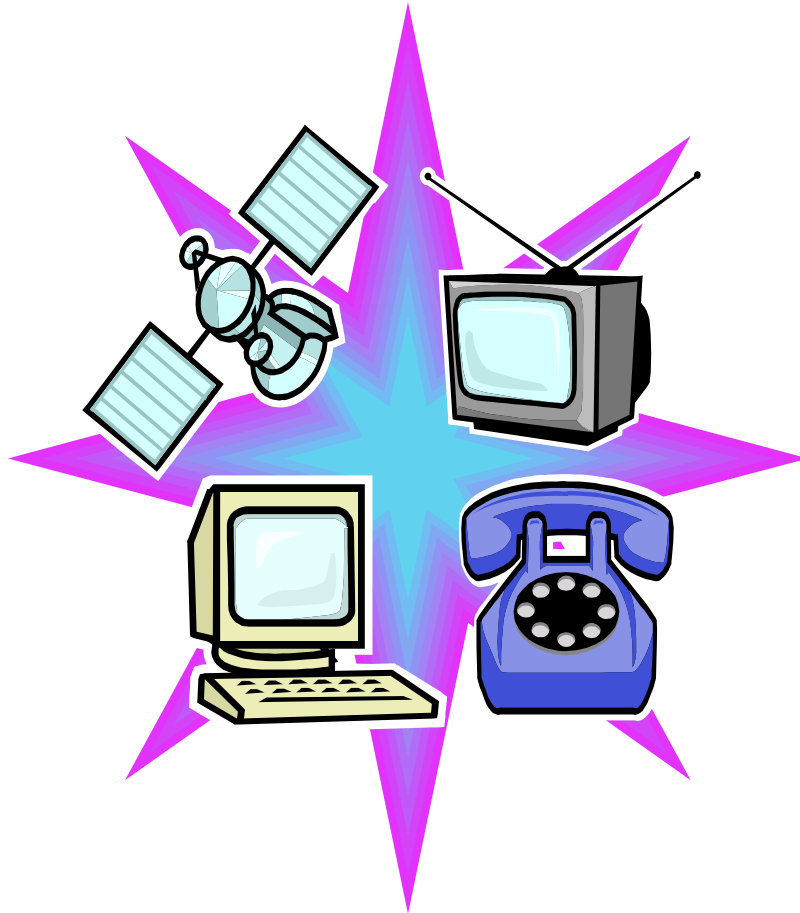
- Determine agency with jurisdiction
- Identify responsible party within agency
- Develop relationships
- Know relevant law governing regulations (Administrative Procedures Act)
- Monitor media, State & Federal Registers

Regulatory Advocacy



- Develop a plan
 - Comments on draft
 - Responsibilities
 - Potential opposition
 - Compromises
- Develop coalitions
- Get broad endorsement
- Use legislative oversight
- Mobilize grassroots

Grassroots & Media Advocacy



- Communicate
 - Own constituency
 - Own supporters
 - Potential Allies
 - General public
- Use media
 - Your media
 - Grassroots media
 - Community papers, radio, & public access TV
 - Mass media

Coalition Advocacy



- Builds support
- Combines power & resources
- Reduces competition for funding & support
- More efficient
- Provides support & expertise to smaller groups
- Strength in numbers
- Strength in diversity
- Broadened skills & expertise

Coalition Advocacy

- Need clarity of goals and how they fit with each organization
- Clear decision-making processes
- Strong communications plans
- Ensure all contribute, have a say, and get credit
- Conflict resolution mechanisms



Questions for Coalitions

- Temporary or permanent?
- Agreed on issues?
- Differences among groups?
- Gifts of each?
- Stuff to give up?
- Stuff to gain?
- Anticipated conflicts & compromises?
- Strategies to address?



Leadership/ Maintaining a Strong Organization



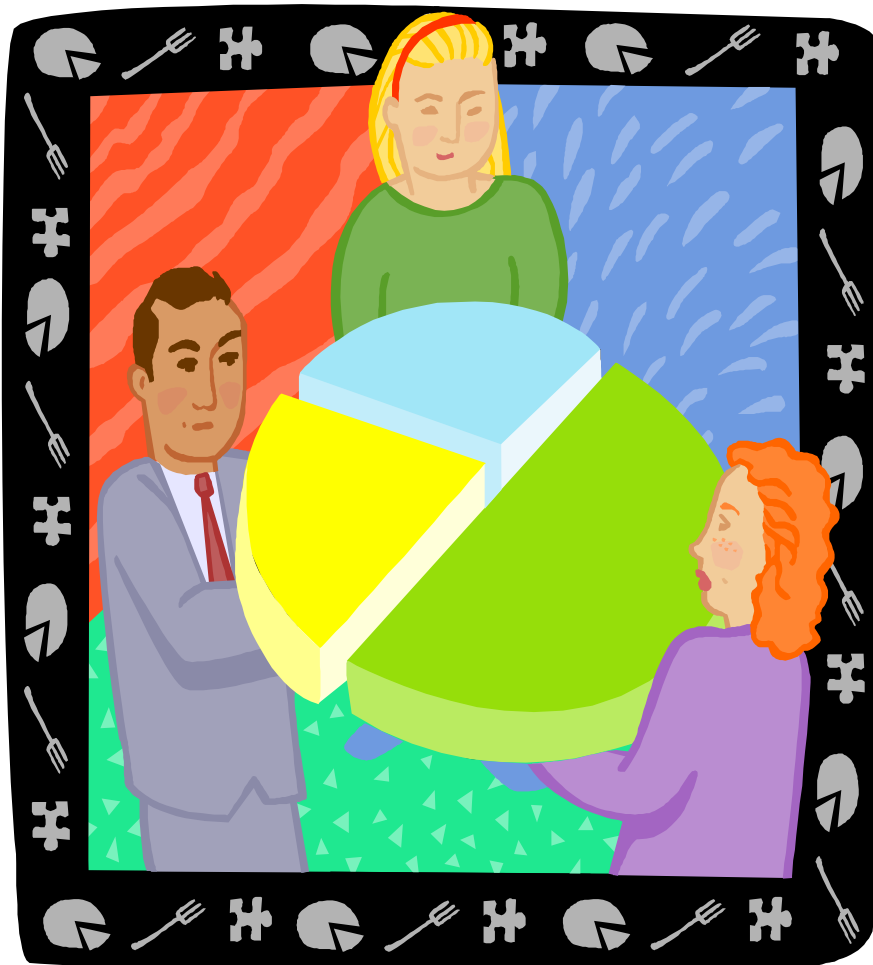
- Intense dedication to improving outcomes for substantial numbers
- High commitment to maintenance activities:
 - Define responsibilities
 - Good communication
 - Clear decision-making
 - Sufficient funding

Effective Strategies Shape Action



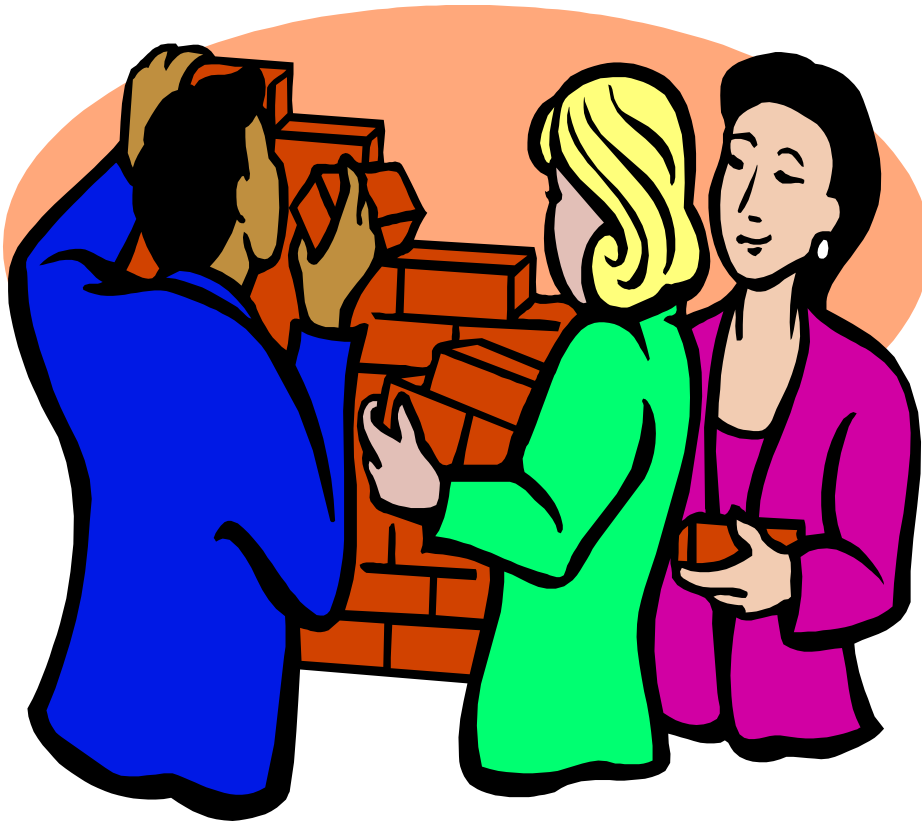
- Ongoing:
 - Planning
 - Implementation
 - Evaluation
 - Revision of plan
- Persistent focus on key systems & central issues
- Understand specific changes needed
- Bring about changes
- Monitor implementation to make sure improvements take place

Information



- Document problems and solutions
- Develop accurate “map” of systems – how they work, who’s important, relationships
 - Formal
 - Informal
- Know how other groups have solved problems

Building Support



- Use media to communicate views and mobilize others
- Develop support networks
- Build well-organized, committed constituency capable of mobilizing substantial political power

Intervention



- Multiple levels
- Multiple tactics
 - Negotiations
 - Demonstrations
 - Filing complaints
 - Testifying
 - Writing, calling, visiting
- Continue direct pressure
- Persistence!