

MAKING A DIFFERENCE

An Advocacy Training for Community Change

(DRAFT)

Developed by The Praxis Project in cooperation with North Carolina ASSIST and
North Carolina Substance Abuse Prevention and Awareness Program

Table of Contents

About This Curriculum	3
Section I. Introduction and Overview	6
Section II. Getting to Know the Community	13
Section III. Taking the Community "Pulse"	24
Section IV. Cutting Your Issue: From Issue to Initiative.....	26
Section V. Identifying Support	33
Section VI. Mobilizing Community Support.....	37
Section VII. Power and Opposition	44
Section VIII. Using the Media	48
Section IX. When You Need A Policy.....	60
Section X. Appendices.....	66

Introduction and Overview

About This Curriculum

We hope this will be a flexible, evolving resource for your advocacy efforts. It is not a recipe or a cookie cutter but a departure point for you to develop your own advocacy initiative. Inside are tools for developing a comprehensive, community-based advocacy initiative. It begins with an overview and definitions of some common advocacy terms and moves through a variety of tools and methods for effective advocacy.

Who Should Use It

This resource is for organizations, groups and agencies that are interested in building broad support for change in their communities. It is designed for groups of people -- or individuals who plan to organize a group with whom they will implement their advocacy initiative. The curriculum is targeted to groups because that's how change happens: with a group of committed people working together. The group focus is only one of three underlying values that guide this curriculum and the methods it contains. The other guiding values for this course are:

- Effective democracy requires vocal, concerned communities that can interact with their government and other institutions in an organized and powerful manner.
- Although individual responsibility is an important factor in every issue, advocacy must focus primarily on developing institutional approaches to problems. When we focus on individual responsibility, our approaches mainly center on programs or services. Affecting policy or community norms require approaches that take environmental and institutional factors into account.

How to Use It

This curriculum is divided into nine short sections, each outlining a step in developing an advocacy initiative. Each section can have as many as four parts marked by icons as follows:

 **Overview: a lecturette that helps participants to understand the concepts in the section.**

 **Facilitator's Note: an outline of special steps for the facilitator including trigger questions and suggested times for each part of the section.**

_Case Study Examples: stories that you can share with participants to help illustrate the section lessons.

_Exercises: hands-on activities for practice and experiential learning

Just look for the icons to know what part of the section you are in and how to use it. There is background material in most sections and in the appendices. Facilitators can choose to use these materials as assigned readings when conducting this training as a multi-day workshop, or simply recommend that participants browse them as time permits. Transparencies are also included as teaching aids. If a concept has an accompanying transparency it will have a transparency reference number in parentheses. For example, (T2-1) will be the first transparency in Section II. Each transparency has the corresponding reference number at the bottom center of the page.

The curriculum is designed to be taught in two, full-day sessions or four, three-hour sessions. Times are based on group processes for 35 people. Times can be expanded or decreased accordingly. Time for questions and comments are built into the sections. Participants should be encouraged to raise questions or share any stories throughout the training. Trigger questions are provided in most sections to help facilitate participant interaction.

Suggested Agenda

DAY ONE

9:00 a.m. Section I: Introduction and Overview (Total time 90 minutes)*

10:30 a.m. Section II: Getting to Know the Community (90 minutes)##

11:00 a.m. BREAK

11:15 a.m. Section II: Getting to Know the Community (Continued)

12:15 p.m. LUNCH

1:15 p.m. Section III: Taking the Community "Pulse" (30 minutes)*

1:45 p.m. Section IV: Cutting Your Issue: From Issue to Initiative (100 minutes)##

2:45 p.m. BREAK

3:00 p.m. Section IV: Cutting Your Issue: From Issue to Initiative (Continued)

3:45 p.m. Section V: Identifying Support (45 minutes)

4:30 p.m. Housekeeping/Evaluation/Closing (time for announcements; review the day's learning and any parking lot issues; ask participants what went well and what could've been better and record responses on chart paper; closing thoughts)

5:00 p.m. Adjourn

DAY TWO

9:00 a.m. Welcome Back/Agenda Review/Review last session's learning and highlights/report back on any issues requiring staff resolution, etc.

9:30 a.m. Section VI. Mobilizing Community Support (60 minutes)

10:30 a.m. BREAK

10:45 a.m. Section VII. Dealing With Opposition (90 minutes)*

12:15 p.m. LUNCH

1:15 p.m. Section VIII. Using the Media (180 minutes)*

3:15 p.m. BREAK

3:30 p.m. Section VIII. Using the Media (Continued)

4:00 p.m. Section IX. When You Need A Policy (Optional -- 30 minutes)*

4:30 p.m. Housekeeping/Evaluation/Closing (time for announcements; review the day's learning and any parking lot issues; ask participants what went well and what could've been better and record responses on chart paper; closing thoughts)

***** *Section can be eliminated to shorten training*

*Section can be shortened to 30 minutes*

What you'll need *:

- **display markers and chart paper on at least two easels**
- **masking tape if chart paper is not adhesive**
- **overhead projector**
- **chairs arranged in one large circle or smaller "rounds"**
- **Chairs that can be easily moved or break out space is made available**
- **watch or timepiece**
- **pens and paper for participants**
- **agenda posted on chart paper**
- **chart paper posted as "parking lot" for emerging issues**

** Other items unique to section appears at the front of each section.*

Section I. Introduction and Overview (Total time 90 minutes)

Section goals:

Begin team building and networking efforts

Assess group strengths and capacities

Model community building

Provide an overview and definition of advocacy

You'll need:

- **watch or timer with a second hand**
- **bell, triangle or some sort of noise making instrument (nothing too annoying!)**
- **small group discussion questions posted on chart paper with instructions**
- **marking pens (fine) or ink pens that can write from a horizontal angle (enough for all participants)**
- **capacity sheets posted around the room with multiple sheets of different colored adhesive "dots" (one color for each sheet)**
- **A list of all the capacities in the exercise with each color code posted on chart paper**

Introductions and Ground Rules (60 minutes)

 ***Facilitator's Note:*** Introductions are very important to building team spirit and a sense of community during the training. In fact, the training itself should give participants clues on how to model community building when they "return" to their neighborhoods to implement their initiatives.

Round Robin introductions: Start by asking participants to take no more than 30 seconds to give their name, where they are from, and any other brief comments. It is helpful if you use a bell or something that makes a sound to gently keep people on track. Before you begin large group introductions, ask everyone to get silent and listen to what 30 seconds "sounds like." Ring your instrument at the end of 30 seconds so everyone will know how to proceed. Now begin.

Setting ground rules: After large group introductions are completed, introduce the concept of the "parking lot" (i.e., a place to write up emerging issues that should be dealt with at a later time). Have the group set ground rules for the remainder of the training. Ask, "What kind of ground rules or courtesies would be good to establish during our time together?" If needed, suggest one of your own (e.g., respect for difference of opinion, no put downs, etc.). Record ground rules on chart paper and post where participants can see them. Take no more than 10 minutes.

Small group discussion: break up into groups of no larger than eight (you can have people count off if you wish) and have them discuss the following:

Have you been involved in advocacy efforts? If so, what has been most challenging? Most rewarding? If not, what has kept

you from “doing advocacy”?

Ask groups to assign a spokesperson and be ready to report out common themes (i.e., what they found they had in common) in 15 minutes. Each group has two minutes for report out.

Overview (15 minutes)

 Overview: Why Community Advocacy?

Effective Advocacy Builds Community Power

Voluntary participation in local community institutions and organizations has long been considered vital for effective crime and drug abuse prevention. Efforts that engage community residents and give them a sense of their own power can make a real difference in a community’s ability to solve problems as well as strengthen individual community members’ sense of “community”. Lack of a sense of community or “neighborhood disorganization” is considered a critical risk factor for alcohol and other drug problems. Community based efforts can address problems through policy changes *and* aids communities in addressing the factors that put them at risk in the first place.

The best kind of advocacy initiative engages the community who shares the problem and helps them become a part of the solution. An example of this kind of effort is taking place in an inner city of Massachusetts with a predominant African American and Latino population engaging youth as advocates..

_Case Study

Advocacy Work That Engages People

Boston, Massachusetts Latino and African American youth were concerned with the easy access of tobacco products by their younger family and friends. South Central Los Angeles was “ground zero” in a multi-cultural, multi-city rebellion that was sparked (in some measure) by the acquittal of three white police officers charged with the videotaped beating of African American Rodney King. Prior to the rebellion, a small but dedicated group of public health activists from South Central Los Angeles’ Community Coalition for Substance Abuse Prevention and Treatment (CCSAPT) had been diligently working to convince California state and city officials that the area’s high concentration of liquor stores posed a serious health hazard to South Central residents. A recent study by the University of Southern California School of Medicine showed most South Central census tracts had more than twice the one outlet per 2500 persons prescribed by California law and that there was a positive correlation between the high density of alcohol outlets and increased violent crime in the area. In fact, the USC study showed that “the threat to public safety associated with a 10% increase in alcohol outlets in a Los Angeles County community with 50,000 residents or more and with 100 existing outlets was 25 additional violent crimes annually. Just prior to the rebellion, South Central had 728 outlets.

The unrest changed all of that as more than 250 liquor stores were destroyed over the three-day insurgence. All of a sudden, overconcentration of alcohol outlets was at the top of the public agenda.

CCSAPT, deluged with calls by the media as well as residents who wanted to participate in the campaign, planned a careful strategy that assessed their allies and opponents as well as what policy changes would really affect root causes of slow economic development and poverty. It was their belief that the prevalence of liquor stores was "cannibalizing" other businesses: While other retail establishments and businesses did not want to locate in the high outlet density/high crime areas, alcohol outlets were increasing to profit from what residents referred to as "the misery market" of poor, unemployed drinkers -- some of whom were reportedly underaged.

The Coalition made a critical decision. Instead of going straight to local elected officials with a new plea for regulation, they took the issue to the streets in the form of a petition drive. In less than two weeks, CCSAPT gathered more than 30,000 signatures in support of their efforts. Not only did they impress policy makers with their public support, they continue to stay in touch with signatories, and organize their expanding volunteer base for other advocacy efforts.

Said one organizer, "The response was amazing. People would say to petition workers: Can we do this? It really changed folks' view of what was possible."

Other Victories As a Result of Advocacy Efforts

- **Dramatic declines in the numbers of children injured or killed by sleepwear-related burns can be traced directly to the "promulgation of strict federal and state standards for flammability of children's clothing." (McLoughlin, Clarke, et al., 1977)**
- **Changes in minimum drinking age laws have had a significant impact on fatal traffic crashes among youth under 21. One study found a 15.4% decrease in fatal crashes involving drivers under 21 compared to a decline of 5.4% involving drivers 21 and older (O'Malley and Wagenaar, 1991).**
- **California's successful initiative to raise the state excise tax on tobacco resulted in a 14% decrease in tobacco consumption compared to a 3.5 to 4% decrease nationwide (McGuire, 1992.)**

_ Exercise: Capabilities Index (10 minutes)

An important part of effective advocacy is building on the strengths and capacities of the people in your community. This exercise enables a group to identify advocacy related talents and capacities among its membership. Below is a broad menu of capacities that you can use to poll the group. Choose the capacities you are most interested in gauging or add new ones.

 **Facilitator's Notes:** Make sure every participant has a marking pen. Each participant goes to each capacity sheet and writes their name (legibly) under each capacity on the sheet. For every capacity (not every sheet) they have, they take a coded dot (posted at the sheet) and put it on their name tag. Participants should be instructed to take their seats as soon as they are finished. Some participants could have lots of dots, others much less. Focus on the strengths of the whole and encourage participants to seek out others who have capacities they are interested in. Follow up training with a typed list of completed sheets.

Questions For Capability Index

VOLUNTEER RECRUITMENT

- I have recruited volunteers and/or conducted training for them (say which one you've done after your name)
- I have and manage a database or list of volunteers
- I have or work with a phone bank or other system to contact volunteers by phone:
- I have or work on a system for rewarding/acknowledging volunteers:

COMPUTERS

- I know the following software (name and software)
- I have access to a computer and have an e-mail address (name & e-mail address)
- I have done desktop publishing:
- I have installed hardware and/or software:

POLICY

- I have called an elected official on a specific issue
- I have helped draft legislation
- I have testified at a public hearing
- I have organized a community hearing on an issue

MEDIA ADVOCACY

- I have held a press conference
- I have called a reporter
- I have been interviewed by a reporter

-I have written a letter to the editor or op-ed piece that was published

FUNDRAISING

-I have organized a fundraising dinner or other special event

-I have written a proposal that got funded

-I have run a direct appeal campaign (asked for money by mail or over the phone):

-I have run a membership drive

ORGANIZING

-I have done door-to-door canvassing

I have organized a house meeting

-I have worked on or coordinated a rally

-I have worked on or coordinated an electoral campaign

COMMUNICATIONS

-I have run a phone tree or fax tree

-I have produced or worked on a newsletter

-I have produced or worked on a video

-I have worked to generate letters from others on an issue

MORE GRASSROOTS QUESTIONS:

EVENTS

I can cook meals for events

I can do child care

I can help with interpreting for others (Name and Language(s) including sign language)

I can do outreach to get people to the event

LANGUAGES

I can speak another language other than English (Name and Language(s))

I can write in another language other than English (Name and Language(s))

I can translate documents from English to another language (Name and Language(s))

AFFILIATIONS

I belong to a religious organization in my community (Name and faith institution or organization)

I belong to my home alert or other neighborhood group (Name and group name)

I am active in local community organizations (Name and no more than two main groups you work with)

Section II. Getting to Know the Community (90 minutes)

Section goals:

Overview on risk and protective factors
Participants understand basic mapping techniques
Practice observation and analysis skills
Model community based issue research

You'll need:

- **Assessment forms for each group or the questions written up on chart paper**
- **pens and/or markers**
- **a watch to keep track of the time**
- **Comfortable shoes and appropriate outdoor clothing for walkabout (see exercise)**

☀ Overview: Identifying Risk and Protective Factors (20 minutes)

The best way to develop advocacy initiatives is to ground them in the real needs and strengths of your community. By assessing the assets (protective factors) and challenges (risk factors), the group is better informed about the dimensions of the problems they seek to address and what resources (human, material and otherwise) are available to help address them. (T2-1, 2-2)

What Are Environmental Factors?

Any behavior or activity operates within a context or an environment that shapes it. Assessing environmental factors in your community means shifting the focus from individual problems to the *context* in which these problems take place. This shift is important because environmental factors can play a major role in proliferation *and prevention* of public health problems in a community. An effective prevention strategy takes these factors into account and attempts to *balance* accountability for public health problems between individual and institutional actors in the greater interest of public health and safety.

What does it mean to identify risk and protective factors? Risk factors are those policies, issues, norms, problems, needs, deficiencies, etc., that are barriers to healthy communities. Protective factors are those norms, institutions, policies, etc., that support and enhance community health and development. All communities have both. Some factors will fit under both categories.

Identifying risk and protective factors requires attention to a community's *environment*, or the context in which these assets and challenges exist. This shift from an individual to an environmental perspective is much like shifting a camera lens away from a simple portrait to capture the "big picture" or landscape that surrounds it. There are different levels and dimensions of a community landscape.

Physical or land use factors - buildings, roads, open space, institutions, businesses (or lack of them) are all a part of the physical infrastructure that form the foundation of a community. (T2-3)

Availability of goods and services - what we eat, wear and read is largely determined by what's available to us. Goods and services are more than what we can buy, it includes public services like schools, hospitals, water and recreational facilities. When looking at goods and services, it is important to also assess how accessible these services are to residents. For example, if a nearby recreation center has no wheelchair ramp or offers no classes in Spanish, it may not be useful to neighbors who require any of these to use the center's services. (T2-4)

Institutional factors - What is the impact of institutional behavior on the community? Public agencies can treat residents like constituents or the "mob at the gates." Corporations can pollute or have unfair business practices. It's important to understand the impact of private and public institutions on the community and if they are good citizens. (T2-5)

Human factors - Who lives here? What organizations do they belong to? Is there a history of concern for community well being? What health indicators are there? What is the quality of family life? These are "portrait" questions that help to paint a clearer picture of who you are working with. Human factors explain *what* is going on for community members, the other factors help to explain *why*. (T2-6)

Risk factors

policies, issues, norms, problems, needs, deficiencies, etc., that are **barriers to healthy communities.**

Protective factors

norms, institutions, policies, etc., that **support and enhance community health and development.**

(T2-2)

Examples of Risk factors

- **high numbers of alcohol outlets**
- **abandoned buildings**
- **billboards)**
- **few recreation outlets**
- **high crimes**
- **high prevalence of substance abuse**
- **limited social networks**
- **limited access to health care**
- **poor quality public schools**
- **families in poverty**

(T2-2)

Examples of Protective factors

- **stable community associations**
- **few or no "pro-use" advertising (i.e., alcohol and/or tobacco**
- **ample recreational outlets**
- **strong social networks and local places to "gather"**
- **quality public schools**
- **low unemployment**
- **access to healthy food (i.e., produce)**
- **adequate, accessible public transportation**

Environmental Factors

Physical or land use

buildings, roads, open space, institutions, businesses or lack of them are all a part of the physical infrastructure that form the foundation of a community.

T2-3

Environmental Factors

Availability of goods and services

Goods and services say a lot about how institutions view an area. Are there more liquor stores than boutiques? Perhaps there are no businesses at all.

It is also more than what we can buy. It includes public services like schools, hospitals, water and recreational facilities. When looking at goods and services, it is important to assess how accessible these services are to residents.

T2-4

Environmental Factors

Institutional factors

What is the impact of institutional behavior on the community? Public agencies can treat residents like constituents or the "mob at the gates." Corporations can have bad hiring practices or pollute the local environment. It's important to understand the impact of private and public institutions on the community and if they are good citizens.

T2-5

Environmental Factors

Human factors

Who lives here? What organizations do they belong to? Is there a history of concern for community well-being? What are the health indicators? What is the quality of family life? These are "portrait" questions that help to paint a clearer picture of who you are working with. Human factors explain *what* is going on for community members, the other factors help to explain *why*.

T2-6

_ Exercise: The Walkabout (45 minutes)

🕒 *Facilitator's Note:* Participants should be encouraged to wear comfortable shoes. Accommodations should be made for people with mobility challenges. Some groups carpool instead of walking if there are climate or physical challenges. Walking is best if possible.

Identify a route near the training site. Hopefully, it's walking distance or arrangements for transportation must be made. The route should provide a mix of things to observe (businesses, institutions, etc.) and take no more than 20 minutes to walk. If much of the business district is abandoned, then that's worth observing, too. Encourage participants to take notes and to pay attention to both assets and challenges. Also, make sure for safety reasons that people stay together in groups. Ask key participants and/or staff to make sure no one falls behind; and to help "herd" the group along the route and back. Some groups provide disposable cameras to encourage participants to document what they see.

When participants return, take about 10 minutes to debrief the exercise in large group. Draw a line down the center of the chart paper and write "Assets" on one side and "Challenges" on the other. **Trigger questions:** What assets do you see? What challenges? Other comments? Thoughts? Record responses as appropriate. If something is both an asset and challenge, record it under each column.

Assessing Community Environmental Risk (seat exercise - 10 minutes)

 *Facilitator's Note:* Break participants in groups of no more than eight.

Assessing Community Environmental Risk

Based on what you have learned so far, fill in the worksheet below.

List three **problems in your community that have to do with how land is used.** Examples: abandoned buildings, not enough green space, billboards in residential areas, etc.

List three **problems in your community that have to do with the availability of goods and services.** Examples: too many of one kind of business (e.g., liquor stores) and not enough of another (e.g., supermarkets); no medical services or youth centers, etc.

List three **problems in your community that have to do with how the institutions operate** there. Examples: not enough enforcement of laws; unresponsive local government; poor schools; local business that pollutes the neighborhood, etc.

List three **problems in your community that have to do with resident conditions.** Examples: high levels of drug use, unemployment and/or poverty; family disintegration, violence, etc.

Assessing Environmental Assets (10 minutes)

List three **assets in your community that have to do with how the land is used**. Examples: parks and green space, housing is well planned and near employment, etc.

List three **assets in your community that have to do with the availability of goods and services**. Examples: availability of healthy foods; access to good public transportation, quality medical services, etc.

List three **assets in your community that have to do with how the institutions operate** there. Examples: responsive local government; good schools; local businesses are good citizens, etc.

List three **assets in your community that have to do with resident conditions**. Examples: high levels of employment, low poverty rates; family stability, etc.

Section III. Taking the Community "Pulse" (30 minutes)

Section goals:

Know and understand various tools for collecting community feedback
Practice active listening

⚙️ Overview: Getting Community Input (10 minutes)

Identifying risk and protective factors are important but how do you know which factor is most important to address? Collecting data and conducting research are important tools that can help. Another equally important way to gather information is to listen to people in the community. Every coalition should have systems for collecting community input and feedback. Here are a few examples of community-focused methods for "listening."

Surveys. Whether by phone, on-line or at the door, surveys are structured ways of getting community input, identifying issues and prevalence of problems or attitudes. Surveys can be tedious and difficult for residents with low literacy skills. However, they do enable groups to collect standardized data that can be analyzed later.

Canvassing. Going door-to-door unannounced can be a good way to reach new people who aren't on anyone's list; raise public awareness; and build organization name recognition. It is often difficult to carry on an extensive conversation under those conditions, so the input gathered will be limited.

Focus groups. One can gather solid, qualitative input from a small group -- especially a group that has something in common or is in some way demographically similar. Just listening to the exchange between participants can be very enlightening and reveal more about the interests and concerns in a community than a two dimensional survey. Of course, information collected at focus groups are harder (though not impossible) to quantify.

One-on-one interviews with key players. Listening is one of the most important tools there is for building relationships. Listen actively with your whole body facing the speaker. Ask questions and probe deeper. After offering a guiding question or two, just follow where the conversation leads you. Suspend your expectations and your agenda for the time being. Just listen to learn more about the other person. Take notes if you need to and it's not too obtrusive.

Trigger question: Has anyone in the group undertaken anything like this? How do you find out what's going on in "the community?" Facilitator should record useful tips for later reference.

Exercise: Dialogue (20 minutes)

Facilitators Note: Ask participants to pair off and take turns engaging in a dialogue. Spend five minutes listening and five minutes as the speaker using the **trigger question:** What should we be doing to make a difference for young people? Make sure to post the question on chart paper for participant reference.

Take another 10 minutes to debrief the exercise. Ask participants to name how each role felt; what worked and didn't work as well; and what would they do differently. Record responses on chart paper.

Section IV. Cutting Your Issue: From Issue to Initiative (100 minutes)

Section goals:

Develop group criteria for issue development
Practice choosing an issue and refining issues into an advocacy initiative
Practice setting initiative goals by group consensus

☀ Overview: Defining An Issue (10 minutes)

You've gathered information from your community and you've identified assets and challenges to help inform your group's strategy. Now, you must take all that information and choose the best *issue* to work on. An issue is defined as a broad problem area -- like alcohol and tobacco billboards or teen pregnancy. There are always lots of issues to choose from. The best way to choose is from a criteria developed by group consensus that takes into account group and/or community values and interests (i.e., what's important).

Community values and interests are the ideal visions and the down-to-earth concerns we carry in our daily lives. They range from dreams of a safe, green world for all families to fears that the wrong kind of neighbors will move in. Advocates must factor in sentiment from both sides of the spectrum in order to identify issues that have meaning for the people with whom we work.

Real vs. Ideal Interests. Interests are usually divided into two categories: real interests and ideal interests. Ideal interests are usually articulated in lofty vision statements like, "a great future for all children." Real interests are those issues that have an impact on our daily lives. They are the company bottom line, our property values, our own children or jobs, to name just a few. Advocates often focus on ideal interests and pay little attention to real interests when choosing issues and framing their initiatives. A good issue provides your group with opportunities to encourage community visioning but is grounded in the real interests and concerns of people where they are.

Trigger question: If anyone in the group has experienced opposition in their advocacy work, did the opposition rely on arguments focused on real interests or ideal interests? What did you do?

Other considerations in developing criteria. All advocacy must operate within the framework of your organization's purpose and long range goals. It's important to compare your organization's goals with the goal for your issue. In your assessment you should ask yourself: what constitutes victory? How will this effort address the problem/have an impact on the quality of life of your clients/members and/or community?

Another important consideration is your organizational health and survival. Can you win? Or perhaps more importantly, can your organization afford to lose? Advocacy campaigns can

strengthen organizations by building a sense of team spirit, expanding the leadership base, deepening the leadership's level of experience and expanding an organization's membership and contact base. Of course, your organization must bring something to the campaign in the first place (i.e., membership, staff, money, reputation, facilities, press contacts, allies, etc.). Make a careful assessment of your assets as well as any liabilities you bring to the effort.

_Exercise: Brainstorming Criteria (15 minutes)

🕒 Facilitator's Note: Ask participants to brainstorm a criteria for choosing an issue. Trigger questions for brainstorming: What would get you to volunteer to work on an issue? What interests would a good issue address? What would an organization want to get out of working on an issue?

Record responses on chart paper and then quickly debrief responses to see what criteria emerged. If necessary refer to the sample criteria at the end of this section for additional ideas.

⚙️ Overview: Distilling an issue into an advocacy initiative (15 minutes)

Once you've identified the issue, you must refine that issue into an *initiative*. An initiative is a planned set of activities, with clear goals and objectives, that your group will undertake to address some part of the issue. No initiative can address an entire issue, but it should be well-defined, doable and have a clear impact on your issue.

An initiative plan has three main parts:

Goal or what we want to accomplish. The goal should be easily understood and should meet as much of a group's criteria as possible. A good goal requires cutting or shaping the issue into effective, doable action that engages community interest and support.

Target or decisionmaking body with the power to enact the action sought. The difference between education and advocacy efforts is that advocacy seeks concrete institutional changes. Having broad segments of the community as target populations are fine for outreach and health education, it simply doesn't work as well in advocacy initiatives. Every initiative must identify a clear target or decisionmaking body that can enact the institutional change required to achieve the goal. For example, when developing an initiative to ban alcohol and tobacco billboards near schools, the group must identify who best to make this happen. City council zoning ordinance? Billboard company policy? State law? Each potential decisionmaking body or target will mean different organizing strategies. Identifying the target is central to initiative planning because it focuses the rest of the outreach toward moving the target to action.

Note: Don't confuse target and allies you need in order to win. Primary targets are always the individuals or decisionmaking body that ultimately have the power to grant group goals. There are lots of folk to work with and convince along the way, but they are not targets. (See materials

on assessing targets in the back of this section for more information).

Objectives necessary to achieve the goal. Once the group has identified the goal and target, they are ready to develop an action plan or set of objectives and timeline to make it happen.

Case Study

Campaigns to stop Uptown cigarettes and X brand cigarettes were developed around two points: the exploitation of important cultural values and institutions to sell deadly products; and these products' potential appeal to youth. In each case, it was clear to advocates that African Americans were being targeted by these companies, but targeted marketing was not enough of a "hook" to draw broad support. By "cutting" the issue in ways that emphasized its racial overtones and placing it within a context of ongoing efforts for socio-economic justice, advocates were able to broaden its appeal -- and newsworthiness.

Another example of adept "issue cutting" is found in the Baltimore Citywide Liquor Coalition's (BCLC) efforts to ban alcohol and tobacco billboards in most areas of Baltimore. Here again, themes emphasizing youth targeting and race and class exploitation proved effective in mobilizing communities -- with a local twist. The coalition successfully transcended apathy around tobacco control by linking billboards to "bread and butter" issues of neighborhood blight, bias and economic development.

When the Baltimore coalition chooses an issue they employ the WRIST test. For every initiative they consider, they ask is it:

Winnable?

Real?

Immediate?

Specific?

Tangible?

According to BCLC organizer Kevin Jordan, issue development is one of the most important steps in developing media and organizing strategy. It will determine your allies, your target and your power base. In fact, organizers who use the WRIST criteria have a saying that illustrates its importance: "If you want to make a fist, you've got to have a WRIST."

Exercise: Identifying Initiative Goals (60 minutes)

Facilitators Note: Ask participants to brainstorm issues on which they'd like to work. Let them know that they will vote on which group they will join. Set a minimum number for small group

size so that the number of small groups will not exceed scheduling and facilitation capacity. If there's one facilitator and the time prescribed in this curriculum outline, there should be no more than five groups. In a large group of 30-40 people, minimum group size should set at five people per group as small groups will vary according to interest.

(Other ways to develop small groups: Some facilitators avoid this part of the exercise all together by choosing four or five issues from participants' previous work and assigning participants into groups. Others ask participants to select issues in advance.)

Record the list of issues legibly on chart paper. After a few minutes of brainstorming, let participants know that it will take five (or other number) to make a group. Read all of the issues through once before the vote to make sure everyone understands each issue. Participants will vote once for the issue of their choice with a show of hands. Issues that have the minimum support required to be a group are set. Issues with no support are crossed out. Issues with less than five supporters go into the negotiation round.

In the negotiation round, review only those groups that have votes, but not enough to become a group. Anyone in a set group (with enough support) can not move except to move from a group that has more than enough support to a group in need of more members -- if they choose. Two groups with similar issues can combine, as long as combining helps them to meet the minimum support requirements. Others can simply opt to leave a "too small" group for a "set" group.

Once groups are set (and some exceptions can be made for the sake of time), groups will meet to develop an initiative goal for their issue. Each group should have a recorder. Groups are to develop a clear goal that is 25 words or less; has a clear target (i.e., institutional decisionmaking body or individual) and is easily understood. They have 25 minutes.

After small group time is up, participants should report out their initiative goal and target. Make sure to avoid cross talk and criticism between groups and keep questions focused on clarification.

Assessing Your Targets

List who/what institutions has/have the power to solve the problem and grant your demands? When possible, list specific names. Identify which is the most important target for achieving your policy goal.

Who must you get to first before those listed above? Be specific:

List strengths and weaknesses of each target:

Target	Strengths	Weaknesses

Assessing Your Targets (Continued)

Which targets are appointed? Elected?

How do you have power/influence with them (as voters, consumers, taxpayers, etc.)?

What is the self-interest of each?

Who would have jurisdiction if you redefined the issue (e.g., turned a tobacco advertising issue into a fair business practices issue)? Does this help you?

SAMPLE CRITERIA FOR CHOOSING AN ISSUE

It will result in real improvement

Winnable

Specific and/or local

Short term victory possible

Community is concerned about it

It will shift the balance of power for the better

It fits our goals and vision

We have the resources to see it through

It will help build/strengthen our organization

It affects people's real interests

It will set us up for the next initiative

It will help us fundraise

It will help build leadership in our ranks

Section V. Identifying Support (45 minutes)

Section goals:

Understand the mechanics of identifying likely allies
Know and understand what constitutes a coalition
Practice assessing community support

☀️ Overview: Identifying Support (15 minutes)

Once an initiative is developed, it's time to identify who is likely to support it. Rarely can one group get an initiative enacted working alone so building broad support is critical to success. Oftentimes, building broad support requires building a coalition or group of organizations that come together temporarily for a specific reason. Coalitions are meant to be short term and are usually developed with a specific target in mind.

When assessing whether to put together a coalition, groups must identify what kind of support is needed to win, who is most likely to support the initiative, and who can influence the target.

To determine the amount of support needed to win, advocates usually start with how the target will make its decision. How many votes (if applicable) are needed to win? Who will review and approve the decision? Who will make recommendations concerning the decision? After a careful review of the decisionmaking process (and any relevant deadlines), identify appropriate levels of support (i.e., minimum number of letters generated, attendance at public hearings, phone calls, etc.) for each step of the process.

Identifying likely supporters requires some knowledge of the community as well as an analysis of each potential partner's interests. It is important to start with a detailed and specific list of prospective allies. Do not, for example, list “the faith community” as one ally. Faith institutions are generally concerned with the community's welfare but they are also a diverse and busy group. Identify *specific* groups and institutions and why they are likely to get involved.

A likely supporter has strong **self interest** and deep **concern** about the issue your group is trying to address. They will also have **low risk** in joining you. Remember, it is often "leaders" who have little self interest and high risk (i.e., more to lose) in joining advocacy initiatives. Try to identify grassroots and other organizations with strong ties to the issue. Allies need not be formal organizations. For example, a group focused on passing a clean indoor air ordinance might identify an ally in parents of children with asthma.

Trigger question: For those of you who have worked with or led coalitions, how did you identify allies? What worked? What didn't work so well?

Exercise: Assessing Community Support (30 minutes)

🕒 *Facilitator's Note:* Have issue groups reconvene to identify groups likely to support the initiative. Each group should identify at least three supporters that likely have high self interest and concern and low risk in joining the initiative. Choose a recorder and be prepared to briefly explain why they chose each ally. Each group has 15 minutes.

Reconvene the large group for report outs and debriefing. Report outs should include a very brief reminder of the group's initiative, the allies identified and a brief justification for each. If time is limited, you may limit groups to no more than five allies for discussion. Quickly review the report outs after all of them are completed. Were the allies specific and clear in most cases? Did the rationale make sense? Refer participants to assessment charts at the end of this section for additional information.

Assessing Community Resources

List who shares this problem:	What would they get out of joining you?	Who else would they bring in?	Who would their presence alienate?	What resources would they bring to the table?

Assessing Community Resources (Continued)

Rank each group named above from 1 to 5 (with 5 being the highest) with regard to your issue taking into account the following factors: self-interest, depth of concern, risk in joining you, and level of difficulty to reach/organize.

Group	Self-interest	Depth of concern	Risk in joining you	Difficult to reach/organize

For each group named above, list the specific power they have over your targets:

Group	Target	Power

Section VI. Mobilizing Community Support (60 minutes)

Section goals:

Learn the mechanics of community mobilizing and volunteer recruitment

Build skills and confidence in volunteer recruitment

Introduce various methods of community mobilization

⚙️ **Overview: Recruiting Volunteers (15 minutes)**

Once you've identified potential allies, it's time to go out and recruit them for the initiative.

Recruiting and keeping volunteers isn't easy but these steps make it a lot easier.

Recruit to Action Not Meetings. Everyone's time is precious. Make sure that you emphasize what your group will do when you get together, what you hope to accomplish, and how they can contribute.

Effective Personal Presentation. Remember that when recruiting, appearances count! There are no hard and fast rules when it comes to presenting yourself but a little common sense can go a long way. Whether making presentations in an institution of faith or at a picnic, make sure to dress and speak appropriately.

Be Prepared/Know Who You are Talking With. There's nothing more annoying to a potential volunteer when someone calls on them who knows little about their work in a community. Avoid the mistake that one zealous recruiter made: She spent an hour explaining to her potential recruit about the harms of tobacco and why it was an important issue in their community. She had no idea that the person with whom she was speaking was an expert in internal medicine who belonged to the national board of a cancer prevention organization. Knowing who you are talking with can help avoid these kinds of mistakes and give you ideas for "openings" that can make potential recruits more receptive to your approach.

Establish Your Credibility. People get lots of requests for their time. It's important that you let them know a little about your skills, experience and what your group has accomplished. Organizing is mostly about building relationships. What experiences, friends, affiliations do you share that can help build a bridge between you? Getting involved can be risky -- especially for someone with significant "standing" in a community. What credibility do you offer that can help allay any concerns?

Listen Actively. Coalitions should reflect the common needs and interests of all participants, but how can you know what they are if you've never asked? When recruiting, probe and listen carefully for relevant self interests, concerns, passions that motivate the person. When you listen at this stage, it sends the message that they will be "heard" throughout the process.

Challenge People to Act in Their Interest. You've been listening and engaging in a fruitful dialogue about their issues and concerns, *now you must ask them if they are ready to do something about them.* A challenge need not be impolite.

An example: *Mrs. Jones, I see you are very concerned about the local convenience store. Our coalition could sure use your help in getting them to change. We have this ordinance we are trying to get passed that has really worked to control these kind of problems in other cities. We think it could work here. But we need your help...*

Remember, try to match your request to the skills and availability of the recruit. Always have some specific volunteer options in mind -- and not just going to meetings!

Commitment. Always ask the person directly for a commitment -- and wait for the answer. Yes, is great but a "no" is better than a "maybe" which more often means, "No, but I just don't want to tell you to your face." A common recruitment phrase is "May I count on you to?"

Follow Up! Follow Up! Follow Up! Even when people make a commitment, they need to be reminded. Stay in touch with volunteers by providing them with updates, reminder calls (three for each meeting is typical), and lots of gratitude and recognition for every contribution they make. Having food at every meeting doesn't hurt either.

Exercise: Recruiting a Volunteer (20 minutes)

You will need:

- two volunteers
- two chairs facing each other and placed where all participants can see
- chart paper and markers

 *Facilitator's Note:* Ask for two volunteers to roleplay recruitment. One volunteer should agree to do the recruiting. After they are seated, remind participants observing that this exercise is to recruit an ally. Ask participants to describe who this ally should be (using the information reviewed above as a guide) along with some of the ally's probable interests and concerns. Make sure roleplay participants are comfortable and ready (the recruiter may need a moment to compose a game plan). Then, let the roleplay begin!

After no more than 10 minutes, stop the roleplay and ask both participants how each role felt for them. Then, ask those observing to list: 1) what worked; 2) what didn't work as well; and 3) other helpful tips or things to think about when recruiting. Record each type of comment on chart paper under the appropriate heading. Thank role play participants with applause.

IMPORTANT STEPS IN RECRUITING VOLUNTEERS

Recruit to Action Not Meetings

Effective Personal Presentation

Be Prepared/Know Who You are Talking With

Establish Your Credibility

Listen Actively

- Self Interests**

- Concerns**

Challenge People to Act in Their Interest

Commitment

Follow Up

Follow Up

Follow Up

T6-1

IMPORTANT STEPS IN RETAINING VOLUNTEERS

FOLLOW UP Thank-you, “no show” and reminder calls are all an important part of keeping volunteers.

INCENTIVES Frequent helper points, certificates, etc., really make a difference.

FLEXIBILITY Not everyone can make it to the meeting. Find things to do for those who can't.

FUN People should look forward to the next time they volunteer!

DEMOCRACY Everyone likes to have some say in what they're involved in. Share decisionmaking when possible.

RITUALS They don't have to be fancy; just regular “customs” that build organizational culture -- like special ways of opening or closing meetings, welcoming new volunteers, etc.

EFFICIENCY Respect people's time, be organized.

PRODUCTION Make sure you accomplish something and always acknowledge what you've done **together**.

T6-2

⚙️ Overview: Base Building (20 minutes)

Tips on Base Building (Adapted from veteran organizer Greg Akili)*

Why have an identifiable base?

People make a difference if you go to them. It is not enough to have a good idea or a good issue. An organization must have a base of people that can be counted on to achieve the goals. More can be accomplished with people who feel part of an organized group. Also, the level of comfort is increased and more people will participate in public actions when there is an identifiable base.

Why should people get involved? What do they get for it?

People get involved either due to personal interest or as a result of crisis. Encouraging involvement goes against much of our socialization in this country. Many people believe that their vote or voice will not count. Many people feel powerless in the policy arena. Remember, don't blame people for not getting involved. They are not obligated to participate or work on an issue. Always ask yourself: *What am I offering?*

Appreciate the total, don't just focus on the core.

Too often, we complain that there are not more people involved. The outer circle of support is dismissed because involvement is measured by how many people come to the regular meeting. When you look beyond the core, there is great potential!

🕒 *Facilitator's note:* Draw a large circle with smaller circles inside -- similar to a target -- to illustrate this point. Level one would start at the bulls eye, level two further out and so on.

Traditional levels of support

1. *Core supporters* (5-7) key volunteers can always be counted on.
2. *Active supporters* (20-25) will support most of the activities and will attend some meetings.
3. *General supporters* (50-70) will do one thing, one time; rarely come to meetings.
4. The public.

The key is getting each level of support to move to the core by asking more from people at each level and showing appreciation for the core *and* for supporters at each "outer" level.

The Science of Numbers

Recruiting volunteers is like working in a great sifter -- the more you shake a sifter, the more its contents falls through the cracks. Building big numbers of volunteers requires talking to lots more people than you need -- and making it very easy (not too many shakes!) for them to make a contribution. If it's too difficult to get involved (i.e., they have to call and get the meeting place, there's no child care, they have to make up a script to help you call volunteers, etc.) they will probably "fall through the cracks."

Some common recruitment equations:

- In order to get 50 people to show up when the issue is not hot, 150-200 names are needed.
- If the names are cold and people are not familiar with the group or issue, more names will be needed.
- Thirty percent or more of the people called will not be at home; 15-20% of the numbers will not be good numbers; 25-30% will be no's; 25-30% will say yes. Of those who say yes, only a small percent will actually show.
- Using a "warm" list, out of the 20 people talked to, nine will say yes and three to four will show.

Common methods for mobilizing include the following:

House meetings. These gatherings are often hosted by volunteers in order to organize a local area. The host will invite friends and neighbors to refreshments and a presentation on the issue by someone in coalition leadership.

Phone bank recruitment. Volunteers and/or staff calling phone lists to recruit new volunteers.

Canvassing. Staff and/or volunteers going door-to-door to raise public awareness of the initiative and recruit supporters.

There are certainly many more ways to get the word out but there's nothing like direct contact (either by phone or in person) to get people into action.

Other important things to remember:

- Every 3-4 months there will be a need to rebuild with a new group of people. People will move on to another level, get involved in something else, or become inactive.
- Develop ways to assist people to move to deeper levels of commitment. Core supporters need to work with new people; conduct orientation, plan parties for new supporters

- It is important to develop recruitment systems including scripts to prompt volunteers; and mechanisms for tracking, follow-up and accountability. See sample script in the appendix or *Elements of a Script* (below).

Elements of a Script

1. Introduction: who you are; identify the group
2. Statement of conditions and the need to take immediate action
3. Statement of hope: *People can make a difference and we need their help because we can't do it alone.*
4. What you can do: *Come to the meeting...*
5. Get a commitment: *Will you join us? Yes or no.* Maybe's cannot be counted or measured.

* *From "Tips on Base Building" by Akili. Adapted with author's permission.*

Section VII. Power and Opposition (90 minutes)

Section goals:

Introduce the concept of opposition and making advocacy demands
Practice preparing for and holding a target accountability session

You'll need:

- Plenty of space for participants to stage their roleplays
- extra chairs for props
- chart paper and markers for participant use

Overview: Dealing With Opposition (20 minutes)

Advocacy is controversial. After all, we wouldn't have to organize, plan and strategize if *everyone* agreed that our initiative was the perfect thing to do. Chances are, the initiative wouldn't have much of an impact if no one took issue with it. That is why savvy advocates understand and prepare for opposition. Of course, it's better not to have any opposition but it's far worse to be unprepared for any that may arise.

Think strategically about your initiative. Are there interests that may be adversely affected? Will the initiative cost money? Raise fees or taxes? Increase regulation? Any of these can generate opposition to your initiative. The best plan is to do your homework, understand in detail the impact of your initiative, and be ready to justify it to the decisionmakers you are targeting.

Case Study

A local coalition prided itself in its good relationships with virtually every decisionmaker in their small town. That was one reason why they thought their initiative to get local police to track alcohol related incidents using a simple form would go over unopposed. The group met with the local police chief in what started to be a friendly, comfortable meeting. The meeting soon turned difficult leaving coalition members hurt and confused. How could they guess that their friend, the police chief, would get so upset about a little form that could do so much good?

The group had not researched procedures for the police department so they didn't know the amount of paperwork police were already responsible for. The coalition had to re-group and develop a new strategy: build widespread support for the data gathering initiative in the community so it would be difficult to dismiss while streamlining the process even further to address police workload issues. Although there were coalition members who didn't go bowling with the chief as often as they used to, the initiative was eventually implemented.

What this coalition learned the hard way is that every initiative has an impact. Often, initiatives designed to improve public health adversely affects powerful interests. This can result in powerful opposition to our efforts -- and, sometimes, strained relationships. Reducing consumption of unhealthy products or limiting advertising of alcohol and tobacco are examples of common public health advocacy initiatives that affect industries' bottom line. Astute advocates remember that "real interests" (as discussed in Section IV) are at stake and plan accordingly. **Trigger question: Has anyone been surprised by unexpected opposition? What happened?**

Usually, the target decisionmaking body is more receptive to industry interests than those of local, community-based groups. Part of the reason is that industries employ lobbyists and government relations staff who nurture relationships with officials as their full-time job. Another important reason is that, for elected officials especially, electoral campaigns require lots of money. Industry contributions are an important source of funds and officials are keenly aware of this fact.

Still, community groups still have power -- even if they don't have money to throw around. They have people power which, with enough of it, will beat money power most every time. However, a coalition must be prepared to show its power if it is to mean anything. In organizing, this is called *backing up your demand*.

Why Demand and Not Request?

Advocacy requires conviction and strength but a demand need not be rude or inflexible. It is simply a statement of what your group wants and what it will settle for (usually called the *back up demand*). Of course, negotiation requires a focus on conditions, goals and impact -- not any rigid, pre-determined outcome. However, if your group has spent time researching the issue, listening to community concerns and developing an initiative based on constituent needs, then there is a responsibility to advocate for outcomes that are consistent with group values and consensus.

The Accountability Session

The first step in making the demand is holding an *accountability session* or meeting with your target (or a representative or portion of the group) to make clear your demand and to assess the target's level of support. Ideally, the group would work to get a commitment of support at the meeting.

Accountability sessions can range in tone and setting from a friendly, small meeting at the target's office to a large community hearing where the target is put "on the spot." The setting and tone will be shaped by the group's history with the target and how the session supports their overall strategy.

Important Issues To Consider When Planning an Accountability Session

Is the target hostile to the initiative?

Does the target have a history of buckling under industry/opposition pressure?

Are there certain trusted allies we have who could effectively reach the target?

Will public pressure help or harm our efforts?

What must we do to prepare in order to have an effective session?

What are the target's relevant interests/concerns?

What are our demands? Back up demands?

Who's best to make the demand?

What power do we have to back up our demands? (i.e., petitions, phone calls, letters, public shaming, recall, etc.)

What are we willing to do? What are we not willing to do?

Once these issues are addressed, a group is ready to plan an accountability session. Although there are no hard and fast rules for holding an accountability session experienced advocates recommend the following:

- Never make idle threats.
- Always represent the group ethically and professionally regardless how “tough” the session gets.
- Never meet with the target alone. Negotiations are tricky and always require at least one witness. Having others in the meeting also sends the message that this is a *group* action (not an individual one) and that you are accountable to the group for any session outcomes.

Exercise: The Accountability Session (70 minutes)

🕒 *Facilitator's Note:* Instruct participants that they will develop a roleplay of an accountability session with their target (or a particular member of the target decisionmaking body). The roleplay should last no more than 5 minutes. The group can choose the setting, who best to represent the coalition (if it's a small meeting), and how they will make the demand. They should realistically portray the target's reaction (if they can anticipate it) and feel free to arrange the room however they need to in order to prepare for the roleplay. Make paper, chart paper and markers available for their use. They have 20 minutes to prepare. A summary of these instructions should be posted on chart paper.

When groups are ready, conduct roleplays and debrief after each. **Trigger questions:** Was that realistic? What could we learn from this situation? Did this roleplay inspire other ideas? Record lessons and ideas on chart paper. Make sure to praise and applaud all roleplays.

Section VIII. Using the Media (180 minutes)

Section goals:

Introduce media advocacy
Practice media planning
Practice framing for content and access
Learn and practice creative approaches to creating news

You will need:

- a television and VCR

⚙️ Overview: Media Advocacy (10 minutes)

Media advocacy is simply using the news to influence public opinion and affect the terms of debate on any issue. News confers legitimacy, sets the public agenda and is the "official story." Therefore, it is an important force for supporting advocacy initiatives -- and advocates must learn to use it effectively.

Trigger question: Let's think of times when the news set the public agenda; when we found ourselves talking about issues we really didn't care as much about before they were on the news. Perhaps the O.J. Simpson trial is an example. Are there others?

Framing is the process by which facts, opinions and images are packaged together to become a news story. There are many ways to frame a story. One way to think of framing is to imagine riding in a train and looking out of the window. As the train speeds by, the window frames the landscape -- that is, it arranges the images so that some are more prominent than others. The moving train imagery is an apt description of how news media move through issues. There isn't often time for detail and long term study. That's where advocates can help.

Trigger question: What kinds of things draw media attention? (Record responses on chart paper)

⚙️ Overview: Framing (15 minutes)

Framing for Access

Getting media attention means getting the news media, that moving train, to stop and pay attention to our issue. Framing a story for the media so it gets their attention is called *framing for*

access. There are many framing techniques for getting the media's attention. Featuring celebrities is, of course, one way to attract the media. Here are some other elements of newsworthiness to consider:

Controversy, conflict, injustice. The news media is in the storytelling business. These make stories interesting.

Irony or uniqueness. Something that makes viewers sit up and pay attention; that catches the eye.

Population of interest. Media outlets are businesses that must reach consumers in order to stay profitable. Oftentimes, some demographic groups (and therefore, stories that appeal to them) are of greater interest than others. Call the advertising department of your local media outlet for its package to prospective advertisers. These materials are free and often outline an outlet's target markets.

Significant or serious. Although this is often subjective, any story affecting large numbers of people is usually considered significant.

Breakthrough, anniversary, milestone. Something new and amazing -- like a discovery or new drug; or the commemoration of something important.

Local peg, breaking news. Piggybacking on a news story that is already getting media attention can be an effective strategy. Advocates artfully used the O.J. Simpson case to raise public awareness of the tragedy of domestic violence.

Good pictures. All media, including print media, need good visuals for their stories. Some groups provide balloons and beautiful backdrops. Others opt for more dramatic visuals like candlelight vigils or deteriorating neighborhoods in order to provide news media with some direct experience of the issues advocates seek to address.

 *Facilitator's Note:* Review (T8-1) and the list generated by the trigger question above. Show video case study example of good, colorful access strategy.

Framing for Content

Once we have the media's attention, we must actively shape the story by providing information, interviews, sources and visuals that will effectively frame the story accurately and from a public health perspective. This element of framing is known as *framing for content*. Framing for content increases the odds that the story is told in a way that reflects a public health perspective of the issue and its solutions.

One way to think of framing for content is to imagine each story as a blank comic strip. The reporter or producer must tell a story with a few words illustrated by a picture. Stories have more than one side so advocates must anticipate and even suggest "characters" for the entire "strip." There will likely be opposition to cast, authentic voices or people who are personally affected by the issue, and experts with important information to provide. Pitching a good story requires paying attention to the whole picture and not just your angle. It also means remembering that the goal is getting a good story, not being quoted. A quote is the most superficial level of impact an advocate can have on a story. By referring other "voices" (including your opposition), you can more effectively shape the story (see *Layers of Media Relations* at the end of this section).

A good framing strategy should:

Translate individual problem to social issue. The first step in framing is to make sure that what you say is consistent with your approach. It's hard to justify an environmental approach to an issue if all media interviews frame it from an individual perspective. Further, a social issue is news, an individual problem is not. Translating an issue helps others to see why it is important and newsworthy.

Assign primary responsibility. Again consistency is key. If the issue is tobacco sales to kids, it's hard to justify a new ordinance if spokespeople assign primary responsibility for the problem to parents. Framing for content means framing your message in ways that support your initiative goal and explains to others why the target you chose is the right entity to address the issue.

Present solution. The message should clearly articulate what the initiative can address. To use youth access to tobacco as an example, the solution offered in this case is to make it harder for merchants to profit from youth smoking.

Make practical policy appeal. This is where the initiative comes in. It should be communicated as practical, fair, legal, affordable and the right thing to do.

Develop pictures and images. If a picture is worth a thousand words and the average media bite is seven seconds, developing compelling visuals that illustrate your perspective is critical.

Tailor to audience. Remember who you are communicating with in each case. Communities are fragmented with lots of different interests and concerns. Tailor your message to your audience which is usually your target.

 *Facilitator's Note:* Review (T8-2) and show video case study example of effective content strategy. Debrief the video reviewing the transparency. **Trigger question:** Did the group in the video clip do all of this effectively? What did they do?

☀ Overview: Media Planning (15 minutes)

Of course, media must support a group's advocacy initiative. This requires strategic planning and preparation. Every media advocacy plan should answer four questions* (T8-3):

1) What is your goal? Goals can be long-term or short-term. First start with your initiative goal then take into account other organizational considerations (i.e., positioning within the community, relationships with media, etc.). In the case of any advocacy campaign, both long term and short term goals must be considered.

2) Who is your target audience? Oftentimes, advocates tend to think of broad-based community education campaigns that target those afflicted with health problems we are trying to prevent or reduce. In media advocacy, since the ultimate goal is changing policy, the target audience is often policy makers, those in whose hands the policy decision we wish to influence lies. Another audience frequently targeted by media advocacy are those who shape or influence public opinion. Sometimes the audience for media advocacy is the voting public, active or potentially active citizenry, or that segment of the public that we are trying to organize to support our policy initiative.

Each target will have its preferred media outlets. Elected officials tend to pay close attention to the editorial pages and letters to the editor. Most young people prefer radio. Think carefully about appropriate media outlets when considering media outreach strategies. Again, advertising and promotional materials are a great way to find out who media outlets are reaching.

3) What is your message? Unlike in advertising or social marketing, "messages" in media advocacy cannot sound planned. *Media bites* are advocates' traditional form for delivering the message. These seven to fifteen second comments summarize and illustrate the story in the way you want it told. Smart advocates use humor, literary devices or an appeal to the emotions to make an impact on the audience. One device, social math, helps to frame facts and figures in a more compelling way. One example: the nationwide death toll from tobacco is equivalent to three full jumbo jets crashing each day. **Trigger question:** Do you know of other examples?

4) Evaluation: How will you measure success? You don't need a complicated research design. Evaluation is simply asking, "Did we do what we said we'd do?" These measures are determined by a group's goals in both the long term and short term. Additionally, other positive (and negative) results of the effort should also be examined

** These questions were adapted from materials first published by the Marin Institute*

Exercise: Media Planning (30 minutes)

🕒 *Facilitator's Note:* Participants should reconvene in issue groups and appoint a recorder/reporter. Using their initiative goal and target, each group should identify a message and preferred media outlet(s) for communicating their message. Remind participants that media bites are short and concise, but they are not slogans. They should sound natural. Encourage participants to brainstorm without censoring and then choose the one they like best. They have 15 minutes. A summary of these instructions should be written on chart paper.

Groups should reconvene and report out their goal, target, message and preferred media outlets. Facilitator should work to minimize critical cross talk. Comments and questions should focus on clarification and support for others. Thank participants with applause and praise.

⚙️ Overview: Media Events (10 minutes)

Too often, community change just isn't "news" to the media. Going back to our train analogy, there are times when our work is just not flashy enough to "stop the news train." In these cases, advocates develop high profile media events or "create news" to capture media and public attention.

Good media events are visually interesting, make room for broad participation, and help illustrate and support the initiative goals. They often require lots of planning and resources to pull off successfully.

Exercise: Media Events (60 minutes)

🕒 *Facilitator's Note:* Ask the group to form four *new* small groups making sure they get together with folk they don't know (as much as possible). Once they are formed, assign a letter from A-D to each group. Small groups should find an area and take a couple of minutes to study the scenario their group has been assigned. Each group has 15 minutes to develop a roleplay of a media event.

Event Scenarios

- A.** Your group is fighting to remove alcohol and tobacco billboards near schools. Develop an event to draw attention and public support to the issue.
- B.** A problem convenience store has historically worried people in the neighborhood. Neighbors are sad and frustrated when a shooting in front of the store resulted in the death of a local teen.
- C.** Your local government is considering allocating funds for a new jail although school funding is at an all-time low. Teachers, parents and community groups are frustrated with local government priorities and fear that if they don't speak up soon, it will only get worse.
- D.** A terrible accident at an unsafe railway crossing has residents worried that, without a signal light, it could happen again. News media is long on gore but short on presenting solutions. Neighbors want more media to focus pressure on local authorities to act now to prevent another accident.

 *Facilitator's Note:* Reconvene participants to act out roleplays. Debrief each roleplay with attention to messages, visuals, setting, etc. Encourage applause and group support.

 **Overview: Final Thoughts on Media (10 minutes)**

Good media advocacy requires that we survey the terrain and develop a system for tracking coverage and media outlets.

Keep an updated media list with names. You can start with the many published media lists available through bookstores or nonprofit associations. However, calls must be made to outlets that are important to your efforts to get the names of key contacts. Routine calls should be made to update lists as personnel moves frequently.

Track coverage at least monthly. Clipping services (both electronic and paper) are useful for tracking newspaper coverage. Some electronic services will also track broadcast transcripts uploaded on databases or the world wide web. Many local papers, especially ethnic and other community presses, are not a part of these services. It makes sense to regularly monitor (i.e., read, watch, subscribe to) key outlets in your area.

Monitor with a mission. Look for the issue's placement in papers or on broadcast news; who's quoted, how are they quoted and how much; whether the reporter had a grasp of the issue's complexity/importance; and the overall angle or frame of the story. If there are no stories on the

issue, look for coverage on related issues. For example, if there are no recent stories on teen suicide, what kind of coverage are teens getting in general?

Don't forget to practice! Media bites don't come naturally, they just sound that way. Practice messages on friends, relatives and colleagues. And never be afraid to make a reporter wait a bit while you collect your thoughts. When a reporter calls, simply ask if they're on deadline and find out when they need the information. Try to accommodate as much as possible but don't rush to respond and regret it later. More resources follow at the end of this section.

Framing for Access *getting on the news*

- ◆ **Controversy, conflict, injustice**
- ◆ **Irony or uniqueness**
- ◆ **Population of interest**
- ◆ **Significant or serious**
- ◆ **Breakthrough, milestone**
- ◆ **Local peg, breaking news**
- ◆ **Good pictures**

Berkeley Media Studies Group (used by permission)

(T8-1)

Framing for Content

Shaping the story

- ☞ Translate individual problem to social issue
- ☞ Assign primary responsibility
- ☞ Present solution
- ☞ Make practical/policy appeal
- ☞ Develop pictures and images
- ☞ Tailor to audience

Berkeley Media Studies Group (used by permission)

(T8-2)

PLANNING FOR MEDIA ADVOCACY

- 1) What are your Goals?
- 2) Who is your Target audience?
- 3) What is your Message?
- 4) Evaluation: how will you measure success?

Berkeley Media Studies Group (used by permission)

(T8-3)

Media Advocacy

general tactics

- **Social Math**
- **Media Bites**
- **Authentic Voice**
- **Symbols**
- **"We" vs. "They"**
- **Shaming**
- **Visuals**

Berkeley Media Studies Group (used by permission)

(T8-4)

INSERT OTHER MA MATERIALS

Section IX. When You Need A Policy (Optional -- 30 minutes)

Section goals:

Understand policy as a tool to address public health issues

Know the various levels of policy action

Understand the steps in developing a policy initiative

Identify the elements of effective policy initiatives

⚙️ Overview: Policy Is Problem Solving (20 minutes)

When a group of concerned citizens, organizations or others observe problems or factors that put their community at risk, they usually decide to develop an action plan to address those problems.

Policy is, at its most basic level, an *agreement* that outlines *collective* action undertaken to further a community's interest or address a shared problem. It is the codification of institutional or community norms, expectations and values -- and the consequences for violating them. (T8-1)

This section provides a brief overview of various policy options and the basic mechanics of the process. Mounting an actual policy initiative will require much more research and planning than provided here.

Options for Policy Action

Voluntary Agreements

- Step 1: Identify institutional actors that have an impact on the issue.
- Step 2: Research their role(s) and possible actions these actors could take to reduce harm in the community.
- Step 3: Develop a "wish list" of actions you'd like the institution(s) to undertake.
- Step 4: Identify both "sticks" and "carrots" for their participation and your power to back up any agreement.
- Step 5: Negotiate (and never negotiate alone. At least two members of your coalition should be present at all times)

Legislation

Step 1: Identify existing laws and how they can be enforced.

Step 2: Try to get them enforced.

Step 3: Do stings and other investigations to gather data.

Step 4: Work to get new policies passed that address policy gaps you identify.

Make sure to bring youth into the policy arena.

Lawsuits and Other Legal Options

- 1) Sue stores for damages when they sell to minors who hurt themselves or others. Get testimony, affidavits from kids to show proof of sales.
- 2) If the siting of negative land uses appear to correlate with the presence of traditionally disfranchised populations, explore Title VI and other legal remedies concerning discrimination.
- 3) If a local jurisdiction is being sued by an industry as a result of public health regulation, your organization might be able to intervene with an attorney to ensure community interests are addressed.
- 4) File complaints about bad or illegal practices with regulatory agencies. For example, alcohol ads that appeal to children are violations in many states. Find out who enforces what public health regulations and work accordingly.

Moratoriums

Sometimes you just need to stop policy activity until there can be further study of its impact and any possible alternatives. Common moratoriums include bans on new alcohol outlets, billboards, toxic waste sites or office construction. It isn't enough to enact a time-limited ban, any moratorium policy should use the time to gather more information and assess policy options.

Develop policy goals

All policy initiatives must operate within the framework of your organization's purpose and long range goals. It's important to compare your organization's goals with the goal for your issue. In your assessment you should ask yourself: what constitutes victory? How will this policy address the problem/have an impact on the quality of life of your clients/members and/or community?

When developing policy initiatives, try to incorporate features that help to address your coalition's long term vision. Good policies can:

Build community capacity. Effective policy leaves the community improved and with more involved community members than before. The experience of advocating for the policy expands the base of leadership.

Pay for itself. Advocates must develop creative ways to fund new policies. One way is user fees -- where the licensee or the storeowner or whoever is using the service or selling the product, must pay a fee for the privilege of using that service or product. Examples: local permit fees for alcohol and/or tobacco outlets, fees for one day special event permits for the sale of alcohol by private parties. A handy formula for calculating fees is to divide the cost of regulating the activity or enforcement by the number of projected "users."

Another way is to require the diversion of funds (either funds seized through drug busts, special levies or other means) to support your program. Some agencies develop economic development plans within their prevention policy with an eye toward self sufficiency in the long term.

Solves real problems. When developing a policy, ask how does this solve the problem? Your answer should be clear, concise, and 25 words or less.

Contributes to a sense of community. How do we regulate liquor stores? Closed administrative hearings for outlet owners with clear regulations and standards, or open community hearings with those same standards administered by neighborhood people in their own neighborhood? Which is easier? But which will bring more people together, give them a sense of their own power and build a new cadre of skilled leadership?

What do we do to develop policies for seniors? Do we develop a free meals project or a credit bank where seniors contribute skills and goods in exchange for others? One senior can take another shopping, another can do carpentry. Which one builds bureaucracy? Which one builds capacity?

Lays the foundation for more good policy. Look to the future. Policy should be incremental and should take you somewhere. The policy you develop today should open the door and set the stage for further progress tomorrow. What will you gain from this initiative? How will it bring you closer to your ultimate goals?

Brings us closer to our ideal world. We have to reflect upon and revisit that idealistic place; that place where we dream and see the best in everything. We must make sure that whatever we do will, in the long run, help make that dream a reality.

Identify the appropriate policymaking body

Which institution can best address this? Remember the exercise on choosing a target. Do you have influence and/or power over this body? Will they be receptive? Is it the best place to go with the policy? Identify allies and likely sponsors and develop a plan for approaching them with the proposed initiative. Be prepared to answer questions about likely fiscal impact, support and opposition. Above all, know your target well before making the approach -- and identify who's best to make the approach.

Develop a set of findings

This requires gathering as many reports, surveys, personal observations and other resources that accurately describe the problem you wish to address. It is difficult to address the youth drinking environment with simply an intuitive, "we see a number of intoxicated youths." Know, among other things, the number of youth alcohol related arrests, injuries and other incidents; where they get their alcohol from, what kind and brand they prefer, and where they go to consume it. Another reason to have detailed information to substantiate your policy recommendation is that all legislation must be based on **findings** or set of facts that provide the rationale for enacting the law. If you are interested in seeing your policy recommendations codified, then you must be prepared with the facts. Above all, be able to clearly describe the problem in ways that help your community grasp how serious it is.

Be prepared to advocate for your initiative

Even the least controversial policies require advocacy efforts. Use the tools outlined in previous sections of this book to shape your organizing strategy. In addition to community organizing, mobilize support specific to your initiative through letter writing, phone campaigns and community events. Make sure you fully understand the policy process (i.e., which committees have jurisdiction, timelines, venues for public input, etc.) and integrate that information into any planning.

Other things to think about

Policy development can be complex. It helps to secure the help of a pro bono (free of charge) attorney to help your organization navigate the process. However, remember that laws are not inflexible or carved in stone. They reflect the power relationships and agreements in effect at any given time. An attorney should be a partner in your efforts to shift those relationships in the public interest. Legal issues are important but they should not drive your efforts. Take care to keep your goals and community interests firmly in place.

Non-profit organizations must take care when entering the policy arena. Check with the Internal Revenue Service, your state tax exempt certifying agency and any grant compliance officers to ensure that your organization is in compliance with relevant regulations.

POLICY IS:

A formal or informal agreement on how an institution or community will address a shared problem. Any institution can make policy.

T8-1

Voluntary Agreements

Legislation

Lawsuits /Other Legal Options

Moratoriums

**Options for
Policy Action**

Section X. Appendices

(Let's discuss what you think fits since this is a general guide)

Resource guides

Background Data and Fact Sheets

VOLUNTEER RESOURCE CHECKLIST

POSTAGE

COPIES

COMPUTER

OFFICE SUPPLIES

OTHER SUPPLIES (specify)

FAX/ TELEPHONE

OFFICE SPACE

OTHER SPACE (specify)

DESK

FILE CABINET

SUPPLY CABINET

TIME (specify days, hours)

SKILLS (specify)

EQUIPMENT (specify)

CONSTITUENCY (specify)

MEDIA ACCESS (specify)

CONTACT(S) (specify)

TRANSPORTATION

FUNDS

ACTIVITIES (specify)

SURVEY/MAILING SUBSCRIPTION

Please return By: _____ To _____

Name _____

Address _____

City _____ State _____ Zip _____

Voice Number _____ Fax Number _____

I can help with:

Financial contribution: \$ _____ enclosed.

Telephone Tree Fax Tree Listserv

OTHER (specify)

Mailings Transportation Website

Writing Bookkeeping

Publicity Legal

Refreshments Graphic Art

General Help Photography

Heavy moving Video

Distribution Editing

Public Speaking Entertainment

Outreach Inspiration

Office help Demonstrations

Holding A Community Hearing

A community hearing is a great way to focus attention on an issue, educate your neighbors and key local players, and utilize a public forum in which to hold your elected officials accountable. It does take hard work and effort to organize one. However, a well attended community hearing can bring more than heightened awareness of the issue. It can also bring further recognition to your organization, identify additional volunteers and help strengthen local coalition building efforts. You should consider doing a hearing if:

- You can get your elected official(s) to attend in order to educate them about the issue and publicly hold them accountable.
- You have a significant base of people who will come out to events if contacted.
- There is local interest in the issue(s) of interest.
- You can identify a person (or more) who is able to take the lead in organizing the hearing.
- You have or can acquire the resources to send notices, press releases and make follow up calls.
- If a hearing isn't really feasible spend your energies on strengthening the coalition instead.

Preparing for the Hearing. Identify a date that is relatively non-competitive with other important local events. It's hard to schedule an event that does not compete with anything. However, it is a wise investment to make a few well placed phone calls to make sure your tentative date works for key players.

Choose a location that many people already like to go to and are familiar with, has plenty of parking and is accessible to disabled and by public transportation. Make sure to mention the bus or train lines that serve the location in all notices. Often times, schools, churches or community service organizations are ideal, inexpensive locations.

Put together an interesting panel to discuss and clarify the issue. Although you might want to include a researcher for legitimacy, make sure that person speaks in an accessible fashion. Think about what kind of panel would undermine the prevailing arguments against your initiative. A line up on alcohol outlet regulation might include a prevention person, a police representative, a local merchant concerned about overconcentration, a parent and either a concerned minister or educator. You may have other great resources to draw from.

Think about who you would like to attend this hearing. Invite them early to help shape the hearings. They may have some great ideas and you could use the help. You don't have to have a meeting to do this. The phone will do if you have a short timeline; however, a letter of invitation

describing the issue and hearing plans in detail can be very helpful -- particularly for more formal organizations. At minimum, ask to use their name as an endorser or sponsor of the event and if they would be willing to share their mailing list.

Publicizing the event. Develop a notice that clearly states what the hearing is about as well as all the logistical information (i.e., time, date, place, directions by car or public transportation.) and if possible a listing of organizations supporting the hearing to lend increased credibility. If you will have refreshments, (strongly recommended) say so on the notice.

Make sure you have a good mailing list(s) that contains local folk who are interested in this issue. You might want to contact organizations that have testified at any public hearings on the issue. As a rule of thumb, you'll need at least four times as many names as people you would like to attend.

In addition to mailing, develop a speakers bureau to make presentations to local groups on the issue and invite them to the upcoming hearing. Work with your speakers to make sure they are clear on the issue and can translate it to others well. It is important to identify speakers in languages beside English to address all significant populations in your community. **Make sure to have translators at the hearing, if needed, and publicize that they will be available on notices in the appropriate language.** Make sure to supply speakers with notices (translated if necessary), fact sheets and sign up sheets so that you can follow up with a phone call later.

Keep track of people who commit to coming to the hearing and prepare to make reminder calls one to two days before the hearing.

Confirm site arrangements a week in advance. Make sure chairs, tables, microphones and p.a. system are all as you planned. Confirm how you will access the site and who to contact at that time if there is a problem. Clarify your obligations for clean up, closing, etc.

Agenda for Volunteer Orientation

1. **Introductions**

2. **What we are doing and why it is important**

Each of you is important and valuable and we thank you.

We want you to feel **comfortable, capable and confident**.

We are phoning/going door-to-door to get people to recruit.... We need to contact 3,000 voters in ten weeks (deduct the numbers as they decrease)

Asking the people in your neighborhood to get involved and to join us.

Because we support our kids and we know that when people like you get involved and take action, that is how we make a difference.

Here are tally sheets and this is the way to complete them. These forms are important!

3. **Don't's and Do's**

DON'T'S

Don't be judgmental and make assumptions.

Don't argue with people and preach to them.

Don't spend too much time with one person.

DO'S

Do smile and sound urgent.

Do look people in the eyes, make eye contact.

Do be polite.

4. **Review what to say, the "Rap," and what is in the packet.**

Read rap aloud; ask people to read with you.

Introduction

Statement of conditions

Get an agreement.

Believe that people want to get involved and take action.

Get a commitment, **can we count on your vote? (then PAUSE)** yes, no, undecided.

Volunteer recruitment should never accept "maybes."

5. Role play

Divide into pairs, each person take turns demonstrating the rap

6. Wrap-up

Volunteers return and fill out tally sheet.

Review what happen, what were the comments - the low's and high points

Ask everyone to come back for the next action.

SAMPLE "RAP" (or script)

Hello is Ms/Mr _____ home? My name is _____ and I am calling from the Organization for Healthy Children. We are having a meeting Tuesday night to address how our kids are getting access to cigarettes and smoking. We are working to protect our kids and could really use your help. We need people to attend the meeting and help us monitor stores that sell to kids, spread the word at church and other organizations (other faith institutions can be inserted here), and come support us down at City Hall next Wednesday where we're trying to get an ordinance passed to keep cigarettes away from our children.

Can we count on you to come to the meeting Mr/Ms. _____? [pause]

(If yes) Great!

We have 500 voters to contact in the next few weeks and we could really use your help. Many jobs don't take much time. In fact, you could help us contact nearly 50 voters for the campaign by dedicating only one hour per week. It would really make a difference!

Here's a flyer with our volunteer schedule. We will have a short meeting with food every (pick a night) from (X-X) p.m. to help you and other people who care about our children to get involved in the campaign. The first meeting is _____day/date/location/_____at ___time. Which one can I sign you up for?

(If yes) Great! There are a couple of questions I need to ask you

Is your phone number still _____? Yes No New #

Is there a need for childcare? Yes No # of children

Is there anyone else you suggest I call to join us?

Thank you so much for your support!

(If no) Thank you so much for your support!

(If not supporting the initiative or undecided) This has been an extremely tough campaign. Your neighborhood/organization will be extremely critical in helping us get this ordinance passed.

May I send/give (if in person) you some materials on this issue and how it's affecting our community?. You can reach me or at (phone number) if you have any questions. (Write number down for the person). Thank you for your time.