

Preparing To WIN

A guide for successful advocacy

BERNIE HORN AND GLORIA TOTTEN

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by Bernie Horn and Gloria Totten

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INTRODUCTION

WHY NOW?

WHY NOW?

his might seem like a strange time for us to be writing a book that makes the case for progressives to go on offense in the fight over public policy. Voters are more polarized than ever, politics is as nasty as it's ever been, and all of it has put conservatives in control of government at almost every level and in most states. Strange times indeed.

But these factors are precisely why we would like to appeal to you to go on offense—now. Voters, whether or not you like the way they voted, have been signaling that they don't want politics as usual, that they want politicians who are not only willing, but will, *fight for them*. Many thought they were getting that with Donald Trump. When they realize he's not the solution, they will look for the next bold leader because, in the words of former civil rights hero Fannie Lou Hamer, they are "sick and tired of being sick and tired."

For progressives and resistors, if that's your preferred term nowadays, that presents a real opportunity—the opportunity to move some of the players on our team into offensive positions, to doggedly pursue, debate and democratize bold progressive policy reforms that people can clearly see will improve their lives.

It's time to stop talking the talk and do the walk. We need to press for ideas that show stark contrast between progressive policies designed to expand the rights, opportunities and well-being of people, and the regressive, antigovernment policies designed to dismantle the very programs, economies and institutions people require. We need to lay the groundwork to make bigger and bolder progressive reforms possible in the future—even if they are not doable now. In this moment, the only way to build capital for progressive change is to press for revolutionary ideas for regular folks.

People ask all the time, "but how do we do that when conservatives control so much, when we don't have the votes?" To which we reply, "you just do."

You are policy leaders. You are out there fighting anyway, so you might as well fight for things you believe in, things that inspire and invigorate you and your supporters. With this book, we hope to show you how to use proactive policy campaigns to:

- Promote ideas that are real-world solutions to the problems people face;
- Expand public awareness of your policies and of the policymakers that support or oppose them;
- Provide ideas to progressive policymakers who ran to make a difference and are looking for ways to do so; and
- Draw attention—and opposition—to conservatives' attempts to roll back the clock, because, with your ideas in the public sphere, the public understands there are real policy alternatives that matter.

Mostly, we want you to feel empowered again to carry out your work for social, racial and economic justice. We want you to help build our movement.

There's only one catch: you can't just introduce a bill, or a resolution, or make a regulatory change. You must *plan*, and run an *advocacy campaign*, and *engage* other leaders—elected and non-elected. You must use different muscles than you have been using, with broader strategies and deeper policies. You must tie the work together so what you're doing is clear to people whose job is not politics or advocacy.

This is what the time requires of you. This is why we wrote this book. And we're here to help if you need us.

SECTION ONE

WHY BE PROACTIVE?

WHY BE PROACTIVE?

he best defense is a good offense. That maxim has been repeatedly proven in athletics, business competition and, sadly, in war. It is also true in advocacy.

To make progress, progressives need to go on the offensive. We must make the development of proactive policy a central component of our work. We must drive bold, proactive agendas in states and localities, even the ones controlled by conservatives. We must arm our activists with policies that represent their values, and that energize them to fight for something instead of just defending the status quo.

Only a proactive strategy makes news, frames the debate, and dictates timing. Only a proactive strategy forces opponents to shift their resources and time to defend unpopular positions. Only a proactive strategy shapes the broader political environment.

Here are six advantages to a proactive strategy, even when the policy is quite ambitious or the governing body is quite conservative:

Proactive policy educates policymakers

Unless a policy is formally introduced, many officials are unaware that a problem exists. Policymakers deal with hundreds or thousands of issues at a time, as well as constituent service complaints. And in most jurisdictions, they have few or no staff to help them. If lenders are misrepresenting themselves in a devious way, or there's an unexpected source of pollution, or women's rights are quietly violated, then you should devise a policy response. Bills and other formal proposals get the attention of policymakers, and at least they will understand there is a problem to address, whether they are liberal or conservative, elected or appointed.

Proactive policy generates news coverage

To be effective, progressive advocates need media coverage. It's the most cost-effective way to communicate with the general public. But it is often

hard to make our policy arguments newsworthy. One big advantage of legislation is that it can be pitched as "hard news" at many points in the process: at an announcement that legislation is forthcoming; when the policy is introduced; when a committee holds a hearing; when a committee fails to hold a hearing and advocates call for one; and when a policy passes or is defeated in any committee or body. (For more about earned media, see Chapter 15.) You can generate news coverage even—or especially—when the legislation is directed at top policy leaders, the policy is satirical, or it's simply a resolution. News coverage is essential to progressive advocacy after all, how can local residents get excited about our issues if they've never heard of them?

Proactive policy frames the issue

The right wing has a history of framing their issues successfully. Just look at their cynical use of the phrases "death tax," "partial birth abortion," and "job creators." Yet, framing is not just a matter of clever words. The most effective way to frame a debate is to select the policy that will be debated. The right wing introduces measures, even when they have little chance of passing, in order to spread misinformation, such as "voter fraud" and "fetal pain." Progressives need to promote measures that frame the debate to our advantage, where the other side has to play defense against popular causes such as a higher minimum wage, closing tax loopholes for the rich, supporting clean energy, lowering prescription drug prices, and protecting women's rights under *Roe v. Wade*.

Proactive policy forces officials to take a position

Unless they are leaders on a particular issue, policymakers usually will not take a position until they have to. When there's a specific proposal, you can pressure progressives to cosponsor or commit, and get conservatives to publicly confirm their opposition—which you can later use against them. And, with a policy introduced, you can compel your opponents to publicly state the reasons for their opposition, which you can also use.

Proactive policy builds grassroots support

Progressives have a tremendous core of supporters at the grassroots, but activists often feel helpless. On the federal level, few of them live where there is even a remote chance of persuading their U.S. Senators or Representative. Our activists need to be given tasks that are positive, significant and

achievable. That is possible—and needs to be done—at the state and local levels across America. Proactive bills and ordinances, even resolutions, allow progressives to activate volunteers and strengthen the movement.

Proactive policy shapes the debate

In many jurisdictions, it has become nearly impossible to pass progressive, or even moderate, legislation. In those places, little good is going to happen until we elect progressive majorities. But it is awfully hard to do so without showing that the current officials oppose good ideas. Therefore, one of our priorities must always be to introduce popular policies, compel officials to take a public stand for or against them, and make sure the public knows when they do the wrong thing.

As Sen. Paul Wellstone (D-MN) said, "If we don't fight hard enough for the things we stand for, at some point we have to recognize that we don't really stand for them." So, promote the boldest legislation possible—measures that force your opponent(s) to debate you on your strongest ground.

SECTION TWO

WHILE PLANNING THE ADVOCACY CAMPAIGN

WHILE PLANNING THE ADVOCACY CAMPAIGN

1. Have an achievable goal

Advocacy groups have broad overall missions, like "reforming the juvenile justice system" or "reducing gun violence." In contrast, an advocacy campaign is aimless without a specific goal that is achievable within a period of years. For example, keeping juveniles out of adult jails or mandating background checks for all gun purchases.

An advocacy campaign does not have to achieve its goal by enacting federal or state legislation. It may be more sensible to start by passing city or county ordinances or to seek policy change by regulation, or other administrative actions by a governor, mayor, attorney general, controller, auditor or independent commission.

The problem is, advocacy groups remain mostly on the defensive, failing to develop and pursue specific proactive policies. In a game where you don't even attempt to score points, you can never win.

And yet, some advocates complain, there are many jurisdictions where the officials are so conservative that progressives cannot expect to enact any important policies. In that case, the goal is to use specific policy proposals to raise the profile of your issue so that it makes a real difference in the public debate.

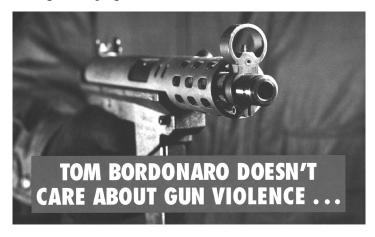
Page 15 displays an example where advocacy drove a particular issue into the public debate and it was used quite effectively. Even if your organization is a 501(c)(3) charity, strictly forbidden from engaging in partisan election campaigns, you can:

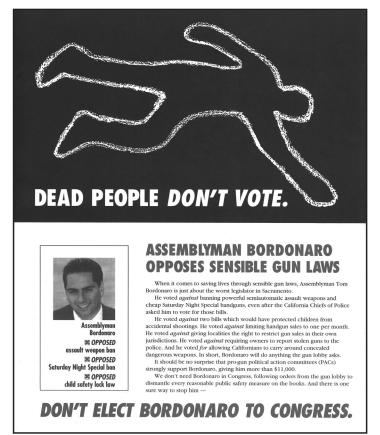
• Promote ideas that are favored by voters so that candidates will want to endorse them, or will attack their opponents for opposing them, without your group's involvement.

- Ask elected officials whether they support your policy or not and publicize their answers.
- For elected officials who are clearly against your policy, provoke them to say something foolish or extremely unpopular in public, preferably on camera or while a news reporter is present. Publicize their gaffes.
- Focus on recruiting and empowering activists in specific geographic areas so they can pressure candidates to support your policy, without your group's involvement.
- Hold press events in specific geographic areas that will raise the profile of your issue in those places.
- Set up a separately-funded 501(c)(4) organization to engage the issue more directly.

There is very little point in spending time and money in an effort that lacks a practical goal. The whole idea of an advocacy campaign is to win.

Dead People Don't Vote Election direct mail Strategic Campaign Initiatives





2. Write down your plan

Every campaign needs a plan. As the late, great political consultant Matt Reese used to say, "If it isn't written down, it doesn't exist." So, before you embark on a campaign to change public policy, write down a plan that outlines what you're going to do, how you're going to do it, and what it's going to cost.

The campaign plan should be developed through a participatory process that maximizes input from lead organizations and experts, encourages ownership and involvement from national, state and local partner organizations, and includes key stakeholders and supporters. Once completed, the campaign plan should remain confidential to the coalition team and trusted partners and be reviewed and evaluated regularly. The plan should include: goal(s), policy background, political background, research, campaign staffing and structure, preliminary message, preliminary targeting of policymakers, coalition building, earned and paid media, fundraising, budget and timeline.

The goal or goals

Describe the policy you seek to enact, the governmental body or official that has jurisdiction, and the type of act you require, e.g., legislation, regulation, or an executive or administrative order. If you are pushing more than a single policy, and the way to achieve them warrants very different targets, messages and/or strategies, then you need to limit your scope or develop separate campaign plans for each.

Policy background

Why is this policy needed? What is its root cause? What has been done or attempted before to address this problem? Why is your particular policy the best one to solve the problem?

Political background

What is the political context? What social or economic factors created or are perpetuating the problem? What political factors will help or hinder your ability to succeed? What's the power analysis (who benefits from the problem and who benefits from change)?

Research

What research does your advocacy campaign need and who will do it? (See Chapter 4 for details.)

Campaign staffing and structure

Outline how the campaign will be structured, including:

- Which organizations have lead roles and what are the responsibilities of each?
- What paid staff will work on the campaign and what are their responsibilities?
- How will the campaign maintain clear lines of authority, decisionmaking, and internal communications?
- Who is responsible for press and external communications?
- Who is responsible for fundraising and financial management?
- Who will do research and polling?
- Who will do paid media?
- How will the campaign handle internal reporting, reporting to donors, and evaluation—what are the accountability mechanisms?

Campaign message

What are the preliminary ideas for the overall campaign message and likely talking points? (See Chapter 7 for details.)

Targeting of policymakers

What are the preliminary targeting assumptions—which policymakers are likely to be for, against, or persuadable? (See Chapter 13 for details.) Based on your assumptions, what are the geographic areas where you likely need to focus? Which policymakers specifically have disproportionate power to approve or reject your policy proposal, e.g., specific committee chairs? These are primary targets—what are some preliminary ideas for persuading each of them?

Coalition building

What are the organizations and influential individuals that might be persuaded to join the coalition for this policy campaign? (See Chapter 9 for details.)

Earned and paid media

What are preliminary plans for earned and paid media? What media outlets will you target? (See Chapters 15 and 16 for details.)

Fundraising

How do you intend to raise the money for the campaign? Include sources of revenue, expected amounts to be raised by source, solicitors, timeline, and materials needed. (See some ideas in Chapter 3.)

Budget

Using the template on pages 19–20, complete a budget for your advocacy campaign. Identify and document real resource gaps. This will help you determine the viability of your campaign before you begin, and it will help form the case for financial support.

Timeline

On a timeline, list all the major strategies that you will use to achieve your objectives. Think of this as a weekly "work plan" list, not a daily "to do" list—you don't have to include every detail. Include external deadlines that you have to work within (e.g. an introduction deadline). So that you can evaluate your progress, list specific, measurable objectives that you need to achieve by different dates. Objectives should always be strategic, measurable, achievable, realistic and time-specific (SMART).

		First	Other	
Department	Line Item	Month	months	Totals
ORGANIZING				
Media	Website development	\$		
	Email Contact Relations Management (CRM)	\$		
	Social media platforms (e.g. Facebook)	\$		
	Social media video production	\$		
	Digital advertising	\$		
	List acquisition	\$		
	Press conferences & events	\$		
	Print ads	\$		
	Billboards	\$		
	Radio production	\$		
	Radio	\$		
	TV production	\$		
	TV	\$		
	total paid media	\$		
Field	List acquisition	\$		
	Flyers	\$		
	Direct mail	\$		
	Postcards	\$		
	Phonebanks (volunteer)	\$		
	Phonebanks (paid)	\$		
	Patch-through phone calls	\$		
	Robo-calls	\$		
	Canvass expenses	\$		
	Events	\$		
	Advocacy / Lobby Day	\$		
	In-district meetings	\$		
	total field	\$		
	TOTAL VOTER CONTACT	\$		
RESEARCH				
	Research	\$		
	Polling (pollster)	\$		
	Polling (IVR)	\$		
	TOTAL RESEARCH	\$		
FUNDRAISING				
	Fundraising event costs	\$	1	
	Printing	\$		
	Direct mail	\$	1	
	Postage (non-direct mail)	\$	1	
	Fundraising database	\$		
	Telephone solicitation	\$		
	Credit card process fees (2%)	\$		
	Web/email solicitation	\$		
	TOTAL FUNDRAISING	\$		

Advocacy Campaign Budget

		First	Other	
Department	Line Item	Month	Months	Totals
OVERHEAD				
Administration	Office rent	\$		
	Office phones	\$		
	Cell phones	\$		
	Computers	\$		
	Desks, tables, chairs and furniture	\$		
	Stationary / Envelopes	\$		
	Photocopier	\$		
	Legal services	\$		
	Postage	\$		
	Supplies			
	Overnight mail	\$ \$		
	Unanticipated costs at 5%	\$		
	total administrative	\$		
Staff and	(Don't forget to calculate the employer-			
Consultants	paid portion, approx. 8.5% of salary)			
	Campaign manager salary & benefits	\$		
	Field organizer salary & benefits	\$		
	Communications staffer salary & benefits	\$		
	Consultants	\$		
	Unanticipated costs at 5%	\$		
	total staff	\$		
Travel	Gas / Mileage reimbursement	\$		
	Meals & Incidentals	\$		
	Car Lease / Rental	\$		
	Unanticipated costs at 5%	\$		
	total travel	\$		
	TOTAL OVERHEAD	\$		
	TOTAL COSTS	\$		
REVENUE				
	Individual donor asks	\$		
	Direct mail	\$		
	Events	\$		
	Email solicitations	\$		
	Foundation support	\$		
	TOTAL REVENUES	\$		
	TOTAL COSTS	\$		
	CASH ON HAND	\$		

3. Manage your time and money

There's a tendency in politics to do things the same way, campaign after campaign. But times and issues change. If you're copying everything from a prior campaign, you're not managing the current one.

Step back and consider the purpose of campaign management. It is to gather as many resources as you can and spend those resources as efficiently as possible. In an advocacy campaign, there are only two resources to raise and spend: time and money. Sadly, too many progressive campaigns tend to waste a surprising amount of both.

In general, the best management decisions move you the furthest toward persuading policymakers, organizations, grasstops leaders and the media to support your policy. The worst decisions pour time and money into activities that don't persuade anyone.

Let's divide management into two ideals and discuss them in turn. The first is to maximize the quantity of campaign communications (that is, the number of repetitions of your message) and the second is to maximize the *quality* of communications (that is, the effectiveness of your message).

Maximize the quantity of communications

First, avoid wasting person-hours and dollars on overhead or giveaways that serve little or no strategic purpose. Do not pay for an expensive headquarters or parties, spend too many volunteer hours on signs and demonstrations, or give away shirts, hats, bumper stickers, buttons, pens and beer mugs that won't persuade anyone. If you're managing the campaign, you will get constant requests for these kinds of accessories. Unless they are both cheap and will substantially improve volunteers' morale, just say no.

Second, don't waste time on a lot of large meetings. The cost of a meeting is the person-hours (and for staff, the salaries) of every participant added together. If you're seeking input, let people participate by email or by contributing to a collaborative Google doc. When you need to hold a large meeting, plan ahead, have an agenda, keep it to just a few key matters, don't let it get sidetracked, and get participants back to the real work of persuasion as quickly as possible.

Throughout the campaign, the most common way to waste resources is by repetitive communications with policymakers whose minds are already made up. Sure, keep thanking and supporting friendly policymakers. But focus resources on persuading undecided policymakers. (Targeting and tracking are explained in Chapter 13.) Nearly all of the combined efforts of advocacy staff, volunteers and allies should generate calls, letters, emails and visits—as well as in-district signs, rallies and demonstrations—aimed squarely at the undecideds.

Maximize the quality of communications

The other key to good management is to focus on a single message. A campaign "message" is a short statement that explains the basic reason why policymakers should side with you. Your message should be fairly simple, entirely believable, and framed to appeal to both undecided policymakers and persuadable voters. Campaign "talking points" are statements which communicate all or part of your message.

For example, suppose your campaign message was: "Prescription drug companies are unfairly raising prices for some medicines which residents have to use or they put their lives at risk. The state can and should authorize the Attorney General to crack down on price gouging by these rich corporations."

Talking points might explain that:

- Prescription drug prices are skyrocketing;
- In many cases (like the EpiPen), the only reason for the price increase is greed;
- Life-saving drugs don't work if people can't afford them;
- It is entirely appropriate to empower the state Attorney General to take action in court; and
- Polls show that voters favor such legislation by a margin of more than seven-to-one.

You maximize the quality of communications when you have a truly effective message (preferably one that's been poll-tested), which through a series of talking points is communicated over and over.

Match tactics to targets

A good campaign manager identifies which individuals and groups have the highest probability of persuading a targeted policymaker—those who have influence with that official, those who he or she will listen to. And then the manager makes sure those influential people and groups engage in the strongest lobbying they can. Advocacy groups often waste a lot of effort by lobbying everyone the same way (e.g., general calls, letters and emails) when that's neither the fastest nor the most direct way to get the policymaker's support.

There is no substitute for knowing as much as possible about each persuadable officeholder. Talk to friendly policymakers and allied groups, read everything you can about the policymaker, and figure out who the best messengers might be. It could be one of the policymaker's own volunteers or donors, a political mentor, personal friend or neighbor, in-district or influential businesspeople, policymakers who are close friends, or powerful leaders like committee chairs. Tailor your approach to the individual. That's both efficient and effective.

Increase your campaign resources

A good campaign manager raises money. There are whole books about fundraising—which you should read—so let's just review some essential guidelines.

- Create a fundraising prospect list of individuals, corporations, unions, policy groups and foundations that might possibly donate to your cause.
- For major donors that require numerous contacts before they contribute, especially foundations, create a "Pipeline" spreadsheet to keep track of every time you've communicated, their donor requirements, and deadlines.
- Nobody gives unless they are asked, so you must be ready to do a lot of asking. Use the telephone extensively; you will get very little money by just mailing out a request. Follow up by phone again and again, and for major donors, visit face-to-face.
- When you ask for money, start with standard pleasantries, transition to "I need your help," find a point of agreement, make them understand the importance of your cause, and ask for a specific amount. If they say "yes" or "maybe," follow up with a letter.
- Use the RAT method: have a reason for the request, **a**sk for a specific amount, and give a particular time when you need to receive the money. As for the amount, almost nobody gives more than asked, so ask high.
- Your attitude matters. Always be upbeat as if you expect a yes. Maintain the outlook that you're doing the donors a favor by letting them participate in this important cause.

- If you hold a fundraising event, keep the overhead costs low. Better yet, create a host committee that pays for the overhead so the campaign keeps all donations.
- The most likely contributors are the ones who gave to your cause previously. Ask again.

Recruiting volunteers is fairly similar to fundraising.

- Create a spreadsheet or database of volunteers. This includes name, street address, email, phone number, and each person's legislative or council district (fill that in yourself based on street address). Record every time they do a volunteer activity and what it was.
- Invite friends, your staff's friends and your allies' friends to volunteer, reaching out through mail, telephone, email, website "volunteer here" pages, and social media. At any meeting or event, capture (at least) everyone's name, street address and email address.
- Keep volunteer recruitment as inexpensive as possible. A peopleraiser event is fine if the host, not the campaign, pays for it.
- Make specific requests for volunteers' time—exactly what you need them to do and when.
- Give volunteers options from short-term, low-responsibility tasks to jobs with greater engagement in order to develop them as leaders. (This is explained in Chapter 10.)
- The people who are most likely to volunteer are the ones who have volunteered already. Ask again.

4. Research your policies and the politics

Before you launch an advocacy campaign, thoroughly research the specific problems and solutions that you intend to take to policymakers. In addition, research the political barriers you will have to overcome. It is awful (and not uncommon) for a campaign, after spending a great deal of time and money, to discover that the policy is unworkable, unconstitutional, unconvincing, or politically impractical. Don't be taken by surprise.

Research the problem you want to solve

What is the problem? Be able to quantify it and describe it in detail. Be able to show how the problem works in your own state, county or city—you usually cannot persuade policymakers based solely on nationwide data. Be able to describe specific local stories about, and victims of, that problem.

Research the solution you want to propose

When you propose legislation or administrative action, you need to know more about your solution than anyone else. You don't have to be an expert in climate science if you're proposing to change your state's or locality's Renewable Portfolio Standard, but you need to be an expert in what your policy does and how similar policies have worked in other jurisdictions. Gather information and be prepared to answer all policy objections. And again, policymakers want local information, so engage experts from your own state to do research that supports your solution.

Research any possible legal issues

Can your opponents possibly argue that your solution violates the federal or state constitution or is preempted by existing federal or state law? Ensure there will be no unexpected legal attacks on your proposal.

Research your proposed message and talking points

In addition to polling (discussed in Chapter 5), you need to thoroughly research all of your arguments. Be ready to prove with footnotes and hyperlinks every single fact that your arguments rely upon. This will prove invaluable throughout the campaign. You should also prepare a list of every argument that might be made against your policy and prove, with footnotes and hyperlinks, that they are false. The easiest way to find such arguments is by looking at similar policy battles that took place in other jurisdictions.

Research the interested parties

What groups and influential individuals are likely to favor or oppose your proposal? And why? This research helps you create a list of who to recruit as allies, spokespeople and donors, and what kind of opposition you might expect. It's also important to know if some influential media outlet, like your big city newspaper, has already taken a position on your issue.

Research the policymakers

Which policymakers are probably already on your side, already against you, or truly undecided? Create an initial target list (see Chapter 13) and then update it throughout the campaign. To find out elected officials' past issue positions, read their biographies, search the Internet for articles and blogs about them, and talk to allies who know them. In addition, as you try to understand officials who are undecided, you can learn a great deal by regularly reading their social media posts.

Research what your group can do under its legal status

It is essential for groups with a 501(c)(3) charity status to understand exactly what they can and cannot do. This is also true of 501(c)(4) advocacy groups when they want to involve themselves in elections. Your group should have legal counsel. But for an excellent layman's understanding of these legal issues, read the resources provided by the Alliance for Justice (afj.org).

Research rules and dates

To approve a law, some bodies require a majority of members who are present, others require a majority of all elected members. Some legislatures have deadlines for introducing bills and some have deadlines for a bill to be passed through one house or it is defeated (called the "crossover date"). Some governing bodies give the committee chair the power to refuse to hold a hearing and/or vote on a bill, others require a hearing or vote. Research the rules of your council or legislature and incorporate them into your campaign plan.

Sometimes all this research can seem difficult and tedious. But over the course of an advocacy campaign, the research that you do at the beginning will be rewarded again and again. More than anything, it will help you avoid mistakes.

5. Poll your policies

If you are pushing an important policy and spending a good deal of your organization's money, it makes sense to conduct a poll. How extensive and expensive the poll should be depends on how much you're spending on the overall policy campaign, including the cost of staff time. You might spend up to ten percent on public opinion research.

The point of polling is not to decide what policies you favor or oppose, which is a question of your values, it is to:

- Decide which policies to advocate in which situations. You should test what people think are problems as well as alternative solutions.
- Decide how to describe your policies. This is message testing: what works, what doesn't, and why.
- Determine if your policies are important enough to voters that they might consider switching candidates based on their issue positions.
- Persuade policymakers, grasstops leaders, opinion writers and donors to support or join the coalition. They want to see poll results in order to decide whether to invest their own reputations and resources in the cause.
- Generate press coverage and raise the credibility of the campaign.

To understand what kind and size of poll you need, here are some basics:

If poll respondents are selected in a proper random manner then, based on the principles of statistics, they will accurately represent the opinions of the population at-large. Polls express a mathematical probability—traditionally a 95 percent likelihood—that the poll results are within the margin of error of what the whole population believes. The margin of error overwhelmingly depends on the number of poll respondents.

> With 95 percent confidence: Sample of 2,401 respondents = 2 percent margin of error Sample of 1,067 respondents = 3 percent margin of error Sample of 600 respondents = 4 percent margin of error Sample of 384 respondents = 5 percent margin of error Sample of 96 respondents = 10 percent margin of error

In other words, in a well-executed poll answered by roughly 384 people, the results will be accurate 95 percent of the time within plus or minus 5 percent. Or, for example, if a poll of 600 people finds that 65 percent favor

increasing the minimum wage to \$15 an hour, that means that in the represented population there is a 95 percent chance that support for the policy is as high as 69 and as low as 61 percent. In one poll out of every 20, support is actually above 69 or below 61 percent. (Although the math is more complicated, this simplification is what advocates need to know.)

In short, you almost never poll fewer than around 400 respondents. The results become too imprecise and both reporters and policymakers may discount the reliability of a smaller poll. If you can afford it, it's preferable to poll between 600 and 1,000 respondents, because this allows for reliable cross-tabulations. Taking the same minimum wage example, if about 100 respondents are African Americans and 80 percent support the minimum wage increase, that means among the whole population of African Americans there is a 95 percent chance that support for the policy is as high as 90 percent and as low as 70 percent. If you wanted to know what a smaller group believes, perhaps people under age 30, there probably wouldn't be enough respondents to give a statistically significant answer.

There are several different ways to conduct a poll: with a live phone bank calling landlines or a combination of landlines and cellphones, entirely automated calls, entirely online surveys, or a combination of phones and online. If you have an experienced pollster, any method can be made to work.

If you plan to use a poll to gain donors and supporters, impress the media, and persuade policymakers, you've got to use a pollster that they will believe. In some places, you can use a local pollster who has built up a good deal of credibility with opinion leaders. Otherwise, national pollsters—although more expensive—are probably your best bet.

On page 29, for example, see topline results from a survey commissioned by the Public Leadership Institute. It polled over 1,000 likely voters to get statistically significant results for a variety of demographic groups, it used live callers to both landlines and cellphones, and it was conducted by a top national pollster, Ann Selzer of Selzer & Company.

Conservatives perform public opinion research constantly. Virtually all of their major efforts are poll-tested. If we want to win major battles, progressive advocates need to test legislation, messages and talking points.

Poll for the Public Leadership Institute SELZER & COMPANY Study #2141 1,003 likely voters August 18-23, 2016 Margin of error: ± 3.1 percentage points 1,569 general population contacts weighted by sex, age, race, and educational attainment 7. Now, I have a few questions about policies that affect the availability of contraception and birth control. For each, please tell me if you favor or oppose the proposal. (Follow with:) Would you say you strongly [FAVOR/OPPOSE] or just [FAVOR/OPPOSE]? (Rotate list.) Net Net Strongly Mostly Mostly Strongly Not Favor Oppose Favor Favor Oppose Oppose Sure Α. To ensure that a woman can get birth control, require pharmacies to stock and dispense contraceptives to any woman who has a lawful prescription or who seeks 13 23 over-the-counter emergency contraception. 84 61 5 8 4 B To prevent unwanted pregnancy, require that when a woman reports a rape to authorities that she be provided information about emergency contraception, also called the morning after pill. 11 67 19 86 7 4 To prevent unwanted pregnancy, create C programs that raise awareness of and access to highly-effective long-acting reversible contraceptives, such as IUDs and implants. 82 14 57 25 7 7 4 8. Now a few questions about crisis pregnancy centers. These are facilities that look like medical clinics and offer help to pregnant women but do not provide abortion services and actively try to stop women from having abortions. For each, please tell me if you favor or oppose the proposal. (Follow with:) Would you say you strongly [FAVOR/OPPOSE] or just [FAVOR/OPPOSE]? (Rotate list.) Net* Net* Mostly Strongly Mostly Strongly Not Favor Oppose Favor Favor Oppose Oppose Sure А Prevent false advertising by crisis pregnancy centers by prohibiting them from using signs, print ads or the Internet to mislead a pregnant woman into believing that they offer abortion services. 62 33 50 12 23 6 в Just as a medical office has to post its license, require crisis pregnancy centers that are not licensed to practice medicine to post a sign saying so. 75 21 58 17 8 13 5 C. So that women can make decisions on sound medical facts, require that a crisis pregnancy center which receives government funding cannot give a woman medically false information, such as the claim that abortion causes cancer. 77 18 64 13 5 13 5 *Due to rounding, net favor/oppose values may not exactly match the combined percentages of "Strongly" and "Mostly" values.

6. Use a multi-year six-step program

100-520

Nearly always, it takes years to pass legislation that substantially addresses a serious policy problem. So why don't more progressive advocacy groups write and follow multi-year plans?

Part of the reason is they only know the same-old methods of organizing and lobbying. Usually, these are: select and write one or more bills to promote, hold a press event to publicize the bill introductions, and lobby for the bills. When the bills lose, we try again the following year. Sure, rinseand-repeat tactics can work, but they are often inefficient and are bound to fail in jurisdictions with the wrong mix of policymakers.

There is a multi-year program that has worked repeatedly but is unfamiliar to many progressive advocates. It is a set of interconnected strategies described in Michael Pertschuk's book *The DeMarco Factor: Transforming Public Will Into Political Power*. The point of Vinny DeMarco's six-step program is to use an upcoming election to drive publicity, corner candidates, compel policymakers to pledge their support, and change the overall perception of the politics of a given issue. This program has successfully enacted legislation for: gun violence prevention, tobacco tax increases, expanded health coverage, stopping casino gambling, and increasing the alcohol tax. Here are the six steps:

(1) Create an evidence-based policy plan.

Progressive advocates often feel, based on their own experience and national-level research, that they know which state or local policies would solve particular problems. And they're often right. But in order to win a difficult battle, you need proof that the solution works not just nationally but locally. So, engage experts in your own state to do research that directly supports the efficacy of your proposed state or local policies. Over the course of the multi-year program, this research will help build alliances, convince activists, generate media attention, and persuade policymakers. (For more detail, see Chapter 4.)

(2) Commission a high-quality poll.

Because this strategy involves an election, progressives need to frame the issue in a way that is popular with voters. You need an issue that excites our base, is favored by persuadable voters, and offends the radical right. (Why offend the right wing? So they don't give up when they realize they're defending an unpopular position.) This requires polling, and if you're going to invest a lot of time and money into a years-long advocacy

campaign, you should not skimp on polling. By using a respected firm, you not only get more reliable opinion research, you also have more credibility when approaching political leaders and donors for support. (For more detail, see Chapter 5.)

(3) Use a resolution strategy to build a powerful coalition.

Create a resolution (see Chapter 8) for organizations and individuals to endorse a specific policy *before* that policy is crafted into legislation. It needs to be specific enough to describe impactful future legislation without being so specific that this step becomes legally defined as "lobbying." With the resolution, progressive advocates seek endorsements from state and local civic, labor, religious, professional and policy groups, as well as prominent businesses, thought leaders, and local governments. This strategy provides a golden opportunity to educate grasstops leaders, activate grassroots supporters, build a powerful coalition for the legislation that follows this step, identify specific objections to the proposed policy, and find answers to those objections. This step also has the potential to generate a lot of press for the cause. And it's entirely 501(c)(3) work!

(4) Introduce the bill and use media to the hilt.

If you are ambitious enough in your resolution, you probably can't enact the legislation the first time it is introduced. And in fact, the purpose of this first bill is not to win, it is to create many opportunities for publicity, get the resolution's endorsees engaged in the fight, gain more support especially at the grassroots level, and flush out the opponents' policy arguments. It is impossible to overstate the importance of getting a lot of press attention. Ninety-nine percent of the legislation before any governing body is below the media's radar, and as a result, the public never finds out what is happening. That kind of legislating favors special interests and their lobbyists. To win an important fight, we need to shine a bright spotlight on the issue—making it one of the few that the media covers—so that policymakers believe that regular people will know how they are voting on it. (For more detail about media, see Chapter 15.)

(5) Make the policy into an election issue.

This step usually requires a 501(c)(4) entity. It is fairly common for progressives to create candidate questionnaires or pledge forms, but we don't tend to give much incentive for less-than-pure candidates to publicly support our issue. Because it is part of a highly publicized multi-year strategy, the pledge form works differently. Policymakers and candidates are pressured to sign by the large coalition that was built around the resolution and the legislative effort. Our advocates make it clear that the results who does and does not sign—are going to be released at a key point in the campaign (e.g. mid-October), that the coalition will ensure that voters know the candidates' positions through both earned and paid media, and that the policy is strongly supported by their voters. This maneuver attacks undecided policymakers/candidates at their weakest point. When in session, officials will often avoid taking a position when they can, but a campaign is a different matter entirely. The radio ad on page 33 is an example of using pledge forms from three different campaigns to create one extremely effective ad.

(6) Win the policy battle.

As a result of co-sponsorships and pledges in the prior legislative session, plus the winning candidates who signed a pledge form during the election season, along with all the publicity generated by the effort, you begin the next legislative session with the maximum possible number of cosponsors—in some cases a majority or near-majority of the governing body. Through the six-step program, you have done more than win legislative supporters one-by-one, you have built a powerful movement and changed the perception of the issue among the political insiders across the state. And that reaps benefits for years to come.

Watch a short video about the six steps at www.publicleadershipinstitute. org/six-steps.

Bang, Cough, Ka-ching

60 Second Radio Ad Strategic Campaign Initiatives

Narrator #1: A message from the Interdenominational Ministerial Alliance.

Narrator #2: Guns. [SFX: Bang] Tobacco. [SFX: Cough] Casinos. [SFX: Ka-ching]

The rich special interest groups have a candidate who does whatever they want.

Guns. [SFX: Bang] Tobacco. [SFX: Cough] Casinos. [SFX: Ka-ching]

It's Ellen Sauerbrey.

The gun lobby. *[SFX: Bang]* They wanted Sauerbrey to vote against every reasonable gun law, including restrictions on semiautomatic assault weapons. And she did.

The big tobacco companies. *[SFX: Cough]* They want Sauerbrey to oppose effective measures to curb teen smoking, such as the Maryland Children's Initiative. And she does.

And the casino gambling interests. *[SFX: Ka-ching]* They want Sauerbrey to stand aside while they fill our state with ten thousand slot machines. And she would.

The special interests may control Sauerbrey, but they don't control you. So vote on Tuesday, November 3rd.

[SFX: Bang] [SFX: Cough] [SFX: Ka-ching]

Because Maryland is our state, not theirs.

SECTION THREE

THROUGHOUT THE ADVOCACY CAMPAIGN

THROUGHOUT THE ADVOCACY CAMPAIGN

7. Frame your messages

Politics is the art of persuasion; we enact new policy by persuading officials to support it. But too often, progressive advocates act as if the only way to persuade policymakers is to educate them in all aspects of our issue. Progressives tend to think, "if they only knew what I know."

For that reason, our side tends to drown policymakers with facts and figures. And yet, facts themselves do not persuade, arguments do. (Any policymaker who wants more facts will ask for them.) In an advocacy campaign, you use facts to illustrate your campaign's talking points. And quite often, those talking points are not about policy specifics. E.g., "People are upset and demand action."

With good messaging, you can gain the support of many officeholders even though they know few of the relevant facts and figures, even though they don't particularly understand the overall issue, and sometimes even though they don't actually like the policy. In fact, this happens all the time.

For a full and practical explanation, we recommend that you read our messaging book *Voicing Our Values: A message guide for policymakers and advocates* (3rd Edition). Here are the key rules of persuasion for advocacy campaigns:

Begin in agreement with your listener(s)

In the course of an advocacy campaign, you can't change people's minds about deeply held assumptions or beliefs, and it is foolish to try. If you challenge those beliefs, listeners will engage their emotions instead of their intellects and reject whatever you say. You lose that vote.

So, start the discussion from a point of agreement, usually about the failure of existing policy or the overall purpose of your policy. Then show how your solution is based on something they already believe. You're not trying to change your listeners' minds, you're trying to get them to realize that you're on the same side—that they agree with you already.

Begin, for example, with: "We need to generate better jobs and a stronger economy." Or "we've always been proud of our state university system." Or "our criminal justice system ought to make us safer." Or "residents really want us to clean up that parkland." Or "our bridges and roads need a lot of repairs." In other words, start with your shared goal rather than your solution.

Stay in agreement with your listener(s)

As you explain how your solution achieves your shared goal, use values. Values are words and phrases that, in their own way, everyone supports. Freedom, privacy, equal opportunity, fundamental fairness, level playing field, security, safety, protecting children and the elderly—these are all values. Use data and anecdotes to illustrate that your particular solution is consistent with their preexisting values and beliefs.

Work around roadblocks, e.g., "Of course we have to ensure this doesn't harm small businesses." And perhaps most important, never say or imply "you're wrong." Your listener will simply stop listening. As Dale Carnegie explained 80 years ago in *How to Win Friends and Influence People*:

In talking to people, don't begin by discussing the things on which you differ. Begin by emphasizing—and keep on emphasizing the things on which you agree. Keep emphasizing, if possible, that you are both striving for the same end and that your only difference is one of method and not of purpose.

It's like fishing. You have to throw out a line with bait in order to reel them in. If they don't like your bait, you'll leave empty-handed.

Show your listeners how they benefit

Demonstrate to policymakers how supporting your issue benefits them either by advancing their own policy goals or by helping them with their constituents. Show that you're not asking for a favor, your policy is a winwin for them.

No policy passes entirely on its merits. If it did, you wouldn't have to generate all those calls and letters! So, understand each official's policy and professional interests and address those. Tell them about groups that endorse your legislation, cite public opinion polls, and explain why this vote will help in their next election.

8. Use a resolution strategy

Passing legislation is mostly about politics rather than policy.

Progressives can have the greatest idea, backed up by a mountain of reports and an army of experts, and get nowhere near enacting it. At the same time, our opponents often have a terrible idea, which experts and their reports overwhelmingly condemn, and yet it becomes law.

Much of the time, the problem is that our side's grassroots and "grasstops" support is not broad or strong enough.

There is a straightforward solution that has won many major legislative battles over the past 20 years but is still underutilized. It's a resolution strategy which, like the six-step program in Chapter 6, was devised by Vinny DeMarco. You can read more about it in *The DeMarco Factor: Transforming Public Will Into Political Power* by Michael Pertschuk.

A resolution strategy is based around the creation of a document (like the ones on pages 41 and 42) for organizations and individuals to endorse a specific policy *before* that policy is crafted into legislation. This is not a resolution that's introduced in the state legislature, it is a statement of policy that can be adopted as a resolution by state and local civic, labor, religious, professional and advocacy groups, from the state Bar Association to a local garden club (depending on the issue, of course).

The resolution can be adopted by local city, county and town governments and endorsed by mayors, county executives, police chiefs and sheriffs. It can be adopted by colleges, hospitals and individual corporations, and endorsed by prominent doctors, lawyers, psychologists, professors, and chief executives of every kind.

These are all "grasstops" allies. Once enlisted in the cause, these organizations and leaders can mobilize their own members and supporters when the campaign needs to generate calls and letters or turn out people for demonstrations and lobby days. Many groups also have paid lobbyists on staff who can make a crucial difference when general policies become specific legislation.

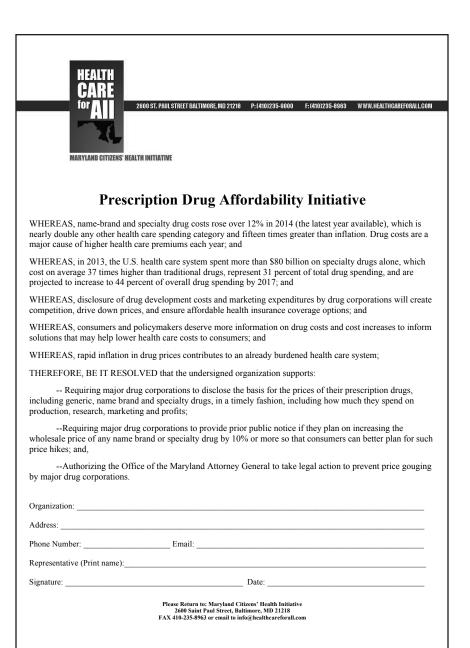
It is far easier to get organizations and individuals to endorse a resolution than a bill. Many groups will never get involved in legislation but can endorse a policy direction. Many groups are justifiably wary of the crucial details of legislation but are okay with a relatively simple, freestanding statement about policy. The point is to get as many entities as possible to endorse the resolution, especially groups that have influence with policymakers.

The process of getting groups and individuals to support the resolution activates people in a very effective manner. It makes policy advocacy accessible and understandable to individual, nonpolitical residents. It gives them something to do that is practical, achievable, and requires little technical knowledge. And once a volunteer wins a small battle to have the resolution endorsed by a relatively friendly town council or civic group, that individual is ready and eager to win the next, bigger battle. (See the Ladder of Engagement in Chapter 10.)

A resolution strategy helps you build a powerful ground-up movement. Here are a few "best practices":

- The resolution should be no more than one page.
- The resolution should be thoroughly poll-tested before advocates begin using it. This is the policy that will ultimately turn into leg-islation. It's better to find the best framing at the beginning instead of changing course in midstream.
- The resolution works best when a handful of core policy groups and funders—agree to it upfront. Stop the all-too-common intramural bickering before it starts.
- The creation of and advocacy for the resolution, if done correctly, is an exercise in public education under IRS rules. It can be done with tax-exempt 501(c)(3) funds.

To win significant policy battles, we need to channel the beliefs and aspirations of a broad coalition of residents in a way that regular people can understand and policymakers can feel. That's what the resolution strategy does. In the words of *The DeMarco Factor*, it helps transform public will into political power.





MARYLAND CITIZENS' HEALTH INITIATIVE

Healthy Maryland Initiative

2600 ST. PAUL STREET BALTIMORE, MD 21218 P: (410)235-9000 F: (410)235-8963 WWW.HEALTHCAREFORALL.COM

BECAUSE: Over the past decade, Maryland's smoking rate has declined by 32%, double the national average, saving over 70,000 people from preventable tobacco caused deaths and hundreds of millions of dollars in health care costs, in large part as a result of three tobacco tax increases; and,

BECAUSE: Tobacco still kills tens of thousands of Marylanders, costing us hundreds of millions of dollars in health care costs; and,

BECAUSE: Use of cigars and smokeless tobacco products, especially by children and teens, has increased during the last decade; and,

BECAUSE: While Maryland has made significant progress in expanding health care in recent years, hundreds of thousands of Marylanders remain uninsured or underinsured. In addition, the significant savings that could be achieved through community based initiatives have not been realized due to lack of implementation funding; and,

BECAUSE: Maryland needs to move forward in developing community based options, strengthening its safety net and improving service delivery in order to fully utilize the opportunities presented by the State Health Improvement Process and federal health care reform; and,

BECAUSE: Lack of additional funding for health care coverage, public health initiatives and community services will mean that uninsured and underinsured people will continue to go to the hospital for care which results in higher insurance premiums for everyone; and

BECAUSE: Raising the state's tobacco tax by \$1.00 per pack for cigarettes with a comparable increase for other tobacco products will raise necessary funds in addition to dramatically reducing teen and adult tobacco use, which in turn saves lives and state health care costs; and,

THEREFORE, BE IT RESOLVED: That the undersigned organization supports increasing the state cigarette tax by \$1 per pack, along with a similar increase to the tax on other tobacco products, with the revenue from these tax increases to fund: the state tobacco control program; the state health improvement process and other community based health initiatives including those that address childhood obesity, long term care for seniors; and, improved access to health care services for Maryland families.

Organization:					
Address:					
Phone Number:	Fax Number:	Email:			
Representative (Print name):					
Signature:	Date: Please Return to: Maryland Citizens' Health Initiative 2600 Saint Paul Street, Baltimore, MD 21218 FAX 410-235-8963 or email to info@healthcareforalLcom				

9. Build and use your coalition

Progressive advocacy groups are not likely to win a major battle all by themselves. Nor are they likely to do so by joining with "the usual suspects," the group's known circle of friends. In every case, progressives must broaden the coalition, seek out groups that are not often asked for help, and incorporate some unexpected partners. For example, to make a major impact, health organizations ought to form alliances with faith and business groups; environmentalists ought to form coalitions with business and labor organizations.

The resolution strategy, discussed in Chapter 8, offers the perfect opportunity to recruit the largest possible coalition. But whether or not you use that strategy, advocates must seek out support from individuals and groups that probably *do not* agree with you on all issues, but have reason to embrace one particular policy.

Reach out in all of these directions:

- Groups that promote equality: pro-women, civil rights (racial and ethnic), LGBTQ, other identity organizations.
- Groups that work in a specific policy area: about the environment, economics, gun violence, abortion rights, etc.
- Labor unions and pro-worker nonprofits: especially teachers, who are more trusted by the public than almost any other profession.
- Faith groups: Our movement usually does a poor job of outreach to the faith community, which is a shame. Faith leaders tend to be excellent speakers and compelling spokespeople with moral authority and a built-in network. Faith groups truly represent the "grassroots" and bring real diversity—racial, ethnic, economic, religious, political—to your cause.
- Professional associations: doctors, lawyers, psychologists—whatever is relevant to your policy—and especially nurses who, polls consistently show, are the most trusted professionals.
- Business associations and individual businesses.
- State and local coalitions, such as your 501(c)(3) table, donor table, and issue-specific coalitions.

Ultimately, you want other groups and their members to persuade policymakers to support your issue from a *different point of view* than yours. They bring a different type of credibility to the debate. For example, the most powerful allies for gun violence prevention advocates, generally, are law enforcement authorities. The most persuasive allies for green power advocates, generally, are businesses that build, operate or use green power facilities. The most important allies for teachers, when they're explaining the negative impacts of "education reform" gimmicks on children, are usually child psychologists and the parents of children who are adversely affected.

Look at the Drug Price Affordability Statewide Coalition on page 45. It includes health advocates, unions, professional associations, the faith community, educators, civic groups, consumer groups and business organizations. In 2017, they overcame a dozen PhRMA lobbyists to enact first-in-the-nation legislation that empowers the State Attorney General to file suit against prescription drug companies for price gouging. Copy that success!



MARYLAND CITIZENS' HEALTH INITIATIVE

2017 Drug Price Affordability Statewide Coalition

1199SEIU (Service Employees International Union) United HealthCare Workers East AARP Marvland Abilities Network AFSCME Council 3 AFSCME Council 67 Advocates for Children and Youth Alliance of Community Health Plans (ACHP) American College of Physicians -- Maryland Chapter American Medical Students Association (AMSA) Baltimore Jewish Council Baltimore-Washington Conference of The United Methodist Church Behavioral Health System Baltimore Casa de Maryland Central Atlantic Conference, United Church of Christ Central Maryland Ecumenical Council Chesapeake Climate Action Network Clergy United for the Transformation of Sandtown Collective Empowerment Group, Inc. Consumers Union Delaware-Maryland Synod of the Evangelical Lutheran Church in America Disability Rights Maryland Doctors For America -- Maryland Ecumenical Leaders Group of Maryland Episcopal Diocese of Maryland Erickson Living Free State Justice Greater Baltimore Chapter of Oncology Nursing Society Interdenominational Ministerial Alliance of Metropolitan Baltimore Jobs Opportunity Task Force Johns Hopkins Center for Salud/Health & **Opportunity For Latinos**

Latino Public Health Network Legislative Black Caucus of Maryland, Inc. Maryland Academy of Advanced Practice Clinicians Maryland Academy of Family Physicians Maryland Business Maryland Center on Economic Policy Maryland Citizens' Health Initiative Maryland Consumer Rights Coalition Maryland Nonprofits Maryland Nurses Association Maryland Public Health Association Maryland Public Interest Research Group (MarylandPIRG) Marvland Rural Health Association Marvland State Conference of NAACP Branches Marvland State Education Association MedChi, The Maryland State Medical Association Ministers Conference of Baltimore and Vicinity National Association of Social Workers --Marvland Chapter National Council on Alcohol and Drug Dependence – Maryland Chapter Organizing for Action - Maryland Chapter Planned Parenthood of Maryland Progressive Baptist Convention of Maryland Progressive Maryland **Public Justice Center** Safe and Sound Campaign SEIU (Service Employees International Union) Maryland and DC State Council United Baptist Missionary Convention of Marvland. Inc. United Baptist Missionary Convention of Marvland - Women's Auxiliary Women's Law Center of Maryland, Inc. Young Professional Chronic Disease Network

2600 ST. PAUL STREET BALTIMORE, MD 21218 P: (410)235-9000 F: (410)235-8963 WWW. HEALTHCAREFORALL.COM

10. Build and use your volunteer base

Progressive advocacy groups rarely have the funding to pay a large staff. To defeat conservative interests, which often spend a lot of money, progressives must recruit volunteers and maximize their impact.

This is as it should be. Since we represent the interests of average American families, it's only right that they participate in the battle. But maintaining a powerful grassroots organization is not easy and, in fact, too few progressive advocacy groups invest the time and resources needed to build a strong grassroots activist base, especially in more conservative geographic areas where they may be needed the most.

The first rule of organizing is to continuously give volunteers something to do—use them or lose them. If you gather a list of supporters and wait for the next occasion for constituents to contact their lawmakers about a bill, you will have thrown away your most valuable resource.

The second rule is to provide volunteers the opportunity to become leaders in the campaign.

Let volunteers work themselves into leadership

Many advocacy groups are deathly afraid of letting go of control. But there is no way to build a powerful organization without delegating elements of responsibility. If you don't empower legislative sponsors, allied groups and grassroots activists, you don't have an organization. It's just your small staff-led group trying the same old tactics against the vast right-wing machine.

Advocates worry that volunteers will make mistakes. Don't worry, they will. But if you manage your grassroots adequately, errors will be relatively insignificant while your power will be greatly magnified.

The trick is creating a hierarchy of tasks where raw volunteers can perform jobs in which mistakes are unlikely and harmless, experienced volunteers can take on tougher duties where repetition teaches them to do it correctly, and superior volunteers who have proven themselves receive the training to be entrusted with substantial responsibility.

The Ladder of Engagement

To maximize what you get out of volunteers, create a Ladder of Engagement—a series of volunteer tasks categorized from the simplest to the hardest. The goal is to give casual, occasional volunteers something constructive to do while providing a path for committed activists to become more and more engaged.

Just like campaign donors, the volunteers most likely to give you their valuable time are the ones who have done it before and come to feel "invested" in the campaign. So keep asking for help and let those who prove their worth climb up the ladder.

Here's a sample Ladder of Engagement:

Basic volunteer tasks

- Participate online in a way that shares the campaign's message or helps gather supporters' names and email addresses.
- Participate in a campaign event: the volunteer simply shows up and takes direction at a press event, fundraiser, lobby day, or demonstration.
- Participate in an activity at campaign headquarters, like a volunteer phone bank.

Tasks with modest participant responsibility

- Recruit other people to campaign events or headquarters activities.
- Perform research about politics or policy that the campaign needs, like searching for articles where individual policymakers have said something about your issue.
- Participate in town meetings or other events where the volunteer publicly asks the policymaker about your issue.
- Participate in a constituent-to-policymaker contact event (explained below).

Tasks with moderate leadership responsibility

- Lead/co-lead, including recruiting and supervising others, one of the events above.
- Lead/co-lead an effort to get the resolution (Chapter 8) endorsed by an advocacy, civic, business, labor or religious group.
- Lead/co-lead as the liaison to an important group after the resolution is endorsed and the group is part of the coalition.
- Organize a volunteer phone bank, including recruiting and supervising others.

- Organize a volunteer canvass, including recruiting and supervising others.
- Participate in a direct meeting with a policymaker.

Tasks with major leadership responsibility

- Lead the effort to get a small municipality to endorse the resolution. (Paid staff will lead the effort when it's a larger county or municipality.)
- Lead a constituent-to-policymaker event, described below.
- Lead/co-lead a demonstration or rally. (These can require a lot of time and money. So be certain you will generate a worthwhile amount of media coverage—and the kind you want.)
- Serve as the designated campaign coordinator for a city, county, town or district.

One of the most common mistakes that advocacy groups make is to designate permanent team leaders (like a County Chair) based on prior campaigns. Every campaign is different in time and subject matter. The hero of 2016 may be overscheduled in 2018, and every movement needs new leadership.

Let team leaders work their way into these jobs. In every campaign, we have ever helped direct, we have been astonished by at least one volunteerturned-leader. It will be someone you never expected, someone who didn't seem to have the experience. (This is especially true if you organize college campuses, which you should!) That volunteer will have fire in his or her eyes, and will work longer and harder than many of your paid staff. People will do amazing things for a good cause if you give them a chance.

When volunteers have accomplished tasks with participant responsibility, start training them to become campaign leaders. Let them choose one of the tasks with moderate leadership responsibility and explain carefully how to do those jobs. When volunteers prove proficient at those tasks, give them a full day (or more) of leadership training and bring them more formally into the campaign structure. The motto of the Obama field campaign was "Respect. Empower. Include. Win." Let it be your motto as well.

Prioritize constituent-to-policymaker contacts

After you have successfully built at least a modest grassroots organization, what are the most important things for that organization to do? In an advocacy campaign, the overriding purpose of volunteers is to deliver your message over and over to persuadable policymakers, either directly or indirectly. Sure, volunteers can also help raise money, recruit other activists, and maximize press coverage. But to the greatest extent possible, they should be engaged in grassroots lobbying.

There is a great difference between effective and ineffective lobbying tactics. Here's a list of ways to communicate with elected officials from most to least effective:

Very effective

- A conversation in front of people who the policymaker likes or needs, like at a civic association meeting or town hall.
- A personal meeting that's not in front of constituents but includes someone with special credibility like a political ally, powerful interest group, victim or expert.
- A personal meeting with a very skilled advocate.

Fairly effective with repetition

- A letter or call from people or groups particularly important to the policymaker.
- Personalized mail or email from constituents.
- Personal phone calls from constituents.
- A paper petition with names and addresses clearly showing that the signers are constituents.

Ineffective

- Letters, emails or calls from individuals who are not constituents.
- Social media posts that are not from constituents.
- An online petition or a paper petition where the signers are not clearly constituents. (Such petitions may aid fundraising or list-building for the group, but they do not persuade a policymaker.)

The bottom line is, volunteers can't help much with "very effective" contacts and it's not worth their time to focus on the "ineffective" methods of contact. So, the best use of activists is to drive calls, emails and letters from individual constituents to targeted officials—the ones who are undecided on your issue. The problem is, your volunteers will disproportionately live in districts where their policymakers are already committed either for or against your proposal. Only a small percentage of volunteers will live in the districts of targeted policymakers.

So, to maximize constituent-to-policymaker contacts, your volunteers need to go into the districts of undecided policymakers, either physically or electronically, and get those residents to write or call. Here are ways your campaign can do that:

- Set up a table in the undecided policymaker's district at a church, business, shopping center or other gathering place. Ask people who walk by to contact their policymaker and help them accomplish it then and there by: dialing a cellphone and handing it to the constituent; helping the constituent send an email on their phone; or printing out a personalized letter (from a computer and printer you bring) for the constituent to sign.
- Go to a meeting or service at a church, labor union, bar association, business association, civic group or other organization in the district (preferably groups that have endorsed your policy) and have constituents there call, email or sign printed letters, then and there.
- Have volunteers solicit local groups to encourage calls, emails and letters themselves.
- Walk door-to-door in the district trying to get residents to call or email, but also carry materials to leave at the door, for when no one is home, asking constituents to make calls or send emails.
- Set up a volunteer-led phone bank for patch-through calls, a process which requires a little technology. In a patch-through, the callers reach constituents by phone, convince them to talk to or leave a message for their policymaker, and the constituent is automatically transferred to the policymaker's phone. (In this way, your volunteers generate calls from constituents without having to travel to the undecided policymaker's district.)

Show volunteers you appreciate them

The magic words are "please" and "thank you."

Do not assume that volunteers know you want them to come back. Ask them for their help, over and over, always with a sincere "please." After every single time they do something for the campaign, say "thank you." Don't ever take volunteers for granted.

If you are asking them to work at a specific location, bring some food. Doughnuts and pizza aren't especially healthy, but they are traditional. And bring bottled water. The costs are small and the benefits—in wellsupervised volunteer work—are large. Activists will work twice as hard if you call them by name, voice encouragement, and thank them repeatedly.

Volunteers deserve your appreciation. You can't win anything substantial without them.

11. Build relationships with policymakers

All-too-often, progressive advocates act, and even feel, like policymakers are their adversaries. Yet this makes little sense because you can't enact your policies unless most of them are on your side.

Advocates need policymakers, obviously. So, seek them out and talk with them about your organization's goals. Sure, there is a difference in how you treat policymakers who are clearly on your side, those clearly against you, and those who might be persuaded depending on the specifics of the legislation. In general, though, be kind to your die-hard opponents (it can't hurt and may help), get familiar with persuadable policymakers, and work closely with your supporters.

For both friendly and persuadable policymakers, try to get to know them before you lobby them. Go to dinners, receptions, and other events to talk with them, educate them about your issues, and offer to help them *before* you ever ask them for a vote. (So they remember, bring and use business cards.) If you don't know how to get invited to such events, ask experienced progressive lobbyists.

Have your staffers and key volunteers build relationships with policymakers who represent the districts where they live. Among other things, they should go to meetings, receptions and picnics where the policymaker is expected and take the opportunity to talk to the official. In the ideal situation, your group would have at least one staffer or volunteer in each district who builds a relationship with his or her elected officials.

In addition to officials, it's also useful to get to know policy staffers. Walk around and introduce yourself. If it's allowed, bring doughnuts or even take staffers to lunch—they're too often neglected.

Whenever you have the chance, say "good job" to legislators or staffers on any issue, whether you're involved or not. Congratulate them on any press they've gotten. Find a mutual friend to talk about, or better yet, have the mutual friend join you at the meeting. The goal is to create long term relationships where they know you, trust you, and ask for your help—and you give it with pleasure.

Work with friendly policymakers

It is very common for progressive advocacy groups to keep policymakers at arms-length until after a measure is completely developed. That holdthe-ball tactic won't score you any points. Instead, as you develop your policies and strategies, work closely with friendly policymakers, especially the ones who are most likely to sponsor or cosponsor your policy.

- Policymakers tend to know more about legislative strategy than you do. They almost certainly know more about committee chairs and legislative leadership. They also probably know more about political obstacles. So, invite them to some of your advocacy campaign meetings and ask for their advice on politics and policy.
- Policymakers want to sponsor good measures. Help provide them with ideas and research on any issue you can.
- Policymakers want opportunities to get press coverage. Give them chances to stand up with your group. In fact, their presence greatly adds to the newsworthiness of any event.
- Policymakers want to publish op-eds and letters to the editor. Write drafts for them.
- Policymakers want to build their presence on the Internet and social media. Feature the best of them on your website and e-news-letters. Invite them to participate in your social media campaigns so they can be seen agreeing with your side.
- Policymakers may want help getting better at messaging, press relations, social media, or networking with like-minded officeholders. If you are aware of organizations that can assist them (e.g., the Public Leadership Institute), connect the policymakers to the groups you know.

In short, find out all the ways your advocacy group and your policymakers might help each other and do as many as possible that advance your mutual interests.

12. Build relationships with the media

Treat reporters like regular people, and get to know them before you ever pitch any news story.

The first thing to do is create a written list (or better, a database) of all the television and radio stations, newspapers, magazines, newsletters, websites and blogs that might cover your campaign. Then find out the names of the reporters, photographers, producers, columnists, editorial writers and bloggers at those media outlets who might be persuaded to cover your issue. Add street addresses, phone numbers and email addresses, and note when and how these people have covered your issue in the past.

Take this list and get to know these journalists before you want them to do anything, preferably long before your policy is introduced. One tactic is to visit them for about ten minutes bringing a very simple one-page explanation of who your group is, who you are, what you're doing, and your contact information. At this point, you're not trying to get a story, you're trying to learn: What is each journalist's beat? What are their deadlines? What can you provide to make their jobs easier when they cover your issue? Do they prefer to be contacted via email, text or telephone?

In statehouses and larger city halls, reporters often have a press room. Go there and introduce yourself. Figure out who sits where. The press room is a real convenience when you are passing out news advisories and releases, especially when something is happening quickly.

Throughout your campaign, when you see a reporter, act like you appreciate his or her work. And you should! Reporters have a tough job and are rarely paid well. They are usually very proud of what they write and sincerely appreciate when you show that you have read their article and understood it. E.g., "Your story about the utility company lobbyists was important. Most people don't realize how they're gaming the system but you really nailed it."

13. Target and track policymakers

Advocacy campaigns should not waste time or money on policymakers who have already made up their minds. They should instead focus on undecided officials. In order to do this efficiently, you must set up a targeting and tracking system and get continuous input from every person in your campaign who interacts with policymakers.

The targeting and tracking system is a spreadsheet or database which lists each policymaker, notes if a policymaker is on a committee that's important to the advocacy campaign, and whether the policymaker is a committee chair, subcommittee chair, or in leadership. The heart of this record is a designation of where each policymaker stands on your proposal.

It is traditional to list policymakers' positions on a 1-to-5 scale where 1 means the official is totally supportive of your policy and 5 means he or she is totally against it. Some of these ratings can start out with question marks or guesses, but as soon as possible you need to know where every policymaker stands.

While staying in touch with 1s, your campaign should overwhelmingly spend its time and money moving 3s to 2s and 2s to 1s. You can also spend a little time on the 4s, but they usually turn out to be 5s who were too polite to deliver a flat "no."

Ideally, this system records in detail every time one of your campaign staff, volunteers or allies talks to any policymaker about your issue. You want to build up information about each elected official's individual questions and concerns. This intelligence-gathering is the best way to figure out what it will take to persuade each policymaker, or if he or she is actually locked-in to support one side or the other.

Keep in mind that not everybody associated with your campaign is a skilled lobbyist. If a volunteer tells you that an undecided policymaker said that he or she is now in favor of the measure, have someone else—a paid campaign staffer or the sponsor—double check. And no matter who heard a policymaker commit to vote for a bill, it is always better to have it in writing—a letter from the policymaker to his or her constituent or a quote by the policymaker printed in the newspaper.

Lobby Tracking Sheet HB 687

District	Member Name	Cosponsor	Rating	Notes
1	Ed Gaffney	No	5	Jan. 21: Is not a
2	LaMar Lemmons	No	3	Mar. 9: Was very
3	Bettie Cook Scott	No	2	Feb. 22: Talked to
4	Coleman Young II	Yes	1	Mar. 22: Tried to
5	Bert Johnson	No	2	Mar. 19: Last saw
6	Marsha Cheeks	Yes	1	Jan. 25: Complete
7	Virgil Smith, Jr.	Yes	1	Feb. 1: Will try to
8	George Cushingberry	No	2	Mar. 9: Needs to
9	Shanelle Jackson	Yes	1	Mar. 5: Said that
10	Gabe Leland	No	1	Feb. 26: Attempt

(This is a simple tracking sheet. The point is to continuously update the rating of each lawmaker on a 1-5 scale and keep track of every contact with each lawmaker in the Notes section.)

SECTION FOUR

ONCE THERE IS A FORMAL POLICY TO PROMOTE

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14. Work closely with sponsors

Work hand-in-hand with the public officials who are your policy's champions. They are the ones who best understand their colleagues, constituents and chamber rules. Issue advocates and policymakers must move beyond "inside-outside" roles and work together from the beginning of the strategy to the end, drawing on the skills and strengths of all involved.

Think carefully about who you want as sponsors. The chief sponsor must be someone who is willing and able to do the work necessary to understand the policy background and current law, master the facts and arguments behind your legislation, and effectively lobby fellow policymakers.

Usually, the sponsor should be a member of the committee that will handle the measure. That way, they're at the table when it is debated and the vote is taken. And, for an important policy, a more senior policymaker makes a better sponsor than a junior one. But the highest-ranking lawmakers are often the busiest. It's more important to have a sponsor who will put a lot of effort into your measure than one with a reputation who can't commit enough time to your issue.

Too often, legislation is introduced at the last minute and cosponsors are simply policymakers who were available at a convenient place and time. That's bad planning. The process of building a list of cosponsors provides advocates with a golden opportunity to educate and energize friendly policymakers and encourage many to take some ownership of the project. As you build that list, maximize the number of cosponsors who are on the committees that will handle the measure. Target leadership, and especially committee chairs and subcommittee chairs for co-sponsorships (unless your sponsor says it's not appropriate in your case). Even if these key policymakers say no, you've contacted them early, gotten some important feedback, and you had the chance to ask, "What will it take to get your support?"

When a policy is nearly ready for introduction, there are two things that require very close cooperation between advocates and chief sponsors:

- Work with the legislative counsel agency to ensure that the final version is written exactly the way you want. Legislative Counsel tend to be very skilled, but you should assume they know nothing about your policy or overall intentions. Advocates and sponsors must read the bill very carefully before it is introduced. Above all, don't let staff members bully you into accepting language that doesn't accomplish your goals.
- Work with the fiscal analysis agency to ensure that you get the best possible fiscal note. Cost estimates can be more art than science. Provide the agency with the data that helps them agree with you about cost. (E.g., get cost info from other states and cities that have done or "scored" that policy before.) Often these agencies are good at estimating cost but need a lot of help to estimate cost savings.

When you're ready to introduce the bill, make sure that your sponsors know what to say to the press. Too often, advocates leave sponsors unprepared to answer difficult questions. Remember that, as elected officials, what they say is more likely to be quoted than what advocates say. So, it is crucial to help them stay on message.

Throughout the legislative battle, keep in close communication with your chief sponsors:

- Regularly show them your targeting/ratings and get their active input and participation in finding out the positions of undecided policymakers.
- When you're going to lobby an undecided policymaker, ask the sponsor for advice. The sponsor often knows the best way to that policymaker's heart.
- Work with sponsors to set up an internal whip operation, where individual cosponsors and other legislative champions are designated to persuade specific colleagues who remain undecided.

- Whenever you're holding a press event about the bill, bring your sponsors. Adding public officials makes nearly anything more newsworthy, they appreciate the opportunity to get media attention, and they deserve it.
- Whenever you're meeting with a newspaper editorial board or op-ed writer, bring a bill sponsor if possible. It will really get the board's or writer's attention.
- Help your sponsors write op-eds and letters to the editor. Set up interviews for them with radio and podcast hosts, newspaper and magazine writers, and bloggers.
- When your bill has a hearing, fully brief your sponsors so they are ready for both friendly and hostile questions.

In short, create a relationship where neither advocates nor sponsors will make important decisions on their own. By working alongside each other and communicating every step of the way, you won't be surprised by legislative compromises and they won't be surprised by your bold lobbying tactics.

15. Earn media coverage

Not the states

It is rare that major progressive legislation succeeds without a great deal of publicity. Plenty of special interest legislation passes in the dark, but our side needs the light. How do you get the media to shine a spotlight on your policies?

Persuade reporters, editors and opinion writers that your story is news-worthy.

News is about what is "new." So, the pitch to reporters and opinion writers must explain why your story is new or timely. Then describe why they *ought* to cover your story according to the unwritten rules of journalism, and/or why they should *want* to cover it because readers/listeners/viewers will be especially interested in your topic.

A media outlet *ought* to cover a story because:

- It is important. It affects a lot of people in smaller ways or it affects a few people in larger ways.
- It's the kind of news they frequently cover and your story should be treated the same as others.
- It's surprising, unusual or unprecedented, e.g., man bites dog.
- It's a "scandal" or involves gross incompetence or hypocrisy.
- It provides "balance" to the media outlet's (perhaps unjust) coverage of your opponents. In other words, they owe it to you.

A reporter or opinion writer should *want* to cover it because:

- It's particularly interesting to the public, e.g., an imaginative protest event.
- It's an emotional human interest story, perhaps about people who would benefit from your proposed policy.
- It's a classic David versus Goliath battle—and you are, of course, the little guy.
- It involves a prominent person or organization, especially celebrities or the rich and powerful.

And perhaps most important in today's media market:

• It will generate a great deal of Internet views and social media likes and tweets.

Obviously, your best chance to persuade reporters, editors and writers is when you show that your story is both important and interesting.

Have a focused message

It's a myth that any news coverage is good "as long as they spell your name right." Negative stories hurt. Yet, what's most common is to get a story that does not really help you because it didn't put forward a focused, persuasive message.

Your advocacy campaign needs to craft a message (Chapter 7), and then you need to structure your media events and quotes to deliver that message.

This overall message captures the most persuasive argument for your policy, framed to appeal to both policymakers and average voters. If you're trying to raise the state tobacco tax, the message might say that it will curtail teen smoking. If you're trying to increase the use of renewable energy, it might focus on the jobs created. A successful campaign to increase the alcohol tax in Maryland was based on the message "Alcohol Taxes Save Lives," a phrase that was repeated over and over by the media.

Whenever you talk to the media or attempt to generate a story, break your message down into talking points, each of which should illustrate part or all of your message. Work hard on these talking points! For each individual press opportunity, write a line that really grabs attention—one that's a clever way to make your point. Reporters always love a good metaphor.

The average TV soundbite is only about 17 seconds and newspapers won't quote you for more than one or two sentences. So, it's essential to make your point and don't ramble on.

Use every opportunity to repeat the message

The legislative process is ideal for generating news. First, there are specific reporters who are assigned to this beat, and they're looking for something to write. Second, there are many potential hard news hooks which enable you to talk about your policy, over and over.

For example, if you follow the six-step program (see Chapter 6), you can pitch stories:

- When you announce the creation of an advocacy coalition.
- When you announce the results of your poll.

- When you release your resolution and explain your goals for endorsements.
- When important individuals or groups endorse the resolution.
- When you reach a milestone for endorsements, e.g., "our 200th signer."
- When you announce there will be a policy introduced and what will be in it.
- When you introduce the policy.
- When important elected officials (e.g. leadership) become cosponsors.
- When the policy has a hearing.
- When there's any kind of formal action such as a committee or floor vote.
- When you hold a rally or demonstration that is especially large.
- When a demonstration is especially clever or unusual, (e.g., abortion rights activists in Texas dressed up as characters from *The Handmaid's Tale* and generated a hundred stories nationwide).
- When a demonstration is disruptive of normal procedures, like a sit-in.
- If the committee doesn't hold a hearing or vote, when you hold an event to protest.
- When you announce any kind of paid ads—TV, radio, print, signs, billboards, direct mail, or Internet.
- When you unveil your candidate pledge form.
- When you announce which candidates signed and didn't sign the pledge form.
- After an election to announce how many winners pledged to support your policy.

Don't spend a lot of time or money on a demonstration that's not likely to generate press coverage. Sometimes marches, rallies and petition presentments are done mostly because they are traditional. But if some type of demonstration is done all the time, it is far less likely to be newsworthy. Of course, your opponents will have media events of their own. Insist to reporters that they include your side's comments in your opponents' stories. Don't take no for an answer. They ought to do this to be fair and balanced, and if you come up with a clever line, they will want to include it.

Make it easy for the media to cover you

The best way to get media coverage is to make it easy for them to cover you. Time your events in consideration of reporters' deadlines. Locate your events, whenever possible, somewhere that's easy for reporters to reach. Create materials that show reporters how to turn your event into a story. And always be a proactive, aggressive advocate.

Timing

It is essential to learn reporters' deadlines, especially those who are most likely to cover your story. Newspaper reporters often have to turn in their work at 4–5 PM. That means press events should usually be scheduled between 9 AM and 1 PM, avoiding as many conflicting events as possible. Friday is usually not the best press day because fewer people watch/listen to/read the news on Friday night and Saturday. (That's why bad news is traditionally released on Friday afternoon.)

Location

This depends on your own jurisdiction, of course. But if you're putting on a common press conference, do not hesitate to book the room that's near the press room and normally used for press events because that's probably the easiest place for them. If you expect television cameras or news photographers, create a good visual. This is usually done by having volunteers hold up signs and banners that should, absolutely, include your message. Sometimes the visual alone makes the story. If there are good reasons to hold your press event somewhere that is not so convenient to reporters, stream it live in a webinar format and encourage reporters to watch and ask questions from their own desks.

Materials

Unless you have a rushed impromptu press conference—like in the hallway after a vote—always use a press advisory. (See an example on page 68.) This is essentially an invitation to the event, explaining who, what, when, where and why. Then at the event, distribute a press release. This should be written like a short news story. The purpose is to show how a reporter can turn your content into an article. By example, the press release argues that the event is newsworthy as well as important and/or interesting.

Distribute paper copies of press advisories and releases directly to reporters' desks whenever that is possible. If you see reporters, tell them about the news event in person as well.

When you distribute a press advisory or release by email, journalists generally prefer that you deliver it in the text of the email, not in an attachment. Similarly, if you want to draw attention to a report, photo or video, they often prefer that it be on a website with a hyperlink to that site rather than providing these as attachments. (Though, by all means, provide an attachment if the reporter prefers it that way.)

When you're responding quickly to an event or statement from your opposition, put that in writing whenever possible. Be clever and keep it short.

Finally, if there is an argument over facts, provide documentary evidence of your point or give the reporter contact information for an expert who can support your side.

Be proactive

When you have anything newsworthy, don't wait for the media to contact you. Reach out to them. When you have a press advisory or release, follow up by phone or in person. When you don't have a formal event, conversationally pitch story ideas to the media.

After something significant happens and reporters have already talked to you, and you know they are writing stories, don't hesitate to check back about 30 minutes before the reporters' deadlines to make sure they have everything they need. See if a reporter will tell you what the other side has said and provide a good response. If possible, email proof that you're right and they're wrong, or provide a source who can back you up.

General rules

- When you talk to a reporter, always assume you are on the record. There are very few situations when a policy advocate ought to speak on background. And there is always a risk of misunderstanding. Essentially, if you don't want to see your statement on the front page, don't say it.
- You may occasionally want to provide a reporter with an exclusive. Make the agreement with the reporter completely clear, especially the exact date and time when you may provide the same information to other reporters, and honor that agreement to the letter.

- Don't lie to a reporter. If you do, it may be the last time you are ever quoted. Sometimes people are tempted to speak when they don't actually know the answer. Don't! Instead, offer to try to find the answer and get back to the reporter.
- Don't expect there to be any agreement or even communication between a newspaper's reporters and opinion writers. You should speak directly to editorial writers and columnists, and you should prepare for those meetings as diligently as if you're meeting with a persuadable legislator.
- When you see a reporter after she or he came to your event or wrote a story, be upbeat and offer appreciation even if you didn't particularly like what the reporter said. Use this opportunity to improve your chances the next time.



MEDIA ADVISORY:

Reproductive Rights Activists Dressed as "The Handmaid's Tale" Characters Protest Anti-Abortion Bills and Regulations

For Planning Purposes May 9, 2017 Contact: Sharmeen Aly, <u>sharmeen@prochoicetexas.org</u>, 214-404-8254

Austin, TX -- This session, lawmakers <u>have filed more than 25</u> <u>anti-abortion bills</u> and several of them are up for debate on the Texas House floor soon. House Bills <u>3771</u>, <u>2962</u>, <u>1936</u>, <u>200</u> and <u>2858</u> are on the House calendar for this week. Reproductive rights activists dressed as characters from "The Handmaid's Tale" will be holding a protest at the Capitol in opposition to these bills and reading Texans' personal abortion stories and what happens when reproductive rights are restricted.

What: Reproductive rights activists dressed as "The Handmaid's Tale" characters protesting anti-abortion bills

When: Tuesday, May 9, 2017 from 12–1 p.m.

Where: Texas Capitol Rotunda

Who: Reproductive rights activists, NARAL Pro-Choice Texas

####

Photos from a demonstration in the Texas Capitol Rotunda organized by NARAL Pro-Choice Texas. Protesters were dressed as characters from *The Handmaid's Tale* and earned a tremendous amount of media coverage. (The protester in the middle of the second photo and at the left of the bottom photo is Public Leadership Institute's Program Manager and Reproductive Rights Policy Specialist, Aimee Arrambide.)







16. Employ paid media

If you are trying to persuade a majority of residents or voters to support a given policy, paid ads are rarely worth the cost (except during a referendum). The real purpose of paid ads in an advocacy campaign is to identify people who already support your policy and get them to contact their policymakers, or volunteer for or donate to your campaign.

Paid advertising is a broad category. It includes broadcast and cable television, radio, print ads, billboards and other paid signs, direct mail, paid phone calls, and ads on the Internet. Unless used very strategically, even the cheapest of these is rarely an efficient or effective use of campaign resources.

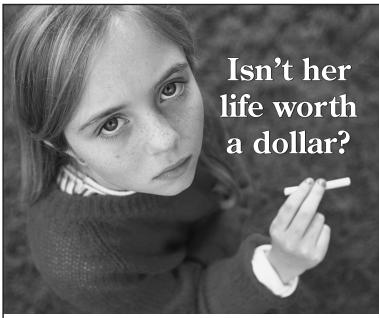
The most straightforward use of paid media in an advocacy campaign is patch-through phone calls. This is when a paid phone bank calls residents in an undecided policymaker's district, persuades residents to speak to the policymaker in favor of the campaign's policy, and immediately connects them to their policymaker's office where they typically either talk to a staff member or leave a voice message. The same can be done less expensively, but also less professionally, by volunteers or automated services. Paid patch-through calls are often worth the cost.

A more complicated use of paid media is to buy high-profile ads that ask residents to call their policymakers—especially local newspaper ads or professional signage (for example, see the ad on page 71)—targeted at undecided policymakers. Don't expect these ads to generate enough calls to justify their cost. However, such paid ads can provide cover for patchthrough calls, making the policymaker think the ads sparked the calls.

The most elaborate use of paid advertising is to buy something newsworthy and tell the press. Done well, you may trigger earned media coverage worth many more times than the paid ads cost. For example, a clever radio ad that costs \$1,000 to make and is played on \$9,000 of air time has sometimes generated news coverage worth more than \$100,000. A radio ad combined with earned media coverage and patch-through calls might convince policymakers of overwhelming public support for your legislation.

Finally, an advocacy campaign might buy social media ads, on Facebook, for example. There are many tools that help you target specific types of people through a variety of digital media. Again, this is rarely a cost-effective way to persuade a jurisdiction's residents but it can help you connect with people who are willing to contact their policymakers, volunteer or contribute to your campaign.

Cigarette Girl Quarter-page newspaper ad Strategic Campaign Initiatives



Ninety percent of smokers started as teenagers. One in three of them will die prematurely from smoking-related illnesses like cancer, heart and lung diseases.

Here's how to save her: Call 301-858-3000.

The most proven, effective way to protect those children is to raise the cigarette tax. Studies show that when cigarette prices go up, teen smoking goes down. In fact it's worked before in Maryland. Our state's previous tobacco tax increases contributed to a 32 percent decline in Maryland smoking rates.

Call your legislators at 301-858-3000 and tell them to sign the Healthy Maryland Initiative Candidate Resolution: Increase the tobacco tax by \$1 per pack and dedicate the money to better health care coverage and stronger tobacco prevention programs.



For more information: www.healthcareforall.com.

17. Generate successful calls and letters

Now that we've discussed how to get volunteers and allies to contact their policymakers, what exactly are you asking them to do?

The two crucial things that an activist needs to communicate to an elected official are: (1) the precise action that the activist is asking the official to do, and (2) why the official should pay attention to this particular activist, which, in almost every case, is because the writer or caller is their constituent.

Crucial aspects of a call

- The activist must identify him- or herself and provide information that makes clear that the caller is a constituent, at least by specifying the activist's neighborhood and preferably by giving a street address.
- If the caller is not a constituent, he or she may still matter to the policymaker if the caller makes clear that he or she is an expert or influential person when it comes to this particular policy.
- The caller must give a concise, clear statement of what she or he wants the policymaker to do, usually by referring to the policy's bill number or name. For example: "I'm calling to urge Senator Brown to vote AGAINST SB 123," or "I'm calling to ask the Commissioner to vote FOR the Abortion Is Healthcare Resolution."
- If possible, the caller should give a personal reason for his or her concern. For example: "My husband has to take a daily prescription that costs far too much."
- If the caller reaches a staffer or voice mail, which will almost always be the case, he or she should keep the message brief—60 seconds or less. If the caller reaches a policymaker, he or she shouldn't talk for more than about two minutes unless the policymaker asks questions.
- The caller should always be gracious and say thank you.

SAMPLE: "Hi, this is Betty Smith. I live in your district at 1234 Oak Avenue and I'm calling to ask you to vote FOR HB 567. [One sentence why: I think drug companies are charging far too much.] Thank you! [Optional: You can reach me at 404-505-6006.]

Crucial aspects of an email

- Just like a call, the writer needs to identify him- or herself, say he or she is a constituent and provide a home address to prove it, specifically state what the writer wants the policymaker to do, provide any particular expertise or personal reason the writer might have for their concern, and be gracious.
- Provide the key information in the email's Subject Line. For example: "Please support SB 678."
- Be a little formal. This is not like an email to a friend. Use standard fonts and format your note as if it were a business email.
- Do not write more than the equivalent of one typed page. It's fine to make the email shorter as long as you provide the essential information listed above.
- Don't include an attachment unless it's really compelling or important.

SAMPLE: Subject line: Please vote for SB 678

Dear Senator Jones:

I live in your district and I'm asking you to support SB 678, which increases the penalties for hate crimes.

We have seen a recent surge in racist and anti-Semitic graffiti in our communities. In fact, I saw a swastika spray-painted on a wall on Chestnut Street just last month. If we are to stop the rise in hate, I believe we need to make it clear that this kind of behavior is totally unacceptable. Enactment of SB 678 would help make that point.

Thanks for your consideration of this important matter. If you would like to reach me, my email address is bsmith99@gmail.com.

Sincerely,

Betty Smith 1234 Oak Avenue Woodlands, KS 66101

Crucial aspects of a letter

- Just like an email, the writer needs to identify him- or herself, say he or she is a constituent and provide a home address to prove it, specifically state what the writer wants the policymaker to do, provide any particular expertise or personal reason the writer might have for their concern, and be gracious.
- A letter is better if it has a subject line, for example: "RE: Please support SB 678." This makes it easier to sort.
- A standard letter is the most appropriate way for an organization or non-constituent expert to endorse or oppose legislation.
- An organization's or expert's letter can be up to two pages long and might include an attachment, but a constituent should keep his or her letter to one page.
- A letter writer should make sure the return address is on the outside of the letter as well as the inside. In some jurisdictions, because of the anthrax-laced letters of several years ago, security personnel get nervous and may halt delivery if there's no return address.
- Be a little formal. Use standard fonts and formatting like a business letter.
- In most cases, a letter has more impact than an email or call.

For all contacts with policymakers, the writer or caller must not seem angry, insulting, threatening, racist, sexist, or suggesting the policymaker is corrupt. The point is to persuade policymakers, not harass them.

18. Have a successful advocacy meeting

When most people think of lobbying, they picture an advocate walking into a policymaker's office, having a dispassionate conversation about the merits of a specific measure, and persuading the policymaker to support it.

But that's rarely how it works.

When a skilled advocate meets with a policymaker, the advocate is mostly intelligence-gathering. It's unlikely that the advocate will persuade the official then and there. Instead, the advocate is trying to discover whether the policymaker has made up his or her mind or is persuadable, and if persuadable, what it will take to get his or her vote. The policymaker may be concerned about policy, but it's just as likely he or she is focused on more emotional or political concerns about the proposal.

Let's consider how an advocate can maximize the impact of such a meeting.

First, make an appointment. Policymakers are heavily scheduled and you're likely to waste your time if you stop in without one. When you get a meeting, ask the scheduler how much time you will probably have and who else, if anyone, may attend besides the policymaker. Sometimes a staff member who specializes in your issue will attend such a meeting, and that can be a good thing.

When you're dealing with state legislators who are in session for only part of the year, the best time to meet is when they're not in session, for example, in the fall before a session that opens in January. There will be fewer distractions and interruptions, you can usually have more time with the policymaker, and a district office meeting is a great opportunity to bring constituents. This is also a good time to ask legislators to cosponsor your bill.

Before any meeting, learn everything you can about the official and relevant staff members. If you're a paid advocate for a policy group, you should have already talked to the policymaker and his or her staffers at meetings, receptions, town halls, fundraisers and other events. Whether you have or not, update your knowledge of the policymaker's district, committee assignments and political allies, and read both the official's biography and any stories in the media that shed light on the policymaker's political and policy thinking.

Do not assume that you can persuade all policymakers with the same information and arguments; that's just not realistic. Treat each policymaker as an individual and find out why that official might support your legislation based on his or her particular history and interests.

Before the meeting—prepare to the max

Let's describe the form of your presentation and then we'll tackle substance.

Carry with you:

- A one or two-page handout that is attractively presented and provides a list of who supports your bill and the top three reasons why the policymaker should vote for it.
- Copies of any charts, graphs or reports that prove the facts underlying your argument.
- Copies of any news articles, polling summaries or letters that prove constituent support for your solution.
- A copy of the measure itself and any amendments, if applicable.

Be prepared to explain:

- Your basic position in 30 seconds—an elevator speech in case you can only catch the policymaker for a moment.
- Your full position in 5 minutes or less—giving no more than three reasons to support the policy.
- Your best answers to all possible questions and attacks—which you should have prepared for all advocates ahead of time.

As for substance, begin from some point of agreement—most often the overall policy goal of your legislation stated in a way that the policymaker will appreciate. After that, it depends on the situation, but in most cases, explain the problem you're trying to solve. For this, anecdotes generally work better than statistics. Then say why your solution works while other solutions don't. Finish with the best argument that your measure is a political winner because of public support or support from powerful interest groups or legislative leaders.

Carry facts and figures with you but limit their use unless asked. Remember, you are not trying to educate the policymaker, you're trying to persuade him or her, which can be a very different conversation.

During the meeting—persuade and listen

If possible, bring a constituent, sympathetic victim, or expert with you to the meeting. Advocates are a dime a dozen. If you have with you someone the policymaker respects, you're already halfway to a successful outcome.

Carefully listen to and watch the policymaker's reactions. They may be different than what you expected and require you to move the conversation in another direction. If you do your job skillfully, the policymaker is likely to admit the areas where you agree and drop hints about what it would take to get his or her vote.

It may be as simple as, "I hear ya but I'm not sure my district agrees." That's a fine response because it tells you what to do—get constituents to call, write or talk to him/her. Or it could be, "I can't cross the committee chair on this one." That means you need to convince the chair or get somebody else who has more power than the chair to tell the policymaker he or she ought to vote against the chair here and make it up on another occasion.

After expending all that energy to schedule and hold a meeting with a policymaker, don't end the meeting with a misunderstanding. End by restating the official's position to make sure you *fully* understand. For example, "So you've heard from the AFL-CIO and you have agreed to support SB 123 to increase the Earned Income Tax Credit. Have I got that right?" If the legislator is against you, stay upbeat and say maybe next time. Give a warm thank you no matter what. Remember you're going to lobby him or her again!

After the meeting—update your targeting

You should already have notes about every legislator—preferably in a user-friendly database, as described in Chapter 13. Update your notes with what you learned at this meeting. If you need to take some action to continue the task of persuasion, accomplish or schedule it.

19. Have a successful hearing

This is show time! You need to be at the top of your game to simultaneously persuade undecided policymakers, satisfy friends and allies, and be quotable for reporters. You're trying to accomplish two things: showing that you have the right policy and that your solution enjoys broad support. Before the committee hearing, know exactly how you're going to do it.

Prepare:

- Learn who is on the committee and what their position is on your policy, especially the committee chair.
- Learn that committee's procedures ahead of time. Some have rules or customs about the order they call witnesses based on a sign in sheet, some sharply limit the length of testimony, some may make you wait for hours while other bills are heard first (so find the closest restrooms!)
- Learn if committee procedures allow you to organize a panel combining your testimony with those of your policy experts and/or people who are affected. If allowed, that's usually the most effective way to testify.
- Figure out which policymakers on the committee are the most favorable to your cause and provide them with friendly questions to ask your side as well as hostile probing questions to ask the other side.

Carry with you:

- Copies of your written testimony to pass out to the committee and the media. If the committee prefers to receive copies of your testimony ahead of time, provide it the way they want it.
- Copies of any charts, graphs or reports that prove the facts underlying your argument.
- A copy of the proposal itself, the fiscal note (if any), and any amendments.

Be prepared to:

• Deliver your testimony without reading it. You don't have to memorize it, just work from notes and deliver the same content but in a conversational voice.

- Project one or more images on a screen (where this is allowed). It can be a very effective way to make your point.
- Answer all possible questions and attacks. This includes having in your hands copies of any backup materials that prove you're right and your opponents are wrong. Note that in some committees, you don't answer the questioner directly but wait for the Chair to recognize you by name. This is often a necessary formality when a hearing is being audiotaped as it would otherwise be difficult to know who is speaking.

When you testify, dress for success. Although plenty of people appear in casual clothing, it is more respectful and persuasive to dress professionally.

When you speak, begin formally. E.g., "Thank you Mister Chairman/ Madam Chair for the opportunity to testify today." Then introduce yourself and your panel (if any). If you're a constituent of one of the policymakers present, say so. State your position clearly: "I'm here in support of/ opposition to Proposed Ordinance 321." Explain any external credibility you bring to the matter: "I'm a psychologist who specializes in..." or "I've led our community's neighborhood watch program for XX years..."

Keep your testimony to 3–5 minutes or shorter depending on the traditions of the committee. Give no more than three reasons for your position. People who are directly affected by the policy in question should tell their stories rather than spouting facts and figures.

Answer questions clearly and concisely and *never* interrupt a legislator while he or she is speaking.

After you finish testifying, sit back down and don't leave the hearing until the discussion of your proposal is completely finished. You want to know what others—especially committee members—have to say about it.

When the hearing is over, walk over and talk to any news reporters present. If it's practical, also talk to friendly committee members to get their impressions of how best to follow up. If a persuadable legislator asked a question, follow up immediately or within a few days to make sure his or her concerns are completely addressed.

20. Pursue an amendment strategy

Many advocates work in states, cities and counties where there is no chance to enact progressive policy. The votes for equity and justice simply aren't there.

In that case, your efforts have two purposes. The first is to educate policymakers, media, organizations, grasstops leaders and the general public about the merits of your policy. In future years, when it's finally possible to enact your legislation, you'll be ready. The second purpose is to raise the profile of your issue so that it can play a significant role in the public debate. This is especially useful when you're promoting a popular measure—it helps create public demand.

Even if you are confident that the measure will go nowhere, have progressive policymakers introduce a high-impact measure and build a full-scale campaign around it. For example, to end government subsidies to rich corporations, guarantee Internet privacy, restrict predatory banking practices, protect people's health insurance, address climate change, or make the tax system fairer.

As described in Chapter 15, generate as much media coverage as possible, including when the policy is introduced and when it is held up or killed in committee.

Then have a policymaker *offer the measure as a floor amendment* to your opponents' legislation or to the budget. Force your opponents to vote against it in a recorded vote. That will give you one more high-impact news story, while also creating the conditions for that issue to help shape the broader political environment.

The main challenge when using this tactic is that many legislative bodies have rules about what amendments are "germane." Most state legislatures have a "single-subject" rule. So you will need a parliamentary expert to help figure out when you can successfully force a public vote on such an amendment.

The point of an amendment strategy is to be bold. You need ideas that capture attention and, simultaneously, are fairly easy for the public to understand. Nothing incremental or compromised, nothing complex. Choose policies that create controversy, make news, energize the base, get everyone talking about progressive values, and demonstrate exactly what you stand for.

21. After the battle is over

The battle is never really over! As soon as one fight has ended, prepare for the next one.

Debrief your sponsors, policy leaders, coalition partners and staff. Evaluate what worked, what didn't, and what needs to be done before the next battle begins. Honestly recognize challenges and fix mistakes.

At the same time, thank, praise, and reward all your allies. Win or lose, make sure policymakers and coalition partners are glad they sided with you in the battle. You will need them next time as well.

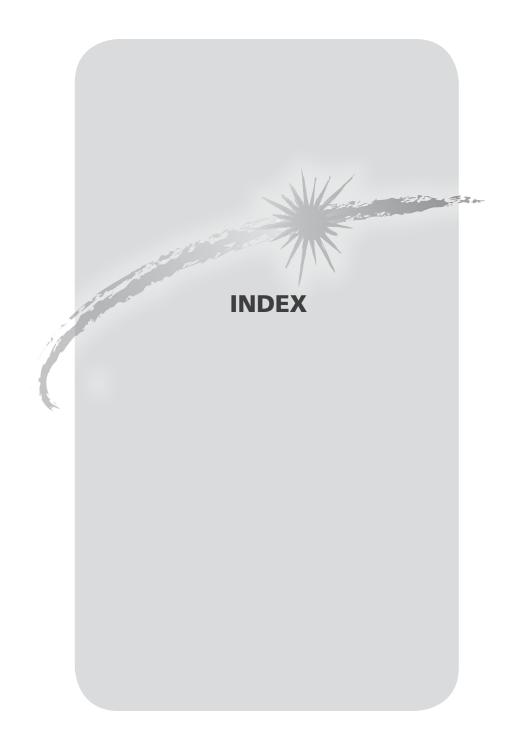
Praise policymakers in letters to your group and in newspaper Letters to the Editor. Write flattering notes to legislators that they can quote in newsletters and campaign fliers. Give out "Legislator of the Year" awards to your strongest champions. Have the members of your group praise and thank policymakers at public events. You might even hold a press conference or buy ads to show your gratitude. They will love it, and they deserve it.

Also, if it is at all practical, make your opponents sorry they voted against you. Complain about them in news stories and Letters to the Editor, send reports to your organization's members that call out those policymakers, get volunteers to attend civic or town hall meetings where they chastise those policymakers for their votes. Make sure the constituents of an opposition policymaker know that he or she did the wrong thing. (The radio ad on page 82 is a pretty aggressive and effective example of this.)

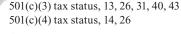
This is not a matter of "getting back" at your opponents, it is to let their constituents know about their position on the issues and persuade those policymakers that they'd be better off siding with you next time.

Finally, if you pass a law, make sure it is fully implemented. This includes ensuring that proper regulations are promulgated, that people know about any benefits from the law, and that the provisions are fully funded in future budgets.

Choosing Sides 60 Second Radio Ad Strategic Campaign Initiatives	
Announcer:	A message from the Maryland Children's Initiative.
Child One: Child Two: Child Three: Child Four:	[SFX: background noise of children on a playground] AhhBilly. I'll takeSuzie. Joey. Mary.
Announcer:	[SFX: background noise fades] Choosing sidesWhat if adults choose sides AGAINST kids?
Clerk: Voice One: Clerk: Voice Two: Clerk: Voice Three:	<i>[SFX: background noise of legislators]</i> Senator Neall. No. Senator Harris. No. Senator Jacobs. No.
Announcer:	[SFX: background noise fades out] It happened in Annapolis. A bill to increase the price of cigarettes by 30 cents a pack came to the Senate floor. Experts estimated it would save the lives of 8,000 children in our state. One group stubbornly opposed the bill—the big tobacco companies. And when the State Senators chose sides, a small number— including Robert Neall, Andrew Harris, and Nancy Jacobs—turned their backs on our kids. Arm-in-arm with the tobacco lobbyists, they led a desperate filibuster. Fortunately, they lost. So the next time you're asked to choose sides
Clerk: Voice One: Clerk: Voice Two: Clerk: Voice Three:	<i>[SFX: background noise of legislators]</i> Senator Neall. No. Senator Harris. No. Senator Jacobs. No.
Announcer:	<i>[SFX: background noise fades out]</i> Think about it.



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Other books on advocacy that we recommend:

Becky Bond & Zack Exley, *Rules for Revolutionaries: How Big Organizing Can Change Everything* (White River Junction, VT: Chelsea Green, 2016)

Dale Carnegie, *How to Win Friends and Influence People* (New York: Pocket Books, 1990), originally published in 1937

Morgan Carroll, *Take Back Your Government: A Citizen's Guide to Grassroots Change* (Golden, CO: Fulcrum Books, 2011)

Michael Pertschuk, *The DeMarco Factor: Transforming Public Will Into Political Power* (Nashville: Vanderbilt University Press, 2010)

Wellstone Action, *Politics the Wellstone Way: How to Elect Progressive Candidates and Win on Issues* (Minneapolis: University of Minnesota Press, 2005)

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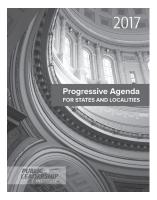
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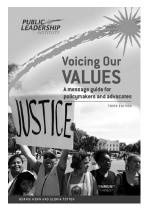
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CURRENT AFFAIRS

To make progress, progressives need to go on the offensive. We must make the development of proactive policy a central component of our work. We must drive bold, proactive agendas in states and localities, even the ones controlled by conservatives. We must arm our activists with policies that represent their values, and that energize them to fight for something instead of just defending the status quo.

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