Social Current Policy & Advocacy Toolkit

social current
Activating the Power of the Social Sector

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GETTING STARTED

ABOUT THE TOOLKIT

The goal of this toolkit is to further:

- Build the advocacy muscle for solutions-oriented, values-driven public policy advocacy within the social sector
- Engage board members and volunteers
- Motivate the whole field of social sector organizations to achieve better policies that serve children and families
- Enhance the effectiveness and impact of our community-based organizations

The toolkit contains information and resources to assist you in communicating effectively with policymakers, legislators, stakeholders, constituents, and media. These resources can be applied to engagement with all levels of government including city officials, local county board members, members of your state legislature, or U.S. senators or representatives. Additional tools provide ideas about what to cover when public officials visit your organization, or when you are testifying before a public body.

As you move ahead, remember that you are not alone in this undertaking; Social Current provides tools and guidance to help your voice be heard and enhance the effectiveness of our collective advocacy.

KEY MESSAGES

Who We Are

Social Current advocates for and implements equitable solutions to society's toughest challenges through collaboration, innovation, policy, and practice excellence.

What We Stand For

Together with hundreds of social sector leaders, we will activate the power of the social sector to create a unified, intrepid, just and purposeful network so that all people can thrive.

What Sets Us Apart

We connect with people, communities, and systems, which gives Social Current a valuable lens for understanding the policies that ensure people, families, and communities thrive. It also allows us to effectively partner with policymakers to create positive change.

Understanding the Challenges Communities Face

- Many of the individuals, families, and communities we serve face persistent intergenerational disparities and/or temporary challenges, such as extended illness, job loss, breakdown in the family unit, violence, or natural disaster.
- We know all families and communities are more likely to achieve their full potential when they have the building blocks of a strong foundation that enables them to thrive, no matter their current situation, socio-economic status, or geographic location.

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Building Blocks for Strong Families and Communities

- Safe, stable, nurturing relationships and environments that prevent and mitigate the impact of trauma through quality care options across the lifespan
- Equal opportunity employment that provides a living wage, economic mobility, and comprehensive workforce supports
- Affordable, preventive, quality health care that provides parity for behavioral health and addresses the social determinants of health
- Affordable, livable homes in safe, vibrant neighborhoods that have accessible healthy food, transportation, child care, and other fundamental services
- Educational success that begins with nurturing and supportive families and continues with early childhood development through post-secondary advancement

Our Core Policy and Advocacy Values

- The engagement of all voices and viewpoints, particularly the individuals and families who need and access social services and the social sector professionals who provide them
- The need to secure access and opportunity for all populations, with a view to reversing historical and current policy decisions that have created racial and economic disparities
- Support for prevention and early intervention strategies across all systems
- Support for results-driven policies that reflect an understanding of the most recent research on brain development and growth across the lifespan
- Support for multidisciplinary policies and financial changes that modernize public systems, drive cross-system functioning, and remove systemic and structural barriers that contribute to family and community instability

WAYS TO ENGAGE IN PUBLIC POLICY AND ADVOCACY

Check out the Policy Platform and Agenda

Our public policy platform describes the fundamental values that undergird our policy work. The 2020-2022 Federal Public Policy Agenda describes the specific policies that we advocate for in our ongoing efforts to create a healthy and equitable society.

Sign up to Receive Policy Updates via Email

Sign up on our website to receive our bi-weekly policy-focused e-newsletter, which covers federal policy issues; quick and easy ways to take action; the latest on campaigns, tools, and events; and curated articles and upcoming webinars.

Contact the Public Policy and Mobilization Team

Email **policy@social-current.org** to reach the Social Current Public Policy and Mobilization Office.

MAKING YOUR CASE

DEVELOPING IMPACT STORIES

Policymakers, the media, and other stakeholders respond strongly to personal stories. Whenever possible, it is recommended that you engage them by sharing examples of how policies will impact different segments of the population through real-life case studies and personal testimonials.

Statistics and data are important as well. When you weave them into personal stories, they provide a broader context while engaging your audience at a more emotional level.

IMPACT STORIES SHOULD:

- Get the listeners “hooked,” so that they want to hear more, and they build empathy and connect the listener to the subject of the story, or storyteller
- Illustrate the impact an issue or bill has within a legislator’s state or district. Having supporting data that aligns with, or supports the empathetic personal story is essential
- Create a problem and solution scenario
- Short and to the point (two to three minutes) as you will not have a great deal of time to share the story, build a relationship and make your ask and/or case

This outline will help in developing the first kind of story. When you tell your story, also plan to provide the audience with relevant factsheets or background handouts (one to two pages maximum).

“At my organization, my staff and I are meeting more and more families that are facing many challenges – whether from job loss, food insecurity, mental health issues or otherwise. For instance, the Gordons, grandparents in their 70s who live on fixed incomes, just became caregivers for two of their grandchildren because the stresses at home had become too much to bear. It is our collective responsibility to recognize that every child in our community has so much potential and ensure that all parents, caregivers and children have the support and resources they need to build a meaningful life.”

Key Elements of Your Personal Story

1. **Who you are:** Include your name, your organization, and the general area you live
2. **Who you are connected to**: Explain your connection to Social Current and our collective work
3. **Your motivation:** In two to three sentences, paint a brief picture that conveys your personal experience. An example would be:

Example of How to Frame an Impact Story

IDEA TITLE: Stories for Impact - Digital Stories for Social Procurement

ONE-SENTENCE DESCRIPTION: Change the Story, Change the World

ADDRESSING TOPIC: Social Procurement Challenge

Provide an overview of your solution and how it solves the problem along with a short description of your inspiration behind the idea:

Social procurement should be further along than it is today. But the problem here is rather like the chicken and egg: In order to grow one’s social enterprise, one needs investment, opportunities, and most importantly contracts. But when buyers don’t have a sense of what the enterprise can do and what scale it could operate at, they aren’t ready to buy.

THE STORY: WATCH ON YOUTUBE.

Impact Story Examples

Google for Education has a **story bank** you can filter to see the impact stories by subject. Imagine how these stories can be used to support appropriations for particular education program, for example.

HOW TO ENGAGE WITH YOUR LEGISLATORS

DEVELOPING YOUR FEDERAL ADVOCACY STRATEGY

A key step in developing an advocacy strategy is understanding who you are trying to reach and what messages will most strongly resonate with those members of Congress.

Begin with these five steps to educate yourself with the background information necessary for all future advocacy activities.

- Identify your members of U.S. Congress, their official websites, and their office contact info by **searching online**
- Sign up on your member of Congress's websites to receive regular email updates, invites to local events, and policy position statements to understand what they're saying. Every member of Congress has an e-newsletter
- Find out where your members stand on the issues related to Social Current's public policy platform and federal legislative agenda. Review their voting history at the **Vote Smart website**
- Set up Google Alerts to receive emails whenever your members of Congress are in the news
- Research through **Google News** and other tools to find out what local reporters have written about your members of Congress

MEETING WITH YOUR LEGISLATOR OR THEIR STAFF

It is important to provide the staffers/legislators you speak or meet with information about your organization and what you are asking of them. One of the best ways to do this is to share information in advance of the meeting and follow up after the meeting. Often advocates send materials after a meeting, but staffers have noted that it is beneficial to have these materials in advance of the meeting to help them prepare.

Make it easy for your legislator to meet with you by offering several possibilities for dates/times and doing your best to accommodate them.

Before the Meeting

- Research your legislators and their responsibilities in Congress. Read up on their professional backgrounds including their committee assignments, and their legislative accomplishments. Most of this information is available on individual legislators' homepages. For members of the U.S. Congress, individual homepages can be found on the House and Senate websites.
- Make an appointment in advance by email to either the scheduler in that office or the staffer who handles the issue area you want to speak about. It is recommended to call first and request the best email address for scheduling requests. Follow up with a phone call to the scheduler if you have not heard back after a week or two. Submit all scheduling requests with at least four weeks' notice.
- Prepare your three strongest talking points and an impact story. Your meeting will probably last only 20-30 minutes. Ensure that your information is accurate and be ready to answer questions.
- Send materials in advance of the meeting and bring them with you to the meeting and leave with the legislators or their staff.
- Wear business attire.

When You Arrive

- Arrive on time, but don’t be surprised if your meetings start late. Don’t be offended if you are asked to have your meeting in the hallway or cafeteria; this is merely a result of space limitations. It is quite likely that you will meet with a staff person instead of your elected official. Staff-level meetings are extremely valuable, as legislators rely heavily on them for policy advice.
- Be respectful. Because offices are small, loud conversations in the waiting area are not appreciated.

During the Meeting

- Identify yourself as a member of your organization and your connection to the Social Current network. All attendees should introduce themselves (including which community they are from) and start on a positive note. Thank those you are meeting with for their past support of issues you care about or for taking the time to meet with you.
- Start by explaining a bit about your organization and the work you do (two to three minutes).
- Explain why you are meeting with the legislator. Example: “I’m here to talk about the need for increased funding for early childhood education programs today.”
- Explain your position with the facts, but always use personal or local stories when possible. Legislators are most interested in how legislation will affect their districts and constituents. Never speak ill of another legislator, staff member, or advocacy group.
- Explain your specific ask. For example, state your legislative asks, including bill title and number.
- Ask for clarification if you don’t understand a position or statement.
- Open the conversation for discussion, allowing the legislator or staffer to respond with questions and/or their position on the “ask” you presented.
- Invite your legislators and their staff members to visit your site if appropriate.
- Share your value as a resource. Offer to be a source of information on the specific issues addressed, on your work with your organization, and on children, youth, communities, and the human-serving nonprofit sector more generally.
- Ask to take a photo with the member/staff and post it on social media with a message thanking the member. Include the member’s Twitter username and any relevant hashtags. (NOTE: Be sure to tag their official Twitter account (not their campaign account), which usually links to his or her .gov email address)
- Thank the legislator and the staff as you leave.

After the Meeting

- Write your legislators (or their staff) to thank them for their time. Reiterate your major points and remind the legislators of anything they might have agreed to do.
- Send any additional materials that were requested or follow up with the answers to questions.
- Share the results of your meetings with Social Current policy staff via email. Share insights you have gained about legislators’ concerns and interests.
- Maintain communication with legislators and their staff members through letters, calls, and visits when relevant. Share annual reports or other updates throughout the year.
- Invite your legislators and their staff members to visit your site if appropriate.

VIRTUAL ADVOCACY EVENTS

If you are interested in advocating as a team with other groups or organizations, virtual events are the perfect way to advocate on a large scale without the high costs and excessive planning that are required of in-person events, such as annual lobby days. Since the COVID-19 pandemic virtual meetings are being used more readily by organizations and/or coalitions to harness their collective power and meet directly with multiple legislators in one day (or week). Legislators themselves have become used to this medium of communication and connection, and many organizations are taking advantage of it.

Here are the main steps to pulling off a successful virtual advocacy event:

Planning: Six to Eight Weeks before the Virtual Advocacy Day

- Nail down the date(s) of your advocacy day. You can concentrate all your meetings on one day or spread them over three days or a week
- Create a centralized, accessible spreadsheet for everyone in your organization who is participating to view information (meeting dates, times, video call links)
- Decide on your main "asks," what would you like the legislators to do following the meeting
- Identify a point person for the following tasks:
  - Create common talking points for the meetings
  - Write a briefing/informational packet to send to decision makers before the meeting
  - Follow up with participants to update the centralized spreadsheet
  - Create an advocacy training for participants
  - Design an evaluation form to receive feedback from attendees after meetings

Scheduling: Reach out to Legislators and their Staff at Least Four Weeks in Advance

- Draft the scheduling request email, mentioning the advocacy day, briefly highlighting in a sentence or two the key issues you'd like to discuss
- Don't forget to include potential dates/times, remaining flexible to accommodate their busy schedules
- Send invitations well ahead of time—at least four weeks ahead; designate a point of contact for each targeted legislator, and who is responsible for reaching out and scheduling meetings
- Enter meeting dates, times, and virtual meeting links into the centralized spreadsheet
- Send calendar invites to all attendees with briefing packet, meeting links and agenda
- In advance, identify some, no more than five to seven, key stakeholders from your network that could participate in the meeting; this could include key program staff, clients, or other key community partners

Preparing: Finalize Remaining Details

- Schedule a training a week before your advocacy day to educate members of your participants on best practices for lobbying and advocacy
- Distribute talking points to attendees in advance, for their review and practice
- If necessary, run a series of meeting dry runs, testing video technology, promptness of attendees, and grasp of talking points and other advocacy materials
- Send reminders to legislators and their staff about the scheduled meetings, include briefing packets again for them to review beforehand. Send a reminder to your organization's attendees as well

Executing: Advocate for Your Community

- Hold group kickoff event to motivate attendees and provide last minute policy updates
- Meet with the targeted legislators (See "Meeting with Your Legislator" and "Meeting with Staff" sections above)
- Make sure to look at the camera, not the screen; turn off notifications; dress professionally; do not multitask
- Hold a group debrief session with attendees that day to receive immediate impressions and feedback; follow up with an email containing evaluation form
- Send thank you email to legislators, answering any remaining questions that may have been raised during the meeting

TOWN HALLS/LISTENING SESSIONS

Members of Congress regularly hold local town hall meetings or public listening sessions throughout their districts or state. Sometimes these are announced well in advance, and sometimes, although they are technically public, only select constituents are notified about them shortly before the event.

- If you can't find announcements online, call your member of Congress directly to find out or visit the **Town Hall Project website** for a full list of town halls by district.
- Send out a notice of the town hall to your organization's stakeholders and get commitments from them to attend; distribute to all of them whatever background information you have on your member of Congress, as well as the prepared questions.
- Prepare several questions ahead of time for your group to ask. Your questions should be sharp and fact-based, ideally including information on the member of Congress' record, votes they've taken, or statements they've made. Thematically, questions should focus on a limited number of issues to maximize impact. Prepare 5-10 of these questions and hand them out to your group ahead of the meeting. Example question:

"I and many district families in Springfield rely on Medicaid access. I don't think we should be rationing health care, and the plan to add a work requirement will limit access to Medicaid. The president and Speaker of the House have signaled their intent to add this requirement to any bill that would repeal and replace Obamacare. We believe this will create serious financial hardship for lower-income, out-of- work individuals. You haven't gone on the record opposing this. Will you commit here and now to vote no on any bill that adds a work requirement to Medicaid?"

- Share everything, including pictures, video, and your own thoughts about the event, on social media afterward. Tag the member of Congress' office and encourage others to share widely. Keep tweets and message topical. Nothing should be seen as an endorsement of the elected official or their campaign, keep all messaging nonpartisan.

Learn more about how to plan your own event in the section on **How to Host a Town Hall**.

CALLING YOUR LEGISLATOR

When the legislature is in session, you can call your legislators at their offices. Lists of members' names, office addresses, and telephone numbers are **available online**. You can also reach out to Social Current for contact information. When Social Current is running a coordinated call campaign, you can access contact information through our **Policy Action Center**.

It is likely you will talk instead to an aide or staffer rather that the legislator. Legislative staff are very reliable and will pass along what you say, so the same process and techniques apply whether talking with legislators or their aides.

1. Identify yourself by location, organization, and role
2. Identify the bill you wish to talk about, by name and, if possible, by number
3. Briefly state your position and how you wish your legislator to vote
4. Ask for your legislator's stance and for a commitment to vote for your position, but don't argue if the legislator has an opposing view or hasn't yet decided
5. If your legislator needs further information, ask to whom you should send the materials
6. Be respectful
7. Follow the call with an email restating your position and thanking them for their time

COORDINATING A SITE VISIT

Site visits, whether at your agency or at one of your project sites, are an important way to inform legislators about the work you do and the people you serve. They offer a firsthand view of what your organization is doing for the community. Plus, site visits help put a human face on complex issues. When your issue comes before them, you want them to have a vivid, firsthand image. But site visits only work when there is good planning and preparation. Five elements to plan for are:

Logistics of a Site Visit

- **Make an appointment.** When attempting to set up a site visit, contact the local, state or district office of your Representative or Senator. Ask to speak with the appointment's secretary or scheduler. Explain your purpose and whom you represent.
- **Be prompt and patient.** When it is time to meet with a member of Congress, be punctual and be patient. It is not uncommon for them to be late, to have a meeting interrupted (due to their crowded schedules), or to allow too little time for a thorough visit.
- **Be prepared.** Have available at the visit site materials that concisely present your issues. Personalize any materials with stories of individuals or with concrete examples of issues.
- **Be political.** Members of Congress want to represent the best interests of their district or state. Wherever possible, demonstrate the connection between the issue and his/her constituents.
- **Follow-up.** Follow up with member of Congress and leave an open invitation to visit the site again in the future.

Message (see Making Your Case - Developing an Impact Story)

- What is your key message?
  - What do you most want to get across to your visitors?
  - How will you convey the organization's mission in that message?
  - How can you connect the message to the work of Social Current?
- Given that key message, what one image do you most want legislators to take away about the work your program does and the people you work with and serve?

Setting

- Given the message you want to convey, what locations or circumstances would be best?
  - Consider time of day, location, area of the site, and what you pass by when traveling from place to place.

Messengers

- Who can best make your points?
  - What programs, classes, or activities should they highlight?
- Who would you want present?
  - Consider board members, volunteers, staff, clients, or neighbors.
- What would you want each participant to say or do?

Supplemental Materials

- What written materials should your legislator carry away from the visit?
  - What messages do you want to have available to your legislator during the days and weeks after the meeting?
  - What materials will provide an effective reminder of the visit?
  - What fills the information gaps?
- Are there any charts, graphs, or photos that may take time to digest but which provide helpful information?

HOSTING SPECIAL EVENTS TO PROMOTE POLICY

One of the most important steps in creating an effective event is to start with clarity around the key audiences you want to reach. Suggested target audiences include:

- Key government representatives (federal, state, and local)
- Community partners and influencers (Businesses, non-government organizations, other nonprofits and associations, and universities)
- Members of the public who will benefit from the new policy (one to two people whose personal stories exemplify why this new policy will be important to the community)
- Media (print, radio, television, and online reporters)

Once you have determined the target audiences of those most impacted by the proposed policy, you can begin to create the type of media event that will reach and engage each of those audiences. Types of events include:

- Policy briefing
- Reception (Include a program of no more than 30-45 minutes in length, speakers who can briefly describe the new policy/initiative, and stakeholders with personal stories who will be affected by the new policy)
- Town hall
- Press conference

HOW TO HOST A TOWN HALL

A town hall forum is great for starting an interactive dialogue and can be effective for managing a debate around a specific issue. Some tips to remember:

- Create and stick to an agenda
- Identify a strong moderator who has a good grasp of the subject matter and the ability to keep the conversation on topic
- Select panelists who can each speak about either the details of the new program or the challenges it addresses
- Hold a meeting before the event with the moderator and other key participants/panelists to discuss potential questions or problems and how to respond most effectively; each speaker should present his or her remarks in a two- to three-minute opening statement, followed by either a panel discussion and/or audience Q&A
- For the audience Q&A, set an established time for each question so that one questioner does not overly dominate the discussion; ask each questioner to identify himself in advance of asking the question

HOW TO HOST A PRESS CONFERENCE

It's important to remember that not every news or event announcement deserves its own press conference. They should be reserved only for stories that are compelling and newsworthy. For a story to be newsworthy, it should satisfy several of the following five characteristics:

- **Timing.** It's happening right now
- **Significance.** It's affecting a lot of people, especially the target audience
- **Proximity.** It's happening locally or to people with whom the audience relates
- **Prominence.** It's happening to a famous person or organization
- **Human Interest.** It's emotional

Some of the important elements to hosting a press conference include:

- A dramatic location that adds to the story
- Strong visuals and good photographic opportunities
- Having key players in one location to make statements and answer questions
- Opportunity for individual, post-press conference interviews with key players

Choosing a Time and Location for a Press Conference

Journalists work under tight deadlines. If you hold a press conference too close to when a reporter must file their story, they won't be able to attend. It's important to research the deadlines of local journalists and plan accordingly. Avoid Mondays and Fridays because these days are likely to be the busiest for journalists. Mornings are always preferable since it gives daily newspaper and broadcast journalists more time to write their story.

A press conference location is equally important for attracting journalists and serving their professional needs. Some locations make it difficult to meet the technical and logistical requirements of the media.

Some things to consider when choosing a location:

- Having enough parking for important people and media
- Availability of a stage, podium, and audiovisual aids to present information
- Adequate seating for journalists and guests
- Enough electrical outlets to plug in computers, cameras, and audiovisual equipment
- Ample room for TV cameras to set up their shots; consider a raised platform in back
- A multi-box that allows media to receive direct audio feeds from one microphone

Invitations to a Press Conference

Journalists are typically assigned a beat, or specific news area to cover. Direct press conference invitations to journalists and publications that have a proven interest in your news or event announcement. A media advisory is used to invite press to the event and should explain the news or announcement without giving away the entire story. It should also list which key spokes-persons will attend the event and their availability for one-on-one interviews. Shorter than a press release, media advisories function as an invitation, detailing the date, time, location, and other logistical information for attendees.

Press releases are issued during and after the event and highlight what was announced and who said it. Media advisories should be sent out at least a week in advance of the press conference, and it's a good idea to make a reminder follow-up call or email to the journalist a day before the event.

Deciding Who Speaks and What They Will Say

Press conferences need a moderator or facilitator to introduce speakers and run the Q&A session. Speakers should be selected based on those who can communicate well, as well as those who have a compelling story to tell. Potential speakers include:

- Government representative/legislator (you may not be able to control their message)
- Stakeholders/partners
- Citizens with compelling personal stories
- Donors/funders
- Subject matter experts who can speak to pertinent local issues

Here are some media training tips for speaking at a press conference:

- Statements should take 10 minutes or less and be built around key talking points
- Speakers should be prepared with short, clear answers to expected questions
- Use visual aids, such as posters or slide presentations, to make your message clearer
- Rehearse statements on camera including mock Q&A format sessions

Assembling a Press Kit

A press conference's main goal is to make the journalist's job easier, so supply good soundbites and photo opportunities. Give journalists additional pertinent information in a press kit, sent by email or on a flash drive. Look to include:

- A press release summarizing the story, important facts, and key players
- Bios, photos, and logos for the key players
- Fact sheets with any graphs or charts presented during the press conference
- Contact information for follow-ups and interview requests
- Video and audio files

Backdrop/Signage

You will want to create a backdrop and signage for your event that includes logos or seals for the organization you represent, as well as any for partner organization(s). Other options are to create a "step and repeat" backdrop, which uses logos/key messages in a tiled format so that no matter which camera angle is used, the images and words are visible behind the speaker(s). Other signage you may need includes:

- Podium sign (if podium is used)
- Directional signage
- Media check-in sign
- Guest check-in sign

Running a Press Conference

Organizers should arrive at least an hour before the press conference to check the physical and technical setup of the room and to help camera crews get their equipment in place.

Make sure parking is easy to find, close to the location and free (or validated). If you expect TV coverage, arrange for special places to park satellite trucks. Direct journalists to the room in which the conference will be held, making sure that all routes are wheelchair accessible.

A greeter should direct journalists to the media check-in table. At the table, staff members can check press credentials, answer questions, share the press kit, and provide a program. Staff can then direct the journalists to a clearly marked media area. Providing food and drink is optional, unless the press conference runs through lunch.

Start the press conference on time, even if only a few people have shown up. This shows respect for reporters' deadlines. The focus should always be on giving the journalist what he needs to do his job. The moderator should keep things moving, never indulging in lengthy introductions or rehashing material that's in the press kit.

The press conference shouldn't run more than 30-45 minutes including the Q&A session. The moderator should ask reporters to identify themselves before asking a question and might want to repeat the question, so everyone can hear it.

After the conference, it's a good idea to email press kits to journalists who showed interest in the press conference but couldn't attend.

Phone/Virtual Press Conferences

An alternative to hosting a live press conference would be to offer local journalists a virtual press conference by phone or online, where an organizer invites a group of attendees to either dial in to a press briefing or watch a live, streaming, online video presentation. The greatest advantage of a phone or virtual press conference is that journalists don't have to leave their desks to attend.

To hold a phone press conference, you will need a conference line that can host up to 25. In your media advisory, send the dial-in number to journalists along with the start time. You may also want to invest in a transcript of the call, which they can provide at an additional cost. To hold a virtual press conference, you'll need a video camera and video conferencing software.

Keep in mind that virtual press conferences do not allow for photo-ops and TV news journalists can't use online video for their broadcasts because the quality of the video stream is too low.

ENGAGING ALL VOICES

HOW TO ENCOURAGE CONSTITUENT ENGAGEMENT

Constituents frequently feel like lobbying or advocacy is reserved for large corporations or other interest groups. As such, many constituents need encouragement to participate in meaningful engagement with their communities and their elected officials. Luckily, nonprofit organizations have enormous potential to boost policy engagement amongst community members. For instance, community-based organizations have the potential to organize advocacy opportunities for constituents to promote the change they would like to see in their communities.

Legislators are very receptive to the perspectives of their constituents, especially when it comes to real-life stories. Studies have found that direct constituent interactions have more influence on a lawmaker's decisions than other advocacy strategies. Members of Congress also place a high value on groups and citizens who have built relationships with the member and his or her staff.

Here are some ways you can start organizing constituents around advocacy:

- Reach out to clients about civic engagement interest
- Organize an educational session on advocacy and why it matters
- Make tools for clients to know their local, state, and federal legislators and contact information
- Organize a group of clients to speak directly with legislators on a community issue, giving them the resources to effectively prepare for these meetings, including lots of time to practice
- Create materials for constituents to easily refer to any facts, statistics, or policy information to support them in advocacy
- Remember that advocacy requires commitment and be respectful of their time

By removing some of the barriers to advocacy, we can create better relationships between community members and legislators, while also building community involvement and connections for clients.

COALITION BUILDING

Organizations expand their advocacy power by partnering with other organizations to pursue common goals. By building coalitions, you can harness the network, finances and expertise of your partner organizations and bring your collective power to bear on the policy making process. Here are the most important steps to take when building a coalition.

Map Potential Partners

- Identify individuals and groups that are related to the issue you intend to work on and/or the advocacy goal you intend to achieve
- Cast a wide net; include organizations that both directly overlap with, and are tangentially related to, your interests. Examples include other community-based organizations, health care providers, PTA, chamber of commerce, local child welfare agency, elected officials, community leaders, student groups

Recruit Partners

- Speak with potential partners about the coalition's benefits, membership responsibilities and potential timeline
- Consider the ways each potential partner would be impacted by the realization of your goals
  - Do your goals improve their community? Affect them financially? Help them achieve their own mission? Fit into their vision or culture?
- Consider how each potential partner would benefit from membership in the coalition
  - Would the coalition connect them to influential individuals? Provide good public relations opportunities? Give them access to potential volunteers and supporters?
- Consider offering different levels of participation, distinguishing between those who want to jump right in and those who want to make a smaller upfront commitment

Identify Vision and Common Goals

- Convene meeting(s) with partners to hash out the details of the coalition's vision and goals, which can range from raising public awareness to passing a specific piece of legislation
- It is crucial that each partner has a clear understanding of the goals and how those goals relate to their organization
- Develop a message that clearly and simply communicates to the public: The actors in your coalition, the problem(s) you want to overcome, and the goals you hope to achieve; aim for two to three sentences and memorize your message and use it often
- A concrete timeline is necessary at this stage

Create Coalition Structure

- Create norms and rules for conduct between coalition members
- Identify responsibilities for each role; potential realms of responsibility include leadership team, secretary, treasurer, communications, public outreach, policy, etc.
- Agree upon a decision-making process and structure; decentralize process with subcommittees or planning groups in charge of specific work areas
- Identify process for accepting new members
- Establish internal and external communication structure
- Create feedback loops to gauge satisfaction and receive feedback

Develop Funding Sources and Structures

- Identify potential funding sources, including, but not limited to, the **federal government**, state and local grant opportunities, private foundations, local businesses, and corporations
- Coalition members can also decide as a collective to each dedicate some resources to the coalition as a requirement for membership
- Community fundraisers, including raffles, auctions, and 5K run/walks are also popular ways for coalitions to raise money as well as increase their public profile

Now you have the fundamentals in place to get going! Remember, in the early stages it is important to identify and achieve a few concrete action items, such as meeting with an elected official, placing an op-ed in the local newspaper, or tabling at a coffee shop. Each action builds on the next, so it's imperative to start immediately!