Citizen and Community Advocacy Training

Updated for SIRC

Spring 2016

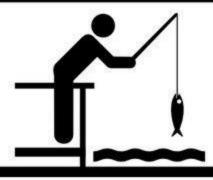
Timothy Schmaltz

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THEY EAT FOR A DAY.

IF YOU TEACH SOME-ONE TO FISH,



THEY CAN FEED THEM-SELVES UNTIL THE WATER IS CONTAMINATED OR THE SHORELINE IS SEIZED FOR DEVELOPMENT.

IF YOU TEACH
SOMEONE TO
THINK CRITICALLY
AND BE POLITICALLY
CONSCIOUS,



THEN WHATEVER THE CHALLENGE, THEY CAN ORGANIZE WITH THEIR PEERS AND STAND UP FOR THEIR INTERESTS.

Legislative Advocacy

- Policies Changes proposed to state laws
- Money Resources needed to provide for necessities of life and to protect children and families and vulnerable adults and provide for the common good.
- Politics Legislature, Governor, other elected officials and the public

Some HISTORICAL CONTEXT

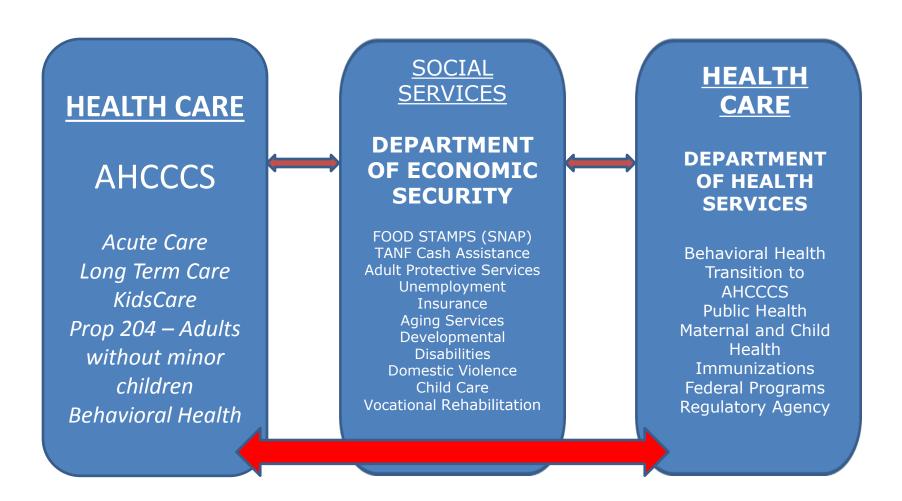
NATIONAL

- Election year
- President OBAMA FINAL TERM
- Trump and Sanders
- Republicans control the Senate
- Republicans control House of Representatives
- Health Care
- Migration and Immigration
- Wars
- Deficit as continuing issue
- Health Care will continue
- JOBS and unemployment
 - Federal Budget and Tax Cuts
 - The Wars
 - Energy and Environmental Policy
 - Immigration and border policy
 - Medicare and Medicaid
- Lots of others to consider!!!

STATE

- State budget
- Education Prop 123
- Tax Cuts
- Economy and Jobs
- Child Safety
- Health Care
- Immigration
- Health and human services (TANF and Behavioral Health Transition to AHCCCS)
- Others????

Overview of Health and Human Services "Safety Net"



Department of Child Safety (2014)

- https://www.azdes.gov/dcyf/
- The Arizona Department of Child Safety is a human service organization
- Dedicated to achieving safety, well-being and permanency for children, youth and families
- Through leadership and the provision of quality services in partnership with communities.
- Foster Care growth and Leadership Issues

Additional "Safety Net" Agencies

- Administrative Office of the Courts
 - Juvenile Probation
 - Court Operations like family court and child and adult protective services
- Department of Juvenile Corrections
- Department of Corrections
- Parts of the Department of Education like requirements for special education, child care food program and adult food programs.

Characteristics of Arizona's Approach to the Safety Net

- Public Private Partnerships
 - AHCCCS is managed care capitated reimbursement approach contracted with private health plans
 - DES many social services are actually provided by private non profit and for profit providers
 - SNAP UI –eligibility for TANF are primary state provided with most other services contracted
 - DHS Behavioral Health System is contracted with private for profit and nonprofit service providers.

Medicaid Expansion

- Up to 400,000 people who are poor and need health care coverage will now have the possibility of getting AHCCCS coverage under the Medicaid expansion passed by the Arizona Legislature to take advantage of Affordable Care Act health care reform implementation beginning January 1, 2014. (HB2010)
- Basically, the law expands eligibility for adults without minor children up to 138% of the federal poverty level. State matching funds will be provided through a hospital assessment.
- Children up to 133% are already eligible under health care reform.
- Medicaid expansion will help create 21,000 jobs, bring billions of dollars federal funds to Arizona's economy, help resolve uncompensated care issues in the health care community, help lower cost shifts from private insurance plans, and help build and sustain health care capacity for the full implementation of health care reform. http://grandcanyoninstitute.org/
- STATE COURT SUIT CHALLENGING THE "FEE" STRUCTURE OF MATCH.
- WAVIER AND LIMITS REQUESTS!

Branches of Government

FEDERAL

- Executive Branch –
 President and Cabinet
- Congress
 - Senate
 - House
- Supreme Court
 - Federal Courts
- Other groups Federal Reserve

STATE

- Executive Branch
 - Governor
 - Corporation Commission
 - Secretary of State
 - State Treasurer
 - Superintendent of Schools
 - Executive Agencies (DES, AHCCCS, DHS, Housing)
- Legislature
 - House and Senate
 - Legislative Council
 - JLBC
- Supreme Court

(County and City)

It's about POWER!

- A good idea is not enough.
- Being right is not enough.
- Organized money and/or organized people
- As citizens we have power if we are organized and act.
- Organized citizen movements
- Who can give you what you want?

Political Power defined

- Power is the ability to influence or control the outcome or results of a planned or desired action.
- Power is the capacity to control the results.
- Power is organized people or money focused to control the results.
- Power is organized strategies to achieve the outcomes desired.

Being Right is not enough!

- All too often groups believe that they will win because:
 - They are morally right.
 - Truth is on their side.
 - They have the best information and facts.
 - They speak for large numbers of people.
 - These qualities are indispensable, but alone, they are not sufficient.
- Being right is not enough. An group or community organization must also have the POWER to compel the person or people who make the decision to give the group what it wants. In every case there are strong forces on the other side that are trying to make that decision go in the wrong way. Strategy is about getting that power.

Lobbying and Advocacy

Lobbying

- Specific form of advocacy
- Persuading Elected officials --- Or others who can give you what you want --- are asked to take a position on a particular issue and vote a certain way
- Part of an advocacy campaign
- Legal Structure must register.

Advocacy

- Broad promotion of an idea or cause
- Every day people shape public policy through organized intervention
- Urging a change in public policy or organizing community change through a diverse variety of actions.
- Identifying what you want and who can give you what you want.

"Inside" vs. "Outside Game" Effective advocacy requires a coordination of two very different kinds of activity:

"Inside Game"

- Meetings with lawmakers and legislative staff
- Providing analysis and information to committees and legislative offices
- Testifying in committee
- Negotiating with policy makers and other lobby groups
- For the most part this type of lobbying is carried out by or in coordination with advocates who work on a regular basis at the Capitol.
- Legal activity which requires registration.

"Outside Game"

- Media activity including news conferences, editorial board visits, and assisting reporters with stories
- Local lobbying visits by constituents to their legislators
- Building broad and diverse coalitions
- Letter writing campaigns to legislators
- Grassroots activity such as rallies, etc.
- It is important that these kinds of "outside" lobbying activities be coordinated with "inside" lobbying activity, to assure that they make strategic sense in terms of timing, targeting, messages, etc.

Legislators are generalists

- Legislators are generalists, they see over 1000 bills a year
- Be a source of knowledge for them
- It takes 50 to 60 separate contacts with a legislator to make an impact
- If you don't know something, say so, and then get back to them with the information

Why Will Lawmakers and Policy Makers Listen to You?

- You are a constituent from their district.
- You have good reliable information. They are not experts in your field--you are.
- You are a trusted source based on professional background, community status or personal knowledge.
- You are representative of a group they want support from.
- Your comments are representative of a broad based cross-section of politically active people
- You and many others are personally affected by the issue.
- 2/3 of Legislators have college degrees and/or advanced degrees --- but are ideologically committed.

How Does a bill become law? http://azleg.gov/alisPDFs/hbillaw.pdf

- <u>Idea</u> turns into talk for change --and more talk
- <u>Research</u> current laws, past attempts, talk with experts
- <u>Identify</u> champions and opposition
- <u>Draft</u> with help of a champion House or Senate (Open a folder)

Who can make the change that you want? Who has to power to make the change?

- Draft ideas to a Legislator to <u>Legislative Council</u> to Bill Draft
- <u>Bill number Draft</u> with a— with primary and co-sponsor signatures
- First Reading (Second Reading)
- Assigned to Committee
- Committee Hearing
- Build support and anticipate opposition – count your votes.

How Does a bill become law? http://azleg.gov/alisPDFs/hbillaw.pdf

- Committee Hearing in Chamber of Origin
- Getting Committee Votes
- Going to another committee or Floor
- Party Caucus on Bill
- Committee of Whole (COW)
- Getting Floor Votes (Third Reading)

- Repeat in Other Chamber (House or Senate)
- If differences, "Conference Committee"
- Final Vote
- Governor (Signed or Veto)
- Becomes Law

It's about RELATIONSHIPS

EDUCATIONAL

- Getting to know them, family, church, education, ambitions, values, interests. (26 new members in House)
- Providing them with information and stories about your interests, causes and values as a constituent.
- Listening is a key skill in advocacy.
- Begin in between sessions or during election season.
- Do your homework!

ADVOCACY

- Urging them to act in a particular way on a particular bill.
- Cultivating Champions
- Being nonpartisan while being true to yourself
- Becoming a trusted source of information.
- Building relationships with key players who have influence

Types of Advocacy

- Education
- Organize your agency or group
- Join groups organized around an issue
- Write emails or letters
- Make Calls
- Make Visits
- Letters to Editor or Op-Ed
- Public Speaking
- Facility and Agency Tours

- Forums and Meetings
- Organized Rallies
- Neighborhood Caucuses
- Boycotts
- Action Alerts
- ACTION DAYS
- Candidate forums
- Elections, voter registration, voter education, voter turnout.

Advocacy Do's and Don'ts

<u>Do</u>

- Be polite and friendly
- Be concise
- Play on emotion
- Include personal relevance
- Mention that you are a voting constituent
- Thank them
- Follow up afterwards

Do Not

- Do Not Be Angry
- Do Not Be Hostile
- Do Not Be Threatening
- Do Not Have too much information
- Do Not Take up too much of their time.
- Do Not Lose Credibility
- Do Not Be Dishonest or Exaggerate

Champions and Allies And the Opposition

Champions

Committed advocates for your cause. Spokespeople. What they need is good information, and visible support outside the Capitol.

Allies

Another group of legislators will be on your side but can be pushed to do more -- to speak up in party caucuses or on the floor.

Mellow Opponents

Will be clear votes against you, but are not inclined to be active on the issue. Keep them from becoming more active, lobby them enough to give them pause but not to make them angry.

Hard Core Opponents

Those lawmakers who are leading the opposition. What is important here is to isolate them, to highlight the extremes of their positions, rhetoric and alliances and to give other lawmakers pause about joining with them.

Key Targets (Primary and Secondary Targets)

- Fence Sitters Uncommitted on the issues
 - Potentially able to vote either way
 - Advocates must persuade them
 - Key targets perusable and open to new facts, ideas and pressure.
 - COUNTING THE VOTES!
 - Be realistic about persuasion!

Tips for a Successful Letter/E-m to a Policymaker

Be brief and to the point.

- Identify yourself as a constituent
- Be clear about the specific issue and about what you want them to do, e.g. vote in certain way on a bill or budget item.
- Give some basic facts including why in one sentence you are interested in this issue.
- Tell a human story that supports the facts.
- Respectfully ask for the accountability questions.
- HOW ARE YOU GOING TO VOTE ON THIS
 ISSUE? (Closing the deal --- don't give away
 your power)

Tips for a Successful Phone Call

- Be prepared! Do an outline of what you want to say ahead of time.
- Most likely will talk to the assistant or secretary. Always be nice to the assistant or secretary.
- Identify yourself as a constituent or who you represent
- Be brief and clear!
- Urge action, but also ask accountability question: How will the legislator vote on this issue? (Closing the deal --- don't give away your power)
- Be prepared to call back to do follow-up.

Tips for a Visit

- Be prepared. **Never go alone** for a visit. Go with at least one other person. **Do your homework about the issue and the policymaker.**
- Prepare all parts of your visit ahead of time including: Introductions.
- Always identify yourself as constituents
 - Be specific and clear about the topic and what you want
 - Have a fact sheet and decide who will share it-just the highlights.
 - Prepare stories, be brief and compelling. Practice.
 - Prepare who will ask the accountability question.
- HOW ARE YOU GOING TO VOTE ON THIS ISSUE? (Closing the deal --- don't give away your power)
- Listen carefully to their response or questions. Be prepared to follow up with more information or calls to find out how your legislator will respond.
- Always THANK Them.

Role Play







Dealing with the typical "dodges"

- The "more information" dodge
- The "process" dodge
- The "pandering" dodge
- The "bait and switch" dodge
- Answers
 - What happens when they say NO!
 - What happens when they say YES!
 - What happens when they don't answer?

CITIZEN ADVOCACY/PERSUASION

- <u>FACTS</u> --- Numbers, Data, Specific Information, Research
- STORIES --- Putting A Face On Rational Facts, Humanizing The Numbers.
- <u>CITIZEN PRESSURE</u> --- Citizen actions, generating pressure, accountability actions, letters, phone calls, faxes, visits, accountability during meetings.

IT'S ALWAYS ABOUT POWER!!!

How do find your legislators and make a call to sent up an appointment.

- Find your legislator at:
 - http://www.vote-smart.org/index.htm
 - www.pafcoalition.org
 - http://www.azchildren.o rg/caa/welcome.asp

- Call your legislator and set up an appointment. Here is a sample script, usually with a secretary or aide.
 - I am a constituent from your district -#XX
 - I would like to make an appointment with the Representative (or Senator) to talk about (mental health funding, child care, whatever your area of interest) We will bring information about this topic.
 - I am with XXX and PAFCO. We will be there as part of PAFCO presence at the Legislature on Date and times.
 - (Be prepared for short visit.)
 - Thank you very much, we will see you then.

ARIZONA LEGISLATIVE INFORMATION SYSTEM



http://www.azleg.gov/

PUBLIC TESTIMONY

Communication Dimensions

- **Content** What I am trying to communicate, the overt message.
- **Process** How am I communicating?
- Context is a very important element of the process of communication.
 - Who is the audience?
 - Nature of the context, committee hearing, press conference, training workshop, inspiration to action.

Giving Public Testimony Preparation is the key

- Be Familiar with the Committee Process visit at least once before you testify to see how it all works.
- Know the protocol rules. (how to address chair and members etc)
- Know Your Audience committee chair, vice chair and committee members and staff
- Presenting Yourself be yourself, but presentable.
- Check Your Feelings (Emotional is okay, mushy emotional is not. Passion is great, but controlled and disciplined.)
- Maintain Eye Contact Use **notes** rather than written manuscript so you can develop good eye contact.
- Define What You Want be very clear! For or against and why!
 - Sum up Important Points
 - Provide Copies of Testimony
 - If you are testifying with a group: Make sure different people cover different topics so the testimony is not repetitious.
- 95% IS PREPARATION AND ORGANIZING YOUR GROUP TO SUPPORT YOUR TESTIMONY and being clear about your position.

Public Testimony – Common Characteristics

- Organize your group --- don't go alone or prepare alone!!! Bring lots of support!
- Dignified Dignity is expressed in testimony by paying attention to protocol.
- Logical Logical testimony starts with a statement of the problem, clearly states the testifier's position on the issue, provides a resolution of the problem, and recommends action to be taken that is rational and possible.
- Passionate Citizen testimony is always about telling your story. Emotions are stirred
 most deeply in testimony delivered by people directly affected by the problem; that is,
 people with disabilities or their family members
- Note: Good testimony has to be both logical and passionate parts.
- Accurate If you are using statistics to back up your testimony, make sure they are correct and up to date. Accuracy also means addressing only the topic being addressed at the hearing not straying into other issues. REMEMBER TO USE SOCIAL MATH as much as possible. Numbers numb.
- **Useful** The best testimony gives decision-makers something they didn't have before that will, either now or down the road, help to resolve the problem at hand. This is the area where most testimonies fall short.
- **Short** If you can't say it in three to four minutes, or less, you have a problem on your hands. Short, concise and well-delivered testimonies are usually received favorably by time-pressured officials, and also serve to make the testifier appear competent and incontrol. Long-winded and repetitive testimony has the opposite effect on everyone, including those waiting to testify.

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 - I am with XXX We will be there as part of XXXX presence at the Legislature on Date and times.
 - (Be prepared for short visit.)
 - Thank you very much, we will see you then.

Coalitions and Partnerships!

- YOU CANNOT DO ADVOCACY ALONE!
- Acting with others rather than alone!!!!
- Mobilizing existing resources and creating new advocates
- Flexibility and Action How to create energy for action!
- How to help and get help?
- Building a network and list spreading the word!

Lessons – Key Characteristics Effective Coalition Building

- Authentic Common Denominator and Goals
 - Solution oriented, not just definition of problems
- Committed Trusting Relationships
 - Conflicts are resolved in trust
- It's are about Power
 - Political Change Coalitions are always about building power, not just the issue or the campaign

- Action unities over infrastructure
 - Talk is important
 - Structure is important, but successful ACTION Unities
- Everything is strategic
 - Act, but think it through.
- Communication
- Shared Leadership
 - Charismatic
 - Pragmatic
 - All styles are welcome

RELATIONSHIPS AND TRUST

- Coalitions are public relationships for public purposes, but they still demand personal relationships and building of mutual trust.
- Do not underestimate the need for shared trust and mutuality.
- We build on existing relationships while building new relationships, among advocates and allies, build a web of cohesive trust.
- Conflicts will arise, only trust filled relationships and clear shared common denominator will overcome the conflicts.
- Create unique signs of solidarity shared messages, unique actions, buttons, etc

Shared Leadership

- Charismatic
- Pragmatic
- All styles are welcome













"One-on-Ones" (Building Leadership)

- A one-on-one is a personal conversation with an individual community member to learn about his/her concerns, level of interest and commitment for an issue, and the resources the person has to offer.
- THE GOAL IS TO ENGAGE THE PERSON IN YOUR CAUSE ORGANIZATION AND ADVCOACY EFFORT AND USUALLY TO BUILD YOUR LEADERSHIP GROUP.
- At the same time, the organizer can introduce the issues of the project/organization, and increase the level of awareness of the
- issue or problem.
- One-on-ones should take place in a quiet setting
- and last 30 minutes to an hour, during which time the organizer and
- the community member should develop a level of trust with one
- another.

Citizen Elections Participation

- When advocacy and persuasion fail
 - If we cannot educate, persuade or change policymakers/decision makers minds,
 - Then we must change the people making the decisions
 - Citizens election participation, voter education, voter registration, GOTV, and working for policy makers who are responsive to the all the people and the common good.

WHY VOTING?

- Elections really matter!!!!
- A critical piece of advocacy and public policy – elected officials pay attention to those people and groups who vote
- Sitting on the sidelines during elections leaves you with less power and access after Election Day

- MORE clout and access for your organization – voter engagement makes you a player
- Leads to healthier people/communities
- It's about POWER!

www.nonprofitvote.org/pben efits-of-voting.html

IT'S LEGAL! NONPARTISAN GUIDELINES

for 501(c)(3) Nonprofits

May not:

- Endorse a candidate
- Make a contribution of money or resources

May do:

- Voter registration
- Voter education
- Get out the vote
- Candidate forums
-and staff can do more AS CITIZENS
- www.nonprofitvote.org

Trusted Messengers!

- Nonprofits as Trusted Messengers
- Voter Registration
- Permanent Early Voting List
- Voter Education
- Candidate Forums
- Voter Tracking and Voter Contact
- Voter Turnout (GOTV)

- Ability to integrate/embed nonpartisan voter engagement into ongoing activities
- Contact with new and underrepresented voters often missed by traditional methods – at least THREE CONTACTS
- Personal Contact
- Urgency A Reason to Vote

Media and Advocacy Communications

- Build Relationships!
- Have something to say! Be clear about your message. Get the facts and your "point of view" clear, concise, compelling, contrasting, credible, and be consistent and persistent.
- Know your target audiences, who are trying to persuade.
- Use alternative media like the Internet.
- Write Letters to the Editor Know your papers policies. How many words, timing, catchy, be different.
- Op-Eds Know your papers policies. Timing. Follow the guidelines, be clever and clear.
- Be strategic!!! Earned media thru press conferences and events.

People are not blank slates

- Facts are not enough. They are filtered through values and ideology.
- Facts are always subject to interpretation.
 - Do your homework get your facts right!
 - Why should anyone care?
 - Building the power to make change is necessary.
 - The Human Story: using emotion and passion
- Be honest, credible and consistent and persistent.
- http://www.frameworksinstitute.org/

Portrait to Landscape

portrait





http://www.frameworksinstitute.org/

Social Math

- Use social math to covert numbers to various metaphors, analogies and comparisons that have impact and relatable and understandable in ordinary terms and lives.
- Use metaphors to make more impact
 - 1.2 Million in AZ uninsured
 - This is the entire population of Phoenix
- http://www.frameworksinstitute.org/

SOCIAL MEDIA

- INTERNET AND EMAIL
- FACEBOOK
- TWITTER
- YOUTUBE
- BLOGS
- Text Messaging
- What else, what other ways?

- Echo Chamber around common messaging
- Populist movements building on social media

Compelling and Effective Narrative Framing and Reframing

- Anti Smoking
- Drunk Driving
- Seat Belts
- Pro choice
- "hope and change"
- Medicaid "restoration"
- religious "discrimination" of 1062
- Others???

Advocacy Writing – Some clarity

- Fact Sheets and educational materials – clear, concise, bullets, one page, summarize key points.
- What do your want and why
- What the logical elements that best communicate your "case" for persuasion?

- Topic Sentence
 - Supporting Facts and ideas
 - Context/Facts/Stories
 - Drive to a conclusion
- Rather
 - Conclusion with clarity first.
 - Last paragraph is first, then facts, stories, context.
 Always polite!

Hints for an Elevator Speech

- Quick concise statement of your idea or case
- "Elevator" 30 seconds
- Peak interest and get their attention, not all the detail.
- Focused on them, their interests and needs.
- Passion, but clear ideas.
- Natural and comfortable, be yourself.

- Introduce yourself & your issue
- Quickly describe your role & expertise
- State the case you wish to make
- Use details that are important to listener
- Briefly back up your case with data or research
- Suggest the solution
- Explain how you can help with the solution

Tips on Generating a Letter to the Editor — Remember Your C's

- Be Current Construct based on their guidelines and be timely.
- Be Clever, Clear, Concise. Your conclusion is probably your real first paragraph.
- Connect the Dots Relate your topic issues with other issues, how it affects what's left of the pie for all other programs, government waste, debt relief, education and many others.
- Be Creative in connecting the dots to other issues in the newspaper.
- Be Controversial have a clear point of view. Be passionate.
- Coordinate Your Efforts have many in your group write in.
- **Be Contagious** encourage others to get into the dialogue.
- Contact information include your address, e-mail and a daytime and evening phone number.
- Your conclusion is probably your opening paragraph and main point.

Why Advocacy?

CITIZENSHIP/COMMUNITY

- WE LIVE IN A DEMOCRACY.
- NOTHING ABOUT US WITHOUT US.
- INJUSTICE CAN BE REMEDIED!
- WE LIVE IN COMMUNITY.
- WHAT EFFECTS ONE OF US, IMPACTS ALL OF US ONE WAY OR ANOTHER?
- WE DO HAVE RESPONSIBLITIES TO ONE ANOTHER!
- WE HAVE POWER WE NEED TO EXERCISE IT.

Passion – Voice - Power

- Find your *passion* --- that cause or group that motivates you to act.
- Find your voice --- your role, your way to be an effective citizen and leader advocate.
- Find your power --- connect with others to give practical ways to have real impact for your causes.

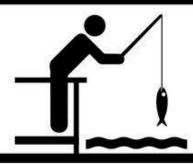
Democracy - Ending where we started, building power among people impacted!

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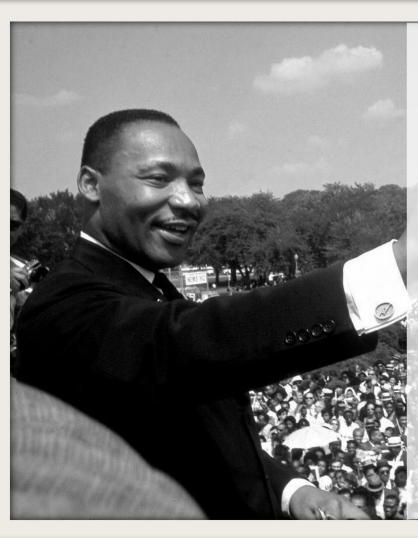
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Frederick Douglass 1857

 "There must be a struggle. Power concedes nothing without a demand; it never has and it never will."



"Power without love is reckless and abusive, and love without power is sentimental and anemic. Power at its best is love implementing the demands of justice, and justice at its best is power correcting everything that stands against love." Martin Luther King Jr