State Advocacy Basics

By Arohi Pathak and Vanna Cure
Contents

- Why advocate now?
- The legislative process: state overview
- Advocacy strategies
- Power of an advocacy coalition
- Fighting fatigue
- Advocacy tools
Advocacy by Definition

Policy advocacy is the act of taking a position on an issue and sharing that position with someone who can do something about it to bring systematic lasting policy change.
Why Advocate Now?

- **Policy decisions affect everyone**—advocacy can help alleviate threats and/or strengthen policy decisions that create better outcomes for communities and individuals.

- **Not everyone can advocate**—advocacy gives a voice to those most impacted by policy decisions. While many low- and moderate-income households are not able to advocate for themselves, 501(c)(3) organizations are in a unique position to highlight their voices and stories.

- **Because advocacy works!**—effective advocacy can result in opportunity and better outcomes for the communities you work in, giving low- and moderate-income families a shot at a better life!
Understanding the State Legislative Process

Each state has its own process for considering and enacting bills, for information specific to your state: http://statescape.com.
Defining “Grassroots” Advocacy

- Local
- Driven by the needs, politics of a community
- Fueled by the support of local volunteers and coalition partners
- Seeks to affect change in policy decisions for generations to come
How Do You Advocate for Change?

Advocacy does not have to be scary. There are some simple ways in which you can advocate for policy change, including:

✓ Data and research to make your case for change

✓ Careful messaging and framing to build awareness, change public perception and move people to action

✓ Educating and engaging policymakers and other stakeholders

✓ Building a strong and diverse coalition or network of partners to amplify your voice and impact
Advocacy Strategies

Data and Research:

- Produce data and research to highlight pressing needs in your community; to make the case for policy change
  - ✓ For state and local data on indicators of financial well-being, visit the Prosperity Now Scorecard

Messaging and Framing:

- Share data and resources with elected officials to illustrate the implications of their decision
- Share stories about the impact of policy decisions on your community
- Write an op-ed or letter to the editor to share expertise on issue
- Use social media (Twitter, Facebook) to educate lawmakers and stakeholders about issue.
  - ✓ Don’t forget to tag policymakers and include relevant hashtags!
Educating and Engaging Policymakers:

- Host events (town halls, legislative breakfast, advocacy day, press conferences) to build public awareness about issue, to educate policymakers
- Invite policymakers to your organization/site to learn about an issue, service or program (elected officials love doing this, gives them a nice photo op!)
- Meet with your elected officials in person to weigh in on an issue or policy change
- Draft a petition or sign-on letter to express views on issue, ask coalition members for support
- Participate in a townhall and ask your elected officials questions about his/her policy positions
  - Hold them accountable to their stated positions!
- Submit comments or feedback on regulations as they are being developed
Advocacy Strategies (cont’d)

Building a Strong and Effective Coalition:

▪ Organize and mobilize stakeholders (coalition partners) to share their story and advocate for change

▪ Educate the public about the legislative process

▪ Introduce constituents to the legislators who represent them—remember, policymakers always want to hear from their constituents!

▪ Hold advocacy days to train coalition members and stakeholders on basic advocacy skills, to educate them about issue
The Power of Your Coalition

The impact of effective advocacy can be greatly amplified by a strong coalition. Coalitions are tremendous agents of change, helping to:

✓ Influence or develop public policy, usually around a specific issue

✓ Change people's behavior

✓ Provide services or coordinate service delivery more effectively and efficiently

✓ Pool and leverage resources for greater impact

✓ Build healthy, vibrant communities
Fighting Fatigue

- Remember that you are in it for the long haul—policy wins rarely happen over night
  ✓ It requires perseverance, incremental change and building the groundwork for future success

- Revisit your “why” frequently to ensure that your message and framing continue to resonate with key stakeholders, and reflect the reality of the political landscape

- Celebrate victories!
  ✓ This helps build credibility for the coalition, while also building momentum for future efforts
Advocacy Tools You Can Use
Coalition Building Tools

Effective coalitions articulate their vision and mission to: explain their group's aspirations in a concise manner; help the group focus on what is really important; and provide a basis for developing the group’s strategic plan.

**Vision statement**: one-sentence describing the aspirational, long-term social change you are trying to create.

- Articulates the social impact (i.e., what you hope to achieve)
- Shared by all coalition members, and is easily communicated
- Broad enough to include diverse viewpoints
- Inspiring and uplifting

**Examples**

**Newark Asset Building Coalition**: All Newarkers are empowered through knowledge, access, and financial tools to achieve financial stability, self-sufficiency, and economic prosperity.

**Idaho Asset Building Coalition**: All Idahoans have the opportunities, skills and supports to achieve long-term financial security
Mission statement: a statement that grounds your vision in practical terms. A mission statement describes what the group is going to do and why.

- Articulates the organizational impact or what group is going to do, in a concise manner (i.e., what you do to achieve your vision)
- Explains outcomes coalition is working to achieve
- Broad enough to include diverse viewpoints
- Can be used to brand coalition or market it to the public

Examples

Newark Asset Building Coalition: promotes well-being and financial stability for all Newarkers by increasing savings, reducing debt, increasing financial knowledge and skills, and improving access to wealth-building programs.

Prepare + Prosper (MN): the group and its volunteers work with low- to moderate-income people to build financial well-being through free tax preparation and financial services, products, and coaching, and by changing systems to create economic opportunity.
## Meeting with an Elected Official

<table>
<thead>
<tr>
<th><strong>DO</strong></th>
<th><strong>DON’T</strong></th>
<th><strong>PRO TIPS</strong></th>
</tr>
</thead>
</table>
| • Schedule an appointment  
• Identify your ask and three key takeaways  
• Ask questions and guide the conversation  
• Prepare a fact sheet to leave behind  
• Clearly communicate the ask  
• Take notes, highlight any follow ups  
• Thank the staff  
• Follow up with email offering to be a future resource/expert on the issue | • Assume the elected official or their staff is knowledgeable about your issue  
 ✓ This is your opportunity to educate them on your issue  
 • Argue, even if you disagree  
 ✓ Remember your goal is to build good relationships  
 • Arrive late or exceed scheduled time | • Small group meetings are more effective  
 • Even if the elected official isn’t available, meet with the staff  
 • Be prepared—research the lawmaker and their position on the issue  
 • Think outside of the box—consider props and visuals to make your case (leave-behinds)  
 • Tell your story!  
 ✓ Stories are a compelling tactic for helping an elected official understand how the issue impacts their constituents. |
Calling/Writing your Elected Official

**Do**
- Research the issue and the lawmaker
- Expect to speak with a live person
- Be concise—clearly make your ask and highlight important takeaways
- Take notes from the conversation
- Send a follow-up email after your call
- Be polite--thank the staffer/official for their time
- Offer to be a resource in the future

**Don’t**
- Panic: if you don’t know an answer to a question, just let the office know you will find the answer and respond via email
- Argue
- Discuss more than one issue at a time
- Be late or disrespectful
Messaging Tips to Drive Action

- Avoid *overusing* statistics and figures in action alerts
  - ✓ Pick two or three salient data points to make your case in a clear and concise manner

- Use clear and concise language, don’t use legislative jargon or abbreviations

- Explain how every day Americans will benefit from specific policy changes
  - ✓ Use a story to highlight the need or pain point of policy decisions

- Specify the urgency of your ask—why is *now* the right time for the elected official to act on your recommendations
  - ✓ New political landscape
  - ✓ Upcoming votes
  - ✓ Key legislative deadlines
Pitching an Op-Ed or Letter to the Editor

Do Your Research (which local publication is most likely to run your op-ed)

Find Contacts (identify the editors of the editorial and/or opinion pages)

Make Your Pitch (email editor introducing yourself; include headline, basic narrative, and key data points of the op-ed or LTE)

Follow Up (with a phone call if you don’t hear back in 24 hours)

Build the Relationship (even if an editor declines to run your piece, stay in touch, they may be interested in learning more about your work in the future)

Pro tip: If your op-ed or LTE is declined, select another newspaper and send them your pitch!
Writing a Letter to the Editor

✓ Keep it brief

✓ Grab the reader’s attention early

✓ Tell a personal story

✓ Don’t neglect facts

✓ Avoid political jargon or acronyms

✓ Tell readers how they can help

✓ Pitch your letter to newspapers of all size

✓ Use correct grammar
## Planning An Event to Educate Policymakers

Large events such as rallies, townhalls, and press conferences are great ways to educate lawmakers and other stakeholders on your issue.

<table>
<thead>
<tr>
<th>Basic Guidelines for Organizing an Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determine your goal for the event, and the audience you are trying to reach</td>
</tr>
<tr>
<td>Choose a target — determine who has the influence to help you achieve your goals, such as the Governor, county/city council member, elected official, agency head, etc.</td>
</tr>
<tr>
<td>Determine the appropriate venue for your event — such as in front of the statehouse, local townhall, public park/square, school or college campus, local business, etc.</td>
</tr>
<tr>
<td>Consider accessibility and attendance — if you hope to attract a large crowd, consider practicalities like parking, public transportation, handicap accessibility, and the need for a permit.</td>
</tr>
</tbody>
</table>
Social Media is Your Friend: Use It!

#Hashtag your way into the conversation
- Keep up with legislative movements
- Increase visibility for your organization by joining larger conversations

Create a Facebook group for your coalition
- Share upcoming events
- Share responses from elected officials
- Recruit!

Let pictures tell the story
- Instagram can paint a picture that emails can’t
- Share pictures of rallies and successful community events
To get comfortable with advocacy: practice, practice, practice!