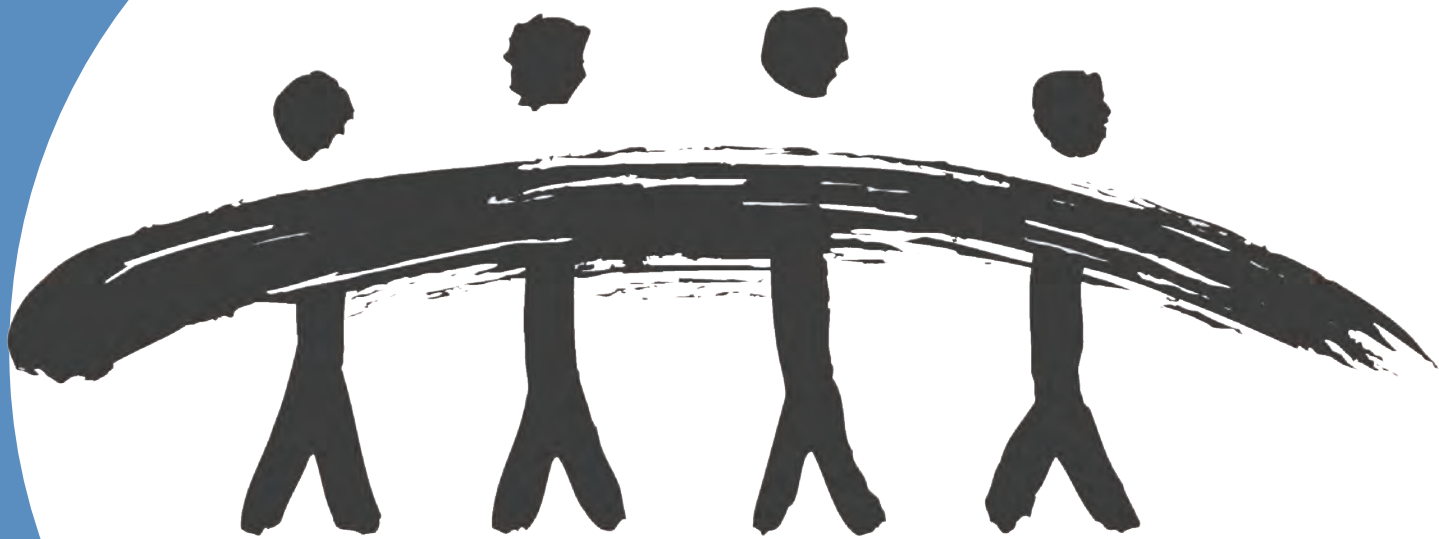


Advancing Advocacy: The Advanced Course



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A Project of the Texas Council for Developmental Disabilities

The view contained herein do not necessarily reflect the position or policy of the funding agency.

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Module 1: Basic Legislative and Systems Change Advocacy

In this module we will understand the basics of legislative and systems advocacy. In order to be an effective advocate, one must move beyond making a difference for the individual to making a difference for all individuals that are impacted by a particular system. We will understand the elements of creating and passing legislation. We will also understand how laws and rules can be affected by advocacy upon implementation. Finally we will understand that as individuals we have many opportunities to make a difference at various points of impact that effect the life of our family member with an intellectual or developmental disability. (The “Basic Legislative and Systems Change Advocacy” handbook will be provided.)



Module 2: Introduction: What is an “A-Team”?

Telling Your Story—The Case for Advocacy

Steps to Change—Advocacy Planning Cycle

Choosing an Issue—Defining the Path to Solutions

In Module 2, we will understand how to tell our story in a succinct and accurate way to present to decision makers. We will develop a clear definition of advocacy – individual and systems. We will develop an understanding of putting together a team of advocates. We will understand that advocating for long term change involves planning and follow-through. We will understand the means to turn our challenges or problems into measurable successes.



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What is an “A-Team?”

A-Teams are Advocacy Action Teams.

The mission of **A-Teams** is to:

- Build close working relationships with key legislators, local and state policy makers, and decision makers,
- Educate decision makers about the needs of Texans with intellectual and developmental disabilities, and
- Encourage those in authority to endorse resources and supports needed to create opportunities for people with intellectual and developmental disabilities to be fully included in their communities.

A-Team members are meant to be the eyes, ears, and VOICE of The Arc of Texas throughout the state. The major activities of an **A-Team** include:

- Coordinate activities that will support statewide disability policy, and local efforts;
- Work with The Arc of Texas staff, who will assist with advocacy efforts as needed;
- Meet with legislators at least twice each year, building relationships with key decision makers and their staff;
- Identify issues of importance in local communities;
- Develop and implement strategic plans to impact positive change for those effected by issues;
- Build consensus and coalitions in local communities to address issues at the grassroots level; and,
- Foster new advocates to keep the momentum of action in your A-Team’s communities.

These training modules are meant to help you, and other advocates in your community, begin the steps of advancing advocacy at the most basic levels. While each section can be presented and tested individually, the modules are meant to build on one another. Our hope is that a living, breathing, working **A-Team** plan will be the result at the end of the training. We promise to help you and your fellow advocates implement that plan, and start influencing issues in your backyard *today!*

Telling Your Story—The Case for Advocacy

(Adapted from “Telling Your Story: A Guide to Preparing Advocacy Case Studies”, © 1992 The Advocacy Institute.)

What is advocacy?



A number of different types of advocacy exist. The strength of each advocacy type depends on how well the individual, group or organization's efforts meet the key elements expressing in the definition of advocacy. They different types of advocacy can be categorized as individual or systems advocacy. Parent and self advocacy are also defined.

Individual advocacy is focused on the issues of a few people. Systems advocacy is a primarily concerned with influencing and changing the system (legislation, policy and practices) in ways that will benefit people with a disability as a group within society.

Parent advocacy is concerned with advocating on issues that affect the person with and disability and their family. Some Parent advocacy focuses on the needs of the parents first. Self advocacy is undertaken by persons or groups who share the same characteristics or interests on behalf of the same person or group.

Whatever the issue, advocacy campaigns seek to involve citizens in the policymaking process. Whatever the level - community, state, or national - activists use similar advocacy strategies. Local PTA members organizing to keep sex education in schools employ the same skills and techniques as other activists who lobby the city council,—or even Congress—for better laws to protect individuals with disabilities.

Within the advocacy community, our stories are told and retold. When advocates come together – whether in an informal situation or a professional gathering – we often find ourselves retelling the events from our latest project or campaign. Advocates try to look at past lessons to guide their future actions; often, they have to “reinvent the wheel” with too little guidance from those who have fought previous battles.

Citizens exercising their constitutional right to petition their government have the power to influence the outcome of a legislative decision. Only a drive to change or improve conditions for people with intellectual and developmental disabilities is needed to begin the process. This is what defines advocacy.

The skills and qualities needed by an advocate are:

- Knowledge of the process in which you are to advocate.
- Knowledge of the issue(s).
- Personal commitment to the issue(s).
- An understanding of when, why and how to communicate with decision makers.

So how do we actually start? Tell your story! We all have them. Some of us have a sibling with a disability, while others may have a disability ourselves. Either way, we all have a story to tell. The value to advocacy is how we relate our stories to those decision makers that can help us make changes to effect our—and other's—stories in a positive way.

Telling your story doesn't have to result in pages and pages of history. It doesn't have to be flowery or even formal. All it needs is a few key pieces to become a valuable advocacy tool. **Use the worksheet provided in this section, titled “Advocates, Tell Your Story!”** to begin crafting your story in a meaningful and targeted way.

Once we can tell our story, we have to determine how to best use our experiences to make changes in our communities. As referenced above, advocates need to understand the basics of the process in which they plan to advocate. While there are numerous processes we may advocate in, our focus throughout this training will be individual, systems, and legislative advocacy.

For instance, if we are advocating to ensure that our child receives the services spelled out in his IEP, we would not necessarily tell our story at a city council meeting. We would start by tailoring our story to advocate for our individual needs within the school system.

Alternatively, advocates would not tell their story to the mayor's office when they are trying to obtain increased state funds for community-based services. They would advocate within the state legislative system.

Take the quiz, titled “What Type of Advocacy Is It?” included in this section to see what you know about different types of advocacy.

NOTES:





Advocates, Tell Your Story!

"Tell Your Story" Advocate Worksheet

Sharing this information will help you inform your legislators and the public about the issues individuals with intellectual and developmental disabilities face. You can write about anything you like. Here are some ideas to get you started!

My issue is:

How my issue affects me:

Having proper supports could change my life by:

My struggles without supports are:

I want to share this experience with you because:

My hopes for the future are:

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What type of Advocacy is it?

What system needs to be impacted? List what type of advocacy it is: individual, systems, or legislative?

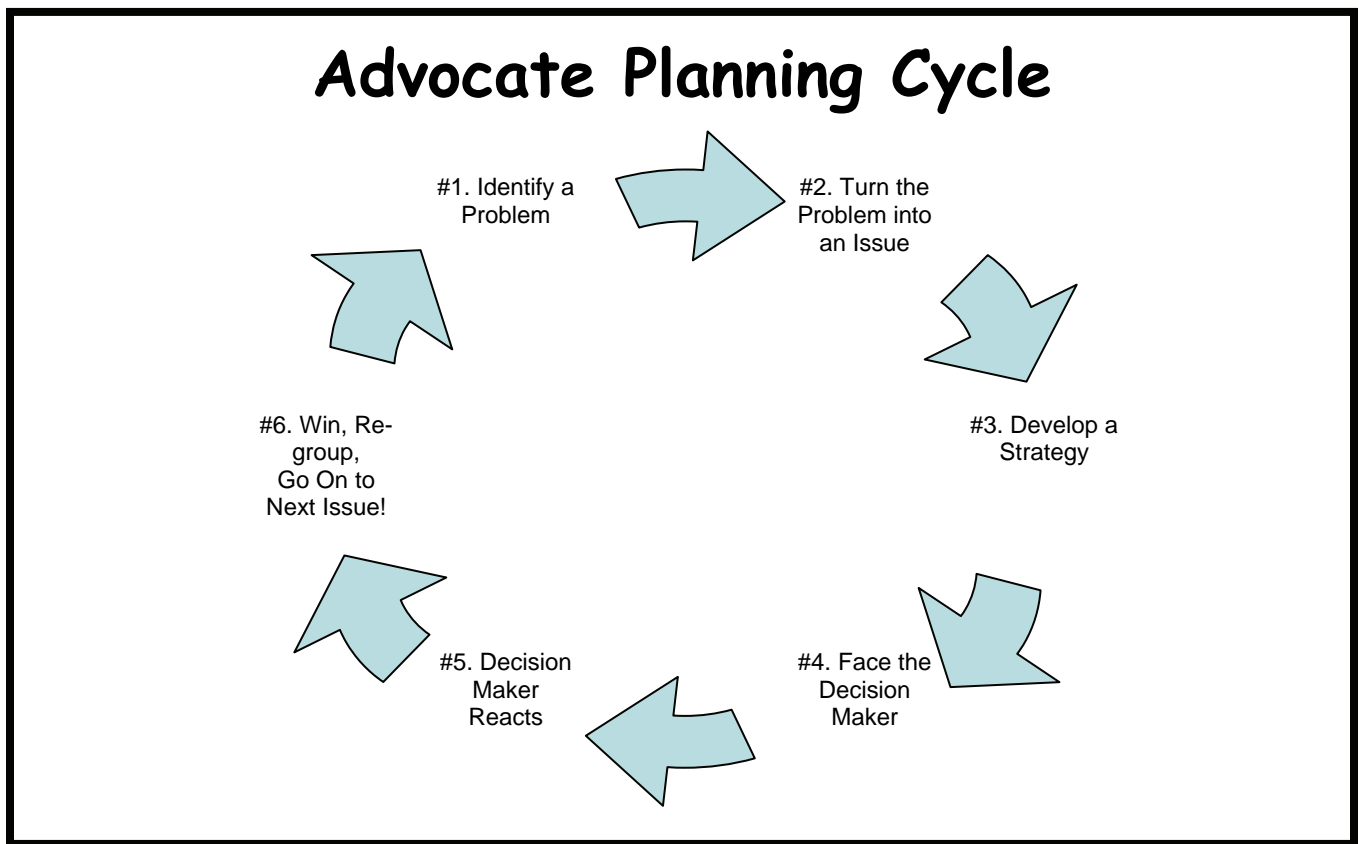
1. _____ A self-advocate bands together with other citizens to impact access to public transit in her city.
2. _____ A group of advocates visits their legislator's office to discuss increased funding for community supports.
3. _____ A man with physical disabilities works to improve access to attend spiritual services at his local church.
4. _____ A student with visual impairments talks to her teacher and IEP team to see if she can increase the number of times per week she can utilize another student's offer to take notes for her in class.
5. _____ A local group of professionals works to get their employer to increase available work time allotted for them to attend required continuing education courses.
6. _____ A group of advocates attends their city council meeting to persuade council members to approve funding for accessible play equipment in their city parks.
7. _____ A grandfather writes a letter to his Congressperson to ask them to support budget initiatives increasing funding for Medicaid Community Based Services.
8. _____ A teenager asks the local Workforce Center to accommodate his learning disabilities as he learns to look for a job.
9. _____ A parent asks for regular evaluations for their child to assist in annual IEP planning.
10. _____ Everyone in this class emails their state legislators to encourage them to support funding for community supports for people with disabilities!

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Steps to Change: The Advocate Planning Cycle

(This section is adapted from the Midwest Academy's "Six Steps of Direct Organizing.")

When advocates engage in advocacy, it is to win a specific issue, that is, a specific solution to a problem. An advocacy campaign usually goes through a cycle, or stages. They include identifying the problem, turn the problem into an issue/solution, developing a strategy, bringing the issue to the attention of a decision maker, getting reaction from a decision maker, and winning/regrouping/reorganizing.



1. **Identify a problem:**

The people who have the problem agree on a solution and how to achieve it. They may define the problem narrowly: "My brother with an intellectual and developmental disability does not live in his neighborhood." Or, they may define it more broadly: "People need to be able to choose where they live." If the advocate wants people with intellectual and developmental disabilities to have a choice about their community living options, then building a coalition to improve community living access might be the best way to address the issue.

2. *Turn the problem into an issue:*

There is a difference between a problem and an issue. An issue is a specific solution to a problem that advocates choose to work on. Advocates don't always get to choose problems; often problems choose you. But you always choose your issues, or the solution to the problem that you wish to win. A lack of support for community living is a problem. Changing the law to get the State to convert state institution beds for community living supports is an issue. An issue is finding the solution to a problem.

3. *Develop strategy:*

A strategy is the overall plan for a campaign. It is about power relationships and it involves asking six questions:

- What are your long- and short-term goals?
- What are your organizational strengths and weaknesses?
- Who cares about this problem?
- Who are your allies?
- Who has the power to give you what we want?
- What tactics can you use to apply your power and make it felt by those who can give you what you want?

From the answers to these questions, advocates can begin to see a strategy emerge. For example, the answers to the above questions might be:

- ⇒ The long term goal is for all persons with intellectual and developmental disabilities to live in the community of their choice. The short-term goal would be to change the way community living supports are funded in the state.
 - ⇒ The organization might have 50 advocates, but little funding for the campaign.
 - ⇒ People who care about the issue might include self-advocates, parents, and community members.
 - ⇒ Allies might be other disability organizations that have similar desires/issues.
 - ⇒ The funding for community living supports is determined by the members of the legislature. The person(s) that have the power to give advocates what they want may be the chairpersons of the Senate or House Finance Committee(s).
 - ⇒ Tactics could include a letter-writing campaign, town hall meetings, and media releases about the issue.
-
-
-

4. Face The Decision Maker:

Use large meetings and actions to force a reaction from the person who can give you what you want. That person is the decision maker, who we often refer to as the “target” of the campaign. The decision maker is always an individual person or number of individuals, never a board or elected body as a whole. Decision-making bodies must be personalized. So, if you are trying to get something passed by the State Legislature, for example, you don't say the decision maker is the State Legislature. Rather you need specific members of the Legislature to vote on your issue. Who are they? Name them. What is your power over them? Do you have members in their districts? Do you have members that know them in other walks of life? Use those relationships to gain access to the decision makers in question.

5. Decision Maker Reacts:

You either get what you want, or you have to go out and organize still larger numbers of people for a second round of the fight. If the funding for community living supports is not funded in the original budget, advocates need to get more people and use different tactics to influence revisions to the budget. Sometimes it takes several rounds before the fight is won. That is why we think of community organizing as a whole campaign; not just as a series of One-shot events.

6. Win, Regroup, Go On To Next Issue:

When advocates win real change in people’s lives, it is exhilarating! Seeing the Governor sign a bill into law after a long-fought campaign is just the goal advocates have worked toward. However, the momentum needs to continue to affect ever-present, ever-evolving issues. Use the excitement felt by advocates to impact future change, build relationships with decision makers and create coalitions with other organizations to continue making an impact in the lives of people with mental retardation and their families.

However, there are times (more often than advocates might like) that an issue is not won. This is simply an opportunity to make changes to your organization so that future issues can be won. It is important for advocates to pay attention to those lessons learned. In other words, what could we have done differently? What worked? What didn't? Turning those lessons into internal changes to a coalition or organization is a positive step as well.

Choosing an Issue—Defining the Path to a Solution

(This section is adapted from the Midwest Academy's "Six Steps of Direct Organizing.")

A lack of community support dollars. Not enough funding for ancillary services in the school district's budget. Inaccessible transportation in a community. No accessible recreation equipment for children with physical disabilities. If an issue is the gap between a problem and the proposed solution, how do advocates choose the issue on which to work? Like all other issues in life, advocates have to prioritize.

First and foremost, groups must ***choose a unifying issue*** to bring advocates together. For example, a coalition of groups representing various disability groups might be built around issues surrounding the civil rights of those with disabilities. However, an issue that only meets the needs of one group versus another can divide a coalition before it has the chance to effect positive change for anyone.

Use the worksheet in this section, titled "Identification of an Issue" to identify issues that are important to members of your advocate group.

When there are so many issues that advocates care about, how do we prioritize? We start by being realistic, and by looking at our resources. How many advocates will work on a given issue? Who else cares about it? Do we have the resources necessary to effect the needed change? We have to have criteria by which to measure our ability to impact the issues.

While there are many criteria to evaluate an issue by, here is a list of some of the most important to consider. For example, will the issue:

- 1. Win real improvement in people's lives?**
Will winning the issue be valued by the intended "customers" of the initial problem. For instance, if advocates win an accessibility improvement to the local community center, how many people will benefit or "feel" the win on a regular basis?
- 2. Alter the relations of power?**
After the campaign, will decision makers and other community members see your group as having influence or political power? Does your group now have the power to impact issues or persuade community members in a way that you did not originally have?
- 3. Give advocates a sense of their own power?**
Do advocates have a sense of their influence on the political or systematic process? Do they feel energized and validated by their efforts?
- 4. Be worthwhile?**
Is the effort made to impact the issue meaningful enough for advocates to care about it?

- 5. Be winnable?**
The issue must be one that is not so large that advocates cannot have an impact on it.
- 6. Be widely felt?**
Many people must be able to feel that this is a necessary issue worthy of advocate action.
- 7. Be deeply felt?**
Advocates need to feel strongly about the issue, not just agree with the issue. Without this deep belief, advocates have trouble “buying-in” for the long haul.
- 8. Be easy to understand?**
If advocates cannot verbalize the issue in 10 words or less, communicating the need for change will be lost on decision makers and other community members.
- 9. Have a clear target?**
A target is not a group or body of people, but one person that has the power to say “yes” in the end.
- 10. Have a time line that works?**
An issue that is being voted on by city council in one week, and advocates have an issue that will take a month to implement a strategy on, is not one that can be impacted in the necessary time frame.
- 11. Be non-divisive?**
While groups of advocates may come to the table with multiple issues on their plate, issues that divide the group’s attention and endorsement will only cause a rift. Nothing will be affected if the group is busy fighting amongst themselves about a single issue.
- 12. Build leadership?**
At the end of a campaign, are there leaders that have emerged in the group? A good issue can help the group gain strength and leadership for future issues.
- 13. Set up future efforts?**
Will winning this issue help set up the group for the next big issue?
- 14. Have a money angle?**
Does the issue involve money? If asking for an increase in funding from a decision maker that doesn’t have any to give, how feasible is it to win?
- 15. Help raise money?**

Does the group have a need to also raise funds for its infrastructure?

16. Be consistent with group's values?

If a group's overarching mission is to increase employment options for people with disabilities, will an issue pertaining to accessible recreation equipment in one local park be consistent with the group's goals?

Once advocates can determine which criteria are important for any issues they work on, prioritizing issues (out of a laundry list of problems) becomes much easier! **Use the worksheet provided in this section, titled "Criteria for Choosing Issues" to prioritize two issues of importance to your advocate group.**



Identification of an Issue—Worksheet

Issues are defined as the gap between a problem and its solution(s). An example might be:

List the problem:

My child isn't getting what he needs in his classroom. He needs a one-on-one aide and the school won't provide one. They say there isn't enough money to pay for one.

List the solution:

My child has a one-on-one aide during class time, provided and paid for by the school district.

List the ISSUE:

Increase funding for special education services funding in the local school district by 15% in the next budget year.

Use the space provided below to define an issue in which YOU are interested in.

List the problem:

List the solution:

List the ISSUE:

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Criteria for Choosing Issues Worksheet

	Ask Yourself: What criteria are important to me/our advocate group?	Issue #1:	Issue #2:
Will the issue...		(Select criteria for Issue #1)	(Select criteria for Issue #2)
1. Win real improvements?			
2. Alter power relations?			
3. Give sense of own power?			
4. Be worthwhile?			
5. Be winnable?			
6. Be widely felt?			
7. Be deeply felt?			
8. Be easy to understand?			
9. Have a clear target?			
10. Have a timeline that works?			
11. Be non-divisive?			
12. Build leadership?			
13. Set up future efforts?			
14. Have a money angle?			
15. Help raise money?			
16. Be consistent with a group's values?			

Module 3: A-Team Building Blocks

Building Block 1: Building Blocks of an A-Team

Building Block 2: Finding A Message

Building Block 3: Ready, Set...

Building Block 4: Who Can Say “YES”? / Who Can Help Make the Decision Maker Say YES”?

Building Block 5: Get the Decision Maker’s Attention

Building Block 6: Evaluate and Celebrate!

Module 3 is designed to give us an opportunity to experience “building” an advocacy effort. We will understand and practice the skills and information gathering that is necessary to make a difference. You may have already done some of these things but this will give you an opportunity to strengthen and improve your ability to impact any system utilized by your family member that has an intellectual or developmental disability.



Building Blocks for Building an A-Team

When people in a community come together for a common purpose, the synergy can energize advocates to impact the issues they care about. But how do advocates work together toward those common goals? One building block at a time.



Building Block 1: *Who Cares and How Much Can They Give?*

First, we have to find out who else cares about what we care about. We might meet other parents at our child’s school that have similar problems with a classroom teacher or administration. We might know other families who are experiencing the same medical issues our family is dealing with. We might meet other advocates that have the same, or similar, struggles with acquiring services in the community. Maybe you have a support group that meets regularly. The group may be ready to move from grief or frustration to action. However we find each other, it’s good to know others are in the same boat.

Next, getting a commitment from members that they want to be involved in making an impact on an issue is very important. While everyone will have varying time they can commit to spending on impacting an issue, knowing the time constraints up front is necessary to get a clear picture of a team’s ability to be effective.

One person needs to be the “leader” or “organizer” of the A-Team and its direction. This person will need to take some responsibility for making sure the team moves forward in any actions it wishes to undertake. [For more information, refer to the *Advocacy Leadership Team Assessment Form* in the *Working Together: Building Coalitions* section of this training.]

When that spark is there, the iron is hot for action to occur!

TASK: With the advocates at your table, or from your community, brainstorm a list of who else out there (organizations, individuals, advocates, businesses) might care about things you care about. Note next to each one whether anyone on your team has a contact with that group or person.



Building Block 2: *Find a Message*

Once we know who else cares about what we care about, the team finds the common message—or issue—they want to impact. But how do we know which issue the team should focus on? To be effective and utilize the time and resources advocates have, focusing the team’s efforts becomes paramount to success.

For example, a group of five advocates might have three different issues they care about. The Smithtown A-Team wants the town to improve access to city parks, ensure that accessible transportation is available to town members and get the school system to spend more on funding for special education students. Knowing that they have five advocates around the table and only two hours each of them can spend per week trying to make an impact may limit their ability to have an impact on ALL three issues. They use a set of criteria to decide where their focus will be (see the worksheet titled “*Criteria for Choosing Issues*”). It is not to say that each issue is not important, but they will need to be realistic about their capabilities and focus their efforts.

TASK: What issues would your A-Team like to work on during the next six months? (If needed, refer to the “Identification of an Issue” worksheet completed in a previous section.)

List the problems:

List the solutions:

List the ISSUES:



Building Block 3: *Ready, Set...*

Now is the time when an A-Team really takes form. The purpose of planning is not to make things “official” or “bureaucratic,” but to help the team have—and keep—a compass heading of where they are going. The team needs to frame the issue in a way that helps others understand that they are working toward a solution, not just listing problems.

For instance, if the team decides that their priority issue is going to be getting the school board to increase funding for special education purposes, the stated issue needs to be specific. Instead of saying to the school board members, “We want more money for special education in our schools,” the team might frame the issue by saying, “We want to increase special education funding by 10% in the next funding cycle.” The areas we want the funding to be budgeted for include hiring more classroom aides, and purchase of new equipment for use by students with a certain level of need.” Now the group knows when they are successful because they have made the issue measurable and easy to understand by other advocates and decision makers.

Once an issue has been identified and framed by the group, it’s time to figure out how to begin to impact that issue.

TASK: Use the criteria worksheet provided on the next page to begin to prioritize your A-Team’s direction. If you have four issues that are important to the group, prioritize them based on the criteria you determine to best serve your capabilities to impact the issue.

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Criteria for Choosing Issues Worksheet

	Ask Yourself: What criteria are important to me/our advocate group?	Issue #1:	Issue #2:
Will the issue...		(Select criteria for Issue #1)	(Select criteria for Issue #2)
1. Win real improvements?			
2. Alter power relations?			
3. Give sense of own power?			
4. Be worthwhile?			
5. Be winnable?			
6. Be widely felt?			
7. Be deeply felt?			
8. Be easy to understand?			
9. Have a clear target?			
10. Have a timeline that works?			
11. Be non-divisive?			
12. Build leadership?			
13. Set up future efforts?			
14. Have a money angle?			
15. Help raise money?			
16. Be consistent with a group's values?			



Building Block 4: *Who can say “yes”?*

Now the A-Team members look at the various factors that need to go into planning to impact the issue directly. Using the strategy chart, the group outlines what resources they bring to the issue campaign, what their limitations are, and who else cares about the issue. With those things in place, the team needs to figure out who can give them what they want. In other words, who can say “yes” to their issue?

In identifying a decision maker, it is important to remember that a body of people is never a decision maker. For instance, if the school board decides on the budget for special education funding, the person who has the final say in that process is the primary decision maker. In this case, it might be the school board president, or the superintendent. The team needs to figure out who has the power to say “yes.” That person is who all the tactics are geared toward to make the issue become a reality.

Building Block 4a: *Who can help make the decision maker say “yes”?*

This caveat is important because while advocates can have an impact on a decision maker, there are always other people in power or authority that have influence as well. These people are called “key contacts.”

For instance, if the primary decision maker for the issue is the school superintendent, is there an advocate or other interested person that has influence over them? Does one member of the A-Team work with someone who went to college with the superintendent, and does that person still have a relationship with the target? Is there someone out there that also cares about the issue enough to pick up the phone or meet with the target in another circle of their lives? Does the superintendent go to the same church as one of the A-Team members? Is there a relationship outside of the issue at hand that could help an advocate gain access to that decision maker? A-Team members can utilize these relationships to have indirect influence on the person that can give them what they want.

TASK: Use the worksheet provided on the next page to determine who your direct target is for your chosen issue. Also list who the secondary targets are (who has power or influence over your direct target?). Remember: a target is never a body of people—it is always a singular person.

Direct and Secondary Targets—Who are they?

<p>Who can say "yes"?</p>	
<p>Do we have influence over them, or access to them?</p>	
<p>Who are the secondary targets?</p>	
<p>Do we have influence over them, or access to them?</p>	



Building Block 5: *Get the Decision Maker's Attention*

Once the other factors are in place, it is the time to plan the actions the A-Team members will undertake to influence the issue. Based on the resources the team members bring to the campaign, others that care about the issue and the relative influence/access to the decision maker, the tactics—or actions—can be planned.

SAMPLE SCENARIO: Waterloo A-Team

The Waterloo A-Team currently has five members, with two hours each to bring to the effort. The group does not have any formal funding for materials or other needs. They know that the primary decision maker is the school district superintendent, and they know two key contacts that have access to that decision maker. Their planned tactics include:

- √ They plan to each call five other parents to let them know about the issue and will ask each parent to write a letter in support of their issue to the superintendent. They are asking the volunteers to write the letters in the next two weeks.
- √ At the next school board meeting in three weeks, they will attempt to turn out as many community members as possible to show support for their issue. To do this, they plan to make flyers to advertise the meeting, as well as develop basic talking points about their issue.
- √ One of them has a neighbor that runs a print shop, and that neighbor has agreed to donate the cost of printing flyers up to \$100. They will use this opportunity to print flyers for the meeting.
- √ Each A-Team member will distribute 50 flyers to their neighbors, as well as ask the local library, community center, day care centers and other community entities to post the flyers. That would mean 250 flyers distributed in the community in the next three weeks.
- √ The A-Team's leader will write a short statement and request to be read at the next school board meeting.
- √ Finally, another A-Team member will turn their issue talking points into a short news release and submit it to four local media outlets.

TASK: Use the sample scenario above to develop a strategy chart for the Waterloo A-Team. This will help you to know what additional information may be missing from your team's situation!

Once you've completed the sample chart individually, work with your team to (1) complete a strategy chart for your issue(s) and (2) develop a timeline for when each tactic and/or task will be completed and by whom. Use the skills and knowledge you've gained today to develop a reasonable strategy chart and tactics.

Blank “Strategy Chart” worksheets and an *Eight-Month Planning Calendar* are provided at the end of this section.

NOTES:

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Strategy Chart Worksheet

Goals	Organizational Considerations	Constituency	Decision Maker	Tactics



Building Block 6: *Evaluate, and Celebrate!*

The A-Team members need to celebrate their success! If the team won its issue on the first time out, fantastic! Now it's time for the members to make sure the implementation of that issue is followed and done the way advocates intended. If it was a money issue that was won, does that mean the members need degrees in accounting and budgeting, as well as school administration? No. It just means that the A-Team needs to make sure that decision makers know that the issue was important enough for advocates to remain involved in the process.

Even if the issue was not won on the first effort, the team (hopefully) learned some things in the process. Who else cares about these issues? Were any relationships built with the media? Were there relationships built with decision makers that can benefit the next issue that comes up? Evaluate where your successes and challenges were. All of these things are valuable tools as the team regroups and plans for next steps.

TASK: Make plans with your team to begin implementation of your issue strategy, including follow up conference calls, meetings, information gathering, target dates—everything you'll need to hit the ground running!

Blank forms (“A-Team Planning” and Member Contact Information” sheets) are provided at the end of this training.

NOTES:



Module 4:

Developing a Roadmap—Strategy Building

Worksheet: *Strategy Chart*

Working Together—Building Coalitions

Article: *“Leadership Roles Within an Advocacy Movement”*
(Advocacy Institute, 2002)

Worksheet: *Advocacy Leadership Assessment Form*
(Advocacy Institute, 2004)

Module 4 will help you understand the necessity of designing multiple strategies to accomplish advocacy goals. We will understand that creating the correct tactics is essential to success. This training component is also designed to teach you how to expand your influence and increase allies. We need to move beyond our comfort level in working with individuals that we know in order to make lasting systems change. To do this we have to form alliances with individuals and groups that may have some differences. We can work with others on specific issues without committing to all that the others believe. However, we must be able to understand how to do this effectively. With this training, we will understand how to involve others to benefit all groups participating in our efforts and still accomplish our goals.



Advancing Advocacy: The Advanced Course

Developing a Roadmap: Strategy Building

One of the most important parts of an effective advocacy campaign is having a clear direction for your advocacy efforts, and an action plan for accomplishing your goal of system change. The strategy chart, shown below, is an excellent tool for advocates to get a sense of their resources, their direction and their specific plans on how to win their issue. The five areas to consider are goals, organizational considerations, constituency, targets, and tactics.

Strategy Chart				
GOALS	ORGANIZATIONAL CONSIDERATIONS	CONSTITUENCY	DECISION MAKERS	TACTICS
LONG-TERM	<i>What resources can you put into the campaign?</i>	<i>Who cares about your issue(s)?</i>	<i>Who has the power to give you what you want?</i>	<i>Media Releases Letter-Writing</i>
INTERMEDIATE	<i>How will you build the organization?</i>	<i>How are they organized?</i>	<i>Who are secondary targets?</i>	<i>Capitol Day</i>
SHORT-TERM	<i>What internal problems might you encounter along the way?</i>	<i>What power do they have? Who are your opponents?</i>		<i>Letters to the editor Meetings with legislators</i>

(Adapted from the Midwest Academy's "Organizing for Social Change", 2001.)

Goals:

In this section, advocates need to identify their long-term goal, their intermediate goal, and their short-term goal. A long-term goal might be: "Inclusion of all people with intellectual and developmental disabilities in community living settings of their choice." An intermediate goal might be: "Increased availability of supported living/group homes in every county." A short-term goal might be: "Increase state funding by \$500,000 for home and community-based services in this legislative session."



Organizational Considerations:

An organization is defined as a group of people who work together. In this case, it is a group of advocates. Some considerations must be made when organizing around an issue. What resources does your organization bring to the campaign, and what specific forms of organizational growth do you hope to achieve during the campaign? Here advocate groups must clearly (and honestly) outline how much money they have to dedicate to advocacy efforts, what kinds of staff and volunteer time they can realistically expect from coalition partners, what internal issues to the organization are there and how the campaign can build the organization for future efforts?

A sample here might be that an advocacy coalition or organization has only \$400 to dedicate to the campaign, but has three staff members that can dedicate a small percentage of time to the efforts, including use of their office space. They have 500 people on their mailing list, but only five or six active volunteers they can call to act. Finally, they hope to increase membership and volunteer involvement by 10% and 25 people, respectively. This gives the group a realistic view of what resources they have to implement an issue campaign.

Constituency:

This answers the question, “Who cares about this issue?” Consider how many people are already organized. How can the issue be illustrated to get the broadest support in the community? For instance, if the issue is about requiring all respite providers to have specific training in intellectual and developmental disabilities prior to providing support, would the list of people who care about this issue include also provider organizations, professional associations for providers or training, as well as the families of persons requesting support? This allows the issue to reach a broader audience, and builds support across a larger base.

It is also important to list those that may likely oppose the issue. Those that would be required to pay for training may be against the issue. The entity that would be responsible for providing the training itself may also object. Other groups that are vying for the same pot of money may even be opposed to the issue. Anticipating the nay-sayers helps advocates prepare for any possible barriers to success.

Decision Maker:

This is the person that can give advocates what they want. If advocates are asking for more funds in the state budget for further supports, the decision makers might be the chair of the finance committee that oversees that part of the budget. It might be the governor of the state, since he/she has final veto authority. It might even be the director of the agency that would be providing further supports. This is why it is vital for advocates to know the system well enough to know who to ask for what.

Tactics:

This is what the people in the constituency column do to the decision maker in order to force him or her to help advocates win their issue. Basically, what can volunteers or members do to the target (the governor, the chair of the Senate Finance Committee, etc.) to get them to act on the issue at hand.

For instance, advocates might list the following as planned tactics:

1. Meet with decision makers at community forum.
2. Write letters with individual stories about the issue to the decision maker.
3. Write letters to the editor.
4. Hold a press conference during in the decision maker's district to ask for action on the issue.

These tactics will likely change throughout the course of the campaign, as will much of the information in each column. Advocates should think of it as a flow chart—when one thing changes on the left of the chart, other things have to adapt to the change.

Use the “Strategy Chart” worksheet provided in this section to devise a strategy for your A-Team’s issue.

NOTES:

Advancing Advocacy: The Advanced Course

Strategy Chart Worksheet

Goals	Organizational Considerations	Constituency	Decision Maker	Tactics

Advancing Advocacy: The Advanced Course

Working Together: Building Coalitions

(Adapted from the Midwest Academy's "Organizing for Social Change", 2001.)

A coalition is defined as “an organization of organizations” working together to affect change on similar issues or concerns. They can be temporary or permanent depending on the goals of the coalition. But whatever the reason or longevity of a coalition, advocates build coalitions to build the power necessary to do something not able to be done by one group alone.

It is important to realize the advantages of participating in a coalition. Coalitions afford advocates the opportunity to:

- Win what couldn't be won alone!
- Build an ongoing power base!
- Increase the impact of an individual organization's efforts!
- Develop new leaders!
- Increase resources and relationships!
- Broaden the impact on issues of importance!

While the power of numbers is always greater than the power of one, there are things to consider before entering into a coalition with other advocate groups.

1. Is it a permanent or temporary coalition?

Temporary coalitions are for specific campaigns, while permanent coalitions address ongoing issues important to coalition members.

2. Who is behind the coalition?

It is important to know the driving force behind a coalition. Who or which agencies will be doing most of the work of the group? Who will get the bulk of the benefits or credit for the coalition's efforts? The answers can help determine whether the effort is worthwhile, and also if your organization can benefit by participating.

3. What is your organization’s self-interest?

Will your group of advocates be playing a leadership or membership role? Both are important, but each role comes with certain expectations and benefits. If your group plays a leadership role in the coalition, make sure the coalition’s issue(s) deeply affects your membership. This makes it more likely that your membership will get involved in coalition activities.

4. How can your advocates participate?

Make sure the tactics or methods designed to impact the issue(s) are designed so that your members can participate with relative ease. Will the coalition be employing tactics outside your members’ comfort zone or will the tactics appeal to your advocates?

5. How will participating in the coalition build your organization?

Since being a member of a coalition means more work, it also affords the opportunity for your organization to build its membership and support. While not all members of a coalition receive the same amount of attention or credit, it is important to consider how your organization can benefit from participation in the overall activities of the coalition.

Once those six questions are answered, there are three main steps to take to get started.

First, **identify who will call others to participate.** The committee of interested advocates should help determine which groups are most likely to be potential coalition partners. Use this committee to list all likely allies. For instance, if your group wants to address transition issues in a community, the obvious allies might include local vocational adjustment counselors or transition specialists, a state agency dealing with rehabilitation and work placement, local independent living centers or parent groups of students going through transition.

Next, think of the unlikely coalition partners. This list might include local chambers of commerce, businesses that currently employ persons with disabilities, the local transit providers, or community housing authorities. They, too, work with students as they transition from school to community living.

Most importantly, make sure that the coalition includes self-advocates. They can most readily speak to the issue or issues being addressed by a local community group.

Second, **select a good issue.** You have a good issue when you can show that it affects the community at large. This increases the likelihood that community members and organizations will see your coalition as one that affects change on a larger scale than individual problems or concerns. See more in the “*Choosing an Issue—Defining the Path to a Solution*” section of this handbook.

Lastly, **call an organizing meeting to set a goal.** Get the possible players together to talk about the issue or issues. Invite key community players to join the group at a brainstorming session. This can help narrow down whether or not the issue is one of interest to the community, or if there are other issues the group may have more influence and power to affect.

With proper attention given to all the pros and cons, coalitions can change the political landscape in a community.

For an interesting look at leadership roles within coalitions and advocacy efforts, refer to the article “Leadership Roles Within an Advocacy Movement” by the Advocacy Institute, provided in this section. In addition, you may want to work through the “Advocacy Leadership Team Assessment Form” (Advocacy Institute, 2004) with your advocate group in order to identify the various types of leaders in your group!

NOTES:



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Leadership Roles Within an Advocacy Movement

At the Advocacy Institute, we have spent more than a decade searching out the secrets of successful social change movement leadership. In books and case studies and in our daily interaction with stunningly diverse movement leaders, we've struggled to find guidance to help strengthen the leadership capacity of emerging community leaders. One way has been to develop an informal "taxonomy" of the leadership roles that seem essential to the success of a citizen movement. That taxonomy is rather loose, its categories shade into one another, a single leader may well embody a handful of the leadership roles, and we keep constantly revising it as we learn more about the movements we work with and observe.

Ideally, a movement must have a plurality of leaders, filling a cabinet of distinct, yet complementary, leadership roles. By utilizing a diverse cabinet of leaders, a movement develops a powerful dynamic that strengthens and emboldens, bringing the movement closer to optimum gains and successes.

The current version of the leadership taxonomy includes Visionaries, Strategists, Statespersons, Experts, Outside Sparkplugs, Inside Advocates, Strategic Communicators, Movement Builders, Generalists, Historians, and Cultural Activists.

Leaders who make up the leadership taxonomy each bring to the movements they serve a special skill set. Visionaries raise our view of the possible. Strategists chart the vision and achieve what's attainable. Statespersons elevate the cause in the minds of both the public and decision-makers. Experts wield knowledge to back up the movements positions. Outside Sparkplugs goad and energize, fiercely holding those in power to account. Inside Advocates understand how to turn power structures and established rules and procedures to advantage. Strategic Communicators deploy the rhetoric to intensify and direct public passion toward the movement's objectives. Movement Builders generate optimism and good will, infecting others with dedication to the common good. Generalists anchor a movement, grounded in years of experience. Historians uphold a movement's memory, collecting and conveying its stories. Cultural Activists pair movements with powerful cultural forces. The happy confluence of each of these leadership roles is the hallmark of a successful movement.

- **Visionaries.** Movements take flight through visionaries. Visionaries lift the horizons of others, setting goals that have never before been imagined or seen as realistic. Visionaries challenge the conventional view of the possible, aim high, take risks, and rethink priorities.
- **Strategists.** Strategists sort out that part of the vision that is realistically attainable, and develop a road map to get there. Strategists anticipate obstacles, including those laid by unruly coalition members, and provide guidance to insure that the movement remains headed in the right direction.
- **Statespersons.** Statespersons carry the movement flag. They are the "larger than life" public figures that embody authority and trust. Statespersons radiate credibility for the movement far beyond its core supporters.
- **Experts.** Experts ensure that all new discoveries and public policy positions are well reasoned and grounded in facts. They possess special skills and knowledge that lend credibility to and back up the positions.

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- **Outside Sparkplugs.** Sparkplugs are agitators: unabashed tellers of truth to power. They operate outside of conventional, political (or other) establishments, free of the ties that bind “inside” players, and capable of holding our governments and other established organizations up to their own rhetoric of mission and commitment. Sparkplugs can kick-start a movement or coalition and keep energy flowing through it. A community may be concerned, even outraged, but it may not be moved to action without a fiery goad. Sparkplugs are often irritating and difficult, but they churn up our collective conscience and annoy us into action.
- **Inside Advocates.** Inside Advocates are wise in the ways of the political process, they are skilled negotiators, and positioned to influence key policy makers. Inside Advocates occupy seats of power or establish an open door to them, intuit the approaches and arguments that resonate with policy makers, and press them in ways that are not easily dismissed.
- **Strategic Communicators.** Strategic Communicators are public teachers, masters of the “sound bite” as the concentrated encapsulation of potent messages. They translate complex scientific data, complex public policy, and basic concepts of truth and justice into accurate, powerful metaphorical messages, the significance of which can be instantly grasped by the broad public.
- **Movement Builders.** The quiet heroes of any successful movement, Movement Builders reach out to draw in new allies; they recruit new activists and make them feel welcome, valued, and heeded. They do the same for longtime movement members as well. They know that a movement is weakest when it shuns diversity and seeks only a narrow, homogeneous base. Builders bridge generations, link local with national, even international advocacy, create space for the knowledge gained through experience to be passed on, and initiate new approaches to participation so diverse voices are heard and their demands heeded. Builders also heal. They circumvent organizational turf hurdles, they convene and facilitate, seek to explore differences through civil discourse and debate, and eschew rancorous division.
- **Generalists.** Generalists bring multi-layered skills to the effort, often cultivated through many years of experience. They see a movement’s activities from many sides, and can turn their hand to many tasks. Generalists model and live out the ideals of a movement, integrating them into their day-to-day perspective.
- **Historians.** Historians are keepers of the movement’s memory, bringing to bear the learning of past experience. They recount the history of relationships with partners and key players, as well as the history and evolution of the issue itself over time. They ensure that activists benefit from the hard-won lessons of those who came before them. Historians provide activists with a sense of their legacy, an honor of and obligation to the past, which renews the call for continued action in the present, and the hope of leaving a new generation of lessons and accomplishments for the future. They are the teachers, torchbearers, and conscience for a movement.
- **Cultural Activists.** Cultural Activists use cultural preservation, history, and activism to sustain movements. They are public opinion leaders, trusted insider figures whom members of a cultural community tend to believe and follow. They build bridges between the movement’s actions and powerful cultural meaning, interpreting back and forth between them in a way that strengthens both.

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Advocacy Leadership Team Assessment Form

Leadership Type	Who do you know of? (incl. yourself)	Where are the leadership gaps in your effort?	What are the action steps you can take to develop or recruit more diverse leadership?
Visionaries <ul style="list-style-type: none"> • Lift the horizons of others, setting goals that have never before been imagined or seen as realistic • Challenge the conventional view of the possible • Aim high, take risks, and rethink priorities 			
Strategists <ul style="list-style-type: none"> • Sort out that part of the vision that is realistically attainable and develop a road map to get there • Anticipate obstacles • Provide guidance to insure that the movement remains headed in the right direction • Choose tactics strategically, plan for contingencies, and seize new opportunities 			
Statespersons <ul style="list-style-type: none"> • Carry the movement flag • Act as "larger than life" public figures that embody authority and trust • Radiate credibility for the movement far beyond its core supporters 			
Experts <ul style="list-style-type: none"> • Ensure that all new discoveries and public policy positions are well reasoned and grounded in facts • Have special skills and knowledge that lend credibility to and back up the positions 			
Outside Sparkplugs <ul style="list-style-type: none"> • Agitate and unabashedly tell the truth to power • Operate outside of conventional establishments, free of the ties that bind "inside" players • Hold governments and established organizations up to their own rhetoric of mission and commitment • Kick-start a movement and keep energy flowing through it • Though often irritating and difficult, churn up collective conscience and annoy into action 			

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Leadership Type	Who do you know of? (incl. yourself)	Where are the leadership gaps in your effort?	What are the action steps you can take to develop or recruit more diverse leadership?
<p>Inside Advocates</p> <ul style="list-style-type: none"> Act as skilled negotiators, wise in the ways of the political process and positioned to influence key policy makers Occupy seats of power or establish an open door to them Intuit the approaches and arguments that resonate with policy makers, and press them in ways that are not easily dismissed 			
<p>Strategic Communicators</p> <ul style="list-style-type: none"> Serve as public teachers, masters of the “sound bite” Translate complex scientific data, public policy, and ideas of truth and justice into accurate, powerful metaphorical messages for the broad public 			
<p>Movement Builders</p> <ul style="list-style-type: none"> Reach out to draw in new allies Make both new activists and longtime movement members feel welcome and valued Bridge generations Link local with national and international advocacy Create space for the knowledge gained through experience to be passed on Initiate new approaches to participation so diverse voices are heard and their demands heeded Circumvent organizational turf hurdles, convene and facilitate, and seek to explore differences through civil discourse and debate 			
<p>Generalists</p> <ul style="list-style-type: none"> Bring multi-layered skills to the effort, cultivated through years of experience See a movement’s activities from many sides and can turn their hand to many tasks Model the ideals of a movement, integrating them into their day-to-day perspective 			
<p>Historians</p> <ul style="list-style-type: none"> Ensure that activists benefit from the lessons of those who came before them Recount the history of relationships with partners and key players, as well as the history and evolution of the issue itself over time Provide activists with a sense of their legacy: honor of and obligation to the past, renewing the call to act in the present and to leave new lessons for the future 			
<p>Cultural Activists</p> <ul style="list-style-type: none"> Use cultural preservation, history, and activism to sustain movements. Serve as public opinion leaders whom members of a cultural community follow Build bridges between the movement’s actions and powerful cultural meanings 			



Module 5: Communicating with Decision Makers

Working with the Media

E-Advocacy

With Module 5, we will understand that accurate and purposeful communication among our group and with the “outside” is crucial to building allies and support for our issues. If we want to help others understand the needs of our family member with an intellectual and/or developmental disability, we must communicate those needs accurately. In turn this brings others over to our side: the side of creating a world that includes our family member.



Communicating with Decision Makers

Why do we communicate with decision makers? Lobbying decision makers is about persuading them to do what you want. The first step to exerting any kind of influence over their decision making is to build a solid relationship with them and their staff. Advocates need to earn and nurture the decision maker's respect. The most important reasons we communicate with people in a position of power are:

1. To influence!

We ultimately want to convince decision makers (legislators, school board members, city council members) to do what we want. We want them to make decisions that will impact those we advocate on behalf of in a positive manner.

2. To educate and inform!

Decision makers come from all walks of life. As a result, they cannot know everything about every issue we bring to their attention. Many times they vote or decide against an important issue simply because they don't know enough about it to make an informed decision. That is where advocates come in. One of the most important purposes of communicating with them is to educate them about our issues, and why they should care about them, too.

3. To build relationships!

We want decision makers to know who we are and what we stand for. As a result, building relationships with them (and their staff) helps decision makers know that we are trustworthy and want to work together to make changes occur. When they see your group as one that is willing to work in a positive and collaborative manner, the chances of access to them and influence over them in future efforts significantly increases.

When meeting with decision makers, there are a few guidelines to follow when establishing your agenda and goals: Know what subject you are going to address with them, do not overload them with too much information, and stick to no more than two or three issues.

Some tips for communicating with decision makers include:

- Show that you understand their time constraints by providing summaries of lengthy reports.
- Use attention grabbers, e.g. a bright colored paper that jumps out of a pile of correspondence
- Show an interest in other issues on which the decision maker is working.
- Tell both sides of an issue so that the decision maker can anticipate the opposition.
- Compliment the decision maker if he/she has done an effective job on anything; a

- Get to know the decision maker's staff—they are the key to getting information or access to the decision maker.
- Provide positive media opportunities for the decision maker through events such ground breaking ceremonies, ribbon cuttings, annual meetings, tours—anything that gets them noticed.
- Honor decision makers at annual meetings, special events, etc. Give unusual awards instead of the ordinary certificate or plaque that will attract attention in their office.
- Remember their birthdays and other events; send a congratulatory note if you hear anything positive about them.
- Use information that is accurate. Information that is vague or not true will only tell them you cannot be trusted. Decision makers appreciate people who have reliable information.

Tactics for Communicating with Decision Makers

There are many tactics that can be employed to communicate directly with decision makers. They include:

Letter writing/Emails
 Surveys
 Telephone
 Face-to-face Meetings
 Public Hearings
 Testimony

Tactic #1: Writing Letters

A letter should be written to a decision maker when you want them to take a position on your issue, or you want them to act on it. Letters should be less than one page, and should be exact about what the issue is. Only address one issue in a letter. Too much information can overwhelm the decision maker and make it difficult to know what you are asking of them. Send letters only when it is truly necessary. Consider sending letters when:

- Trying initially to drum up support for an issue
- A vote on a bill of importance is looming (if the decision maker is a legislator)
- They have done something advocates want to praise
- They are undecided about an issue

Not sure what to say or how to say it? Here are some tips on things to include when writing a letter to a decision maker:

- Be clear about your issue, and what action you want them to take.
- Address the letter properly.
- Use your story. Personalizing the issue makes it real to the decision maker. Tell him/her

- Ask for a statement of their position on the issue(s) in a written reply.
- Thank them for their attention to the letter.
- Be sure to include your full name and address. This helps them contact you with a response, or if they are a legislator, this helps them know if you are a constituent.

If you are writing to a legislator, mailing addresses can be found at <http://www.capitol.state.tx.us/fyi/find.htm>. **See a sample letter at the end of this section.**

Tactic #2: Surveys

How do we find out where decision makers stand in the first place? How do we get them “on the record” about our issues? One tactic advocates can use is a decision maker or legislator survey. This can be a valuable tool to gather not only official positions on issues, but also find out how decision makers want to hear from advocates. Some decision makers only want to hear from advocates via email, while others insist on face-to-face meetings. Knowing this information from the start can help advocates tailor their strategy and tactics to best suit the targeted decision maker. **A sample survey used with legislators can be found at the end of this section.**

Tactic #3: Calling Decision Makers

Decision makers take notice when advocates call them about important issues. It is less-time consuming than letter-writing, and more certain than email that may never be answered. For this reason, using the telephone to contact decision makers is a reliable way advocates can quickly get their voices heard—literally.

While no tactic can take the place of a face-to-face meeting with a decision maker, calling the official’s office assures that someone will answer. Advocates may not get to talk directly to the decision maker each time they call, but they can articulate their issue to the staff they talk to, and tell them what advocates want the decision maker to do on an issue.

Some tips to remember when calling decision makers:

- Write down your message before you call.
- Identify yourself as a constituent (if calling a legislator)
- Say exactly what you are calling about. Use bill numbers or issues to make your point.
- Say specifically what you want them to do (vote against budget cuts, support a bill, etc.).
- Be sure to leave your name and contact information, including your address.
- Do not criticize or become involved in a debate.
- Chances are, the call will only last 2 minutes, so being on point is critical to getting your message across.

- Conclude the call by thanking the decision maker or staffer for his/her time and attention to the issue.
- Even if advocates do not speak to the decision maker directly, the staff are the ones who have the ear of the decision maker. Give them the message on the issue at hand.

Tactic #4: Visiting Decision Makers—Face-to-Face Meetings

Meeting decision makers face-to-face is the most effective way to get your message across. Advocates can meet decision makers in their offices, but you can also have them on your turf. Invite them to a membership gathering or a location that supports people with intellectual and developmental disabilities. This can help advocates convey their message in human terms.

Some important rules to remember when meeting with decision makers include:

- Make appointments as far in advance as possible for the amount of time needed.
- Arrive early, but be prepared to wait.
- If advocates are meeting a decision maker in their office, keep the group small as most offices are not large enough for more than a few people.
- Choose a spokesperson for the group, or agree on a speaking order. This will assure the message is concise and clear.
- Make the group diverse. Include self-advocates, family members and professionals—people who can address an issue from multiple sides.
- Be informal, but not disrespectful.
- Avoid using acronyms and jargon. They may not be familiar with terms (e.g. HCBS, IDEA, ADA, MR).
- Know in advance with whom advocates will meet. If it's a staff person and not the decision maker, that's OK. They are the portal to getting information to the decision maker.
- Be specific about what the desired action is from the decision maker (act on a bill, support increased funding).
- Be prepared to answer questions.
- Bring information to leave with the decision maker. Include information on the issue, as well as how the legislator or their aides can contact advocates for further information, as well as information about the organization or coalition advocates represented. Be sure your information includes contact names and numbers.
- Follow up. Advocates need to send a thank you letter, provide further information and stay involved in what the decision maker does next.

Tactics #5 & #6: Public Hearings and Testimony—Telling Your Story

The purpose of public hearings and testimony is to give individuals and groups the chance to interact and exchange information, and to provide citizens and advocates the opportunity to express their opinions to decision makers.

If the decision maker is a legislator, public hearings are generally held after a bill is assigned to a legislative committee. It can also be scheduled to get input into drafting rules, or to see how well current laws or programs are working. Sometimes they are held as a requirement by law before a statute can be approved or implemented. They are usually held in the Capitol, but can be held in a legislator's district as well.

Hearings can also be sponsored by agencies, such as the Texas Health and Human Services Commission. Citizens can make public comments and communicate with decision makers in these agencies at public hearings.

Attending public hearings organized by the decision maker or a committee, or by other organizations, can be an excellent occasion for advocates to learn the status of an issue is. It is also a chance for advocates to provide information and education to decision makers on issues of ongoing importance. Offering your expertise to committee members or staff can mean they come to rely on you for information. Finally, it is a great opportunity to find out what other groups are interested in the issue. This can help foster collaborations on future issues.

Other reasons public hearings are important are to:

- Educate and influence decision makers.
- Educate the public.
- Publicize positions, problems and solutions.
- Test reactions to positions.
- Learn what others are thinking and asking about the issue.

With testimony, individuals are called on to give prepared statements on the issue being addressed at the public hearing. This is the chance for advocates to tell their story and humanize the issue. Tips for developing testimony include:

- Become familiar with the issue and how it effects you and others.
- Gather available data, including pertinent statistics. Decision makers want hard data (cost of care, numbers on waiting lists, how many people are effected in a community or school district).
- Begin by identifying yourself, the group you represent, and your position.
- Be brief and accurate, leave out lengthy philosophizing and avoid clichés, repetition or threats.
- Use personal examples to make your point.
- Do not make claims you are not prepared to defend.
- Prepare a written copy of your testimony to leave with decision makers and staff, attendees and the media, including your name and contact information for further questions from the decision maker.
- Have large representation of groups and other advocates testify as well.
- End by thanking the committee or the decision maker for the opportunity to testify.

Actual sample testimony can be found at the end of this section.

The Things You SHOULD NOT DO When Communicating with Decision Makers!

While this is by no means an exhaustive list of ways to build effective relationships, there are also things that advocates do NOT want to do:

- Do not confront or challenge a decision maker by saying things like “You promised me/us...”; rather say, “I understood you to say...”
- Do not take too long when meeting with them or talking to them at an event. Show that you respect their time and recognize it is as valuable as yours.
- Do not lecture a decision maker. They will respond better if you have a clear, concise message to leave them with.
- Do not make electoral threats.

The most important thing to remember is that elected officials and decision makers are just like everyone else. They appreciate people who show an understanding and respect for the individual’s personal philosophy or issues, and they take note of service systems and alliances that have a clear strategic vision.

However, realize that decision makers cannot always comply with requests from advocates. If you do not get everything you asked for, thank them for what they did do, or even for their willingness to listen, and then follow up.

Use your “Tell Your Story” Worksheet provided at the beginning of this course to craft a message to a decision maker on an issue you care about. A blank “Tell Your Story” Worksheet is provided at the end of this section. Practice delivering your message with a partner at your table.

NOTES:

Sample Letter to a Decision Maker

January 1, 2007

The Honorable Hubert Harris
Texas Senate
State Capitol
Austin, TX 55555

Dear Senator Harris:

I call it the Texas Tragedy. It's when the state's budget priorities don't reflect the needs of people with mental retardation and related developmental disabilities. I have a son that has been on the waiting list for services for 8 years. We were told that he could have to wait for up to 20 years before his name comes up for services. We cannot wait that long!

As so many Americans are, we are aging and will no longer be able to provide the supports necessary for my son to live at home. We—and he—want him to live in the community, in a place of his own. That is not possible with the current state of the waiting lists in Texas. The Tragedy has been building for years. Today more than 45,000 people with intellectual and developmental disabilities are languishing on never-ending Waiting Lists for community-based Medicaid Waiver Programs like the HCS and CLASS programs offered through the Texas Department on Aging and Disability Services (DADS). Some of these individuals have been on the Waiting List for eight years and have yet to receive community services.

For the last ten years, The Arc of Texas has worked actively with legacy agencies and the Legislature to increase state funding for these Medicaid Waiver programs to reduce the massive Waiting Lists. Little financial relief has come. **We ask you to support Senate Bill 000 TODAY to end the Waiting List crisis in Texas.**

I would be glad to speak with you at greater length about this issue. I would appreciate knowing your position on SB 000. Thank you for your continued service to our district.

Sincerely,
Mrs. Susie Brown
89 North Boundary Road
Temple, TX 12345
(254) 742-0000

Sample Legislator Survey

1. Do you support inclusion of persons with intellectual and developmental disabilities in the community? This includes supports to assist individuals living in typical homes, attending the neighborhood school and working at real jobs despite the severity of the disability.

Yes No

2. Do you personally know anyone with an intellectual or developmental disability?

Family Member Friend/neighbor Co-worker No

3. Are you familiar with programs supporting persons with intellectual and developmental disabilities in our community?

Very familiar Somewhat familiar No

4. Will you support increased appropriations to eliminate the waiting list for intellectual and developmental disabilities services?

Yes No Undecided

5. If you are proposing reduction in taxes, do your plans call for cuts to services/ programs for persons with intellectual and developmental disabilities?

Yes No Not proposing tax cuts

6. If a budget surplus exists, which is your priority - increasing services to individuals with intellectual and developmental disabilities and their families or cutting taxes?

Increasing services Cutting taxes

7. Have you been approached by your constituents about services to individuals with intellectual and developmental disabilities?

Yes No

8. What do you believe is the most critical issue facing Medicaid? What would you do to address this issue?

9. What is your vision for citizens of Texas with intellectual and developmental disabilities?

10. How do you prefer for advocates to communicate with you about important issues? (please number in order of preference)

Phone Call Email Face-to-face Meeting in the Capitol
 Testimony Fax Face-to-face Meeting in District

Thank you for completing this survey! Please return the completed Legislator Survey to INDIVIDUAL/ ORGANIZATION, ADDRESS, FAX NUMBER. If you have any questions, do not hesitate to call PERSON'S NAME and PHONE NUMBER.

SAMPLE TESTIMONY

**House Committee on Appropriations Subcommittee on Health and Human Services
Comments on the Texas Department of Mental Health and Mental Retardation
(Legislative Appropriations Request for FY 2004-2005)
By Richard Garnett, President, The Arc of Texas**

Good morning. My name is Richard Garnett. I am President of The Arc of Texas, the state's largest non-profit volunteer organization creating opportunities for people with mental retardation and other developmental disabilities to be included in their communities.

I want to talk to you about A Texas Tragedy. It's the situation that occurs when the state's budget priorities don't include community-based services for Texans with disabilities.

It's a Tragedy when, due to lack of community services, an elderly couple spends worried, sleepless nights wondering who will take care of their 56 year old son with mental retardation after they die.

It's a Tragedy when Moms and Dads break up because of the incredible stress that comes with living with the needs of a child that has severe disabilities without in-home support services like respite care and therapies.

It's a Tragedy when a family must look to putting their daughter who has a disability in a state institution, at a average cost to the state of over \$100,000 per year because they can't get the much less expensive home and community supports that would enable her to stay at home—her own home.

It's a Tragedy when these stories are repeated again and again, every single day, in every part of the state.

It's a Tragedy when, in Texas, more than 20,000 of our friends and neighbors with mental retardation and other developmental disabilities who apply for needed community-based services are placed on a waiting list and are told to wait.

It's a tragedy when some of these folks wait seven, eight, nine even ten years before they can receive the services that the law of the land says they should have and to which they are entitled.

It's a Tragedy that someone who is added on the list today might have to wait for services for 20, 30, 40, or more years if the current rate of service expansion is not accelerated.

It's a Texas Tragedy when a mother of a daughter who has severe disabilities—and who is really sick and really fragile—expects that her daughter will likely die before her name ever comes to the top of the waiting list.

It's a Texas Tragedy when families must bring a federal suit to seek relief for their loved ones who continue to wait for services.

As an advocate, as a father of a son with disabilities, and as a Texan I am ashamed by how our state treats our citizens who have mental retardation or other developmental disabilities.

- We don't make our children wait for ten years to enter elementary school.
- We don't wait ten years before we put our felons behind bars.
- We don't tell Granny to wait ten years before we will have an open nursing home bed for her.

What in the world makes it right for us to tell our next door neighbor who has mental retardation "sorry, you'll just have to wait ten years...or more." I believe that most Texans want to take pride in the way we support our citizens with disabilities. I believe that most Texans want our state to provide the services that their friends and neighbors who have mental retardation and developmental disabilities really need. And I believe Texans are willing to pay for it.

This Texas Tragedy has gone on way too long. This tragedy must not continue—not for another ten years. Make it a priority. Find the money. End the waiting list.

Thank you for your time and consideration of these comments.

Working with the Media

(Adapted from the “Community Toolbox”, University of Kansas, Contributed by Aimee Whitman, Edited by Bill Berkowitz and Gillian Kaye)

Everyone has seen organizations and agencies make a case for their cause on the television, newspaper and radio. We have all heard stories about how a media consultant has helped improve a political candidate's image by cleverly manipulating the press. There are many ways you can use the media to the benefit of your cause. This section introduces you to working with the media.

What is the media and media advocacy?

Media, which is the plural form of 'medium,' are the forms of communication -- television and radio (“broadcast media”), advertising, and newspapers, magazines or written materials (or "print media") used to spread or transmit information from a news source to the general public.

Advocacy means openly supporting a certain viewpoint or group of people. If you are an advocate for a specific cause, you work to get local, state, or federal governments to grant specific rights, make policy changes or create new laws for the good of your cause. For example, if you have a child with a disability, you might advocate for the increased availability of medical services for children with disabilities in your city.

Media advocacy is the use of any form of media to help promote an organization's or a company's objectives or goals, which come from the group's vision and mission. For example, suppose you work as a media advocate for a non-profit agency fighting to reduce gang violence in your neighborhood. You would try to present neighborhood issues related to gang violence and the changes you want to make in such a way that you:

- Change** the way community members look at community issues or problems;
- Create** a reliable, consistent stream of publicity for your agency's issues and activities;
- Motivate** community members and policy makers to get involved.

Media advocates, or the people who work to attract publicity for organizations, know that the media can get a public or social policy message across to the largest audience possible in the least amount of time. As a media advocate, you will use the media to:

- Inform** the public about what really causes or contributes to public health problems;
- Recast** health problems as public health concerns that effect everyone, not just individuals;
- Encourage** community members and other professionals to find out more about public health problems and to get involved.

Why should you get into media advocacy?

The media have been shown to be a primary source of health information but, be careful! The media can be the best friend or worst enemy of health promotion and community development workers. Despite the pitfalls getting involved with the media can yield great benefits. Newspapers, television, and radio have access to different kinds of people and audiences.

Some of the goals of media advocacy are:

- √ To inform the media about who and what really contribute to health problems, community deterioration and the choices that individuals make about the behaviors that effect their health and well-being.
- √ To use the media to pressure health and community development officials to make policy changes.
- √ To influence the media to give your coalition exclusive coverage, allowing your members to tell their stories in their own words.
- √ To give communities more control by letting residents who might not otherwise be heard have a stronger voice in the media. Shining the spotlight on a community can give its members the power and the desire to change the policies and situations that effect their lives.
- √ To get the media to cover the kind of stories that will "light a fire" under other community members so that they get involved and contribute to community-based solutions.

When should you focus on the media?

You should always focus on the media. Media coverage can be a two-way street and while good coverage can help your organization, your group should be prepared if the coverage is not what you expected. Media is essentially free advertising for an organization and/or an issue.

Good times to focus extra energy on the media include:

- √ **During** the announcement of a new project. For example, you may want to recruit more funders to your organization, and publicity given to your agency's new initiative to reduce the sale of cigarettes to teens is a good way to alert the public of your plans and needs.
- √ **When** you have information that can be tied to a community's events. Perhaps your community has had a rash of burglaries in a particular part of town. You can tie your efforts to increase public safety into the crime problems currently reported in your local paper.
- √ **When** using an opportunity for publicity could mean the difference between you meeting your goals or your opponent reaching his/hers.
- √ **When** a media opportunity makes the difference between the passage or non-passage of

NOTES:

What does media advocacy involve?

There are three different activities in the media advocacy process:

1. *Agenda setting* is what you accomplish when you influence what the media covers (media agenda), what people talk about (public agenda), and what policy makers do during legislative session or in committee (policy or political agenda).

To set an agenda:

- Let the media and public know what your concerns are.
- Get the general public to acknowledge that your issues are important; that is, get them talking about what is important to you.
- Generate some sort of action. Create a policy change or new policy surrounding your issue or get more people involved.
- Agenda setting helps you make connections with the media and the people who pay attention to them.

2. *Shaping the debate* is trying to change the way people talk about public problems. Traditionally, the media tells an audience, "This is what the problem is" informing the public about a problem and, "This is the solution" usually summed up in a quick message such as, "Just say no."

The media's habit of giving tidbits of information about problems and then providing quick-fix solutions (e.g., "This is your brain... this is your brain on drugs... Any questions?") reinforces the idea that if a person has a problem, it's his/her own fault. This kind of media picture influences the way the general public finds solutions and how fast problems are solved.

Once you gain greater control over the way public issues are reported by the media then the community can work for real improvement.

3. *Advancing a policy* is a way to use the media to put pressure on policy makers. But media coverage created by media advocates has to be built and backed up in such a way that decision makers feel or anticipate pressure from the people who elected them. This pressure, then, motivates policy makers to take action.

NOTES:

How do you set up a media campaign?

A media advocacy campaign is similar to a political campaign in that the people who run it need to plan it out; they need to have specific strategies, or plans and tools, in mind before they take any action. As you gear up for a media advocacy campaign, you'll need to prepare yourself to do business with the media. It's your job as a media advocate to understand your organization's goals and to know how you want the media to help you advance those goals.

Here are the steps you'll follow when you set up a media campaign.

1. Preparing your members

In addition to developing common talking points, you will need to designate a spokesperson or spokespeople to work with the media. They will need to be prepared to speak with the representatives, using extra caution with words and language that can be manipulated.

2. Identify your objectives

Ask yourself why you need to set up a media campaign in the first place. What is your organization missing? Is an advocacy campaign the best way to get it? What are you going to use the media for? Do you only want to inform the public of important facts or do you want to get community members involved in your issues? Do you want to change policies or create new ones? Do you want to expose your opponents? Do you want to build support for your goals and objectives?

3. Select a target audience

Anyone who gets involved in public issues can make a difference. Because the people who live in one community can have many different opinions and preferences, you can't reach everyone with just one message. You will need to narrow your audience and decide whom you want to target. Who do you want to reach? The general public? Policy makers? People who are undecided about your issues? People who don't know about your issues?

4. Make a plan

Because media advocacy activities can be time- and money-consuming, it's important to put your best foot forward when you begin a campaign. Carefully consider when a good time to start your campaign is, who you will contact first, what issues you will tackle and how you will present them. What forms of media would you like to use? Television, print media (magazines, news-papers, newsletters, press releases, etc.), advertising, radio, billboards, public service announcements, news stories, feature stories, radio shows?

5. Review your goals

Even though you put a lot of thought into your media advocacy plan, be prepared to modify your goals. Remember, the news in our world can change in the blink of an eye, and you need to be ready to react to an opportunity, even if it isn't really appropriate for your organization. Are your goals feasible for your organization?

6. Keep your ear to the ground

What do people talk about these days, in your community and nation-wide? What can polls and surveys tell you about the hot topics they talk about? How much do people know about your issues? What kinds of misconceptions or prejudices can you find in public opinion?

Why make friends with the media?

There are a number of reasons why making friends with the media would be beneficial to your group. For example:

- √ The media can increase the public's awareness of your group.
- √ The media can help recruit members to your group.
- √ The media can inform the community of what you are doing and what you have done.
- √ The media can raise public awareness about various issues.
- √ The media can portray your group and the issues you are standing for in a positive light to the public, or, conversely, the media can portray your opponents in a negative light.

How do you make friends with the media?

Cultivating good relations with news people is vital to a successful media advocacy campaign. If reporters and editors know that you are a good, reliable source of information (i.e., someone who makes their jobs easier), your chances of gaining favorable, well-placed coverage will improve. Here are hints to help you become a trustworthy source:

Be informed

Read the newspapers, watch the TV news, listen to radio broadcasts. Stay up-to-date on current events that effect your organization.

Study your news sources

Which reporters and which media agencies pay attention to your field of interest? Consider keeping a chart or record that shows who gives the best coverage.

Analyze their content

Notice the kind of articles covered by local media. Who gives good coverage on the issues that are important to you? On which journalists should you focus your energy? What, if any, bias exists in that source?

Though the media are supposedly bias-free in their news coverage (that is, they don't "take sides") inevitably a publisher, editor, or program director will have strong political opinions. These opinions may effect what is covered and how much the media pay attention to you.

Pay attention to advertisers

Find out which businesses advertise with a particular media outlet. You gain insight into how wide or narrow a media outlet's audiences are when you know who advertises there. For example, most manufacturers of house-cleaning products advertise heavily during soap operas, because they feel lots of housewives, the people who buy these products, watch daytime TV.

Make the most of your information

Use the information you've collected on local media to tailor your stories to each outlet's style and needs.

Be ready to use any form of media that comes along.

Even if you don't feel comfortable using new technology, force yourself to do it. You need all the publicity you can get! Using as many media outlets as possible increases your visibility.

Assemble press kits

A press kit contains background information on your organization, its accomplishments and current projects. This information can be sent out in a hurry to keep up with today's fast-paced media coverage.

Send out information packets to local media

When you have a story you want covered, send out press kits to local journalists. Make sure to footnote all the facts you include in such a package.

Follow up with a phone call.

After you send out what would be included in a media packet, telephone your chosen media contacts to emphasize your story's importance, such as telling the reporter how many people are effected by this issue or by illustrating the future consequences of the situation.

News Releases Can Make A Difference!

Cultivate the local media by well-timed use of news releases (provides all the information on an issue) and news advisories (announces happenings). Do not overwhelm with trivia, but follow up all releases with phone calls. Advocates can identify the reporters most likely to be assigned to your subject matter, and stay in touch. Discuss possibilities for special features with them, and offer to help them put stories together.

When planning activities (hearings, meetings, forums), plan with media coverage in mind. If the media has agreed to attend a gathering, let decision makers and their staff know. Decision makers, especially those that have to run for office or are politically appointed, are always on the look out for media opportunities of their own, so use that to your advantage. Getting a decision maker to an event can garner more interest in your group or issue, which gives more opportunities for media coverage. It's a cycle—it's all linked.

Having an always-ready media packet for distribution at events for reporters or media outlets helps advocates provide consistent, up-to-date information in a timely fashion. Information that should be incorporated in any media packet include:

Cover letter—a letter of introduction explaining who you are and why you are contacting the reporter (used when sending information to the media)

Press release—remember the who, what, where, when and why

Fact sheet—information about your organization, including number of members, history of the organization, and resources

Brochures—local brochures about intellectual and developmental disabilities, local services, general information

Biography—information on the person you want the reporter to write about or interview (if applicable)

Relevant material—any other materials you want the media to have, such as reports, state bills, funding estimates, etc.

Since paid advertising can be expensive, consider free media possibilities that can get your message out to the public. Be creative, but judicious, in requesting these. Unpaid television and radio coverage on commercial and public broadcasting include:

Public Service Announcements (PSAs)—many stations are required to provide a certain number or percentage of these in relation to their regular programming.

Newscasts—local stations may want to do a story on either the issue itself, or an individual advocate's story.

Editorial Commentary—most news stations have regularly scheduled editorials from senior staff members; get issues in front of them through phone calls or meetings.

Unpaid newspaper coverage includes:

Editorials—most major newspapers will print editorials on selected issues.

News stories—cultivate relationships with editors and journalists working on your area of interest.

Feature stories—these stories usually include photographs and more in depth information on the issues.

Letters to the Editor—be concise (100 words or less) and be as assertive and persuasive as you can by using your best arguments and by citing specific examples. Sign your letter, including address and phone number.

News releases (also called press or media releases) are used when a group wants to announce an event, make a statement, take a stand on an issue, or make a challenge (usually to a legislator or decision maker). Remember to answer the “who, what, why, when and where” when deciding to use a news release. Over use of news releases can dull the media’s attention to your organization, so use them when something is truly newsworthy.

When writing a news release, consider these guidelines:

- Use letter-sized paper, double-spaced with wide margins, one side only.
- Identify the organization in the upper left corner, and provide the name and phone number of a contact person.
- Type any instructions in all caps (e.g. FOR IMMEDIATE RELEASE, or FOR RELEASE: DATE).
- Write a text-like news story, answering who, what, where, when, why and how. Include the most important information in the first paragraph.
- Use quotes to make your point strongly, but do not use abbreviations or jargon.
- Use active rather than passive verbs. It involves the reader in the information.
- At the end of the release, type “ ** ” to signify the end of the information.
- If newspapers will accept photos, provide them. Always attach a typed, one or two sentence caption to the back of the photo to identify people, place and action.
- Hand deliver, fax or mail the release to the appropriate people. For daily newspapers, to the city desk; weekly papers, the editor; radio stations, the news director; and television stations, the news assignment desk.

A sample press release can be found at the end of this section.



The Arc of Texas Calls on Legislators to Increase Funding for Intellectual and Developmental Disabilities Services

Advocacy Group for People with Intellectual and Developmental Disabilities Launches Awareness Campaign to Step up Pressure on Lawmakers

AUSTIN, TX—With the 80th Texas Legislative session set to convene on January 7 The Arc of Texas is calling on lawmakers to break through the logjam of service requests from people with intellectual and developmental disabilities by increasing funding for community-based programs by 10 to 20 percent. The Arc wants to eliminate waiting lists for Medicaid Waiver Programs within the next 10 years.

“The Legislature will gavel into session next year with an estimated \$16 billion budget surplus. Yet nearly 100,000 Texans with disabilities continue to languish for years on waiting lists for community-based services. It is time to adequately fund support programs for these individuals and their families,” says Mike Bright, Executive Director of The Arc of Texas.

By calling on lawmakers to allocate more money for Medicaid Waiver Programs, The Arc hopes to see more funds earmarked towards Home and Community-Based Services (HCS) as well as Community Living Assistance and Support Services (CLASS). Increased funding for both programs would allow Texans with intellectual and developmental disabilities to lead more independent, fulfilling lives, Bright says.

Investing more in both programs could also save the state money in the long run. Conservative estimates suggest annual expenditures of \$100,000 per person when care is provided in one of the state’s Medicaid-funded schools for people with intellectual and developmental disabilities. The average cost in the HCS program, which pays for in-home services and group homes, is only \$42,000 a year.

The 79th Texas Legislature expanded services to over 9,000 Texans with disabilities on waiting lists for various Medicaid Waiver Programs. Of those, approximately 4,500 Texans with intellectual and developmental disabilities are enrolled into the HCS and CLASS Medicaid Waiver Programs.

“Despite a modest increase in funding for both programs last year, waits of several years are still common,” says Richard Hernandez of EduCare Texas, a service provider to more than 3,000 Texans. “Texas legislators made progress in moving people off waiting lists last session, now we ask that they show a commitment to eliminating the waiting lists once and for all,” says Hernandez.

According to the Texas Department of Aging and Disability Services, more than half of the 30,000 families on the “interest list” for the HCS program have been there for more than three years. In the CLASS program, more than 40 percent of the applicants wait that long.

The Arc encourages family and friends of citizens with disabilities, as well as concerned Texans, to contact their local legislators and urge them to spend budget surplus dollars on community-based Medicaid Waiver Programs for people with intellectual and development disabilities.

About The Arc of Texas

The Arc of Texas is the oldest and largest nonprofit, volunteer organization in the state committed to creating opportunities for people with intellectual and developmental disabilities to be included in their communities and to make the choices which affect their lives. The Arc believes that all people with intellectual and developmental disabilities have strengths, abilities and inherent value; are equal before law; and must be treated with dignity and respect. The Arc supports families, advances public policies, provides training programs, and builds a statewide network of advocates.

For more information, visit <http://www.thearcoftexas.org>

For press inquiries, contact:

Amy Mizcles, Director of Governmental Affairs
512-454-6694 or amizcles@thearcoftexas.org

Jeff Salzgeber
512-382-6685 or jeffs@sherrymatthews.com

E-Advocacy: Using the Internet

The Internet can be a powerful tool for advocates. Using the Internet is not just limited to sending e-mails to decision makers. Advocates can use the Internet to get their message out, contact volunteers, as well as communicate with decision makers and their staff.

When using e-mail to write to decision makers, many of the same rules for letter-writing apply. E-mail allows advocates to communicate with decision makers from work, home, libraries, community centers—wherever the Internet can be accessed. It allows for immediate and timely action across geographic areas.

According to OMB Watch, a nonprofit government watchdog agency in Washington, D.C., dedicated to promoting government accountability and citizen participation in public policy decisions, "Hill staffers and system administrators, in sharing their views on how incoming electronic mail is handled, continually make clear that their primary concern is addressing and responding to electronic mail from constituents, and effectively weeding out mail from non-constituents and routing that to the appropriate member. An additional problem is meeting the expectations of people who send electronic mail. They expect their e-mail to be answered online and immediately. It's even worse if you do manage to respond immediately to an e-mail, as that only raises the expectation for all subsequent mail to be answered as quickly. Staffers have said that if you are not a constituent, and if you do not provide contact information, including an address and phone number, then your e-mail won't be answered."

While email is convenient to advocates, it may not necessarily be the best way to communicate with decision makers. It is much more effective to do so by phone, written letter or in person. However, if advocates choose to use email to communicate with decision makers and their staff, here are a few tips to increase its effectiveness:

- Identify the subject of your message in the "Subject" line. Do not use vague description lines such as "Info," rather specific words about your message, such as "House Bill 000," or "Support for Disability Funding."
- Print copies of your messages and use them to document the communication.
- Do not use email to overwhelm a legislator's inbox. If advocates "stuff" the decision maker's inbox, chances are the communications will be ignored.

According to E-Advocacy for Nonprofits, by the Alliance for Justice, some possible alternative uses for e-mail include:

- Sending an alert to groups of advocates.
- Contacting a decision maker or their staff member with information on issue developments.
- Sharing information on an issue with other agencies or groups interested in similar issues.
- Sending notices for public hearings or issue meetings to participating advocates.

Action alerts are another use for the Internet. They are calls to action to advocates on a certain issues. Using the Internet can help assure the widest distribution to people who are willing to take action in a timely fashion. If a decision maker is going to make a decision about an important issue in the next two days, there is no time for an effective, traditional letter-writing or calling campaign. Advocates can be notified and spurred to act on an issue within hours of releasing the Action Alert.

A sample action alert can be found at the end of this section.

NOTES:

****SAMPLE****

Action Alert-- Immediate Action Required!
House Committee to Move on IDEA Reauthorization
April 4, 2003

Background:

The House Education and the Workforce Committee is scheduled to markup H.R. 1350 on Wednesday, April 9, to reauthorize those components of IDEA scheduled to expire on September 30 and make other revisions to the law. Full Committee action follows by one week a markup by Education Reform Subcommittee of that committee. Despite some changes made by the subcommittee, H.R. 1350 as written is still strongly opposed by The Arc, UCP and most other disability advocacy organizations.

Among the most problematic provisions in the bill are:

- The procedural safeguards in current law are gutted and replaced by new provisions giving wide latitude to school authorities to discipline students with disabilities as they do students without disabilities.
- IEP provisions are altered including the removal of benchmarks and short term objectives and allowing schools and parents to craft three year IEP's.
- IDEA's enforcement provisions are significantly weakened.

Action To Be Taken:

Members of the Education and the Workforce Committee need to be contacted immediately, before the Wednesday markup. Tell your legislators to:

1. **Oppose H.R. 1350 as written, and**
2. **Postpone the markup until it can be broadly disseminated to parents and advocacy groups around the country for their input.**

Please generate as many calls, e-mails, and faxes to the Members of the committee from your state. All Members offices can be reached by calling (202) 224-3121, or use The Arc's Action Center located on The Arc's web page at www.thearc.org.

* Expires April 9, 2003 *



Addenda

A-Team Member Contact Information

Supporting Materials and Resources

Course Evaluation



A-Team Member Contact Information

Name:
Email Address:
Home Number:
Cell Number:
Mailing Address:
Other:

Name:
Email Address:
Home Number:
Cell Number:
Mailing Address:
Other:

Name:
Email Address:
Home Number:
Cell Number:
Mailing Address:
Other:

Name:
Email Address:
Home Number:
Cell Number:
Mailing Address:
Other:

Name:
Email Address:
Home Number:
Cell Number:
Mailing Address:
Other:

A-Team Planning

First Conference Call Scheduled for:

My tasks before first conference call:

First A-Team Meeting Scheduled for:

My tasks before first A-Team meeting:

A-Team Member responsible for scheduling meeting space for first meeting: _____

Follow-Up Conference Calls

Follow-Up Meetings



The following list is an opportunity to become familiar with advocacy activities beyond what you may have conducted on behalf of yourself or a family member. This will help you get comfortable working with others who may also be novices at advocating on a larger scale. Utilize this list at your own pace: you can try these activities once a month or once a year. You can also pick and choose activities that allow you to participate in a way that is doable for you and/or your group. They were put in this order to help you think about building upon skills but certainly there is no requirement to do them in any order.

These activities can be helpful when advocating with elected officials, community and state agencies and with other advocacy groups. Please contact your local Arc or The Arc of Texas for ideas about participating in advocacy activities that may be occurring in your community. To find a chapter near you, visit us at www.thearcoftexas.org.

1 -Join local, state, and federal disability organizations' listservs!

Action: Google search on the internet for "disability organizations".

Tips: When you find these groups, pick two or three and sign up for action alerts. Review what types of advocacy tools the listservs discuss or suggest. Practice with a few tools to become familiar and find the ones that you are most comfortable using. Poll other advocates to see how many have internet access or e-mail accounts. Discuss how your advocate group can better use email and the internet to communicate between advocates and with decision makers on issues of importance.

2 -Attend and monitor community meetings.

Action: Monitor School Board meetings for special education issues. Observe city council meetings for issues like housing, transportation, employment. Check the web for state meetings [(i.e. Department of Assistive and Rehabilitative Services (DARS), Department of Aging and Disability Services (DADS)] to learn about issues like budgets, program rules and legislative action.

Tips: Contact organizations or agencies for dates, location, and time of meetings. Keep an updated calendar and send out reminders to other advocates in your circle of friends. There is power in numbers so attend meetings in groups to bring attention to your mission.

3 -Attend community/public hearings.

Action: Volunteer to speak/serve on a panel and/or sign up to provide public comment. Be sure to keep your remarks short and constructive. Be sure that your remarks are pertinent for the forum. It is unproductive to speak at a city council meeting about classroom monitoring.

Tips: Be prepared! Holding a 'mock hearing' beforehand to practice your message is a great idea, especially for people who don't usually speak at public forums. Arrive early to familiarize yourself with the meeting room, agenda, and also to discuss any last minute ideas with your group. Rotate speaking at public forums among your group.

4 -Visit local legislative office(s)!

Action: Call to set up an appointment with your state representative in his or her home office. Introduce yourself and your group of advocates. Invite them to a community meeting and ask them to speak about how to communicate with legislators.

Tips: Be prepared for a short meeting, possibly with the legislator's staff/aide. Be polite and respectful, but be clear and direct on why you are there. Maintain good eye contact, give a firm handshake, and dress professional but comfortable. Be prepared for a brief meeting. Bring a one or two page statement regarding your pressing issue to leave with the legislator or staff person.

5 -Visit an institution (State School, Nursing Home, Etc.).

Action: Contact the superintendent or supervisor in charge of facility to inquire about visitor rules. Invite facility staff to participate and learn about self-advocacy. Invite self advocates to participate.

Tips: Maintain respect for the facility and its members/residents, while encouraging a 'safe' environment for participation. Support the self-advocate by volunteering to be their advocate. Discuss the importance of perseverance while trying to make systemic changes.

6 -Participate in focus groups!

Action: Volunteer to help moderate the discussion.

Tips: Know and understand the issues at hand and ask open ended questions. Recruit participants with different view-points and don't pre-judge. A good moderator will keep the group focused by asking how the group feels about an issue. Keep the group small but invest time in the planning process in order to get the right people to participate.

7 -Host an Informal Chat!

Action: Invite a small group of advocates to your home and provide light refreshments. Identify issues of importance at hand and get feedback from group. Review what has been accomplished in the previous months. Celebrate the big and little victories. Develop a new approach to an on-going issue.

Tips: Plan this on a regular basis. Rotate meeting locations; keep it informal but on topic and informative. Provide writing materials and designate an advocate to take notes or develop a problem solving chart with an action plan. Everyone loves a party, so keep the atmosphere light and respectful to encourage on-going group participation.

8 -Start a self-advocacy group.

Action: Meet with your local Mental Health/Mental Retardation (MHMR) Center to identify possible participants and/or Community Providers. Attend provider meetings or a Provider Fair to discuss goals of self-advocacy. Coordinate face to face meetings with participants. Visit with existing groups to consider joining rather than creating a new group. Deliberately include self advocates.

Tips: Once your self-advocacy group is formed, hold meetings in centrally located places such as libraries that also have access to buildings and to public transportation. Encourage self-advocates to lead the group and ask for their input on issues that affect their lives. Encourage self-advocates to visit with their legislators and to attend other community meetings or hearings.

9 -Host a letter writing campaign on issues important to your advocate group!

Action: Use samples provided by organization handbooks, such as The Arc of Texas <http://www.thearcoftexas.org/advocacy/publications.asp#handbook>. Write your own letter! Be sure to include a bill number and sponsor if writing about legislation. Make copies of letters and any responses and keep in a correspondence file for you and your group!

Tips: Familiarize yourself with the timing of the communications. Be sure they are timed in relation to the decision maker's timeline (i.e. not after a decision has already been made). Most decision makers will remember an influx of letters and respond accordingly to their constituent's request.

10 –Meet with other disability community groups and seek opportunities for collaboration. Identify local issues, build consensus, and strategize!

Action: Contact your local Mayor's Committee on Persons with Disabilities and attend a meeting to find out what issues are being discussed or addressed.

Tips: This is a great opportunity to volunteer and/or to organize a committee around disability issues if one is not already formed.

11 -Organize a voter registration drive!

Action: Contact the League of Women Voters or your County Clerk's Office to find out about the voting process. Volunteer to work at election polls. Begin a campaign to help people with disabilities exercise their right to vote!

Tips: Work with other disability groups to organize "Get Out The Vote" campaign. Register people with disabilities, as well as students that may have reached voting age. Sponsor community trainings to inform people with disabilities about their voting rights.

12 –Contact one media outlet (television station, newspaper, local community magazine).

Action: Introduce yourself and your group. Ask how stories are developed for their medium. Get to know the editor and reporters and maintain good communication.

Tips: Invite them to one of your group's community meetings that a representative from a local legislative office is attending. Offer to write an article about successes or concerns in your community. Agree to an interview with local television, and ask for free public announcements in the newspaper about scheduled meetings.

The Difference Between Advocacy and Lobbying: What Nonprofits Should Know

[Adapted from the Illinois Arts Alliance/Foundation's website, http://www.artsalliance.org/al_faq.shtml#dos.]

Although most people use the words interchangeably, there is a distinction between advocacy and lobbying that is helpful to understand. When nonprofit organizations advocate on their own behalf, they seek to affect some aspect of society, whether they appeal to individuals about their behavior, employers about their rules, or the government about its laws.

Lobbying refers specifically to advocacy efforts that attempt to influence legislation. This distinction is helpful to keep in mind because it means that laws limiting the lobbying done by nonprofit organizations do not govern other advocacy activities.

Sometimes when people hear the word lobbying, they say, "It's illegal for nonprofits to do." This is a myth. It is perfectly legal for 501(c)3 nonprofits organizations to lobby. In fact, it is a powerful strategy for making people's lives better and for building stronger communities. However, there are limitations on the amount of lobbying nonprofits can do. For more information on lobbying and the law or for help estimating whether your organization is approaching the maximum it may spend on lobbying go to the Center for Lobbying in the Public Interest at <http://www.clpi.org/lobbyingandtheLaw.aspx>.

Do's and Don'ts of Nonprofit Lobbying

One thing a 501(c)3 nonprofit cannot do is endorse candidates; contribute money, time or facilities on behalf of the organization to a candidate; or, engage in electioneering or discriminate against any particular candidate. In addition, nonprofits cannot set-up a fund or manage a political action committee under section 527 of the tax code for electoral activity.

There are several things a 501(c)3 nonprofit can do including educate the public on issues and encouraging participation in the political process, educate candidate on your issues, participate in nonpartisan forums, invite all candidates to meetings or events, encourage people to register to vote, work on behalf of a ballot measure and take part in other general lobbying/advocacy activities (letter writing, attending advocacy events, etc).

What Private Citizens Should Know

As a private citizen - separate from your non-profit - you have all the rights provided by the Constitution to petition, advocate, and communicate with your government. As a private citizen, you can contribute to campaigns and make public statements separate from your organization. If you are a leader in the community associated to a particular nonprofit be sure when you are participating in activities that are NOT permissible for nonprofits, that you clearly indicate you are participating as a private citizen. In other words, do not sign-in or introduce your self as "Joe Smith from ABC nonprofit organization" just introduce yourself as "Joe Smith."

TEXAS LOBBY LAW*

Chapter 305 of the Government Code requires a person who crosses either a compensation or expenditure threshold to register with the Texas Ethics Commission and to file periodic reports of lobbying activity. Chapter 305 also contains restrictions applicable to persons required to register as lobbyists. This lobby law is administered and enforced by the Ethics Commission. Rules that the Ethics Commission has adopted under the lobby law are in Chapter 34 of Title 1 of the Texas Administrative Code (T.A.C.).

Even if you are not required to register as a lobbyist, you should be aware of the bribery, honorarium and gift prohibitions in Chapter 36 of the Penal Code. In addition, you should be aware of Title 15 of the Election Code, the campaign finance law, which places restrictions on contributions and expenditures to support, oppose, or assist candidates and elected officeholders.

If you have a question that is not clearly answered by this guide or by the instructions to a lobby report, please contact the Ethics Commission.

What is Lobbying?

The lobby law regulates "direct communications" with members of the legislative or executive branch of state government to influence legislation or administrative action. See Gov't Code §305.001, 305.003(a). To understand what activity is regulated by the lobby law, it is important to understand the terms "direct communication," "member of the legislative or executive branch," and "communication for the purpose of influencing legislation or administrative action."

Direct Communication

The lobby law regulates certain "direct communications." "Direct communication" includes contact in person or by telephone, telegraph or letter. The communication must be directed to a member of the legislative or executive branch of state government. For example, if an organization publishes a newsletter for its members, the individuals writing the newsletter are not "communicating directly" with members of the legislature, even if a legislator may read the newsletter.

Member of the Legislative or Executive Branch of State Government

The lobby law regulates direct communications to "members of the legislative or executive branch" of state government. This guide uses the term "state officer or employee" as a shorthand term to refer to a member of the executive or legislative branch of state government. You should remember, though, that the term does not include an officer or employee of the judicial branch.

Member of the Legislative Branch. A "member of the legislative branch" of state government includes a member, member-elect, candidate for, or officer of the legislature or of a legislative committee (Gov't Code §305.002(7)). Employees of the legislature are also "members of the legislative branch" of state government.

Member of the Executive Branch. A "member of the executive branch" of state government includes an officer, officer-elect, candidate for, or employee of any state agency, department, or office in the executive branch of state government. Gov't Code § 305.002(4).

Lobby Law Not Applicable to Communications to Judicial Branch. Communications to a member of the judicial branch of state government (such as a judge or a court clerk) are *not* subject to

Lobby Law Not Applicable to Communications to Local Government Officials. The lobby law applies only to communications to *state* officers and employees. It does not apply to a communication made to an officer, an employee, or anyone else who represents a political subdivision of state government, such as a county, city, school district, or other local government or special district. (A person communicating to influence the actions of a local governmental body should check to see whether the local governmental body has adopted its own lobby regulations.)

Communicating to Influence Legislation or Administrative Action

The lobby law applies to direct communication with state officers and employees to influence "legislation or administrative action." "Legislation" means a matter that is or may be the subject of action by either house of the legislature or by a legislative committee. *See* Gov't Code § 305.002(6). "Administrative action" means any matter that may be the subject of action by a state agency. *See id.* § 305.002(1).

The fact that a communication does not include a discussion of specific legislation or administrative action does not mean that the discussion is not a lobby communication. If a communication is intended to generate or maintain goodwill for the purpose of influencing potential future legislation or administrative action, the communication is a lobby communication.

Determining Whether Lobby Registration is Required

Lobby registration is required if a person meets either one of two thresholds: the "compensation and reimbursement threshold" or the "expenditure threshold." A "person" required to register may be a corporation, partnership, association, or other type of business entity as well as an individual.

Compensation and Reimbursement Threshold

Under current Ethics Commission rules, a person who receives *more than \$1,000* in a calendar quarter as compensation or reimbursement to lobby must register as a lobbyist.

Expenditure Threshold

A person who expends *more than \$500* in a calendar quarter for certain purposes must register as a lobbyist.

What is a Lobby Expenditure?

Expenses that count toward the expenditure threshold are expenditures that benefit a state officer or employee or the immediate family of a state officer or employee, that are made to communicate with a state officer or employee to influence legislation or administrative action, and that fall into one of the following six categories:

- Transportation and lodging,
- Food and beverages,
- Entertainment,
- Gifts,
- Awards and mementos, and
- The attendance of a state officer or employee at a political fundraiser or charity event.

An "expenditure" is "a payment, distribution, loan, advance, reimbursement, deposit, or gift of money or any thing of value and includes a contract, promise, or agreement, whether or not legally enforceable, to make an

Entity Registration

A corporation, partnership, association, or other type of entity may be required to register as a lobbyist if the entity exceeds either the compensation threshold or expenditure threshold.

Detailed Reporting

In some cases, you must identify the individual who benefits from a lobby expenditure and provide other details about the expenditure. (You are not required to do detailed reporting of expenditures for events to which all legislators are invited.) Detailed reporting is required if a lobbyist spends:

- More than \$76.80* in one day for food and beverages, transportation, or lodging for a state officer or employee;
- More than \$76.80* in one day for entertainment for a state officer or employee *or* for the spouse or dependent child of a state officer or employee;
- More than \$50 for a gift, award, or memento for a state officer or employee;
- any amount for a state officer or employee to attend a political fundraiser or charity event.

**Excerpts taken from “The Texas Ethics Commission: Lobbying in Texas—A Guide to the Texas Law”, <http://www.ethics.state.tx.us/guides/LOBBY%20guide.htm>.*

COURSE EVALUATION

TRAINING LOCATION:

TRAINING DATE:

Congratulations on completing The Arc of Texas' Advanced Advocacy and A-Team Training! We would like to know how well you feel we have prepared you to be an advocate in your community. Your answers will help us make the training process better for future advocates.

Please mark a number for each statement below, with 1 being the least prepared and 5 being the most prepared.

(Please circle one for each statement)

How prepared are you for each of the following:

1. I understand what advocacy is	1	2	3	4	5
2. I understand how to tell my story	1	2	3	4	5
3. I understand what an issue is	1	2	3	4	5
4. I know the need for an advocacy strategy	1	2	3	4	5
5. I understand the need to work in a coalition.	1	2	3	4	5
6. I understand the need for clear communication	1	2	3	4	5
7. I feel the materials provided are helpful.	1	2	3	4	5
8. I feel the instructor helped me learn.	1	2	3	4	5

The information presented today that was **most** helpful to me was:

The information presented that was **least** helpful to me was:

Other comments:

TELL US ABOUT YOURSELF!

NAME: _____

EMAIL ADDRESS: _____

PHONE NUMBER(S): _____

MAILING ADDRESS: _____

Would you like to receive advocacy updates and Action Alerts from The Arc of Texas?
YES _____ NO _____

Would you like to be contacted by the Texas Council on Developmental Disabilities for outreach, networking opportunities and information dissemination?
YES _____ NO _____



