



# EFFECTIVE POLICY ADVOCACY

FRAMING

MESSAGING

TACTICS

TOOLS

The AED Center for Leadership Development strives to facilitate the emergence of effective leadership at all levels of society. Our expertise lies in the design and delivery of high quality, comprehensive leadership development programs, with an emphasis on learning, creativity, and community building. Our staff is diverse and familiar with a broad range of theoretical constructs, best practices, resources, and tools that can be applied to build and launch new initiatives or to strengthen existing programs. In all of our work, we understand the importance of strategic partnerships in designing, implementing, improving, and evaluating outcome-oriented initiatives. The Center has a solid record of advancing opportunity, equity, and inclusion to assure that the leadership of the future has major impact and is diverse in all respects.

Cite as Ken Williams, *Effective Policy Advocacy: Framing, Messaging, Tactics, and Tools*. Washington, D.C.: Academy for Educational Development, 2009.

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# EFFECTIVE POLICY ADVOCACY

FRAMING, MESSAGING, TACTICS,  
AND TOOLS

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DECEMBER 2009



Leadership and Institutional Development Group

**Disclaimer:** This essay is only for informational and educational purposes. It is not intended to encourage specific individuals, groups, or organizations to lobby or to incur lobbying expenditures, either in general or in connection with a particular policy agenda.



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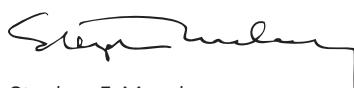
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## FOREWORD

I am pleased to commend to you this new guide to effective policy advocacy. At AED, we know that long-term systemic change is necessary to bring about a better quality of life for every member of the human family. We know that great outcomes often arise out of the reform of institutions, the reshaping of dynamics of influence, generous commitments of resources, partnerships across boundaries and sectors, and sheer determination.

We hope that this guide will make it easier for the people we serve and support to participate more fully in political processes. Each of us should strive to “own” and improve our democracy. We are eager to see more people from disadvantaged backgrounds gain the opportunities, support, and confidence necessary to mobilize for the changes in public policy that align with their own interests and aspirations. The value of their perspectives in setting the global agenda cannot be overestimated.

We hope that the strategies, tools, and information presented in this monograph contribute in some way to the attainment of dramatic outcomes—improvements in the lives of the resilient and courageous people that we encounter in our work. We believe that everyone has a moral obligation to work together to address the imbalances and indignities in our world that lessen all of us. Through the lever of civic engagement, we must all do our part.



Stephen F. Moseley  
President and CEO  
*Academy for Educational Development*

## ACKNOWLEDGMENTS

I thank the many individuals who have influenced my thinking about effective public policy advocacy, most especially Robert Walker, executive vice president of the Population Institute. Mr. Walker has worked on Capitol Hill, served in advocacy and lobbying roles for major nonprofits, shown tremendous skill as a trainer and facilitator, and has been both friend and mentor. Doua Thor, executive director of the Southeast Asian Resource Action Center, provided helpful information about resources. Chrystal Rambarath, our senior program associate, recently set a fine example of leadership by organizing a first-rate public policy institute attended by emerging leaders from the Gulf Coast region. Also worthy of recognition are the New Voices Fellows and alumni, who serve as a constant source of inspiration to me and to many others in struggles for justice.



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# GETTING STARTED

Imagine that you and those you serve and support are beginning a process of developing a policy agenda. Suppose that there are pressing needs that must be addressed, difficult challenges that must be tackled, and basic rights that must be defended. Below we have provided information about a variety of resources related to advancing policy change, and we have outlined a host of strategies and tactics that you may find useful in constructing an advocacy strategy. We are not giving you specific advice, just approaches to consider as you move forward with your efforts to foster change. Please take only what you think may work and leave the rest. Also, please do not feel overwhelmed by the numerous options and factors. You can always get involved in the policy process without knowing every player and tactic.

Take a deep breath. Share with one another your experiences, perspectives, beliefs, and values. Begin with questions such as these: What is happening? Who is affected? What is the impact? What is the opportunity? What is at stake? Why do we want to take action? Is there anyone else we should get involved before we define the issues and the possible solutions? These conversations can help your group or coalition stay united and motivated as new challenges arise.

Review the applicable law and decide if your group should advocate or lobby. Advocacy draws attention to a problem or a set of problems facing a constituency and may recommend approaches and solutions that should be strongly considered. Advocacy usually involves giving information and providing an education about the issues at hand and the impact of current conditions and arrangements. It may entail telling stories, presenting data, and sharing the results of nonpartisan unbiased research. *Lobbying*, in contrast, involves communications that

refer to a *specific piece of legislation*, state a position or view, and request the support of a policymaker or public official. This exchange is called “direct lobbying.” When an organization issues a call to action to its members, allies, or to the general public in connection with a specific piece of legislation, it is engaged in what is termed “grassroots lobbying.”

Here are a few commonly cited Web sites that you may find useful for understanding the distinction between advocacy and lobbying:

- ▶ Internal Revenue Service,  
<http://www.irs.gov/pub/irs-pdf/p557.pdf>.<sup>1</sup>
- ▶ Web site funded by the IRS on the requirements and restrictions associated with maintaining tax exempt status,  
<http://www.stayexempt.org/mini-courses/resources/player.html>.
- ▶ Independent Sector, <http://www.independentsector.org/index.htm>. See *Public Policy* section of the site.
- ▶ Alliance for Justice, <http://www.afj.org>. Check under the *For Nonprofits and Foundations* section of the site.
- ▶ Board Source, <http://www.boardsource.org>.  
See the *Knowledge Center* section of the site.
- ▶ Center for Lobbying in the Public Interest, [www.clpi.org](http://www.clpi.org).  
Note especially these three sections of the site:  
*The Law*, *Site Map*, and *Publications*.
- ▶ NP Action: <http://www.npaction.org>.

Nonprofit organizations often have policies and procedures related to the authorization of advocacy and lobbying activities and any associated expenditures. The approval of the board of directors, executive director, legal counsel, or an authorized

staff member may be required before embarking on a direct or grassroots lobbying campaign. Be sure to consult a qualified attorney, certified lobbyist, or check with the IRS ([www.irs.gov](http://www.irs.gov)) when and where there is uncertainty about what your group can and cannot do. *However, technical considerations should not deter you from getting involved in the political process.* All nonprofits can both advocate and lobby under certain conditions.

Your organization could also apply for 501(h) status by submitting Form 5768 to the Internal Revenue Service. This status usually gives a nonprofit greater clarity and range of motion in its lobbying efforts. It establishes the ceiling or upper limit for lobbying that a group can reach. Spending limits are set by law, applying a formula to the organization's overall budget expenditures. Securing 501(h) status is often a smart approach to protecting the organization, particularly when there will be a substantial amount of lobbying. Alternatively, the organization could go even further and establish a separate dedicated lobbying organization under the IRS Code, section 501(c)(4). Empowered with this status, a nonprofit can lobby without the expenditure restrictions, but donations to the organization are not tax deductible.

Other ways to advance your policy agenda include:

- ▶ registering a separate Political Action Committee (PAC) with the Federal Election Commission to support the political campaigns of candidates who share your group's values and vision;<sup>2</sup>
- ▶ pulling a coalition together to hire its own lobbyist, drawing on the collective resources of member groups;<sup>3</sup>
- ▶ making the case for regulatory reform or for the enforcement of existing regulations;

- ▶ filing a lawsuit;
- ▶ providing technical advice and recommendations to a legislative body concerning specific legislation, in response to a written request from a policymaker or legislative committee;
- ▶ publishing and disseminating the results of your group's nonpartisan research and analysis.

Nonpartisan research and analysis gives a full and fair explanation of the factors that should be considered by policymakers and others when weighing the various policy option(s), but it does not issue a call to action. A group typically shares its perspective on the advantages and disadvantages of proposed legislation through a presentation, white paper, report, set of fact sheets or section of a Web site. The communication is informational and factual, as objective and balanced as possible, and does not amount to mere propaganda. Often, data and case studies are presented and the reasonableness of an approach is defended.

The end product of the research is made widely available so as to enrich the public debate, and is not disseminated narrowly to a select target group with the primary intention of manipulating the outcome of the political process. Typically, a case is also made against adopting the proposal(s) of an opposing policymaker or group, due to inconsistencies, lack of supporting evidence, potential for negative impact, or a weak value proposition—meaning that the overall costs of implementing the proposal, whether social, economic, cultural, environmental, or political, outweigh the benefits.

# MOVING FORWARD

Once it's been settled though—whether to advocate, lobby, or deploy a strategic combination of both—take time to listen to the stakeholders, those who will be affected by the proposed changes in policy. Work to understand the perspectives of both your allies and your opponents, as this understanding will prove invaluable at later points when policymakers or others ask questions, or when adjustments in strategy can be made to garner more support or weaken opposition to your recommendations. Encourage candor in these discussions. Beat back any cynicism. Build one another's confidence that change for the better is possible.

Collect the best data and stories that you can to clarify exactly what is taking place and what is necessary and feasible related to your group's issue. Look into what is happening in other countries, states, communities, and institutions in connection with your cause. You may find evidence that shows that your group's perspective is valid and that your proposal is reasonable and likely to be effective. Or you may discover smart ways to adjust the requests or demands that you will make.

Visit the Web sites of the advocacy groups and officials who care about and make decisions that may affect your issue. See what policies they are currently endorsing, as well as the pertinent decisions they have made in the past related to the concern or topic at hand. If there is not a good fit between their ideologies, stated positions, and records, and the philosophy and proposals of your stakeholders, develop a strategy for persuading them to meet with your group to listen and weigh all sides of the issue. Identify other policymakers and influential advocacy groups that could endorse or integrate your idea(s) into their own platforms. Expect in all of this a give-and-take process that requires negotiation and compromise.

Visit the Web sites at the end of this essay. (See *Public Policy Quick Links* on page 56.) These sites will help you to identify key power brokers and decision makers, whether they are your potential friends or your potential opponents. You are deciding who will be the focal points or “targets” for your advocacy or lobbying.<sup>4</sup> Some of the Web sites we have cited will help you to study the legislative priorities and positions of leaders on contemporary issues. Keep in mind as you develop the architecture of your overall strategy that there are three branches of government (the executive, legislative, and judicial branches), each with its own scope of power and responsibilities. You may be able to raise your concerns or foster support for your agenda on any or all of these fronts.<sup>5</sup>

There are also the national, state, and local contexts for advocacy. Some concerns must be tackled at the state level, because the authority to make key decisions (including budgetary ones) has “devolved” or been delegated by the federal government to the states. In addition, there may be intransigence and gridlock at the federal level that makes it impossible to achieve large scale change. Sometimes states also transfer authority and distribute funding to the counties and cities within their borders.

Then there are the three main sectors of society: government, business, and nonprofit. Each may be a potential source of support for your initiative. Can you persuade a government agency to give you critical data that will help you make a case for your approach or solution? Can you get a company to loan you meeting space or sponsor a fundraiser? Can you get nonprofits to donate or sell you their mailing lists?

You need not focus your time and energy on all of these domains, but it is worth thinking about where the opportunities for influence, synergy, and leverage lie, particularly when it looks as though engaging the players in one sphere of



influence is likely to be futile. Both research and outreach can help you to develop a comprehensive strategy and generate ideas about how best to develop your group's argument for reform and help the group determine whom it should approach for further information and support.

Now begin to forge the pivotal strategic relationships. Engage the interested and the invested, the partner organizations and unexpected allies, all of the committed individuals and groups you can get on board. Build a strong base and strive for a united front built on a foundation of people's experiences, shared interests, values, hopes, and unique capacities to contribute. It is often strategic in the beginning to approach influential leaders or members of organizations for one-on-one conversations before issuing invitations to come to a briefing, round table, or coalition meeting. In some situations, however, a one-on-one meeting will not be productive at all, and only the pressure and encouragement from peers and partners, whether behind the

scenes or sitting around the table, will help to tip the scales in your favor and define the opportunities for alignment.

Define the outcomes that you hope to see, both the bare minimum that you will accept as a solution and the maximum with which you will be thrilled should the effort arrive at total success. Be as specific and realistic as possible about the details of your policy agenda, deciding which things are negotiable and who will do the negotiating. Agree as a collective to the ways the issues will be framed and what the group's recommendations, requests, or demands will be. Be ready to explain how supporting your proposals will affect the decision maker, their affiliations and relationships, specific constituents and stakeholders, and the general public.

If you cannot gain the full consensus of your group on a policy agenda that you will promote together, hold an extended discussion of the considerations and factors that are shaping each member's position, whether tentative or firm. If the group becomes mired in discord, you may find it helpful to use a process in which each member or organization numerically ranks the set of policy options under consideration—anonimously and confidentially. Then a facilitator or volunteer collects the sheets with the ranking scores and posts the numbers on a flip chart or marker board or projects them onto a screen using an LCD projector. The numbers for each policy option are placed directly adjacent to that option and then counted as points.

Once the points for all of the options have been added up, you will be able to take the pulse of the entire group, i.e., its overall center of gravity. This is sometimes critical, as when there are many options on the table, many stakeholders, and the potential for hours or even days of wasteful rancor. Sometimes a more objective or "clinical" approach such as this prevents the group from being swept away

## RANKING OF PROPOSED POLICY SOLUTIONS

	Option A	Option B	Option C
Stakeholder W	3	1	2
Stakeholder X	1	2	3
Stakeholder Y	2	1	3
Stakeholder Z	2	3	1
TOTAL POINTS	8	7	9

Three policy options (A, B, C) are ranked by four stakeholders (W, X, Y, Z), with a score of 1 being the stakeholder's favorite or first choice, and a score of 3 being the stakeholder's least favored or last choice. Option B, with a total of 7 points, has more support than options A and C, with totals of 8 and 9 points respectively. (Keep in mind that a low numerical score such as 1 means there is strong support compared to a high numerical score of 3. The same can be said for the totals.).

by someone who is extraverted and has the best rhetorical skills. When there is likely to be irresolvable controversy, it can be useful to hold a preliminary debate of the considerations and the criteria for a good decision, conduct the ranking process, and then discuss the results and make adjustments.

A ranking approach such as the one described here is also useful if there is a group in the room that has specific power or influence some of the other groups are concerned about. You do not want your potential allies to hesitate to make a decision favorable to your agenda because they are thinking: "We need that group's support for something else that is more important to us." "We don't want to anger them." "They have a lot of clout." "They have always been our allies." Through this process you are giving all of the stakeholders a chance to weigh in and register their preferences. You may decide that a ranking of the options by a sample of individuals directly affected by the issues (e.g., residents, clients, constituents, members) should be given more weight than the ranking of options by advocacy groups and

other stakeholders. Or the final agenda can be approved by large cohort of those most affected following inclusive discussions.

A speedier alternative sometimes agreeable to all is traditional majority voting. Whether it makes sense to take this path depends on the stakes and the level of comfort and consensus the group has already attained. Encourage your stakeholders to vote with their consciences based on the information at hand, core beliefs and values, the potential for new partnerships and impact, and their visions of a more just and healthy society.

Keep in mind that people may be able to support certain parts of the policy agenda, while abstaining from others. If it is helpful, use a grid such as the one below, with these columns: support, oppose, abstain, uncertain, willing to negotiate. A table such as this can help to facilitate agreement about how best to work together and focus the group's energy and resources. Where there are irresolvable differences, the group can discuss steps it will take to mitigate any party's potential loss. Part company with some of the members if you have to, but avoid burning bridges. You may eventually gain support or see less opposition from a dissenting group when there are developments as the effort moves forward. Or you will be able to loop back and partner on something else that is of importance. Avoid personal attacks. Civility is critical.

### CURRENT LEVEL OF ALIGNMENT

	Option 1	Option 2	Option 3	Option 4
Support				
Abstain				
Opposed				
Undecided				
Willing to Negotiate				

Avoid dredging up “ancient history” and resentment. Usually it is best to begin the discussions with a clean slate or to allude to the past with a gentle reference.

Get as much buy-in and enthusiasm as possible from everyone who is still in and on your side of the issue. Remain open to returning to those who are undecided or opposed at a later point. They may join forces with your group when some of their concerns have been addressed, new evidence comes in, or when they see the likely outcome of the effort and want to be on the side of victory. Keep organizing and mobilizing. Expand the circle of supporters.

# FRAMING AND MESSAGING

Given your agenda, and the outcomes you are striving to bring about, frame the current situation in ways that are “sticky” and have “hooks” that will catch the attention of policymaker(s), stakeholders, influentials, the general public, and the press. These frames should be creative, concise, and engaging. They may even be jarring or shocking. You are looking for a reaction such as “Is that what’s really going on here?” “I hadn’t looked at it that way.” “What do you mean by that phrase?” “Yes, that is exactly how I see this problem (or opportunity).” “That is a very snappy heading for this story.” “You’ve defined the situation powerfully and succinctly.”

Frames and messages are not always about what is wrong with things, or what people should find troubling or ugly. They can also point us to something inspiring and beautiful and make us



want to lend our support. Some common examples of positive frames are: “community engagement,” “equal opportunity,” “parental involvement,” and “work/life balance.” Frames serve as key terms, levers, and pivots in the communications process. They tell us “what this is a matter of,” i.e., “what it is all about.” They are also frequently the opening or preemptive salvos that introduce what will be the linguistic and conceptual battle lines for future exchange and debate about an issue. Sometimes you need multiple frames to address the fact that you have multiple audiences that should be differentiated or segmented. The frame gives you a firm footing in the course of conversations about the current situations and conditions, opportunities, and solution(s).

In order to decide on your frame(s), ask yourself these questions: What is the exact interpretation of this situation, in the simplest of terms, that we want our audiences to appreciate and adopt? How can we shed a bright piercing light on this condition or arrangement, so that people will focus their attention and see it as we do? What specific language is likely to be the most productive in generating support for the changes our group desires. A frame is the “kernel” of truth, the “essence” of what is happening or needs to happen.

Now, it is unusual for a frame to be expressed in more than a few words. It is usually something along the lines of:

- ▶ let's call it (frame)
- ▶ (frame) is what is going on here
- ▶ so-and-so is (frame)
- ▶ this is a matter of (frame)
- ▶ (frame) is what this is truly about
- ▶ haven't you had enough of (frame)
- ▶ (frame) is attainable

Messages, by way of contrast, serve to fill in the spaces opened up by frames. They build on and explain their associated frames, enrich the discussion, outline the main considerations and factors, and clarify the advantages and disadvantages of a proposed solution. In music, a frame would be the major theme, while the messages would be the elaboration and development of the theme. In writing, the frame would be a short, engaging heading, while messages would be the bullet points or a series of propositions beneath the heading. A frame is to its messages as a bone is to its meat.<sup>6</sup>

Here is an example of a frame that was used in a campaign to prevent the sale of handguns at gun shows without first conducting criminal background checks. The Brady Act of 1993 had mandated such screening in the sale of handguns at gun stores, but gun shows had not been included in the bill. Gun control advocates chose to frame the issue as the “gun show loophole.” This frame was strategically chosen, according to Bob Walker, because “nobody likes a loophole.” It also begged the question: What’s the loophole? In doing so, it positioned advocates to explain their views and proposals.

Another example of a strong frame is one that was used by the Center for Third World Organizing and others in a campaign to address concerns that a local grocery store in Oakland was selling poor quality food to its customers, mainly low-income people of color living in the surrounding neighborhoods. The initiative was framed as the “green meat campaign,” and this frame, along with smart messaging and organizing tactics, led to major concessions from the store.

Here is another frame that we often hear from activists working on school reform: “Through underperforming schools, failed reform efforts, inequitable distribution of resources, and dysfunctional policies, practices, and processes, this country

has constructed a *school-to-prison pipeline*." Messages: Crime does not occur in a vacuum. Young people are being set up for failure. Everyone deserves an opportunity for a good education. Excessive security and harsh discipline prepare youth psychologically for delinquency or incarceration. A comprehensive set of interventions is necessary.

Then a modest part of the solution is introduced:

*Our broadband access proposal is part of a comprehensive solution because it will support the delivery of high quality and engaging multi-media educational content in the classroom, in libraries and computer centers, and at home. Building the infrastructure for free or subsidized broadband access, accompanied with training and technical assistance, would also facilitate adult learning and help to assure employability in a competitive global economy, as well as foster parental engagement and connections with teachers and mentors.*

One of the boldest and most radical framing efforts we have seen to date is the use of the expression "economic cleansing" in connection with policies, practices, and processes that facilitate gentrification in large cities and the displacement of low-income residents. This frame has been used to build an organizing base that includes single income households, elderly residents with fixed incomes, and underpaid workers.<sup>7</sup>

Messages should be clear and concise. Keep your sentences short and sweet under the assumption that less is more.

Campaigns often fail because:

- ▶ the messages were not compelling and did not resonate with the audience; they did not have "traction";
- ▶ the messages were not engaging enough; they lacked creativity and vitality;

- ▶ there were too many messages;
- ▶ the messages were mixed, muddled, contradictory, or confusing;
- ▶ the messages were too complex or technical for people to absorb.

You have to make it easy for people “to get it” quickly and see the logic of your viewpoint or proposal. Otherwise you will lose them, and they may fall back into comfortable positions.

Sometimes campaigns use the wrong messengers. Keep asking: Who will listen to whom within this particular context? Who should be the face and voice of the effort at this given moment in time? Should the target audience hear from teachers? parents? law enforcement? veterans? the formerly incarcerated? Sometimes it is strategic to assign key messages to each individual or group, particularly within the context of testimony at a hearing or a group visit with a legislator. Who is the ideal person or which is the best group to deliver this specific message? In a well designed campaign, all messages have their “couriers.”

Consider, for example, whether it would be strategic for six groups in your coalition to deliver the same main points or whether it is best to divide things up in some way. It depends on the situation. Sometimes you will in fact want everyone to keep repeating the exact same messages. Other times you are trying to avoid monotone and boilerplate, or lengthy tomes, and it is helpful to take advantage of the powerful voice or capacity that a particular individual or organization has to deliver a compelling message. When do you all need to speak with one voice? When is it helpful to support the individuation or differentiation and projection of a unique voice in a way that adds value, richness, and power yet still blends well with the other voices? In this regard, there are analogues between policy advocacy and

choral work. The dimensions of casting, staging, presence, and delivery create analogies with theatre.

Another set of choices concerns the placement of messages at the “front” or “back” of an advocacy campaign as it moves forward. Ask yourself: What are the main or leading messages that need to be delivered at this time, and which ones need to be held or saved for another place and time? Suppose that your proposed approach to solving a problem implies a tax increase. It is unlikely that raising taxes would be the dominant or leading message at the forefront of the communications. However, an adjustment in placement could be made in a meeting with a policymaker who is very empathetic to your group’s concerns, adamant about advancing opportunity and a decent quality of life for all, and a proponent for balancing budgets without compromising basic human rights or shirking collective responsibility.<sup>8</sup>

Before launching an advocacy campaign or outreach effort to inform, educate, and engage the public, decide which messages need to be loud and clear and which ones need to be kept at a lower decibel. Put your best foot forward rather than begin with a proposition that is so unpopular that the campaign may be drowned out and defeated just as it leaves the gate. Check to see if there is any polling data that can guide you in your messaging. Who do you expect to step up to support you as you release your first communications? And who do you expect to stand up to oppose you immediately? Would there be any advantage to seeing if you can get specific groups in your corner before you publicize your group’s viewpoint or announce its objectives? It may also be prudent to take a moment to check in with your traditional allies or the “low-hanging fruit” to confirm you will receive assumed backing.

There are also ethical considerations in the ways that issues are framed, particularly in the beginning, and in what information

is shared or suppressed. Avoid any communications that may later be viewed by your potential supporters as misleading. Pay particular attention to the risks associated with the presentation of data, historical facts, legal matters, and anecdotes or stories that may be considered by policymakers, the media, or the public as outliers (“cherry picked”) and not representative of the population group or situation.

Think carefully through the associations, whether positive or negative, that your target audiences may have with specific words you are using and with the individuals and groups that are serving as the face and voice of the campaign. For example, many groups would shy away from highlighting an endorsement by Big Tobacco for a measure, unless it were an anti-smoking bill, investment, or strategy. The associations that some people have with the tobacco industry could infect or weaken the brand and the overall appeal of the campaign.

Consider also whether there has been a scandal that has driven down the public perception of a particular individual or group. This may create distraction or “drag”. Alternatively, has someone in the coalition just received public honor and acclaim? Reputations, credibility, and perceptions of objectivity are valuable assets to leverage at strategic moments in the course of a campaign.

Imagine also the associations that people already have or could have between a policy, whether existing or proposed, and its impact. Think of this as the fundamental question in the minds of your audiences. They want to know what is at stake. What difference will their support make if they get involved and who stands to gain or lose? What are you asking them to “buy” or “to buy into”? Will their support lead to 100 children getting access to quality day care? Will ending the policy in question bring about reconciliation and collaboration between groups

that have had a long history of strife and antagonism? Will your proposed solution definitively resolve an issue that many feel has been ignored for too long? Fostering such associations of positive or negative impact with the ideas or solutions that your group is introducing is one of the most important dimensions of an advocacy effort. People's readiness to contribute or resist is often based on associations and first impressions.<sup>9</sup>

Then there are the questions of tone and emotion. Most advocacy campaigns aim in communications to attract empathy, stimulate anger, raise fear or concern, appeal to conscience, or inspire. A well-structured campaign does not lose sight of this and considers not only which messengers will convey which messages, but also what the tone will be in the conveyances.

For example, suppose that you are an advocate for or supporter of a group of immigrant farmworkers. They are testifying at a hearing about the impact of poor working conditions and wage violations on themselves, their family members, and the local community.

You may want to discuss with the workers whether, as a matter of strategy, it would be better to focus the attention of the panel or committee on the dais primarily on the suffering they are experiencing, in hopes of attracting genuine empathy and concern, or to let the overall tone of the testimony be dominated by anger. The strategy team may also want to explore whether it would be valuable for the workers to share some of the inspiring parts of their own personal stories. Should one of the leaders interject warmth and a small bit of humor at some point? The placement of emotion and setting of tone is a matter of context, purpose, and comfort. It is important for the advocate or coach to support discussions of considerations related to the expression of emotion and setting of tone and to not let personal views or preferences stand in the way of an open conversation.

The considerations above do not in any way abrogate the indisputable rights of the workers to express what they are feeling, in whatever way they would like. The discussion heads instead toward a question of whether, from an outcome-oriented perspective and a mindful recognition of the realities of prejudice, it would be strategic and effective at this moment to let the lion's share of the anger and indignation in the room shift and be lifted and carried by other advocates in the room who are also testifying. Alternatively, the workers could decide that they do in fact want to express their anger, but will be careful to associate the emotion with the perpetrator or "villain" in the situation, say an exploitative land owner, rather than direct it toward the policymaker. They may also want that anger to be further validated or reinforced by allies. In sum, in the most rigorous design and implementation of an advocacy strategy, there is not only a focus on the carrying of messages. There are also decisions to be made about the best way to communicate the emotions that accompany the messages. Of course this point applies to positive emotions such as joy, optimism, and enthusiasm.

None of the above notions would mandate or recommend staging contrived or faked expressions of emotion or suppressing deep feelings. It is only a matter of maintaining self-awareness, making conscious and deliberate choices, and being attentive to discipline, teamwork, and alignment. Sometimes it is best to let some emotions out right after you've left the room or when you rejoin one another elsewhere.

There can also be advantages to engaging a speech writer, coach, or communications professional to work closely with the stakeholder organizations and coalition members, as well as a cadre of engaged individuals who have been affected by the

concern at hand. This coaching, training, or technical assistance can include guidance in the generation of compelling op-eds, testimony, statements, and press releases. It may prepare participants for press briefings and for face-to-face meetings with lawmakers, government agency staff, donors, or advocacy groups. If politicians and CEO's can have such professional services, such as speech writing, should not people of limited opportunity and means have access to them as well? It is important to provide a supportive structure rather than let anyone flounder or feel unsure in unfamiliar space. However, the consultant, trainer, or staff member should be careful when drafting text or providing in person coaching to amplify rather than supplant the voice of the participant and to tap into the participant's capacity to convey a unique and authentic message that she or he is comfortable owning. The writer should clearly draw on actual conversations with participants. The participant should always retain the right to approve or disapprove any expression or articulation of his or her personal experience and perspective.<sup>10</sup>

In further preparation for delivering your message(s), consider ways to deploy art forms and multi-media solutions to help people connect emotionally with your cause. Touch them at a primal or visceral level rather than only at a cerebral level. The art forms you can fold into the advocacy process may include fine art, graphics, murals, photography, videography, music, song, dance, shorts stories, poetry, cartoons, comics, theatre—any or all of it. If you can get a cadre of committed artists involved in your initiative it can be incredibly powerful. Think outside the box every step of the way about the talent that you can tap. What about engaging comedians? How could chefs support your campaign? Does a popular celebrity or war hero care about your issue?

Appeal to a time honored tradition that people are likely to defend or find comfort in, a historical fact or figure, or something that people take pride in or enjoy. If you are creative, you can always find new ways to get more and more stakeholders engaged and invested.

Meanwhile keep generating buzz for your ideas. What will your audiences find appealing and compelling? And what is likely to turn them off? The careful crafting, delivery, and dissemination of messages will help to determine whether your group will be followed by honey bees, killer bees, or no bees at all.

# 15 WAYS TO MAKE YOUR CASE

As you develop your communication strategies and advocacy tactics, there are many approaches you can take in structuring your arguments.

- 1** *The rights-based approach.* Help policymakers see that the issue you have raised is a matter of justice, a cause for which they should fight, a situation or arrangement that they should not tolerate.
- 2** *The community-based approach.* Appeal to a vision or dream of harmonious relations, a good quality of life, and self-determination. Describe the actual or potential impact of existing or proposed policies, programs, services, and investments. Argue for the need to launch new enterprises and to build new infrastructure and systems from which all or many will benefit.
- 3** *The compassionate approach.* Tell the powerful stories. Reveal the outrageous suffering. Attract or call for genuine empathy. Engage policymakers at an emotional level by telling the truth about the impact of the current state of affairs on real live human beings. Ideally, those who are most affected by the issues at hand will be the ones who personally carry this core message of human impact.
- 4** *The relationship approach.* Talk about how the decision to support you could build new partnerships and alliances, bring about reconciliation, or affect people's levels of trust and commitments of support for future proposals of the policymaker.

**5** *The evidence-based approach.* Present accurate and compelling data. Introduce the results of a poll, survey, study, or literature review. Be careful not to overwhelm your target audiences with too many numbers or complex data and jargon. You may find it helpful to focus the conversation on your top three to five most compelling statistics or findings, and then provide more evidence when asked for it. Introduce easy to understand statistical charts, tables, and frameworks or models. The good news is that convincing data need not come from a well-funded controlled research study conducted by a university and funded by a government agency. In fact, sometimes a community can generate valid data through its diligent effort. Today some advocacy groups are training local community members in the collection, analysis, and strategic use of data.<sup>11</sup>

**6** *The principled approach.* Look at whether ideology is involved in the current debate about your issue or proposed solution. Do policymakers on your target list believe that government is the solution to problems? Or do they take a more individualistic “wild west” approach that says that people should take care of themselves? How do you frame decisions to support your group rather than to obstruct it, as a matter of obligation or principle, of adhering to a code of ethics, reasonableness, and common decency? What is the core proposition with which you want to them to agree? A few examples: “Do you agree that all people, regardless of upbringing or station, deserve a living wage so that they take care of their families, pay taxes, and contribute to the larger society?” “Do you believe that we have a moral obligation to reduce these dropout rates?” “We think that endorsing this solution would demonstrate your commitment to equal protection under the law.”

# 7

**The vision approach.** Paint a picture of the future in which things that have strong appeal to your prospects are going to happen. What will the situation look like if they back your proposals? How will the situation be noticeably transformed? What are *their* notions of perfection and beauty? Can you find speeches that they have delivered at events or in public debates? Are there inspiring statements on their Web sites that you can point to? “*Imagine* what it would be like if everyone in this country had broadband Internet access. It would reduce disparity in access to information and resources, as well as disparity in influence. It would enable everyone to engage more fully and frequently in our democracy through opportunities to contribute personal experiences and perspectives in the course of online debates and discussions, responding to polls and surveys, and perhaps even voting some day through a secure, encrypted ballot.”

# 8

**The ego approach.** Appeal to the influential’s sense of pride, commitment to integrity, desire for self-consistency and coherence as a “human narrative.” “Is this a decision that you can live with?” “Do you want to be known as \_\_\_\_?” “Here is how we will honor you for your support \_\_\_\_.”

# 9

**The budget-based approach.** Show policymakers that the policy change your group is promoting is affordable and fiscally responsible and that we will pay an even higher price if we do not embrace it. Point out how the taxpayer or investors will get more bang for the buck, gain extra value, and suffer fewer losses if your idea prevails. Demonstrate how your approach is better than that opposing one, because it has all of *these advantages*, whether revenue generation, cost savings, or added value.

# 10

***The interest or curiosity-based approach.*** Ask the decision maker “Is this something you are interested in?” “Would you like to see what we can learn from this approach?” “Does this merit an experiment or pilot project?” “Can we launch a demonstration project without expecting the taxpayer to write a blank check?” “Would you be willing to support a competition of our solution with this other one that is under discussion—to see which is more promising or effective?” The latter approach may put the policymaker or an opponent to your proposal in a tough spot, because free, open, and fair competition of ideas is a popular value. Sports, spelling bees, and poetry slams demonstrate this as much as competition in the market place. Presumably, everyone would want to know which solution among the options under consideration is the best value.

# 11

***The passion-based approach.*** Take note if the policymaker is known for caring intensely about the issue or constituency under discussion. Has she or he made moving speeches; proposed, introduced, or co-sponsored legislation; written an op-ed or letter of support; or held a press briefing or press conference on the issue? Has he or she had a personal experience that could be referred to in your pitch? “We know how strongly you feel about (x) because \_\_\_\_.” “We think this is the perfect way to respond to the need you have already stated for \_\_\_\_.” “This is an opportunity to build on all of the learning that happened when \_\_\_\_.” This is a good way to tap into all of the emotion that is connected with this issue.

# 12

***The enjoyment approach.*** “If you do this, you and those you represent will have the pleasure (or satisfaction) of \_\_\_\_.” “This will be a lot of fun because \_\_\_\_.” “There will be reason for celebration.” “You’ll be glad you did it!” “This will give people the lift that they need right now.” “We know how much you enjoy \_\_\_\_.”

# 13

**The faith-based approach.** Ask your potential sponsors to consider their spiritual beliefs and practices, religious symbols and ritual practices, and public or private positions of the leaders of their churches, mosques, synagogues, or temples. Consider citing or alluding to what it says in the scriptures if they are devoutly religious. Recall the words of a figure they consider holy or transformational. Remind them that life is short and that this decision is also about their legacy within the larger context of human history.

# 14

**The safety approach.** Point out the risks that are involved to them, to you, to specific stakeholders, or to society in general. What harm could happen to an individual or group if your interpretation of the facts is not accepted and your proposal is not approved? Where is the potential for damage or protection? If you are able to quantify the potential impact, all the better. "This will protect 5,000 young adults in our state from slipping into a life of poverty." "It is possible that 300 workers right here in this community will lose their jobs." "This could lead to a major increase in domestic violence."

Some policymakers are afraid of losing influence, their jobs, and financial security. They may be concerned about losing longstanding friends. Some worry about the possibility of public shame and embarrassment or angry confrontation, particularly if they are considering reversal of an earlier position. It is sometimes possible to discuss these fears confidentially and in private. It may be as simple as inviting honesty: "What are you worried about?" When your group is able to leverage its resources and contacts to offer protection or to minimize risk and reduce loss, that capacity may be worth putting on the table in order to address what may well be legitimate concerns rather than a lack of integrity or courage.

# 15

***The indirect approach.*** A policymaker may not be ready to support your group publicly, but could agree to let something you oppose “die in committee,” and gradually fall off the public radar screen. Sometimes a policymaker will refuse to make a public statement, but become very engaged behind the scenes, drawing on technical information and the framing provided by your group. There have also been examples of legislators attaching “killer amendments” or inserting “poison pills” into bills to prevent them from being passed. In these situations, the additional provisions make the bill unacceptable, often to swing votes. Of course, a policymaker may also add “sweeteners” to a bill or strategy to make it more palatable to colleagues or advocacy groups.

A policymaker may decide to make statements such as:

“We should not be focusing on this. We should be focusing on \_\_\_\_.”

“I’m not ready to close off the debate on this topic.”

“I think this debate is important, but this issue needs more research. Let’s create a task force, commission, or panel to study it.”

“I don’t feel that I have enough information to make a decision either way on this, so I’m going to abstain.”

“I’m eager to be supportive, but there is one provision that I simply cannot accept.”

Be attuned to whether you really need to have enthusiastic support from a policymaker, or do you just hope that your advocacy will lead them to vote for ending a debate or filibuster so that a vote on the

measure can proceed? Garnering enough votes to end a debate is sometimes called “cloture” and may require more than a majority vote in the legislative chamber.

Based on information or perspective that you provide, you may gain ground should separate bills that were passed by two chambers of the legislature go to a conference committee composed of representatives of each chamber for further discussion and negotiations. A conference committee typically strives to merge the two bills and reconcile the conflicting provisions. During this process the door may still be open for your group to make a case. However, continue to maintain clarity throughout about the distinction between advocacy and lobbying, and when the line has been crossed attend to the ways in which expenditures are being booked.

Keep an eye out as well for opportunities to offer perspective and advice when negotiations are in process between policymakers, advocacy groups, and the executive branch (e.g., the mayor, governor, president). The information and analysis that your group provides could lead to a reframing of the public debate, adjustments to the final edition of a bill, a veto, a veto override, or favorable regulations.

Whether or not your group prevails in some way at the legislative level, you may be able to influence the details of regulations that are issued by a federal, state, or municipal agency charged with implementation of the new act. Sometimes there is a period set aside for public comment on draft rules, enforcement provisions, and operational plans associated with the use of appropriated funds. Weighing in during these regulatory discussions does not constitute lobbying.

# TAKING STOCK

Some of the above approaches and tactics may sound too complex or manipulative or seem to require a level of investment and compromise that is difficult to justify. Politics is dirty at times, but this does not mean that *your* politics have to be dirty. Throughout the process keep track of how you feel about both your ends and your means. Consider both the short- and long-term views. Remember the interests of your stakeholders and the reasons you got involved in the first place and the price of inaction. Though policy advocacy may in some contexts feel like playing a game, it is, as Bob Walker has noted, “a game with real consequences.”

Keep in mind that there are policymakers who come from adversity and have a track record of striving for integrity and consistency while working on reforms that involve complexity and require tough decisions and compromise. Ask whether you need to draw clear distinction in your advocacy effort between idealism and perfectionism. Be cognizant of what those most affected by the situation want. Do not allow past privilege or romanticism to cloud your thinking. Avoid raising issues and objections that the population you serve and support does not care about as much as you do.

Make sure you have completed a thorough analysis of each stakeholder’s strengths and assets to the extent that time and commitments to transparency allow. Assume that every member of your group has capacities that have gone unnoticed. Ask all to contribute what they can, under the assumption that anyone’s contribution could tip the scales. Make sure that everyone is clear and explicit about roles, responsibilities, and commitments. Get as specific as possible about the money, time, and calories that people are ready to burn. Take nothing and no one for

granted. Look for and engage the lost sheep, the silent ones, the skeptics, and anyone lacking self-confidence.

Fine tune your game plan and map it out. Work out the specifics—the tactics, the scheduling, and the logistics. Be creative about your tactics. Do not march on the capital if it is what everyone else does, will not receive much attention, and is unlikely to have a tangible impact or build a broader, more engaged, more powerful base for advancing dignity and prosperity. Be mindful of how you are using your resources. Would 30 members operating a phone bank and faxing letters of support bear greater fruit at the moment than 300 members standing in the cold at a rally?<sup>12</sup>

Draw up a list of the individuals and organizations to which you believe the policymaker will listen. Some of your allies may fall into categories such as: law enforcement, health care providers, religious leaders, union members, business leaders, and so forth. Consider also if there are special populations or identity groups that should be heard from in the campaign: women of color? seniors? youth? blue collar wage earners? soccer moms? veterans? people from neighborhood(x)? “success stories”? Cross social, economic, political, and geographic boundaries to show broad-based support for your agenda.

If you can gain the support of someone who has a personal relationship with a policymaker, the tactic can be fruitful. But be careful. You do not want your potential supporter to think or say “How dare you try to get her involved!” If you or your organization are already familiar and close to the heart of the family member, colleague, or friend, you are on safer ground.

Now consider: What is the best sequence or roll out of this initiative? What are the possible obstacles? What are the contingency plans? Where is there wiggle room? What is negotiable and what is not? Anticipation (including the

moves and countermoves of potential opponents) and advance planning can really pay off. You are creating as detailed a road map as possible, with due regard for where there are gaps in your group's capacities to achieve specific milestones. Try to find a creative way to encapsulate and represent the various players, pathways, and strategies visually, in a decision tree, table, graphic, logic model or art form. If time and resources allow, consider using a mind mapping solution such as *Mindomo*, *Mindmeister*, or *PersonalBrain*. This will help your members understand the overall architecture of the initiative.

Think carefully about your communications methods. What is the strategic mix of face-to-face meetings, phone calls, faxes, letters, office deliveries, and e-mails? Policymakers know the "difference between grassroots and astroturf." That is a phrase said to be coined by Senator Lloyd Bentson. He was referring to boilerplate mass communications that are orchestrated by established or well resourced organizations. An example would be a wave of generic form letters and postcards. Customize and personalize everything as much as possible so that it doesn't look canned.

Note that at any time during a phone call, visit, public forum, press briefing, or e-mail exchange, you may need to pause for a moment, check how the decision maker sees the issues and feels about the proposals under consideration, and then adapt your messages accordingly. You are exploring and testing the waters even as you advocate for your ideas.

Engage all of the senses, especially the audio-visuals. People can only absorb so much text. A five-minute video clip, a hilarious cartoon, or a compelling photo and caption may have far greater impact than a ten-page report or a dry speech that is largely academic.<sup>13</sup>

Prepare a concise “sign-on letter” from your coalition that conveys the breadth of support for your proposal, or a roster that lists those who back your policy agenda or campaign. Ideally you are able to show that your coalition is diverse in mission, and that unexpected alliances have formed that should capture people’s attention. A policymaker may say: “This is a group I usually side with. Why do they support this?” Be wary of engaging only “the usual suspects” and the “clearly self-interested” in your advocacy efforts. Where is the surprise element?

# CRAFTING THE PITCH

If a decision maker is undecided or has already taken a preliminary stand on your issue, here is how your pitch could be loosely structured or formulated:

*Thank you so much for making time on your schedule to meet with us. We feel that it is urgent that we talk with you today. We represent \_\_\_ and are here to talk with you about \_\_\_. Did you know that \_\_\_? And we are wondering if you have heard about \_\_\_? The \_\_\_ [insert adjective] thing about this is \_\_\_. And the long-term consequences are likely to be \_\_\_.*

*We believe it is critical that \_\_\_. So here is our proposal: \_\_\_. And here is a list of the people and organizations that agree with our perspective on this issue and are backing [supportive of] our recommendations. One strategy that is working very well [over here] is \_\_\_. We think it would be \_\_\_ if we were to try it here. So much is at stake \_\_\_ [give list], and we have a concrete solution. We think that the best way to move forward is \_\_\_ because \_\_\_. If we take that route, \_\_\_ will happen.*

*We think that this approach is consistent with the stand you have already taken on \_\_\_. [Or] we know from \_\_\_ [source] that you \_\_\_. And we know how important \_\_\_ is to you. Here is how our idea aligns with your commitment to \_\_\_ and your vision of \_\_\_. And here is how you or \_\_\_ [stakeholder] will benefit: \_\_\_.*



Note: Do not appeal to the self-interest of a policymaker if she will be insulted or turned off by it and think it is a subtle bribe that questions her motives. Tailor the exchange to what you think the potential sponsor is interested in or cares about. Entertain the idea that the policymaker wants to do something about the issue under discussion and has been puzzling about it, and could be persuaded that your perspective is correct and that your idea is the most practical solution. Assume that there is a passion for legacy, even if there are signs that indicate to you a lack of full commitment to integrity.<sup>14</sup>

If you are receiving signs of opposition or a lack of interest on the part of a policymaker, consider staging a live or figurative debate.

***We realize that our opponents frame this as a matter of \_\_\_, but here is why that is not a valid interpretation. [Or] As you know, there are three proposals under consideration. Here are the arguments that are being made in favor of and in opposition to each. Note that our approach has all of these advantages or added benefits that the others do not. [List them]***

If your targets are frozen in ideological positions, ask them if they have considered things from a different angle. Give them another framework to look at or apply a distinction to the situation they had not thought of. "Here is the difference between a free market and an anarchic one: \_\_\_\_." "There are two different ways to look at judicial activism: \_\_\_\_." "In this situation is your first loyalty to your party or to these constituents?" Cite a reputable source or a recent study. Use a "wedge approach" by showing that others in their camp are now publicly supporting your idea. Let them know that they will not lose much, certainly not everything, if they support you. "We can do this together."

They may want to know that you "have their backs" or will get them additional "cover" if there is likely to be major fallout for supporting your group. They may appreciate your thoughts

about how to address any public relations concerns. Sometimes it is important to think about what the explanation of a decision to support your group will be. This is sometimes called “spin.” You can also offer to publicize the way(s) in which their support is having an impact on the population affected by your issue and why their support for your cause makes them heroes or heroines and sources of inspiration to others.

***Will you support this idea? Wonderful! Thank you so much! We'll follow up with you [or your staff] right after this meeting.***

If someone you have approached will not support you, the response could be something along the lines of:

***Can you say more about why you are opposed to this? Is there something we can do that would make it easier for you to move in our direction? What would you need from us to change your position? What If we were to \_\_\_?***

Now the rule is to make as strong a case as you can for your proposal, but never to threaten a policymaker or power broker, either explicitly or implicitly. This includes political threats. The exception is made only on occasion when the stakes are incredibly high, the risks have been weighed very carefully, the support is pivotal, and it is unlikely that there will be another opportunity in the foreseeable future to attain this critical victory.

Threats can backfire or close the door on other proposals your group will bring to a policymaker in the future. Remember that your influential prospect may say “Get out of my office!” the next time you approach him or her, attack or undercut your group, or ignore and dismiss you. It is important to make strategic decisions as to whether you will challenge specific opponents and in what ways. Make this decision together in advance, as a contingency plan. When is the right time to declare the group’s analysis and intentions? Is it better just to walk away and regroup?

If you do confront a policymaker, your communication should be measured and scaled to the situation.

Something along the lines of:

*As you can imagine, our \_\_\_ [constituents, members, coalition partners, etc.] will be hurt by [upset with] this decision because \_\_\_. They may demand that we \_\_\_, and we would rather \_\_\_. We feel that you have a lot to contribute to \_\_\_. And one of the things that we respect about you is \_\_\_. This is a historic opportunity to \_\_\_, and we don't want to fight you unless we have to. Can we keep the conversation going and try to work towards an agreeable solution? We are willing to compromise [or negotiate], particularly on \_\_\_.*

If the answer is still no:

*Well, obviously we are disappointed because this means \_\_\_. Is there anything we can do that would make it easier for you to take a stand with us on this? Any information we can provide? Someone you would like to talk with? Someone we can get on board publicly? We know that adopting our viewpoint and supporting our proposal would be a turning point [reversal] for you, but sometimes it is a decision such as this that breaks new ground and makes history. This is our best chance to \_\_\_. We know that you can do this, because it's the right thing to do, and we'll be there to support you if you do.*

*[Then] Thank you for your time. We want you to know that this conversation has been [or that this relationship is] \_\_\_ to us. We will follow up and try to make a more compelling case for our idea. Please contact \_\_\_ [names of designated persons] if you need any additional information from us, or have any questions, concerns, or ideas. Your decision is important not only to us, but to all those who \_\_\_.*

Then be sure to follow up with a letter, card, phone call, fax, e-mail, and/or press release.

## FINE TUNING

Throughout the entire effort of the organizing and advocacy, the group should appoint someone to stay on top of the latest information. Manage the inflow and outflow of information. What is the news that is significant for advancing your idea? Consider using a Web-based news reader or aggregator, such as *Google Reader* or *FeedDemon*. This solution makes it easy to collect news that comes directly to your computer via what are called really simple syndication (RSS) feeds. (See the orange buttons on major news sites for examples of news feeds that you can add to your free news reader account.)<sup>15</sup>

Once you have set up a news reader, you can quickly scan and click on incoming headlines, under which some of the text of the stories is displayed for quick viewing. You can also search the news by key words. For example, if you are working on a domestic violence campaign, you can search the news sources that you choose by simply putting the words “domestic violence” in the search field. A search under “health care reform” may pull up 30 recent headlines from the major news sources that you trust. You can then click on the stories in which you are most interested. You can quickly e-mail stories to others directly from your reader. Don’t worry about getting overwhelmed by too much news. You can always delete or ignore material while taking advantage of the fact that the information is organized, selective, and searchable.<sup>16</sup>

Does there need to be a Web site set up with a dedicated domain name reserved for the initiative? What is the best strategy for keeping the site current? How can it interface with other technologies the campaign is deploying? Some popular solutions for establishing a Web site focused on advocacy work include *Joomla*, *Drupal*, *Plone*, *Google Sites*, *Liferay*, *Weebly*, and

*Homestead*. However, sometimes it is less time consuming and resource intensive just to create a dedicated blog, particularly for campaigns that are quickly assembled, fast moving, or basic. Be careful, however, not too allow important information and key messages to be buried too far down a list of posts or in archives.

Consider also setting up a closed “social book marking” account (e.g., *Delicious*, *Furl*, *Simpy*, *Blogmarks*). This solution enables everyone in your group to visit, monitor, and quickly go to the key Web sites that relate to your campaign. You can access your group’s account from anywhere with an Internet connection. In complex campaigns, this is useful, particularly if your stakeholders are separated by distance. It enables everyone to find information and resources and to keep an eye on the moves and position statements of influential organizations and agencies. When there are many proposals under debate, participants may take assigned roles in scanning the Internet or tracking the moves of key movers and shakers.<sup>17</sup>

The designated leader, if there is one, may want to use a blog (e.g., *Wordpress*, *Blogger*, *Xanga*, *Typepad*) or a “micro-blog” such as *Twitter* to share information and perspective on what is happening and how the effort is going. These communications can be either open or closed to the public (i.e., by invitation only). This applies to both viewing and posting. Blogs and *Twitter* can transmit information to and from mobile devices such as cell phones and personal digital assistants (PDAs).<sup>18</sup> In addition, coalitions and networks sometimes create dedicated groups on social networking sites such as *Facebook*, *Myspace*, *Elgg*, or *Ning*. These sites serve as platforms that host profiles of each member, information updates, and discussions and support blast alerts. They can also be used to recruit new members.

Hosting strategic briefings with the key stakeholders and providing opportunities for input and feedback from members

is imperative. You can convene your allies in person, use traditional conference calls, or try a Web-based conferencing solution such as *WebEx*, *GoToMeeting*, or *DimDim*. Using an application such as *Skype* or *Google Wave* can help to save money on long distance calls. Establish a listserv for alerts and a telephone tree to reach individuals who do not have Internet access. Maintain a contact list that includes phone and fax numbers. A Web-based group on sites such as *Google*, *Yahoo*, *Wikispaces*, or *Dropbox* can support online collaboration, the sharing of documents, and discussions of strategy across distances and time zones.<sup>19</sup>

Additional tactics for mobilizing are bulk SMS text messaging and the rapid, viral dissemination of audio and video clips.<sup>20</sup> You can use flip cameras or even cell phones to produce and upload videos to a sharing site such as *Youtube*, *BlipTV*, *Vimeo*, or *HowCast* and then send a link to the footage to your stakeholders and target audiences. These videos can be both informational and motivating. They can add live faces, emotional content, and, should it be necessary, “strategic sarcasm”. (Note: Sarcasm and cynicism are two separate things.) Sometimes there are video clips already available on the Internet that you can use to your advantage. Conduct key word searches on video sharing sites such as *Truveo* and *YouTube*.<sup>21</sup>

Phone banking (calling people to ask them to contact a decision maker in support of your cause) may be productive. A policymaker may say: “Please stop the phones.” Or “Keep the calls coming, we’re doing a tally and I need to be able to demonstrate there is strong public support for this.” When your target is not a policymaker, but rather an advocacy organization, a few phone calls from the group’s members or popular leaders may be helpful to gaining the organization’s interest, backing, and allocation of resources to your cause.<sup>22</sup>

Meanwhile store all of your data: the evidence you gather that clearly demonstrates there is a problem that needs to be addressed, an opportunity not to be missed, or that your solution is well grounded in facts. Save copies of any press clippings associated with your issue or initiative in a place where they can be quickly retrieved to include in briefing materials and fund raising packets. Organize all new contact information. Maintain files, whether physical or electronic, that capture what you need to know about your prospective supporter(s) and opponents. A constituent relationship management (CRM) software can be useful for this purpose. Some popular examples include CiviCRM, *Salesforce Nonprofit Edition*, *Democracy in Action (Salsa)*, *Convio*, and products of *Blackbaud*.

Keep a timeline or history of your group's effort and consider using digital storytelling, perhaps a blog with video interviews, photos, and voice recordings of the stakeholders. If there is a designated leader or lead organizer, documenting and sharing the entire effort through a Web-based solution such as *LiveJournal* could be effective. Other solutions for inspirational documentation include *Animoto*, *Prezi*, and *VoiceThread*. A basic mapping solution such as *Google Maps* or *Google Earth* could help to introduce the need or issue or tell the story of the campaign as it unfolds. The product of your documentation activities can be leveraged later in processes of debriefing and reflection, popular education, training activities, Web site enhancement, fund raising, and celebration.<sup>23</sup>

Maintain the engagement with your stakeholder group. Toggle between the circle of sharing, strategizing, and consensus building and the arrow of forward movement. Celebrate your wins. Debrief and heal from your losses. Continue to add personal touches and strengthen bonds wherever and whenever you can.

Believe in yourself and stay engaged. You never know when the perfect opportunity for influence or instruction may arise. If you feel that “the system” or process is unfair or corrupt, as it most certainly is (either sometimes or often—depending on one’s viewpoint), your team can tackle those structural challenges whenever the time feels right, everyone is ready, and the forces for change are falling into alignment. Know that it is important to have made your case and to have spoken for your people. Do not lose sight of the significant wins that your group can achieve now, however small or modest in comparison to your end objectives. Take courage and keep people’s hope alive. Remember that there have been powerful voices and unexpected victories before you. Continue to bear witness to your values.

Keep breathing. Take a nap. Give hugs. And stop for ice cream in between.

## POLICY AGENDA AND STRATEGY FORMULATION TEMPLATE

- 1. Who we are:**
- 2. Who we represent, serve, support, engage, advocate for, and/or organize:**
- 3. The needs, problems, and challenges that we believe merit attention.**
- 4. Compelling stories or case examples that illustrate and justify the concerns we are raising.**
- 5. Key data or statistics that demonstrate that there is a problem or a good solution:**
- 6. How we will frame or effectively shed light on this situation:**
- 7. Our proposed concrete policy solution(s):**

**8. Additional messaging about the problem and the proposed solution (details, implications, considerations, feasibility, merits, and rationale):**

**9. Our allies, coalition members, supporters:**

**10. What we want the decision maker to do:**

**11. What is the historic moment? The unprecedented opportunity? Why is this the right time for this solution?**

**12. What is in it for (her/him/them):**

**13. What resources we have to work with and those that we need to garner:**

**14. Any follow-up that we need to do to complete our plan:**

## TARGET AUDIENCE(S) CHECKLIST

You may find it helpful to organize your policy plan into three sections: federal strategy, state strategy, and local strategy. Another cut is government, corporate, nonprofit, and grassroots. “What are our dot.gov, dot.com, dot.org, and dot.net strategies?” (“.net” here means grassroots networks.) Use a contact sheet for each person, group, or organization that you will approach to support or to not obstruct your effort.

*Check the boxes that apply.*

### Federal/National Strategy

#### EXECUTIVE BRANCH

- President
- President's staff
- Federal agency official
- Regulatory body or commission

#### LEGISLATIVE BRANCH

- U.S. Senator or her/his staffer
- U.S. Representative or her/his staffer

#### NATIONAL ADVOCACY GROUP:

- Association
- Think Tank
- Policy Group
- Coalition
- Direct Service Network
- Other

## State Strategy

### EXECUTIVE BRANCH

- Governor
- Governor's staffer
- State agency official
- Regulatory body or commission

### LEGISLATIVE BRANCH

- State Senator or her/his staffer
- State Representative or her/his staffer

### STATE ADVOCACY GROUP:

- Association
- Think Tank
- Policy Group
- Coalition
- Direct Service Network
- Other

## Local Strategy

- County Commissioner
- Mayor/City Manager
- Municipal regulatory body or commission
- City agency/department official
- City Council Member
- Local advocacy groups

**Influential**

- Media contact*
- Respected or credible expert*
- Community leader*
- Corporate/business leader*
- Professional group*
- Voluntary association*
- Student group*
- Faith community representative*
- Population group*
- Celebrity*
- Funder/donor*
- Policymaker's superior*
- Policymaker's subordinate*
- Policymaker's colleague*
- Policymaker's favorite person or group*
- Policymaker's friend (Be careful!)*
- Policymaker's family member (Be very careful!)*
- Key constituent*
- Other*

## CONTACT SHEET

Fill out this form for each potential supporter or opponent as is necessary or strategic. Valuable information about a prospect may include party affiliation, committee membership, positions within agencies/departments, responsibilities, public position statements, domains of influence, venues for access, and any other information you think is important to note.

- 1. Contact person (the policymaker, decision maker, staffer, advocate, other):**
  
- 2. Contact information (name, title, organization, address, phone, fax, e-mail):**
  
- 3. Her/his/their Web site:**
  
- 4. Things to note about him/her/them:**
  
- 5. Date and time of meeting or contact:**
  
- 6. How we are tailoring our framing and messaging for this particular person or group:**
  
- 7. Our relationship building strategies:**
  
- 8. Other strategies or tactics for persuading her/him/them to support us (or oppose us less):**
  
- 9. What we can do to honor his/her/their goodness for supporting us or to confront his/her/their opposition to our proposal:**

## TEMPLATE FOR A LETTER TO A POLICYMAKER OR INFLUENTIAL

Date

### **Name of Policymaker**

Title

Organization

Address

Dear \_\_\_\_\_:

My name is \_\_\_\_\_, and I represent [organization]. We work on issues such as \_\_\_\_\_, and the people we serve and support are \_\_\_\_\_.

One concern that we have today is \_\_\_\_\_. [Then give two or three statistics and anecdotes that represent the need or problem, or the value of your proposed solution.]

We believe \_\_\_\_\_. So we write to recommend that you \_\_\_\_\_. The impact of your support will be \_\_\_\_\_.

We know that you care about [are committed to, have supported] \_\_\_\_\_, and we are eager to work with you to assure that \_\_\_\_\_.

Sincerely yours,

Name

Organization

Phone

Fax

E-mail address

## PUBLIC POLICY — QUICK LINKS

The president, her/his cabinet, staff, policy agenda, speeches, and statements:

[www.whitehouse.gov](http://www.whitehouse.gov)

The U.S. senators, their staff, the committees on which they serve, their positions on issues, their legislative agendas, their spending priorities:

[www.senate.gov](http://www.senate.gov)

The U.S. representatives, their staff, the committees on which they serve, their positions on issues, their legislative agendas, their spending priorities:

[www.house.gov](http://www.house.gov)

Federal Agencies:

Agriculture	<a href="http://www.usda.gov"><u>www.usda.gov</u></a>
Commerce	<a href="http://www.commerce.gov"><u>www.commerce.gov</u></a>
Defense	<a href="http://www.defense.gov"><u>www.defense.gov</u></a>
Education	<a href="http://www.ed.gov"><u>www.ed.gov</u></a>
Energy	<a href="http://www.energy.gov"><u>www.energy.gov</u></a>
Health and Human Services	<a href="http://www.hhs.gov"><u>www.hhs.gov</u></a>
Homeland Security	<a href="http://www.dhs.gov"><u>www.dhs.gov</u></a>
Housing and Urban Affairs	<a href="http://www.hud.gov"><u>www.hud.gov</u></a>
Justice	<a href="http://www.usdoj.gov"><u>www.usdoj.gov</u></a>
Labor	<a href="http://www.dol.gov"><u>www.dol.gov</u></a>
State Department	<a href="http://www.state.gov"><u>www.state.gov</u></a>
Interior	<a href="http://www.doi.gov"><u>www.doi.gov</u></a>
Treasury	<a href="http://www.treasury.gov"><u>www.treasury.gov</u></a>
Transportation	<a href="http://www.dot.gov"><u>www.dot.gov</u></a>
Veterans Affairs	<a href="http://www.va.gov"><u>www.va.gov</u></a>

## KEY STATE AND LOCAL GOVERNMENT WEB SITES

State Government:

[www.ncsl.org](http://www.ncsl.org)

[www.nga.org](http://www.nga.org)

[www.usa.gov](http://www.usa.gov)

[www.stateline.org](http://www.stateline.org)

City/Town Government:

[www.usmayors.org](http://www.usmayors.org)

[www.nlc.org](http://www.nlc.org)

[www.usa.gov](http://www.usa.gov)

[www.icma.org](http://www.icma.org)

[www.natat.org](http://www.natat.org)

County Government:

[www.naco.org](http://www.naco.org)

[www.usa.gov](http://www.usa.gov)

## GENERAL RESOURCES

Explore links to federal, state, and local government Web sites and gather other valuable information published by the government: [www.usa.gov](http://www.usa.gov)

Find copies of bills, committee reports, congressional record of debates: [www.thomas.loc.gov](http://www.thomas.loc.gov)

Track legislation organized by issues and topic areas, with news feeds and e-mail lists: [www.govtrack.us](http://www.govtrack.us)

Visit federal Web sites grouped by various issue or topic areas: [www.browsetopics.gov](http://www.browsetopics.gov)

Locate and review federal publications and reports by topic: [www.gpoaccess.gov/topics/index.html](http://www.gpoaccess.gov/topics/index.html)

## FREE PUBLICATIONS AND TOOLS

Advocacy 2.0 Guide: *Tools for Digital Advocacy*. Web site:  
<http://advocacy.globalvoicesonline.org>

Advocacy Policy Planner: *An Advocacy and Policy Change Composite Logic Model*: <http://planning.continuousprogress.org>

Blog for A Cause: *The Global Voices Guide to Blog Advocacy*. Joyce, Mary. Global Voices Advocacy. Download from  
<http://advocacy.globalvoicesonline.org>

*Developing a Policy Initiative*. Themba-Nixon, Makani. The Praxis Project, 2002. Download from <http://www.thepraxisproject.org>

*Effective Advocacy at All Levels of Government*. William K. Kellogg Foundation and Center for Lobbying in the Public Interest. May 2008. <http://www.wkkf.org/advocacyhandbook/index.html>

*Effective Policy Advocacy*. Themba-Nixon, Makani. The Praxis Project. July 2003. Download from <http://www.thepraxisproject.org>. Thorough and great tools for use with communities.

*Framing Public Issues*. Frameworks Institute. Download from  
<http://www.frameworksinstitute.org>

*Geobombing: Your YouTube Videos on Google Earth*. Download from  
<http://advocacy.globalvoicesonline.org>

*The Internet Advocacy Book*. Organ, Michael. Web site:  
<http://www.issuemarketing.com> [Author's choice!]

*The Just Enough Planning Guide: How Nonprofits Can Achieve Their Campaign Goals*. <http://www.justenoughplanning.org/about.php>

*Learn to Love Lobbying.* Nelson, Fraser; Brady, David; and Snibbe, Alana Conner. Stanford Social Innovation Review, Spring 2007.  
Download from <http://www.ssireview.org>

*Little Black Book. Young People For: Advocacy and Lobbying.* Download from <http://www.youngpeoplefor.org/resources/blackbooks>

*Mission-based Advocacy Toolkit.* Alliance for Children and Families, January 2006. <http://www.alliance1.org>. A thorough and practical resource.

*Mobiles-in-a-Box: Using Mobile Phones for Advocacy.* Tactical Technology Collective. October 2008. Download from  
<http://mobiles.tacticaltech.org>

*Now Hear This: The Nine Laws of Successful Advocacy Communications.* Fenton Communications. Industry Guides, 2009.  
Download from <http://www.fenton.com>

*Organizing Tools.* Wellstone Action! Web site: <http://www.wellstone.org>

*Seen but Not Heard: Strengthening Nonprofit Advocacy.* Bass, Gary; Arons, David; Guinane, Kay; and Carter, Matthew. The Aspen Institute, 2007. (Available for purchase through <http://www.amazon.com>)

*Quick and Easy Guide to Online Advocacy.* Tactical Technology Project. <http://onlineadvocacy.tacticaltech.org>

*SpinWorks! A Media Guide for the Rest of Us.* San Francisco: The Spin Project, Communications Leadership Institute, 2000.  
Download from <http://www.spinproject.org>

*Using Mobile Phones in Advocacy Campaigns.* Stein, Michael.  
Download from <http://www.mobileadvocacy.org>

*Whose Media? Our Media! Strategic Communication Tools to Reform, Reclaim and Revolutionize the Media.* San Francisco: The Spin Project, 2008. Download from <http://www.spinproject.org/whosemedia>

## RESOURCES FOR FOUNDATIONS

*Advocacy Funding: The Philanthropy of Changing Minds.* Proscio, Tony. From the Grantcraft series funded by the Ford Foundation, 2005. Download from [www.grantcraft.org](http://www.grantcraft.org)

*The Challenge of Assessing Policy and Advocacy Activities: Strategies for a Prospective Evaluation Approach.* Guthrie, Kendall; Louie, Justin; Foster, Catherine Chrystal; and David, Tom. The California Endowment. Blueprint Research and Design. October 2005. Download from [www.calendow.org](http://www.calendow.org)

*The Challenge of Assessing Policy and Advocacy Activities: Strategies for a Prospective Evaluation Approach: Part II – Moving from Theory to Practice.* Guthrie, Kendall; Louie, Justin; and Foster, Catherine Chrystal. Blueprint Research and Design. October 2006.

Download from [www.calendow.org](http://www.calendow.org)

*Foundations and Public Policy. The Center on Philanthropy and Public Policy.* Edited by Ferris, Dr. James M; Foundation Center, 2009. Available for purchase through the Foundation Center Web site: [www.foundationcenter.org](http://www.foundationcenter.org)

*Foundations and Public Policy Grantmaking.* Coffman, Julia. James Irvine Foundation, 2008. Download from [www.irvine.org](http://www.irvine.org)

*Funding Health Advocacy.* Issue Brief 21. Panares, Rea; Schwartz, Anne; and Meredith, Judith. Grantmakers in Health. February 2005. Download from [www.gih.org](http://www.gih.org)

*A Guide to Measuring Advocacy and Policy.* Reisman, Jane; Gienapp, Anne; and Stachowiack, Sarah. Organizational Research Services. Annie E. Casey Foundation, 2007. Download from [www.aecf.org](http://www.aecf.org)  
*Guidelines for Informing Public Policy.* W.K.Kellogg Foundation, 2009. Download from [www.wkkf.org](http://www.wkkf.org)

*Strengthening Democracy, Increasing Opportunities: Impacts of Advocacy, Organizing, and Civic Engagement in New Mexico.*  
Ranghelli, Lisa. National Committee for Responsive Philanthropy.  
2008. Download from [www.ncrp.org](http://www.ncrp.org)

*What Makes an Effective Advocacy Organization: A Framework for Determining Advocacy Capacity.* Raynor, Jared; York, Peter; and Sim, Shao-Chee. TCC Group, January 2009. Download from [www.calendow.org](http://www.calendow.org)

*Why Supporting Advocacy Makes Sense for Foundations: Investing in Change.* Deutsch, Ted. The Atlantic Philanthropies. May 2008. Download from [www.atlanticphilanthropies.org](http://www.atlanticphilanthropies.org)

# ENDNOTES

<sup>1</sup> See pg. 44-45.

<sup>2</sup> See [http://fec.gov/ans/answers\\_pac.shtml](http://fec.gov/ans/answers_pac.shtml).

<sup>3</sup> For a national directory and profiles of lobbyists, firms, and government relations officials, you may find it helpful to visit <http://www.lobbyists.info>.

<sup>4</sup> We realize that some readers will be uncomfortable with the use of the word “target,” though that is the accepted term. By targets, we mean “prospects,” “change agents,” “power brokers,” or “potential sponsors or allies.” A target may be selected on the basis of formal position, areas of influence, control of resources, access to networks, valuable knowledge or expertise, or reputation.

<sup>5</sup> For a basic orientation to these three branches of government, go to the White House Web site, <http://www.whitehouse.gov>, and to the mega-site, <http://www.usa.gov>.

<sup>6</sup> In some ways framing is a bit like branding, labeling, or tagging, but the focus is on succinctly capturing the essence of a situation, condition, opportunity or aspiration rather than on promoting or comparing a product, company, or service. To learn more about framing, visit the Web sites of the Opportunity Agenda ([www.opportunityagenda.org](http://www.opportunityagenda.org)) and the Frameworks Institute ([www.frameworksinstitute.org](http://www.frameworksinstitute.org)).

<sup>7</sup> For a case study in sharp edged, controversial framing aimed at challenging displacement and the ill effects attributed by some activists to gentrification, study the Web site of the Right to the City Alliance ([www.righttothecity.org](http://www.righttothecity.org)).

<sup>8</sup> Occasionally an unexpected opportunity for advancing an unpopular solution to a social problem arises when a policymaker is preparing for retirement and has made a decision not to seek reelection. Your prospect may feel ready and determined that it is safe and the right time to individuate, reverse positions, and break away from the pack. Changes in course or reversals of position such as these can be some of the most thrilling (or demoralizing) events in politics. Be flexible and prepared to lose old friends and to make new ones, if only momentarily and in connection with a specific objective or provision.

<sup>9</sup> Politicians are skilled at this art of association and dissociation. Consider, for example, the 2008 presidential election when the Obama campaign sought to associate Republican candidate John McCain with some of the policies of the Bush administration while vice presidential candidate Sarah Palin simultaneously strove to tap into negative associations some voters may have with the concept or practice of community organizing. This process of association is often a conscious and sophisticated strategy of “hooking” or “tagging” an opponent that aims to affect his or her standing, position, brand, or perceived value in the public sphere.

- <sup>10</sup> To review strategies, resources, and tools that can be used for communications planning, training, and coaching, visit the Web sites of the Spin Project at the Communications Leadership Institute ([www.spinproject.org](http://www.spinproject.org)) and Cause Communications ([www.causecommunications.com](http://www.causecommunications.com)). Young People For ([www.youngpeoplefor.org](http://www.youngpeoplefor.org)) has also published guides to effective policy advocacy and strategic communications for campus organizers and student leaders.
- <sup>11</sup> One group in Mississippi that does this work of training communities in data generation and analysis very well is Southern Echo. See <http://southernecho.org>. A request for government data, materials, or answers to a set of questions under the Freedom of Information Act (FOIA) may also provide useful information and content for compelling advocacy work or even litigation. For more information about FOIA requests, see the Web site of Public Citizen ([www.citizen.org](http://www.citizen.org)).
- <sup>12</sup> If you do hold a march or rally, develop a great press strategy, appealing signage, and bring sufficient materials to hand out to the public in case people are “wondering what the commotion is about.”
- <sup>13</sup> Adjustments to the format of the communications should be made if the policymaker or a stakeholder has a specific disability, such as sight or hearing impairment, or limitations in mobility.
- <sup>14</sup> Sometimes tailoring your communications is not so much a matter of what a power broker *wants* to hear as it is a matter of what he or she *can* hear. Be careful about using words that are loaded and likely to raise red flags or to cause mental static and distraction for the leader.
- <sup>15</sup> AED does not endorse or recommend a particular software application. Those mentioned in this publication are only intended to be examples of major categories of solutions.
- <sup>16</sup> To learn quickly about RSS feeds and other Web 2.0 applications, watch the free educational videos produced by Common Craft (<http://www.commoncraft.com>) or conduct key word searches at <http://www.truveo.com>. You can also search Wikipedia. For the more technologically adventurous, there is a plethora of tools collected at <http://Go2Web20.net> and <http://www.teacher20.org>.
- <sup>17</sup> Should your group be concerned about potential changes in a Web site that has information that is valuable to your cause, a screen capture solution such as *Fireshot*, *Snagit* or *Jing* may be helpful to have ready. You may also find it strategic to study the differences in functionality between *Internet Explorer* and Mozilla’s *Firefox*. *Firefox* has some add ons that are worth exploring.

<sup>18</sup> An example of an emerging mobile solution is the use of live streaming from smart phones or “phone casting”. Examples of new applications include *Qik*, *Kyte*, and *Flixwagon*. For other strategies to leverage cellular networks, see <http://www.mobileactive.org>.

<sup>19</sup> Other technology solutions to consider deploying in an advocacy campaign include live streaming (*Ustreamtv*, *LiveStream*), Web-based mapping and touring (*Google Maps*, *Google Earth*), online photo sharing (e.g., *Flickr*, *Picasa*, *Snapfish* and *Photobucket*), HTML newsletters, event management solutions (e.g., *Eventbrite* and *Amiando*), wikis, and podcasts. For large complex and multi-organizational campaigns, consider deploying a Web-based project management solution such as *Central Desktop* or *BaseCamphq*. For reviews of these and other Web 2.0 solutions, see Techsoup ([www.techsoup.org](http://www.techsoup.org)), Idealware ([www.idealware.org](http://www.idealware.org)), Progressive Technology Project ([www.progressivetech.org](http://www.progressivetech.org)) and Tactical Technology Collective ([www.tacticaltech.org](http://www.tacticaltech.org)).

<sup>20</sup> SMS means short messaging service. Try a search on the Web under “bulk sms.” Compare, for example, <http://www.frontlinesms.com> and <http://www.bulksms.com>. See also <http://www.mobileactive.org>.

<sup>21</sup> Consider developing one brand, including a similar look and feel, across platforms such as the campaign Web site, blog, discussion group, *Twitter* account, video channel, and dedicated social network (e.g., *Ning*, *Elgg*). Most of these solutions allow for customization and some level of integration with one another.

<sup>22</sup> When specific legislation is referred to in these phone calls and coupled with an explicit or implicit call to action it is likely that the group is engaged in grassroots lobbying.

<sup>23</sup> Among its services, the AED Center for Leadership Development offers Public Policy Institutes and Web 2.0 “boot camps” to foundation grantees and nonprofits in the metropolitan Washington, D.C. area.





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