

## ♣ Five Steps to Effective Advocacy ♣

*“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”*

*Margaret Meade*

Whether you are lobbying a state or federal legislator, talking to a school principal or county administrator, or advocating for a change in policy at your work setting – like better cafeteria offerings – effective advocacy skills are essential for understanding your “community” and influencing policy within that community.

Advocacy efforts are most effective when they are targeted and specific. Know what you are after and what needs to be changed. Create a plan that outlines the who, what, when, where and how:

- *Who:* Who needs to be influenced? Who will help advocate for change?
- *What:* What are the key messages you need to communicate? What changes are you hoping for? What are the best ways to communicate those messages?
- *When:* When are the best opportunities to advocate for change?
- *Where:* Where are the best places to influence and promote change?
- *How:* How will you bring about change and garner support for your efforts? How will you communicate key messages - what settings will be used to communicate key messages?

### **Step # 1: Determine “WHO” the target audiences are and “WHO” will help**

- ✓ Key decision makers in the organization
- ✓ Other key players or influencers
- ✓ Partners to help in the advocacy effort

It is essential to identify the key decision makers that will determine the outcome of your efforts. These can be elected officials like school board members, county or other local leaders, state legislators, school district superintendent and principals, county health leaders. It is also essential to identify the key influencers – people who play a role in influencing the decision maker. These can be friends of the decision makers, their secretary or administrative “right arm,” staff members that support the school board or legislators, children, a husband or wife. Spend some time identifying who the influencers are and make sure they are included in your advocacy efforts.

Line up partners to help bring about change and look to garner support from an array of potential advocates – the more voices that speak up with a consistent message, the better your chances of promoting change. Partners may include:

- Local school food service directors
- Principals and vice principals
- Athletic directors, coaches, PE/ health teachers
- Superintendent

- School board members
- PTA leaders
- Students
- Local vendors or bottlers

Remember, one lone voice may not cause them to vote or act a particular way. But if enough players band together to promote change and let decision makers know it -- that can be very persuasive. Your job includes

identifying key decision makers and their influencers, informing others of your position, building support for your position, and target key decision makers.

### **Step #2: Know “WHAT” you are after**

Any advocacy effort – whether trying to make small changes in a school cafeteria or promote a large, county-wide wellness policy, must have a goal in mind – know specifically what you are hoping to change and what your outcomes should be. Make them clear and easy to understand.

### **Step #3: Know “WHEN” to advocate for change**

Determine if there are “golden” opportunities to advocate for change. Is there a state-wide public health meeting where a key influencer can be invited to attend? Is there a school-based wellness/nutrition initiative that a key decision maker can be invited to?

### **Step #4: Know “WHERE” to advocate for change**

This will vary and should include different locations. You may want to develop a list of partners to testify in front of the local school board – school boards hold open meetings and schedules are generally available via school board or school system web sites. If you are promoting a school health issue, you may want to hold a meeting or public gathering at a local elementary school and invite key decision makers and influencers. Meet with PTA leaders and ask to brief the larger PTA body – many school districts have larger, district-wide PTAs that oversee the school-based ones.

### **Step #5: Know “HOW” to advocate for change**

Once you have your key messages, it will be important to develop some effective tools to promote those messages and help influence decision makers. The key is to be **CONCISE** and **DIRECT**. Often times, decision makers do not have a lot of time to spend discussing issues. In addition, elected officials and other decision makers have a lot more practice doing the talking; make sure you get your points across in an “easy-to-understand” way. While it is not uncommon to “freeze up” when meeting face-to-face with key decision makers, there are some simple techniques that will help you get past the initial scare and help you make your points quickly, vividly and directly.

- ✓ **A picture tells a thousand words.** When talking to key decision makers, use easy-to-understand graphs, pictures or tables – it provides a good opportunity to explain the issue.
- ✓ **Memorize a little speech, just a minute-and-a-half or two minutes long.** It should include your name and position; that you live/vote/work in their district or organization (if influencing legislators); any organization or coalition that you represent as well as key people that support your position; state the problem, solution, and action in terms your grandmother can understand. For example, “We really need your support in approving the county wellness policy – it will mean healthier foods for all kids in schools and more recess in elementary school” and hand over a one or two-page fact sheet that includes a name, address, phone # and e-mail.
- ✓ **Use the media to promote your message.** Using the media, such as the local paper, school or business newsletter, radio call-in show, twitter and facebook, helps reach even more of those “other voters,” key decision makers, influencers, and others who can help in your efforts. Make your concerns known and they may provide positive media coverage of your issue.
  - *A Letter to the Editor* is effective and an often-read part of any paper.
  - Get to know your local writers, radio station announcers, and TV newscasters – local papers love health and nutrition stories.
  - Reporter and policy maker e-mail addresses and twitter handles are easily accessible - send them updates, notes and story leads.
  - Offer to write an article, conduct a class or host site visits for media.

## ♠♥♦♣ Developing an Effective Advocacy Effort ♠♥♦♣

### Definitions

*Advocacy*: shift public opinion; mobilize resources & forces to support a position (issue, policy, or constituency.)

- No statutes or legal terms; don't have to register to be an advocate; won't jeopardize tax status; can't lose fed or state funds

*Lobbying*: influencing the legislative process, generally after a bill has been introduced. Definition varies based on individual and organization.

- Narrowly defined in laws; ind. and orgs. that lobby must comply with laws; public funds generally cannot go towards lobbying; not-for-profit status can be questioned

*An advocacy strategy - whether individual or organizational - should be created by a process.*

### Key Components to the Advocacy Process

1. Know *what* you're after: Identify the specific issues and concerns as well as the changes or outcomes that are desired through the advocacy effort.
2. Getting it *together*: a critical element to effective advocacy is bringing together the key stakeholders who will work together to help move policy and/or are impacted by policy. This becomes the "think and action" team for policy change.
3. Know *who* you're after: identify the key influencers and/or decision-makers of the desired outcome. Such influencers could be local elected officials, nonprofit service providers, businesses, schools, media, faith and other issue groups, state government, schools, etc.
4. Decide *what* you want: once the influencers are identified, the team decides what it wants from each influencer or influencer group in order for the policy/issue change goal to be reached. Determine the top priorities on which to focus.
5. Decide *how* to do it: the team decides what top 2 methods/activities to create and implement – stick to education and promotion oriented methods - for each identified influencer or influencer group. These must be specific actions that reach the target influencer in order for that influencer to act upon the top priority action that will result in the policy/issue change.
6. Look at what you *need*: the team must identify what resources will be needed during the advocacy process, such as money, expertise, partnerships, other tools, etc.- be specific to the policy goal.
7. Know your *competition*: the team must identify barriers and challenges inherent in executing the plan and specify action steps for overcoming barriers.
8. Develop a *timeline*: a time line that identifies who/what is responsible for ensuring each influencer or influencer group does what is intended for them to do along with deadlines for key actions.
9. Measure *success*: decide what the data or outcome measurement will be that indicates success regarding the policy or system change.
10. *Advocate, advocate, advocate*: once a change has been made, always monitor to assure that that advocacy efforts continue and the change sticks. Many efforts have gone to waste when proper follow-up, monitoring and re-education are not done.

## Advocacy Process: Specific Example

**Change/outcome desired:** limiting the sale of certain unhealthy foods in vending machines in middle and upper schools in Sweettooth County, USA

**Advocacy Team:** concerned parents, students, teachers, PTA leaders, health department staff, dental and medical association reps, other health organization reps (American Cancer Society, American Heart Association, American Public health Association, etc.).

**Key influencers and influencer-groups:** county board of education members, district Superintendent, school principals, PTA leaders

### Actions desired from influencers

Board of Ed/Superintendent: issue standards to each middle/high school principal outlining acceptable foods and beverages allowed in vending machines; issue guidelines on establishing school nutrition committees in each school to oversee vending sales

School principals: support changes to current vending machine sales; accept Board of Ed standards; promote school nutrition committees

PTA: support changes to current vending machine sales; accept Board of Ed standards; promote school nutrition committees

### How will you impact each influencer

Board of Ed/Superintendent: develop education packet on the health effects of poor eating among youth; meet with key board members; conduct briefing at school board meeting

School principals: send health packet to each; set up briefings for key, influential principals; provide case studies/examples of effective revenue streams that do not compromise student health

PTA: send health packet to each president of middle/high school PTAs; set up briefings/educational sessions to be provided at local PTA meetings; develop flyers for school newsletters with ways to promote healthy environments; provide case studies/examples of effective revenue streams that do not compromise student health

**Resources needed for process:** advocacy committee time and energy; mechanisms to reach out to each principal and PTA president; admin supplies/Xeroxing

**Competition/barriers/challenges:** funding issues are driving vending sales with school principals claiming to need vending revenues to maintain basic school services such as uniforms, summer programs, computers, etc.; must overcome the potential and perceived lack of revenue stream through decreased or modified vending sales; students and parents want choice and do not support restrictions to food choices for students.

**Timeline:** List specific activities for each month with description of who will be responsible for what and when. For example, Aug and Sept may be good months to meet with school board officials; Sept and Oct may be good months to meet with PTA presidents and principals.

**Measuring success:** Board of Ed/Superintendent issue standards; school nutrition advisory committees established.

## Advocacy Process Worksheet

**Change/outcome desired:**

**Advocacy Team:**

**Key influencers and influencer-groups** (use the following tables to complete the influencer-related sections for each influencer/influencer group):

Influencer	
Expected action	
How to influence	
Resources needed	

Influencer	
Expected action	
How to influence	
Resources needed	

Influencer	
Expected action	
How to influence	
Resources needed	

Influencer	
Expected action	
How to influence	
Resources needed	

## Advocacy Process Worksheet (cont'd)

**Other resources needed for overall advocacy effort:**

**Competition/barriers/challenges:**

**Timeline:**

**Measuring success:**