

The 'How' of Policy & Built Environment Change

A Guide for Engaging in Effective Grassroots Advocacy

healthy communities, healthy people



Rural Action Now!

Produced by

Rural Action Now!

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Rural Action Now! developed this technical assistance guide for community health advocates seeking changes in policy and the built environment that help reduce the incidence of cardiac disease and other chronic disease in Northern New York State.

The exercises and “helpful tips” contained in this guide are presented as guidance and are based on our experience in working with coalitions seeking policy and built environment changes at the local level. This approach is by no means the only way to conduct a grassroots advocacy campaign. Many additional resources are available online and in print.

Overview of Rural Action Now!

Rural Action Now! seeks to empower citizens with the grassroots advocacy training and support they need to improve the health and wellness of rural communities.

Health Advocates Program

Rural Action Now! provides training, technical assistance and support to community-based projects and advocates who wish improve the health and wellness of communities through sustainable policy and environmental change. Our efforts are mostly focused on projects that impact physical activity and nutrition.

Our free advocacy training is designed to give citizens the knowledge and tools necessary to become advocates for improving health and wellness in their rural communities.

Participants will gain an understanding of the structure and function of state, county and local governments and how to design, plan and implement grassroots advocacy efforts to achieve policy and environmental changes in their communities.

Rural Action Now! also provides technical assistance and support that is tailored to the specific needs and goals of community-based coalitions. RAN can help your group on a number or levels, including conducting research, community assessments, strategic planning and coalition building, media outreach and identifying funding sources for your project.

Alliance for Healthy Communities

The long-term goal of Rural Action Now! is to foster a learning network that supports community health advocates beyond the funding and scope of our program. We are recruiting individuals and organizations from across Franklin, Essex and Hamilton Counties to join this network, which we call the Alliance for Healthy Communities. Alliance members will serve as a resource in their communities for citizen advocates who want to implement community-based policy and environmental changes that improve health and wellness. Ideally Alliance members will have participated in one of our trainings or will have previous advocacy experience. This is a rewarding opportunity to share your knowledge and experiences as an advocate with others in your community with similar goals.

Introduction

Rural Action Now! developed this technical assistance guide for community health advocates seeking changes in policy and the built environment that help reduce the incidence of cardiac disease and other chronic disease in Northern New York State.

As adult and child obesity rates continue to skyrocket, a growing number of public health coalitions are turning their focus to empowering individuals and community groups to achieve **sustainable policy & environmental change** as a way to combat this epidemic and improve the overall health of community members. A paradigm shift is underway. The focus is no longer solely on educating individuals to be more active. The problems we face are complex, and demand innovative solutions that impact entire populations.

Why policy and built environment change?

In their efforts to prevent chronic disease, community health advocates are increasingly making the link between our policies and built environments, increasing rates of physical inactivity and obesity, and chronic disease. A growing body of research shows that creating or enhancing access to places where people can be physically active and creating opportunities for people to eat healthier foods - when combined with education and encouragement efforts - is an effective strategy to help people incorporate healthier behaviors into their daily lives. Reversing the decline in physical activity and good nutrition through policy and environmental change presents a major opportunity for improving health in rural communities.

What is policy and environmental change?

Policy and environmental changes are sustainable interventions which affect the entire population of a community or region. They are often used in combination to achieve public health strategies that aim to prevent and reduce chronic diseases.

Policy is defined as a *written* course of action intended to influence and/or determine decisions or other matters that promote healthy living. Policies can be enacted by organizations or programs, companies, schools, or local, state and federal government. Changes in local, state, and federal policy have the potential for achieving the broadest impact across a community. Over time effective policy change leads to behavioral change and eventually social norm change. The progression of seat belt regulations over the past 50 years and the increased public awareness of the benefits of seat belt use is a good example.

Environmental change is a change, enhancement or addition to the built environment that permits, influences, or encourages the performance of an action or behavior. Often these changes occur in the places where we live, learn, work and play (i.e., the physical structures and facilities that comprise our community infrastructure). Examples include walking paths, trails, community gardens, new playgrounds, sidewalks and bike lanes, and improved accessibility for people with disabilities.

Grassroots Advocacy with Local Governments

Why should citizens, organizations, agencies, or public health coalitions comprised of these members, get involved in grassroots advocacy for policy and built environment change at the local, regional and state levels? Because simply educating individuals about making healthier choices is not always effective. We need to make it easier for people to make those choices by removing the barriers that prevent and discourage them from doing so.

Policy and built environment changes that address these barriers are a critical part of the solution, and achieving change requires the focused, informed participation of people at all levels in community decision making. Grassroots efforts that mobilize the citizenry to affect these changes in their own community are invaluable in preventing the chronic diseases that are the leading causes of death in the United States.

Why should local governments encourage citizen participation?

Local elected officials have both a responsibility and a stake in keeping citizens fully informed about local decision-making and providing clear opportunities to participate in developing and implementing local policy and built environment changes.

Encouraging citizen involvement in local planning and policy-making helps avoid problems and confusion later, and allows decision-makers to obtain first-hand knowledge of citizen needs, problems, and opinions on important issues. By supporting citizen involvement in this process, local governments, especially in rural areas, can take advantage of valuable citizen expertise and an expanded base of community support.

How can citizens participate in their local government?

Citizens can participate in a number of ways, both public and private. The rest of this guide is focused on helping you identify which forms of participation are best for advocating on behalf of the policy and built environment changes you seek.

Public

- Joining a planning or advisory board
- Forming citizen coalitions
- Organizing ad hoc committees
- Testifying at public meetings
- Running for elected office

Private

- Writing letters to elected officials
- Face-to-face meetings with elected officials
- Joining an interest group that advocates on behalf of your issue
- Donating to a political campaign

Advocacy vs. Lobbying

It is worth examining the difference between advocacy and lobbying, as many people use the terms as though they are the same. The distinction is especially important for non-profits, who can only use a certain percentage of their budget for lobbying purposes; and publicly-funded agencies (like public health departments), who cannot use *any* public resources to lobby elected officials. Citizens are of course not prohibited from engaging in either advocacy or lobbying activities on behalf of an issue they care about.

What is Advocacy?

- Educating decision makers about an issue and your group's role in addressing it
- Engaging in dialogue about an issue with members of the public
- Building a persuasive case for a specific policy or built environment change

What is Lobbying?

- Attempting to influence public officials to make a specific decision on legislation
- Asking the general public to contact decision makers about specific legislation
- Appealing to the public to vote a certain way on a ballot initiative or referendum

Types of Advocacy

Direct Advocacy is educating and persuading decision-makers on matters of policy and built environment change.

Grassroots Advocacy/Public Engagement is building awareness and support for your issue and the change you want to see.

Media Engagement is delivering your message to decision-makers and the public through the media.

Types of Lobbying

Direct Lobbying refers to influencing legislation through communication that (a) is directed to a legislator or employee of a legislative body, (b) refers to specific legislation, and (c) reflects a view of that legislation.

Grassroots Lobbying, when conducted by non-profit organizations, refers to influencing legislation through communication that (a) is directed to the general public, (b) refers to specific legislation, (c) reflects a view on the legislation, and (d) encourages the recipient "...to take action with respect to the legislation."

Citizen Lobbying is when the citizens contact their own legislators to try to influence legislation, policy and built environment changes.

Effective Advocacy in a Nutshell

Effective Advocacy is Strategic

Advocates need to be strategic by taking into account the social, economic, and political climate they are working in.

Social Climate – Do you have public will and support? Have you raised awareness of your issue with support from a variety of stakeholders?

Economic Climate – Does your issue involve an expenditure of money by a government body? If so, is the economic climate right for additional expenditures?

Political Climate – Do your legislators have the political will to pass your policy? Can you build political support? Or are you building awareness for a day in which the climate is more favorable?

Effective Advocacy is Flexible

Advocates need to be flexible in adjusting plans, tools, partners and strategies in response to changes in the social, economic and political climate.

Effective Advocacy is Organized

Simply put, advocates need to have a plan to get connected, get informed, and get involved.

Get Connected – Networking and coalition building are critical to achieving policy and built environment change. Remember, no advocate is an island.

Get Informed – Learn about the policymaking process in your town, county, and state. Learn about the regulatory body and policymakers you hope to influence. Gather information to build your case.

Get Involved – Find the level of involvement that is right for you – form or join a coalition, make a phone call or write a letter, testify at a public hearing, meet with legislators, or organize a rally or focus group meeting to raise awareness of the issue.

Three Things Every Advocate Should Know Before Getting Started

1. Policy change is incremental. Be prepared for the long-haul.
2. Achieving a short term goal like getting a policy introduced or out of committee is just as important as reaching the ultimate goal.
3. Celebrate every success – no matter how small – and have fun!

The ‘How’ of Achieving Policy & Built Environment Change

Engaging in Effective Grassroots Advocacy

Proper Planning Prevents Problems. Successful advocacy campaigns are well-planned in advance and are organized around a clear message and specific goals that can be easily communicated to a wide range of stakeholders. Good preparation will ensure that you will have the time to be patient and confident; that you can be proactive rather than reactive; and that you’ll be able to build awareness of your issue through the incremental successes of the campaign.

Good planning and preparation is critical to any policy change initiative, but advocates should also remain flexible. “A plan,” said General Patton during WWII, “is only good until the first shots are fired.” Advocates need to assess the political, economic and social climates they are working in, and as much as possible, try to anticipate contextual factors that might interfere with your efforts. You must also be ready to tweak your activities in response to these factors, without losing sight of your core goals.

Below we have highlighted six steps for engaging in effective policy advocacy. If you take the time to follow the steps, ask the questions, and make refinements as necessary – you will be better prepared to achieve your goals.

[Under each section additional guidance is referenced in the Resources section, and should be referenced for more specific information about the topic.](#)

Six Steps for Effective Grassroots Advocacy

- I. Defining the Issue
- II. Choosing SMART Goals
- III. Strategic Planning for Advocacy
- IV. Making the Case for Policy & Environmental Change
- V. Meeting with Decision Makers
- VI. Sustaining Advocacy Campaigns

Defining the Issue

Begin by defining the issue on which you or your group will focus. You should be able to communicate the issue in a sentence or two, in a manner that makes sense to people, addresses their concerns, and offers a clear explanation of possible solutions.

Consider whether it is a good issue for your group to adopt by asking the following questions:

- Is there an evidence-base for your issue (research studies, data, surveys)?
- Are many people aware of and/or passionate about the issue?
- Can the issue be addressed through policy and/or built environment changes?
- Will policy and/or built environment changes result in a quantifiable and definite improvement in the community?
- Are other entities already working on the issue in your community or region?
- Will the issue attract the attention of influential groups or individuals?
- Will it attract positive media attention?

Research the issue

Addressing public health issues through grassroots advocacy requires that you constantly remain on top of the facts. Research your issue by collecting the following information:

- Health indicator data from a variety of sources
- Peer-reviewed research papers
- White papers and reports from organizations and government agencies
- Copies of existing policies, laws, resolutions, and minutes of public meetings
- Policy and design guidance and sample policies
- Case studies and media coverage of the issue
- Survey and built environment assessment results

Identify strategies to address your issue

Once you have defined your issue, complete **Exercise #1** to brainstorm possible strategies to address the issue. *See the Resources section for more guidance on this topic.*

For each policy or built environment change idea identified, complete **Exercise #2** to identify the most promising ideas.

Record other useful ideas by completing **Exercise #3**. The *Spectrum of Prevention* provides a framework for identifying strategies that address public health issues. It allows users to identify a comprehensive approach for improving health outcomes through strategies ranging from the individual (education) to the whole population (policy).

Exercise #1: Brainstorming

1. Introduce the question to be brainstormed and review the rules of brainstorming:
 - All ideas are welcome
 - No comments or evaluation during the brainstorm
 - Quantity, not quality, to start with
 - Don't worry about duplicate ideas at this point
 - Keep in mind POLICY & BUILT ENVIRONMENT changes
2. Explain what will be done with the brainstormed ideas (show examples)
3. Write the question to be brainstormed at the top of the first page of flipchart paper.
(ex. What policy or built environment changes will address our issue??)
4. If you wish, offer a one minute "quiet period" before the brainstorm for people to think about the question and jot down a few ideas
5. Begin the brainstorm.
 - Guide the brainstorm by recording ideas on a flipchart or whiteboard as they come. You may wish to designate a recorder
 - Stop any comments that evaluate ideas. Invite new ideas, and encourage the group to share their ideas freely. Help generate energy and free-thinking through encouragement.
 - As the responses slow down, offer last chances for additional ideas, then stop the brainstorm.
 - Ask the recorder for his or her ideas. Thank people for participating.
6. Number or letter the ideas when you have the full list, so people can more easily refer to a particular idea.
7. Ask for clarification of any ideas that are not clear to you or others.
8. Highlight the ideas that lead to policy/environmental change.

Exercise #2: Evaluating Brainstorm Ideas

Idea #1:

Idea #2:

Idea #3:

Idea #4:

Idea #5:

Evaluation Criteria	1	2	3	4	5
Readiness How ready is this community to make this change? 1=extremely ready ----- 5=not ready at all					
Implementation How easy will this be to implement? (1=extremely easy ----- 5=extremely difficult)					
Impact How many people in the population will be affected? 1=many impacted ----- 5=few impacted					
Cost How much will it cost to implement and is funding readily available? 1=low cost/funding available ---- 5=high cost/funding unavailable					
Measuring Success How easy will it be to measure the success of this project? 1=easy ----- 5=difficult					
Total Score Add up the scores for each project idea Low score=good odds of success ---- High score=bad odds of success					

Exercise #3: Spectrum of Prevention Framework

Spectrum Level	Community-based Strategy
<p>7. Influencing Policy & Legislation <i>Educate policy makers and advocate for changes in law and policy that influence health outcomes.</i></p>	
<p>6. Mobilizing Neighborhoods & Communities <i>Prioritize community issues and provide training that supports policy and environmental change.</i></p>	
<p>5. Changing Organizational Practices <i>Adopt policies and procedures to improve health and safety and create new standards for the organization.</i></p>	
<p>4. Fostering Coalitions & Networks <i>Bring together groups and individuals to coordinate efforts, broaden goals and have greater impacts on target populations.</i></p>	
<p>3. Educating Providers <i>Informing providers who will transmit skills and knowledge to others or become champions or advocates for your goal.</i></p>	
<p>2. Promoting Community Education <i>Provide information and resources to promote existing opportunities for healthy eating, activity and safety or to prevent unhealthy practices.</i></p>	
<p>1. Strengthening Individual Knowledge & Skills <i>Enhancing an individual's capacity to eat healthy, get active or to avoid unhealthy behaviors / environment.</i></p>	

SMART Goals

Now that you have defined the issue and brainstormed ideas for addressing it through policy and/or built environment changes, you are now ready to outline more specific goals based on your best ideas. These will become your coalition’s core goals or objectives, and will form the backbone of your efforts moving forward. *See the Resources section for more guidance on this topic.*

Are your goals **SMART?** Specific, Measurable, Achievable, Relevant, and Time-based?

Specific: This is the WHO, WHAT, WHERE, WHY, and HOW? The goal should set a specific objective, for a specific purpose, to be accomplished in a specific place within a certain timeframe.

Measurable: Choose goals with measurable progress so you can benchmark success over time? Define a method for tracking incremental progress, which encourages a feeling of achievement among your members and other campaign partners.

Achievable: Have others achieved similar goals? Is the goal theoretically possible? Do you have the necessary resources, or a chance of getting them? Have you accurately assessed the limitations that might prevent you from reaching the goal?

Relevant: Your goals should be consistent with your issue or mission, and your short and long-term strategies for carrying out that mission. Goals should also correspond to an existing or upcoming opportunity otherwise you might be wasting your time.

Time-based: Set a specific timeframe for each goal. Creating a deadline for each goal gives you a clear target to work towards. Without a time commitment, there’s less urgency to take action now. Time must also be measurable, attainable, and realistic.

Advocates should further evaluate SMART goals using the following criteria:

Potential for Significant Impact	Political Feasibility
<ul style="list-style-type: none"> • Addresses a clearly identified issue • Achieves meaningful policy or built environment change • Influences social norms • Reaches underserved communities • Does not impose undue burden • Is a milestone towards continued change • Builds the movement for change 	<ul style="list-style-type: none"> • Can be effectively framed for broad support • Supported by influential constituencies • Supported by multiple constituencies • Supported by underserved populations • Supported by general public • Addresses concerns raised by opposition • Elicits strong media interest

Strategic Planning for Advocacy

Strategic planning

Strategic planning gives you and your coalition a road map to show where you are going and how you will get there. It ensures that your focus is placed on the most important activities and that resources are properly allocated to those activities that have the most impact towards achieving your core goals. Involving your whole team in the strategic planning process right from the start provides everyone with a clear understanding of what needs to be done and brings everyone together around a common vision.

Planning for advocacy can be challenging. Advocates must do their work in the public eye, which often means sticking your neck out to get decision makers to make changes that are often not in their short-term political interest. Remember to keep your plan flexible so that you can respond to unpredictable opposition, changing social, economic, or political climates, or when a strategy does not work.

Completing a strategic planning process should be the first step in developing your advocacy strategy. For each core goal your group has identified, complete the questions in **Exercise #4**. Below we elaborate on each component of the exercise.

Identifying Key Audiences - *Who has the power to make the change?*

Primary audiences are those people who have the power to implement the change that you want to see. Most of your advocacy efforts should be focused on them. If a majority vote is required from a board of supervisors or trustees, then you should select a subgroup from among this governing body to advocate with. Find out everything you can about how this group makes decisions, and gather information on past voting records and past positions on your issue (if possible).

Secondary audiences are those members of the community who can help you advocate with your primary audiences. These might be community organizations, civic groups, business owners, and citizen advocates. Each one of these groups can get involved in a different way. They may be enlisted to write letters of support, attend public meetings, or conduct petition drives. Some of these people may also become members of your coalition (more about that later). The media can also be considered a secondary audience, but we'll discuss that separately.

Developing Your Message - *What message will convince those with power to act for change?*

Crafting an appealing message and effectively communicating that message is key to winning a policy or built environment change. Always make sure that your messages are factual and well-documented. Being able to effectively explain your message for diverse audiences is essential to your cause. *See the Making the Case for Policy and Environmental Change section for more information.*

Identifying your messengers - *Who must be mobilized to deliver the message?*

Many of your messengers will ultimately be those people and organizations identified as secondary audiences – but you need to get them on board first. Begin by inviting them to a meeting to discuss your goals. Ask them to support your efforts and give them specific options for participating. Consider their expertise and how it relates to your issue. Messages from a group of people and organizations with diverse interests in the issue at hand can be highly influential. People with personal stories to share about the issue can also be very effective at gaining the attention of your primary audiences.

Delivering your message - *How can we get those with power to hear the message?*

Communication often makes or breaks an advocacy campaign, so take the time to carefully consider the best way to deliver your message. Depending on the audiences you have identified, there will be numerous options for communicating your message. Face-to-face meetings with decision makers, media campaigns, informational presentations, petitions and surveys, focus group meetings and other public outreach efforts can all be effective means for communicating your message. We will cover these topics in more detail in the next two sections.

Recruiting Key Partners & Coalition Building - *Who else do we need to recruit? What additional resources do we need?*

Ideally you will recruit partners who can compensate for your weaknesses and/or lack of resources. Consider which stakeholders might already be working on some aspect of your issue and reach out to them. Use **Exercise #6** to help identify new partners. The best advocacy campaigns are not waged by a single organization, but rather a broad-based coalition of stakeholders with diverse interests in the issue at hand. **Coalitions** are organized groups of people working together to influence outcomes around a specific goal. Coalitions are effective for achieving a range of public health goals that would eclipse the capacity of any one individual or organization. *See the Resources section for guidance on this topic.*

Creating an Action Plan - *How do we begin?*

Starting with the first steps identified in your strategic planning exercise, use **Exercise #5** to develop an action plan for each core goal. This will help your group focus on incremental steps rather than getting overwhelmed by the big picture. Action plans should be reviewed, revised and updated as your work progresses.

Evaluating Progress - *How do we measure progress?*

It is important to think about how best to measure benchmarks throughout the life of your advocacy effort. Evaluation helps your group identify and celebrate incremental successes as you move toward your ultimate goal. We will cover this topic in more detail in the last section – Sustaining Advocacy Campaigns.

Exercise #4: Strategic Planning for Effective Advocacy

GOAL: What specific policy or built environment change do we want?

AUDIENCES: Who has the power to make the change?

MESSAGE: What message will convince those with power to act for change?

MESSENGERS: Who must be mobilized to deliver the message?

DELIVERY: How can we get those with power to hear the message?

PARTNERS & RESOURCES: What partners do we have? What resources do we have?

BUILDING CAPACITY: Who else do we need to recruit? What additional resources do we need?

FIRST STEPS: How do we begin? (*answer forms basis for Action Plan*)

EVALUATION: How do we measure progress?

Exercise #6 – Engaging New Coalition Partners

What sectors are currently represented in your coalition (ex. public health, recreation, highway)?

Considering your coalition goals, are there additional partners you can engage to more effectively implement your action plan?

What existing relationships can you build on to develop new partnerships? How can you reach out to new partners to begin developing new relationships?

Name of New Partner			
What assets/skills can they contribute?			
What resources can they contribute?			
What are their organizational or personal interests and goals?			
Where is their common ground between their interests and the coalition's interests?			

**Adapted with permission from the Prevention Institute's Building Healthy Communities Action Institute Training*

Making the Case for Policy & Built Environment Change

Now that you have identified your goals and developed a strategic and flexible plan, it is time to begin implementing the activities you identified in your action plan. This section of the guide will give you an overview of effective advocacy strategies and ideas for working with the media to build support for your goals.

Effective Advocacy

- **Strategic** – consider the social, economic, and political climate you are working in...
- **Flexible** – adjust your plans, tools, strategies, and partners as needed...
- **Organized** – have a plan for getting connected, informed and involved...

Effective Advocates

Advocates need to be well-informed regarding their issue and armed with information supporting their goals. You must also be knowledgeable about your community, credible among decision makers and the public, and respectful of others' points of view. Effective advocates are persistent, resourceful and enthusiastic about their goals.

Effective Advocacy Messages

As we said before, crafting an appealing message and effectively communicating that message is key to winning a policy or built environment change. Always make sure that your messages are factual and well-documented. Being able to effectively explain your message for diverse audiences is essential to your cause.

If you know what your opponents will say about the issue, try to address their concerns directly in your message without resorting to “attacks.” Using positive campaign messages shows that your organization respects the opinions of the people you wish to persuade, and may help you find common ground with your opponents.

When crafting your message, pay attention to the language you are using. Message framing, or the way in which you describe the issue, can have a significant influence on how people react to your ideas. What reaction does your message trigger? Will your message lead to support for your goals? The language you use can affect whether your issue receives support from stakeholders. [See the Resources page for more guidance on this topic.](#)

Also think about what other benefits your policy or built environment change might bring to the community. The long-term goal of your efforts might be to improve health outcomes, but there might also be economic, environmental, safety, or quality of life benefits associated with those efforts. Take the time to highlight these benefits, as they may be appealing to audiences whose interests are varied.

Effective Advocacy Strategies

1. Face-to-face meetings with your primary audience
Members of your coalition, and the secondary audiences you have mobilized to deliver your message, can advocate in-person, by phone or in writing with the decision-makers you have identified as primary audiences. *See the section on Working with Decision Makers for more information.*
2. Media Campaigns
Delivering your message through media coverage can influence both decision makers and the general public. *See the Using the Media section below for more information.*
3. Petitions & Community Surveys
Petition drives are a great way to educate the public about your issue while simultaneously gathering signatures to support your policy or built environment change goals.

Community surveys bring decision-oriented information into the local policy-making process. Surveys also provide an excellent way of checking the pulse of the community and getting specific and current information from a cross-section of residents in a timely manner. *See the Resources section for more guidance on this topic.*

4. Focus Group or Town Hall Meetings
Hosting a focus group or town hall-style meeting is an excellent way to engage the general public by giving them an opportunity to meet with local elected officials, coalition members and other stakeholders to discuss the issue at hand.

First, create a committee to determine a format, logistics and schedule for the meeting(s). Then publicize the event as soon as the date, place, time and speakers have been finalized. Recruit a speaker and/or moderator who is unbiased in his or her opinions to lead the meeting. Following the meeting, write a press release or letter to the editor about the results. *See the Resources section for more guidance on this topic.*

5. Public Engagement Campaigns
The ultimate goal of these campaigns is to build a larger base of support for your goals. You can also use public outreach tactics to recruit new allies and mobilize your supporters. Distribute informational guides discussing your issue and goals to the general public. Host events or sponsor television or radio advertisements to build awareness and support of your issue and your coalition's goals.

Using the media

Using the media is often the most effective way to deliver your message to the largest number of people, including your primary and secondary audiences. Planning and implementing a media communications plan is an essential step in any serious advocacy effort. Developing and maintaining access to the media will ensure that your issue is visible to the public and decision makers.

Benefits of Using the Media

- Cost effective (if earned media)
- Immediate coverage
- Large audience
- Wide variety of strategies

Assess the media outlets in your community

Make a list of all the newspapers, radio programs, television stations, and internet sites that cover the news in your area and identify contact information for a reporter or editor at each outlet. It is crucial to make sure you are targeting the right people with your media message. Many advocates make the mistake of sending press releases to the "Editor," assuming it will be forwarded to the right person. That rarely happens. You need the name of the right editor or reporter to cover your story.

Think about it this way: a reporter is more likely to write about a company or person he/she knows about...and is MOST likely to write about a company or person with whom he/she has a relationship.

Develop a media communications plan

Not only working with the media, this is everything your coalition will do to reach out to decision makers and the general public to create interest in your issue and build support for your goals. Your plan should identify ways to educate elected officials and other decision makers and the public; bring information to the attention of the media, or force an elected official to take a position your issue. Media outreach strategies need to be designed according to the audience you are trying to reach.

Establish your coalition as a credible source of information for the press

Remember, you are the expert. Make your expertise available to the media. Establish relationships with reporters who cover your issue and reach out to them with story ideas. If working with a coalition, identify a spokesperson to interact with the media. Keep the lines of communication open by sharing press releases and offering to answer any questions they may have.

Elements of a Media Communications Plan

To conduct an effective media campaign, it helps to have a media communications plan. Review the following elements of a media plan to learn more about what they are, how they're used, and when you might want to use them.

Press Kit

A press kit is essentially an "information kit" that will provide a journalist with background information about you and your coalition. It can be presented in a folder (preferably one with your company's name and logo on the outside) or an online document that contains many of the "informational" elements described below. Remember, it is not a sales brochure -- it should be a real help to reporters in writing their stories.

You will need to have press kits prepared when you go on a press interview; when you are pitching a story to someone who does not know anything about your company; or whenever you are attending public events where press coverage is likely (ie: When you might be interviewed). The contents of your press kit should change depending on when you're using it. In general, it will include some or all of the following:

- Recent press releases
- Background material about your coalition (pamphlets if you have them)
- A one-page fact sheet about your organization
- Biographies of your top representatives or staff (and photographs if you have them)
- Contact names and numbers

Press Releases

A press release is the primary way you communicate news about your organization to the media. Reporters, editors and producers are hungry for news, and they often depend on releases to tip them off to new and upcoming events and other developments. [*See the Tips on Writing Effective Press Releases below.*](#)

Backgrounder/Fact Sheet

A "backgrounder" tells your company's story. It should include all pertinent information -- about your organization—its mission, activities/strategies, goals and its key team members. It should be written in such a way that it holds a reporter's interest. Keep it focused on benefits and information...once again, keep the hype to a minimum. You can create a workable backgrounder by writing a paragraph or two about each of these elements:

- What your organization does
- When and why your organization was started (mission & vision statements)
- A brief history of your organization
- Your core goals and/or strategies
- Your coalition partners

Media Alert

As the name suggests, a media alert is used to inform the media about a press conference, special event, demonstration, or other newsworthy event. It is a one- or two-paragraph "release" that focuses on what will occur, and why the media would be interested in it. You might want to think of it as a way of inviting the press to attend your event. Be sure your media alert includes:

- What is happening
- Why it is important
- Where it is happening
- When it will occur
- Who to contact for more information
- An invitation for the press to attend
- And don't forget to say that photo opportunities are available!

Biographies

It is important for you to have up-to-date biographies of all your top staff or volunteer representatives. These are particularly critical when you are planning press interviews, since reporters will want to know about the person they are interviewing.

Focus a bio on the person's current responsibilities. What does he or she do for your organization? That's the most important information you include, and should be at the beginning (i.e. John Smith oversees ATC's advocacy efforts). In other words, write it in reverse chronological order -- with the most recent information first and the oldest last. You can also be creative -- talk about what sets a person apart from the crowd, what makes him/her different. When you're writing a bio, think in these terms:

- What does this person do for the coalition?
- Why does he/she do that job well?
- What other qualifications does he/she have?
- What did he/she do before? Is it pertinent to his/her current job?
- Is there anything else about this person that would make me stop and think "hey, that's really interesting?"

Effective Media Strategies

There are a number of strategies to consider when crafting your media communications plan. Below we have summarized several effective ways to publicize your issue and goals.

Daily Newspapers

Daily newspapers cover national, state, and local news topics from a variety of angles. Read the papers that cover news in your region or community and familiarize yourself with the way that they cover stories related to your issue.

Letters to the Editor

Opinion pages are typically the most-read section of the newspaper. Advocates should take advantage of this by using letters to the editor to create interest in your issue and build support for your goals among the general public. You can also write letters to clarify or correct facts about an article related to your issue, support or oppose actions taken by your local government, or to publicly thank volunteers who have worked with your coalition. Be brief and give just enough information to convey your main points, as most papers limit letters to the editor to 250 words.

Guest Commentary/Op-Ed

If you can't deliver your message in a 250-word letter to the editor, consider writing a guest commentary or op-ed piece instead. Small newspapers are more likely to print guest commentaries right away because they don't receive a large amount of submissions. Large newspapers are more likely to pick and choose the op-ed pieces they print, so contact them ahead of time to see if there is interest in your story.

Earned Media

Advocates can actively pitch news stories to the media in order to increase visibility of your issue. The best way to "sell" your story to a reporter is to send them a **press release** (*see Tips below*) with enough information about your effort to get them interested. When you start making contacts with reporters, it is important to get information about their deadlines and timetables so you can be more strategic about pitching stories.

Television

Remember that television coverage is driven by ratings. When pitching a story to television reporters, make sure to explain why the issue is important to the community. If you are being interviewed, try to make one or two clear points about the issue that can be used as sound bites. Watch what you say – you are never completely "off the record."

Radio

Radio has a greater need for "news" than does television. Get to know the radio stations that cover your area, and consider what your primary audiences are listening to. Talk radio programs might be a good way to deliver your message, but be wary of those that are more "tabloid" than news. Press releases can also be delivered to radio station news directors.

Internet

If your coalition has access to an existing webpage, or the resources to build one, use it to disseminate information to your supporters, primary audiences, and the media. You can also use the site to share links to member organization's sites, helpful resources, and past news stories about your issue. Lastly, don't ignore *Facebook* as a way to share information about coalition activities and ways for supporters to get involved.

Tips for Writing an Effective Press Release

Keep the following points in mind when writing your press release:

1. **Is your news "newsworthy?"** The purpose of a press release is to inform the world of your news item. Do not use your press release to try and make a sale. A good press release answers all of the "W" questions (who, what, where, when and why), providing the media with useful information about your organization, product, service or event. If your press release reads like an advertisement, rewrite it.
2. **Start strong.** Your headline and first paragraph should tell the story. The rest of your press release should provide the detail. You have a matter of seconds to grab your readers' attention. Do not blow it with a weak opening.
3. **Write for the Media.** On occasion, media outlets, especially online media, will pick up your press release and run it in their publications with little or no modification. More commonly, journalists will use your press release as a springboard for a larger feature story. In either case, try to develop a story as you would like to have it told. Even if your news is not reprinted verbatim, it may provide an acceptable amount of exposure.
4. **Not everything is news.** Your excitement about something does not necessarily mean that you have a newsworthy story. Think about your audience. Will someone else find your story interesting? Focus on the aspects of your news item that set you apart.
5. **Does your press release illustrate?** Use real life examples about how your company or organization solved a problem. Identify the problem and identify why your solution is the right solution. Give examples of how your service or product fulfills needs or satisfies desires. What benefits can be expected? Use real life examples to powerfully communicate the benefits of using your product or service.
6. **Stick to the facts.** Tell the truth. Avoid fluff, embellishments and exaggerations. Journalists are naturally skeptical. If your story sounds too good to be true, a journalist will pass.
7. **Pick an angle.** Try to make your press release timely. Tie your news to current events or social issues if possible. Make sure that your story has a good news hook.
8. **Use active, not passive, voice.** Verbs in the active voice bring your press release to life. Rather than writing "entered into a partnership" use "partnered" instead. Do not be afraid to use strong verbs as well. For example, "The committee exhibited severe hostility over the incident." reads better if changed to "The committee was enraged over the incident." Writing in this manner, helps guarantee that your press release will be read.

9. **Economics of words.** Use only enough words to tell your story. Avoid using unnecessary adjectives, flowery language, or redundant expressions such as "first time ever". If you can tell your story with fewer words, do it. Wordiness distracts from your story.
10. **Beware of jargon.** While a limited amount of jargon will be required if your goal is to optimize your news release for online search engines, the best way to communicate your news is to speak plainly, using ordinary language. Jargon is language specific to certain professions or groups and is not appropriate for general readership. Avoid such terms as "capacity planning techniques" "extrapolate" and "prioritized evaluative procedures."
11. **Avoid the hype.** The exclamation point (!) is your enemy. There is no better way to destroy your credibility than to include a bunch of hype. If you must use an exclamation point, use one. Never do this!!!!!!!!!!!!!!

Tips for Formatting your Press Release

1. Put your press release on letterhead.
2. Add the traditional heading
3. Write a headline that catches the reporter's eye
 - a. Instead of "The Parents Response to the Governor's Statement, use "Angry Parents Picket Governor."
4. Double space the body of the release
5. Write a lead paragraph that answers the questions who, what, when, where and why?
 - a. The lead paragraph must grab the attention of the journalist
 - b. If the rest of the release is cut, it must be able to stand on its own
 - c. Try to keep it to 3 sentences
6. Write a second paragraph using quotes from your spokesperson
7. The third paragraph and beyond will continue to develop the story with:
 - a. Additional quotes from leaders or experts
 - b. Data or documentation to support your position
8. The ideal press release is one page, two at absolute maximum
 - a. Brevity is key so take your first draft and edit and cut!
9. At the end of your release, center and place either of these symbols:
 - a. ####
 - b. -30-
10. If you have a report or study to back up your position in the press release, you can attach it to the release (if mailing or handing out in person) or attach it to your email.

Working with Decision Makers

Developing and maintaining good relationships with elected officials and other key decision makers is a cornerstone of effective grassroots advocacy. Educating local, regional and state legislators about your issue and effectively communicating a persuasive message to them is essential for building support of your policy or environmental change goals.

A good first step is to develop a fact sheet highlighting your chosen issue and your coalition's key messages and goals. This will be used in face-to-face meetings and can be included in written correspondence as well. The fact sheet should include:

- A clear explanation of the issue and background facts (statistics, research, survey results, etc)
- Your position, or if you are working with a coalition, a mission statement
- A clear explanation of your policy or environmental change goals
- Names and affiliations of all core members of your coalition, or the number of members that your organization is representing

Maintaining a Relationship with Legislators

Establishing yourself or your coalition as credible advocates on an issue requires that you maintain a good working relationship with your legislators. At a minimum, you should meet with elected officials once a year to keep them informed about the issue and your progress. If relevant, create a recognition event or award for those that champion your issue or goals for policy and environmental change. Maintain regular communication through emails, letters, media clippings or newsletters. Whenever possible, attend their events and meetings to show that you or your coalition has a presence in the community.

Five Conversations Your Legislators Want to Have with their Constituents

1. Real-life stories that personalize your issue – *NOT LOBBYING*
2. General local statistics and survey results – *NOT LOBBYING*
3. How state & federal money is being spent in your town/district – *NOT LOBBYING*
4. Your visibility and momentum as a coalition or group – *NOT LOBBYING*
5. What specific legislative action would make you happy – *LOBBYING!!*

Three Ways to Advocate with Decision Makers

1. **Face-to-face meetings**

A first step should be to schedule an appointment with your chosen audience. Arranging a face-to-face meeting with local or regional officials is often relatively easy, and in some cases, might only involve a phone call or conversation on the street to get started. State and federal lawmakers are harder to pin-down, and it might be necessary to meet with a staff member. Check to see where their district offices are located and try to arrange a meeting there. *See the tips for meeting with elected officials below.*

2. **Testimony at Public Hearings or Meetings**

Delivering testimony before the legislative body you are attempting to influence, whether during a regular meeting or public hearing on your issue, is an excellent way to introduce your coalition's goals for policy or environmental change.

Regular meetings of your town board or county legislature have specific time allotted for public comment. Check to see if there is a time limit for public testimony. If the time limit is too short for what you want to say, ask to be added to the agenda to make a longer presentation. This will also give you the opportunity to use visual displays like power-point, photographs, maps, or charts if they are needed.

It is also a good idea to submit written testimony based on your oral presentation. This gives decision makers a chance to review your message...and let's face it, some of us are better at writing than we are at public speaking.

3. **Writing letters, email, and making phone calls**

It is not always possible to meet face-to-face with a decision maker or to attend a public meeting to deliver testimony. Additionally, meeting in person or attending hearings with state and federal legislators can be very difficult. In this case, letters, emails and phone calls will help to inform the decision makers about your issue and goals. *See the tips on writing to elected officials below.*

10 Tips for Meeting with Elected Officials

1. **Come prepared.** Each participant should know what role they are playing. Bring a packet of materials for the supervisor, including your fact sheet. Know how much time you have for the meeting. Know the issues. Know your allies and opponents.
2. **Identify everyone in the room.** It is important for the supervisor to know which organizations are represented, where they are based, and how many members they have. Be sure to point out which advocates are constituents.
3. **Say what you know. Never lie.** There is no faster way to lose your credibility than to give false or misleading information to a supervisor. If you don't know the answer to a question, acknowledge it and offer to get the facts and get back them.
4. **Be specific and direct about what you want.** Remind yourself what the purpose of the meeting is. Do you want the supervisor to know tobacco-related mortality in his district? Attend an event? Make sure you ask in a clear, direct manner. Only one person should ask the "pin down" question.
5. **Stay focused.** Elected officials are good at getting advocates to engage on every topic except the one at hand. Forcefully, but politely, steer the conversation back to the issue you came to lobby on. Do not leave before you get answer to the key questions.
6. **Don't argue.** No matter what, stay cool. You don't win any points for passion by arguing with an elected official.
7. **Maintain control of the meeting.** Don't let the supervisor start facilitating the meeting. You asked for the meeting. You are the one with the agenda.
8. **Briefing materials should be brief.** Elected officials glaze over thick packets of information. Bring only what is necessary. Your fact sheet alone might suffice.
9. **Anticipate the arguments of your opponent.** It is better to address your opponent's arguments early in the dialogue. Do so directly and openly, without a hint of defensiveness.
10. **Follow-up and follow through.** Send a thank you note to the supervisor. The note should restate the commitments you extracted in the meeting. Follow-up after an appropriate interval to find out if the supervisor did what they committed to do. It's also important for you to follow through on commitments that you made.

Writing to Elected Officials

You won't always be able to arrange a face-to-face meeting with a legislator. If you have difficulty getting face time with an elected official, try writing a letter first to peak their interest. Many elected officials understand that a letter represents not only the concerns of the coalition or person writing it, but potentially other constituents who have not taken the steps to write. In rural areas with small populations, one or two letters might be enough to get the attention of elected officials.

Seven tips for writing an effective letter:

1. **Keep it brief.** Your letter should fit on one page and should only address one issue. Keep the message clear and concise.
2. **Get to the point.** Identify yourself or the coalition and your goals in the first paragraph. Clearly identify the issue about which you are writing.
3. **Hit your three most important points.** Highlight the three strongest messages you have developed to persuade decision makers. Explain or clarify each message if necessary.
4. **Personalize the letter.** Tell the official why your issue matters in his or her community, district or state. If you have one, include a short personal story about the issue. This can be very persuasive.
5. **Personalize your relationship.** Tell the elected official if you have ever voted for them, donated money to their campaign, or if you know him or her through personal or professional relationship. Your message will be more persuasive if he or she feels a personal connection to you.
6. **Remember, you are the expert.** Your legislator's job is to represent the interest of his or her constituents. Be courteous and confident in your message, but don't be afraid to take a firm position. Often the elected official will know less about the issue than you do.
7. **Identify a follow-up.** As with face-to-face meetings, you should finish by identifying a way for the elected official to follow-up with you. Provide a phone number or email address, and offer to share more information at the convenience of the legislator.

Sustaining Your Advocacy Campaign

Resource Management

Advocacy campaigns require dedicated people who are willing to volunteer their time to the cause, and sometimes they cost money.

Developing a campaign budget is always a good idea, even if you don't expect to spend a significant amount of money. Determine the cost of the materials you'll need to carry out your strategy – mailings, printing costs, phone calls, travel to meetings, and so on.

If necessary, develop a fundraising plan. You can seek cash donations through personal appeals to potential donors, contributions from supporters and/or fundraising events, but don't overlook the importance of in-kind donations. Getting a public relations specialist to review your communication plan for free can be just as valuable as a large cash donation. When you meet with potential partners (secondary audiences), always ask if they are willing and/or able to contribute money or staff time to the campaign.

Many grassroots advocacy campaigns do not require large sums of money, but that doesn't mean that resource management is any less important. Managing people and recruiting and maintaining a volunteer base is just as critical as your fundraising and budget work. Many coalitions follow this mantra for keeping volunteers engaged in the campaign: *Inform, Involve, Thank and Ask*.

Have jobs available for anyone who offers to help. If necessary, start them on small tasks and gradually give them more as their confidence and passion grows. Make sure people know why they are doing something, and have specific instructions on how to complete each task. Strive to make every volunteer feel welcome and appreciated, regardless of the importance of their task. The volunteer who testifies at a crucial public hearing is no less important than the volunteer who bakes cookies for every meeting.

Recognize that some people will burn out or drift away from the work of the campaign. This is normal, and should not be discouraging. Rather, your recruitment work should be ongoing, and the organization should focus on growing new leaders whenever possible. Keep your eye out for individuals with leadership qualities, and give them opportunities that will help them grow into that role.

Most importantly, have fun. This will keep your volunteers happy and motivated, and will help hold your campaign together during the often long process of advocating for policy and built environment change.

Evaluation

Evaluation should occur regularly along the road to achieving your goals, and after a policy or built environment change is adopted by decision makers. The latter should be relatively easy if you identified measurements when developing your SMART goals. While your campaign is in progress, evaluation lets you know that you are making progress, and gives you early clues if you are getting off-track. *See the Resources section for more information.*

Here are a few evaluation questions to consider:

- **Issue Reframing** – has there been changes in the way your issue is presented, discussed or perceived among decision makers and the general public?
- **Media** – has media coverage of your issue changed as a result of your advocacy?
- **Coalition Capacity** – have you gained new skills or knowledge as a result of forming a coalition. Are coalition partners collaborating effectively?
- **New Advocates & Supporters** – have previously unengaged individuals become involved in your campaign? Have new advocate “champions” adopted your goals?
- **Coalition Visibility** – has your coalition been identified as a credible source of information on your issue?

Implementation

Your work as advocates is not over once a policy or built environment change has been adopted that fulfills your campaign goals. The hard work has only just begun. Your coalition will need to stay engaged with your partners and decision makers to ensure that the policy or environmental change is effectively implemented.

Well-written policies have implementation and enforcement clauses built right into the document. However, many policies are no more than “paper policies” which never result in any meaningful change in practice or in the environment. Often agencies that implement policy are stuck in the “old ways” of agency procedure and practice, and are unwilling, or unable (usually due to lack of training and/or resources) to implement a new policy. Advocates must stay involved to ensure that new policies are not ignored.

Often effective implementation of a policy is dependent on the motivation of the leadership of the agency or government body to do so. Your ongoing positive relationship with leadership who instituted the policy change is the key to your influence with the department charged with implementation. Try to position yourself as a resource and respect their implementation process. The relationships you build with the media, and their coverage during the campaign, will also affect your ongoing influence with department staff and elected officials.

Additional Resources

The following resources offer more guidance on a number of topics addressed in this guide:

[CDC Recommended Community Strategies to Prevent Obesity](#) (Centers for Disease Control) - Identifies strategies and measurements that local governments and communities can use to plan, implement and monitor initiatives to prevent obesity

[Local Government Actions to Prevent Childhood Obesity](#) (Institute of Medicine) – Provides 15 strategies for local governments to encourage healthy eating and physical activity

[Public Health Law & Policy](#) (website) – Provides guidance and sample language for creative law and policy strategies that improve public health

[Promising Strategies for Creating Healthy Eating and Active Living Environments](#) (Prevention Institute) – Strategies for addressing issues that impact physical activity and healthy eating

[ENACT: Environmental Nutrition and Activity Tool](#) (Prevention Institute) – Short policy and built environment assessments and an interactive menu of strategies designed to help communities enhance food and activity environments on a local level

[Smart Goals](#) (website) – Provides additional guidance on developing SMART goals

[The Action Guide for Advocacy and Citizen Participation](#) (Just Associates) – An advocacy planning guide that combines concrete and practical action “steps” with a sound theoretical foundation to help users understand the process of people-centered politics from planning to action

[Developing Effective Coalitions: An Eight Step Guide](#) (Prevention Institute) – A step-by-step guide to successfully forming and managing coalitions to address public health issues

[What Surrounds Us Shapes Us: Making the Case for Environmental Change](#) (Strategic Alliance) – A brief which suggests how to create frames to help see how the built environment affects health

[Making the Case for Active Transportation](#) (Canadian Fitness & Lifestyle Research Institute) – A series of sample fact sheets focused on the benefits of multi-modal transportation infrastructure

[Community Needs Assessment Survey Guide](#) (Utah State University Extension) – A guide for conducting community needs assessment surveys through the use of questionnaires

[A Brief Guide on How to Conduct Community Needs Assessments](#) (Loyola University, Chicago) – A how-to guide for conducting community needs assessments through the use of focus groups

[What’s Different About Evaluating Advocacy and Policy Change?](#) (Harvard Family Research Project) – Evaluation techniques for advocacy and policy change campaigns