Practical Applications: Campaign Implementation Tools

CHAPTER 6

The Public Servant, the Politician, and the Preacher (continued)

In Chapter 2, we profiled three community health activists trying to preserve and protect publicly funded health programs in their community.

- ***First,*** *they assessed the approaching changes in the county's Medicaid reimbursement system as a compelling problem that needed to be fixed ASAP.*
- ***Second,*** *they identified an achievable and effective policy solution.*
- ***Third,*** *they identified the public policymakers with the power and authority to move their solution forward.*
- ***Fourth,*** *they planned and executed strategic activities designed to persuade the policymakers to adopt their solution to the problem.*

Their past experiences had taught them to realistically assess their political clout and internal capacity. They had learned how to build power by working in coalition with each other. They had learned the importance of presenting a clear, compelling campaign message and mobilizing affected constituents into campaign activities. They knew how to create hero opportunities for key policymakers. They knew how to win!

The purpose of this chapter is help *you* win. You will find some message development tools, model timelines, and workplans designed to help develop your own campaign message, organize your campaign resources, and mobilize a district-based network of constituents.

A public policy campaign *is a series of actions and activities designed to persuade public policymakers to make something happen or to do something differently (i.e., pass a new law or amend an old one, write a new regulation or enforce a current one, appropriate some new money or make a budget allocation or reallocation, or even cut money from the budget). Sometimes, it's just to listen. When the campaign succeeds and the new policy is launched, it is sometimes called a* community-government partnership.

Understanding and Using the Two Rules of Influencing Public Policy

In the face of an emerging crisis, public policymakers do not have the time or the resources to engage in a scientific decision-making process. They do not posit and test hypotheses for a governor trying to figure out if the state can stop the purchase of three community hospitals by an out-of-state, for-profit corporation.

"Just stop the sale!" say outraged community activists.

"Can't!" says the governor's lawyer, citing laws that limit the state's ability to interfere in private business transactions.

"Can too!" say the advocates' lawyers, pointing to existing regulations authorizing the governor to set standards for community benefits. (By *community benefits* we mean efforts by local healthcare institutions to invest in community health improvements.)

In the end, the governor, like all elected officials, makes policy decisions very

Family policy in the making: "No dear, I don't care how cheap it is or how safe it is. I am not paying for you to get a nose ring."

much like a parent who, after careful or not-so-careful deliberation, proclaims a family policy. To family and government policymakers, opinion is as important as facts, and public opinion is a fact.

This decision-making dynamic, however goofy it seems to trained scientists and lawyers, is a critical component of our democracy because it forces elected policymakers to make their decisions based not only on objective facts but also on our expressed and subjective opinions about the facts.

In the parable of The Endless Unlesses (see Chapter 4), we described how one legislator decided, during a roll call, how he would vote on a bill. While this legislator had plenty of input from his constituents, many public officials make many policy decisions in a vacuum. There are no urgent pleadings from lobbyists, no probing questions from the media, no commentary from family and friends, and no concern from constituents. Facts or opinions are often gratefully received: "At last, I know what somebody thinks about this issue!"

> Rule #1
>
> *Elected and appointed public policymakers make different decisions when watched by the affected constituency.*

Remember how relieved the legislator in the Parable of the Endless Unlesses was to find his staff notes about the calendar? It is not uncommon for a legislator, approaching the chamber for a roll call alert, to ask colleagues or any lobbyists in sight, "What's this vote about? Do you know how it affects my district?"

> Rule #2
>
> *Get the right information to the right person at the right time.*

Neither is it uncommon for an assistant commissioner, in the middle of reviewing the seventeenth draft of the Medicaid regulations, to plead with staffers to get feedback from somebody on the front lines—a real provider or consumer who is actually going to have to deal with this stuff daily.

The legislator and the commissioner both want their decision to be molded by constituents and citizens affected by the issue.

*The **right information** is persuasive, relevant facts.*

*The **right person** is the specific policymaker who must make the decision:*

The right person could be the legislator who must decide whether to support or oppose a proposal to offer a no-cost loan to a troubled community hospital.

The right person could be the public health commissioner who must decide which of three finalists would run the tobacco control program.

*The **right time** is before the decision is made. The second best time is before the decision is announced.*

How Do Advocates Working With the Executive Branch Find the Right Time?

Savvy activists closely monitor the pronouncements and policy decisions of public officials who run the departments or agencies that affect their programs. They build a professional, trusting relationship with the department or agency staffers and share information about public policy initiatives and pending crises. They invite key policymakers to speak at their annual meetings to announce initiatives and alert them to pending crises.

Never combative, always discreet, these advocates offer input on any pending policy decision, and they step in after a public crisis or scandal to offer policymakers help in devising an appropriate response.

How Do Advocates Working With the Legislative Branch Find the Right Time?

Smart advocates closely monitor legislative leaders' public pronouncements and the legislature's daily decisions. They try to spot an opening for their policy solution. They develop trusting, professional relationships with leaders and committee staffers and share information about upcoming debates on their issues. They monitor debates on related issues to identify and evaluate potential heroes and opponents.

As a bill or budget moves from the legislative process—clerk's office to the relevant committee(s) of jurisdiction to the floor for amendments and a vote, to the other legislative body, then to the conference committee where differences in the two versions are worked out—the message may change, but the delivery schedule is consistent. Committee members are briefed before the bill is heard; rank-and-file members are briefed before the floor vote; leaders are briefed before the conference committee deliberations.

Mounting a Public Policy Campaign

Step 1: Developing a Campaign Message

The strategic planning tools in Chapter 5 helped you present your community's healthcare access problem as sympathetic and compelling, your solution as effective and achievable.

The following message development tool can help you persuade others to advance your campaign.

Fill-in-the-Blanks Message Tool

____________________is in crisis because _________________________

____.

You should care because ____.

We know that this solution will begin to fix it:___________________________

____.

You can help by ____.

Use it:

- to persuade allies to join your coalition
- to convince private donors to contribute to your campaign
- to recruit constituents into your grassroots network
- in a meeting with an elected policymaker
- in an elevator conversation at the state capitol with a trapped public policymaker
- to ask a legislator to be a key sponsor for your bill
- to ask a public manager to amend regulations
- to ask the governor to issue an executive order
- to ask legislative leaders to schedule your bill for debate
- to ask the commissioner to stand with you at a press conference

You can use the message tool to develop fact sheets, research reports, talking points for press statements, public hearings, and even campaign slogans or bumper stickers. Every message, even slogans and bumper stickers, should tell the audience the following:

- what the public policy problem is that must be fixed
- what your solution is

- why the audience (public policymaker, constituent, allied organization) should care about it
- what they can do to help
- who they should contact to get involved or to get answers

Ways to Get Your Message Out

A One-Page Fact Sheet

(Yes, you can use both sides of the page.)

1. The first part should describe a compelling problem and the sympathetic, affected constituents.
2. The second part should establish the credibility of the campaign by describing the coalition and naming its leaders.
3. The third part should outline the campaign's goal (i.e., to persuade a public manager to change a practice or to get legislation passed).
4. The fourth part should describe the campaign's general plan and current activities.
5. The fifth part should name contact people and give their phone and fax numbers and their office and e-mail addresses.

A good fact sheet is updated as the campaign progresses.

Use the fact sheet to develop press releases, membership mailings, newsletter updates, direct-mail fundraising, and fax and e-mail alerts.

FACT SHEET
Emergency Room Interpreter Bill
H. 1172 /S. 530 of 1999-2000

AN ACT TO REQUIRE, PROFESSIONAL INTERPRETATION IN
THE DELIVERY OF ACUTE HEALTH CARE SERVICES

Sponsors: Representatives Jarrett Barrios, Kevin Fitzgerald, Gene O'Flaherty, Alice Wolf, Timothy Toomey, Antonio Cabral, Anne Paulsen, Kay Khan, Ruth Balser, Elizabeth Malia and Charlotte Golar Rinchi and Senator Robert Travaglini

Status: Joint Committee on Health Care public hearing April 8,1999, State House Hearing Room A-1, 12 noon.

Problem: Many non-English speakers who are in desperate need of acute health services, both physical and mental, are unable to obtain those services—or are badly served—because of language barriers,. The ultimate solution for each person is to learn English: but until he or she can do so (and some, being elderly or disabled, may never do so), each acute health service provider should be required to deliver those services, where necessary, with the assistance of competent interpreters. Many hospitals now do an excellent job; but many do not. There should be an even playing field for all acute providers, so that non-English speakers in need are properly and efficiently served.

What this Bill Does: This bill would mandate an even playing field by requiring in a reasonable and cost-efficient way that all acute-care hospitals provide interpreter services in their emergency rooms, and that all-acute care mental hospitals (or acute mental health units in general hospitals), do the same, if an appropriate bilingual clinician is not available.

The bill also would require that all governmental units that are required to pay for health care services cover the costs of interpreters for any mandated provider.

Finally, the bill gives the Attorney General, or any individual aggrieved by violation of the mandates, a right to seek enforcement in court.

The bill would take effect one year after it is signed by the governor.

For more information contact Rep. Jarrett Barrios (617-722-2130), Ernest Winsor, Esq., for the Babel III Coalition, at the Mass.Law Reform Institute (617-357-0700 X 330, or by e-mail, EWinsoragbls.org) or Torn Louie of the English Plus Coalition (617-457-8885, or by e-mail, Maengplusaaol.com).

One-Page Fact Sheet

Loss of Income Support and Nutritional Benefits for High Risk Populations With Drug-Related Felony Convictions

A Matter of Public Health

Victoria Nixon, Project Manager
Brenda Vitale, Intern

Boston AIDS Consortium
140 Clarendon Street
Boston, MA 02116

Phone (617) 867-0144
Fax (617) 424-6594

... community-based social ... incarcerated individuals living with ... overall health and reducing substance abuse ... stance abusers in recovery, maintaining adequate ... relapse prevention[12]. Being physically ill, tired, or unfit can . . ... vulnerability to relapse. The AA slogan 'H.A.L.T." (hungry, angry, lonely, ... to remind recovering addicts of potential relapse danger signs. Neglecting one's ...ealth and physical needs, including the need for proper exercise, rest, and nutrition, can be indicative of an overall lack of sufficient self-care to carry the [person] through recovery.[13] Policies that prevent those in recovery from accessing food and safeguarding physical health may ultimately result in increased relapse and increased substance abuse treatment costs.

Risks Resulting from Loss of Income and Food Stamps

Adequate nutrition and good dietary habits are essential to health maintenance throughout the course of HIV illness. Poor nutrition has been shown to correspond with higher rates of weight loss, opportunistic infection and shortened life span.[14] Many medication regimens must be accompanied by special diets in order for the to medication to be properly absorbed and metabolized.[15]

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9 "AIDS among the Homeless of Boston: A Cohort Study" (J Acquir Immune Defic Syndr Hum Retrovirol, 1995 Mar 1, 8:3, 292-6).
10 Ibid.
11 J.P. Tulsky, M.C. White. *Screening for Tuberculosis in Jail and Clinic Follow-Up after Release,* in Amer. Jour. of Public Health. Feb. 1008, Vol. 88. No. 2. Peter Selwyn and Steven Batki, Consensus Panel Co-Chairs. Substance Abuse and Mental Health Services Administration; Treatment for HIV-Infected Alcohol and Other Drug Abusers: Treatment Improvement Protocol (TIP) Series 15, 1995.
12 Arnold Washton, Cocaine Addiction: *Treatment, Recovery and Relapse Prevention.* 1989.
13 Ibid. Page 129.
14 Peter Selwyn and Steven Batki, Consensus Panel Co-Chairs. Substance Abuse and Mental Health Services Administration; Treatment for HIV-Infected Alcohol and Other Drug Abusers: Treatment Improvement Protocol (TIP) Series 15, 1995.
15 The Panel on Clinical Practices for Treatment of HIV Infection convened by the Department of Health and Human Services and the Henry J. Kaiser Family Foundation. *Guidelines for the Use of Antiretroviral Agents in HIV-Infected Adults and Adolescents.* 1997

Research Report

A Ten-Page Research Report

(Yes, it can be only eight pages.)

You will establish your campaign's credibility if you produce an official-looking research report written (or at least reviewed and endorsed) by respected experts and opinion makers. Especially if the report includes footnotes and charts that label the problem as significant and support the solution. A research report can be used as the centerpiece of a statewide or local press event; as briefing material for administration officials and key legislators; or as a training document for allied organizations, coalition staffs, and grassroots leaders.

Talking Points for a Five-Minute *(or Thirty-Second)* Rap

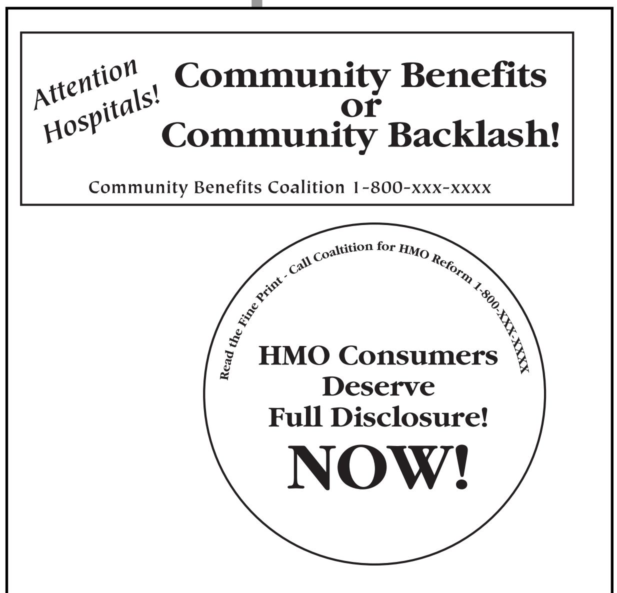
All workers on your campaign need talking points to help them handle short telephone or face-to-face conversations about the campaign. The script will change as the campaign progresses. For instance, a legislator will be asked to take a series of actions as the bill or budget item moves through the legislative process. First, the legislator might be asked to sponsor the legislation, then to write a letter of support to the joint committee, and finally to participate in a floor debate. A potential ally might be asked first to endorse the campaign, then to participate in a coalition decision-making process, and finally to mobilize a letter-writing campaign.

Slogans, Bumper Stickers, Buttons, and Sound Bites

We all use a shorthand method to describe even the most complicated campaign, if only for our meetings and to-do lists. Some coalitions have a resident wit capable of transforming a managed care reform campaign into a slogan or 20-second sound bite for the morning paper or evening news. Other campaigns hire, or get free advice from, pollsters or public relations consultants.

Bumper stickers and buttons should deliver a message that prompts the reader to support the campaign or take action. It also gives a way to contact someone on the campaign (even if it's in teeny-weeny print around the edge).

Two spokespeople should deliver sound bites: an affected constituent and a coalition member who can deliver a punchy quote to describe the current situation and reinforce the campaign's goals.



Daily Tribune

"Consumers won today. The Commissioner's ruling means that HMO consumers will be able to appeal a decision that denies them medically necessary care. We look forward to working with the Commissioner to iron out the details," says Suzie Goodheart from the Health Coalition. . . .

The Herald

"The hospitals won today. The Senate gutted a bill requiring non-profit hospitals to provide minimum benefits to people in the community. Our Coalition will work with the governor to restore language requiring hospitals to help the communities they serve," said Marc Maddog from the Health Consumers Watch. . . .

Step 2: Building and Sustaining Coalitions

The strategic planning exercises in Chapter 5 can help activists identify the elements of a public campaign and figure out more about the political dynamics in their statehouse than they really wanted to know. The self-assessment exercise in Chapter 5 can help organizations focus their internal resources and figure out what kinds of expertise they may have to beg, borrow, or buy.

Your next step is figuring out how to build and maintain an operational coalition. Get ready to deal with the politics of coalition-building! Some of us who are more controlling and impatient than we should be used to think that coalition politics made the state capitol seem like a church—until we learned about church politics.

Coalition Politics

We can learn lessons from operational coalitions built by health access and tobacco control advocates in Massachusetts, Arizona, California, and Oregon during their successful campaigns to fund healthcare access with tobacco taxes.*

By reaching out to untraditional allies in the business community and to powerful trade associations, the advocates managed to build a powerful, well-funded campaign governed by a steering committee made up of coalition members.

Lesson 1. Build a power-sharing coalition. In operational coalitions, participating organizations make an official, board-approved decision to share power, credit, and blame with other coalition members.

Lesson 2. Recruit untraditional allies. Untraditional allies have several distinguishing characteristics. First, they usually have very different perspectives on the same issue (i.e., consumers and providers). Second, the two sides often have a long history of conflict and confrontation. Third, the two sides often have great differences in organizational capacity, resources, and decision-making cultures, which go beyond the usual turf and competition issues in traditional coalition partners.

Lesson 3. Recognize and respect differences. The first symptom of distress among untraditional allies is shock over process issues, which mask unresolved questions about the balance of power. A typical balance of power question is, which organization has more power, the partner who has a lot of money (usually a provider) or the partner who has the ability to deliver and mobilize sympathetic constituents (usually an advocacy organization)? The struggle over power is finally resolved when the consumer organizations realize how much the campaign depends on the providers' resources, and the providers realize how much the campaign needs the consumers' sympathetic stories.

** Funding Children's Health Care Through State Tobacco Taxes Building Winning Coalitions with New and Unexpected Allies Heller School/Brandeis University Robert Wood Johnson Foundation, Waltham, Massachusetts, July 1998.*

Words to the Wise

1. Set up a steering committee composed of major partners committed to the campaign. Each organization should contribute something of value to the campaign in at least one of three categories:
   - cash/fundraising ability
   - grassroots capacity to deliver sympathetic consumers/beneficiaries able to inform and motivate public policymakers
   - political expertise and demonstrated credibility at the statehouse

2. Set up a democratic governance structure that allows for full and fair discussion of issues, honest conflict resolution, and a satisfactory planning and evaluation progress. In other words:
   - establish a clear decision-making process (Majority rules? Weighted votes? Consensus? Veto power?)
   - adequately brief coalition members in writing or e-mail before scheduled and emergency meetings
   - communicate between meetings about future plans

Campaign Operations

We defined a public policy campaign as a series of connected events and activities that, over time, result in new or improved public policy.

Campaign operations are planning, coordinating, and connecting the events and activities in a campaign.

The best advice from successful public policy advocates is to organize campaign jobs by type. The chart below lists titles of team leaders and what their responsibilities are. Most low-budget campaigns do just fine with two or three talented people who wear multiple hats. Some medium-budget campaigns find it useful to hire an experienced consultant to help with press, message development, or political analysis. (More on hiring consultants is presented later in this chapter.)

Team Leader's Title	Job Description	Qualifications
Coalition Operations	Managing coalition decision making and budget Managing fundraising and internal communications Reports to steering committee	Experienced project and people manager Good consensus-building skills
Director of Policy & Research	Managing policy research and message development	Policy wonk who writes clearly Possibly a short-term consultant
Grassroots Mobilizing Director	Managing membership outreach, education, and mobilization	Inspirational cheerleader who can manage mass communication tools
Media Relations	Managing earned media, paid ads, and other public awareness activities	Experienced public policy "spin-meister" Possibly a short-term consultant
State Capitol Operations	Coordinating professional and grassroots lobbying activities directed at policymakers in the executive or legislative branch	Experienced public policy advocate Possibly a short-term consultant

A Campaign Timeline

If you thought our definition of a public policy campaign was a bit understated and simplistic, wait until you see our timeline chart.

We defend its simplicity, however, because most healthcare access advocates have put together campaigns before—money-raising campaigns, public-awareness campaigns, outreach and education campaigns, or membership campaigns. For each campaign, somebody listed precampaign activities, followed by implementation activities, followed by celebration and evaluation activities.

The excellent publication *Medicaid Managed Care: An Advocate's Guide for Protecting Children*, published in 1996 by the National Association of Child Advocates, summarizes several dozen campaigns waged by healthcare access advocates across the country. Each effort involved thoughtful coalition planning, quick and intelligent analysis of developing policy, clever message development, and artful implementation of strategic activities. We assume they all partied afterwards, for they certainly deserved it.

Planning and Other Precampaign Activities

Task/Activity	Team Leader(s)	Product(s)
Message Development	Policy Research, Media Relations	A verbal rap, 1-page fact sheet, 10-page background for public policy arena, media, potential coalition members, potential statehouse champions
Policy and Political Analysis	Policy Research/Statehouse Operations	Identification of solution options for executive and legislative branches and briefing of potential statehouse champions
Coalition-building/Solicitation of Partners	Coalition Operations	Choosing of steering committee who, in turn, devise and approve a coalition governance agreement
Coalition Fundraising	Coalition Operations	Budget developed, money-raising plan in place
Internal Membership Education and Mobilization	Grassroots Mobilization, Policy Research, Steering Committee, Media Relations	Develop training materials, identify grassroots leaders

Another series of successful healthcare access campaigns was highlighted in 1998 at a conference in Massachusetts called *Funding Children's Health Care Through State Tobacco Taxes.* Sponsored by the Heller Graduate School at Brandeis University, Health Care for All, the Tobacco Control Resource Center, and Community Catalyst, the conference brought together the three states that had successfully engineered campaigns to improve children's health care by increasing tobacco taxes.

Each of the three states—Massachusetts, Oregon, and Arizona—sent delegates from their untraditional coalitions to share with other states the lessons they had learned. Two of the states (Oregon and Arizona) went directly to the people with an initiative campaign. Massachusetts used a legislative campaign. All three coalitions urged other states to—guess what?—plan carefully, develop clever messages, and implement procedures skillfully.

Implementation, or Herding Cats

Task/Activity	Team Leader(s)	Product(s)
Focused Message Development	Policy Research, Steering Committee, Statehouse Operations, Media Relations	Specialized verbal raps, fact sheets, customized background piece for each audience, regional media events
Policy and Political Analysis	Steering Committee, Policy Research, Statehouse Operations, Statehouse Champions	Refined solution options, thoroughly analyzed and prioritized, bottom lines established
Coalition Communications and Maintenance, Solicitation of New Partners	Coalition Operations, Steering Committee	Coalition trust-building through ongoing communications, regular briefings, open decision-making procedures and a fair process for resolving differences
Budget Fundraising	Steering Committee, Coalition Operations	Prompt reporting of expenditures, ongoing solicitation of funds
Internal Membership Education and Mobilization	Grassroots Mobilization, Policy Research, Steering Committee, Media Relations	Develop training materials, identify grassroots leaders

Model Workplan

Here is a model workplan that comes with its own self-assessment tool, which was developed for distribution after the 1996 Children's Health Care/Tobacco Tax conference.

A successful healthcare access/tobacco tax campaign:

- identifies a compelling, winnable legislative or referendum fight that pays for expanded access to health care by increasing state taxes on tobacco products
- identifies and recruits an organized, mobile base of affected constituents and powerful allied organizations
- is governed by a representative coalition of organizations and community leaders who are smart, informed, strategic thinkers and doers
- is managed by competent, hard-working staffers with enough resources

Phase I

The first phase of a successful healthcare access campaign typically involves the following activities:

- conducting legal research to determine the proper legal processes, procedures, and deadlines for amending state law or for referenda initiatives. Additional legal and regulatory research may be needed to resolve questions relating to new federal laws about health insurance and Medicaid eligibility, ERISA preemption issues, new (and pending) federal tobacco taxes, and tobacco control policies
- gathering data to identify healthcare recipients, healthcare providers, tobacco consumers, and tobacco distributors, who might be affected by a new state program that improves healthcare access by increasing tobacco taxes
- identifying potential partners and allies (including untraditional allies), their resources, their public images, and their political clout. Partners are defined here as organizations willing and able to provide significant organizational resources, including, but not limited to, turning out many people for grassroots and volunteer activities

- identifying potential opponents, their resources, their public images, and their political clout, including their involvement in other antitobacco tax or healthcare access expansion activities
- conducting polls to determine the public's attitude about healthcare access issues, increased tobacco taxes, other tobacco control efforts, potential opponents, and potential allies
- developing and testing messages for the campaign
- developing preliminary materials for coalition building
- identifying and developing networks of uninsured families committed to working on the campaign

Phase II

The second phase typically includes the following:

- forming a diverse, representative coalition of key advocacy organizations, providers, insurers, and other untraditional allies, such as business organizations that participate as partners to govern the campaign—each partner should donate money and staffers, and turn out volunteers for campaign activities
- establishing a campaign committee to open campaign bank accounts and develop fundraising and expenditure procedures that comply with the law
- establishing a campaign staff to carry out day-to-day activities
- refining a final campaign message through additional polling or focus-group testing or consultants
- developing a public education campaign to deliver messages through free and paid media
- researching the opposition, including identifying local targets and planning activities for Phase III
- putting together grassroots volunteers to distribute campaign material to targeted workers, potential allies, the media, and elected officials

Phase III

Phase III of a successful campaign typically marks the implementation stage of the initiative or legislative campaign.

People working on legislative campaigns must:

- be informed about the political history and current political dynamics of the state legislature
- have a well-thought-out strategy for assembling a majority and winning the support of the governor
- understand legislative rules controlling the committee process, hearing schedules, timetables, and voting and amendment procedures
- understand the political dynamics within each legislator's district and within the legislative body (including the election year proximity factor)
- understand which elected officials will be the most effective sponsors of their legislation
- plan and carry out a district-based grassroots lobbying effort
- have a targeted media plan to support the lobbying campaign (open hearings in the neighborhoods, direct actions against targeted opponents, workplace leaflets, canvassing, production of canned op-eds, and letters to the editor, radio talk show spots, print, radio, and TV ads).
- identify and polarize appropriate opposition targets

People working on referenda or initiative campaigns must:

- hire legal experts to develop legally correct ballot language and petitions. Make sure these folks are on top of deadlines and on top of all legal requirements about signature gathering (such as notarization requirements and perfecting amendment procedures)
- have a strategy, which all the partners agree on, for gathering signatures

- have the capacity and accountability to collect signatures using volunteers and paid signature gatherers, if necessary
- have a plan and the capacity to manage the campaign message through free and paid media—this includes everything from neighborhood meetings to passing out leaflets at large events to rallies to detailed press reports on opponents to paid ads
- have a good get-out-the-vote strategy, which includes a collaborative and productive relationship with allied organizations statewide
- have enough polling data to permit targeting potential voters by neighborhood or relevant geographical area
- have the capacity to carry out the traditional activities during the last 30 days of the campaign (phone banking, literature drops, canvassing, election-day poll coverage)

Be prepared to take advantage of what luck brings you! *Good luck is an essential element of any winning effort. The Tobacco Kids Campaign in Massachusetts benefitted from having new House and Senate leaders looking for opportunities to make public statements about their priorities for the Commonwealth. Visionary leaders in organizations like the Mass Teachers Association, the Mass Medical Society, and the United Way provided crucial support. The campaign also coincided with a national mobilization on children's issues that helped mobilize hundreds of additional activists during the drive for two-thirds vote in the Senate. Last but not least, the legislative champions of the bill were not only committed, but strategically placed as heads of the Health Care Committee. Hostile leadership in these positions could have doomed the effort from the beginning.*

—Rob Restuccia, Executive Director,
Health Care for All Boston, Massachusetts

Mobilizing Grassroots Activists

A winning plan depends on a campaign's ability to mobilize a network of constituents into performing activities that will persuade policymakers to fix a community problem.

ACTION ALERT
Legislative Hearing On Environmental Justice

THE PROBLEM: Environmental Justice

Because low-income communities of color are disproportionately selected for the placement of new pollution sources, they also bear the extraordinarily high environmental and public health problems associated with the presence of these sources. For example, is it any wonder that [ ]—which hosts several diesel vehicle depots and solid waste facilities—also has an asthma hospitalization rate five times the state average?

THE SOLUTION: ACEJC DESIGNATION
Senator [ ], in collaboration with a local grassroots organization, has recently proposed the EnvironmentalJjustice Designation Bill (Senate 1060), which would give the Executive Office of Environmental Affairs (EOEA) the authority to designate Areas of Critical Environmental Justice Concern (ACEJC). This designation would prevent new polluters (e.g. solid waste facilities) from operating in neighborhoods which are already overburdened by exposure to environmental and public health threats.
The proposed bill is modeled after an existing law for Areas of Critical Environmental Concern (ACEC), which has been used to restrict the siting of solid waste facilities near valuable natural resources. The Environmental Justice Designation Bill is legislative affirmation that humans living in underprivileged communities deserve similar protection.

TAKE ACTION!
Here is what you can do to support the ACEJC Legislation:

1) Testify at the legislative hearing which is at 11 AM in Room B2 at the STATE HOUSE on JUNE 16, 1999. Tell the natural resources committee how your community has been overburdened by the environmental and public health risks stemming from pollution in your area. Demonstrate firm public support and need for this bill! If you are unable to attend the hearing, submit written testimony to the following addresses:

Senator [ ]	Representative
State House	State House
Room 109 C	Room 473 F

2) Call [ ], at the EOEA to urge EOFA Secretary [ ] to testify in favor of the Environmental Justice Designation bill.

For more information on the hearing or the proposed regulation, contact [ ] Alternatives for Community & Environment (ACE), Bowdoin Street Health Center, Environmental League [ ], and Dudley Street Neighborhood Initiative (DSNI).

Call to Action

The recruitment, training, and mobilization techniques that follow are drawn from the experiences of the public policy entrepreneurs who are quoted throughout this book. They have learned that mobilizing constituents into campaigners is not only the best way to inform and motivate public policymakers, but it also provides a platform for leadership development and empowerment.

Recruiting Local Activists

Start with your base. Draft coalition partners. Because some organizations do not demand much from members except dues, be prepared to give these partners help in developing a good education and outreach effort to recruit members for the campaign. Encourage all coalition partners to customize the campaign message for their organization and figure out how to get a call-to-action message out during regular meetings and newsletters, or even a special mailing. The call to action should help members see that the campaign benefits them, that their participation in district meetings with local policymakers is critical, and that they will be part of a powerful statewide coalition effort that will improve their lives.

Expand your base. Ask local activists to list community organizations and institutions that might support the campaign and provide volunteers to meet with public policymakers. For instance, tobacco control activists can usually get endorsements and volunteers from local Heart and Lung Associations, the American Cancer Society, and Boards of Health. Advocates for the underserved and uninsured can get support from churches, social service agencies, and neighborhood health centers. They can locate affected constituents by distributing fliers at neighborhood meetings and posting notices in laundromats.

Use the local media, including the bulletins of other community groups and weekly shopping brochures, to invite the public to community meetings. Check out local radio and cable TV shows for opportunities to reach affected constituents and volunteers.

Organizing Activists

Identify local coordinators. Each organization's board and staff should identify key members throughout the state who can take on a coordinating role.

Some campaigns bring local coordinators into a statewide training and briefing meeting in order to build solidarity and a sense of power. Other campaigns hold regional training meetings. In both cases, the agenda always includes:

- a briefing on the problem and the proposed solution
- a briefing on how the administration or the legislature makes policy, and how to influence the process by offering a solution to the problem
- information on key public policymakers with addresses, phone numbers, pictures, and background on the issue, if possible

Ask local coordinators to go home and organize a local training session that includes the three items listed above as well as a detailed briefing on local policymakers. Include input from community activists who have worked well in the past.

CPR: Campaign for Patients' Rights

3886 Beverly NE; Building 1, Ste 21; Salem, OR 97305
phone: 503-581-6830; 1-800-789-1599 fax: 503-364-1939

LEGISLATIVE ALERT

YOUR HELP IS NEEDED!!

SB 21, 1997's Patient Protection Act has been scheduled for a hearing.

Thursday March 27th 3 PM Hearing Room B

Show your support for protecting the rights of people enrolled in managed care by:

- ✔ **Attending the Thursday March 27th Public Hearing on SB 21.**
- ✔ **Attending the Tuesday March 25th "Invited Testimony only" overview of SB 21.**
- ✔ **Writing to your legislator and asking her/his support for 21.**
- ✔ **Writing to any or all members of the key committees and asking them to support SB 21.**

◆ **We have scheduled an informal informational meeting and discussion about the Patient Protection Act from 1:30 to 3 PM on Thursday March 27th at the State Capitol in Room 350. Join us before the hearing on SB 21 to share your opinion and ask questions!!**

Sample Flyer

Mobilizing Activists

The campaign's job is to put Rule 2 into action: Get the right information to the right person at the right time through a series of coordinated campaign activities.

Local Activities

District meetings with local elected and appointed officials have two goals: briefing officials about the policy problem, and asking the officials to support the proposed solution. District meetings may take many forms, but all should allow affected constituents to tell their own stories and provide a role for each of the coalition partners.

Smart local coordinators hold a premeeting and prepare a rough script, which includes an introduction, time for affected constituents to talk about the problem, time for coalition members to present a solution, and a follow-up plan prepared by the local coordinator.

AGENDA—Grassroots Training Emergency Room Interpreters Campaign

7:30
Welcome and Introductions

7:45
Problems faced by limited English-speaking persons in our communities
Hugh Barrios, Newcomers Assistance Coalition

8:00
The Emergency Room Interpreter Bill—A solution to one problem
What it does. Where it is in the legislative process. What you can do.
State Representative Margaret Tisme

8:15
How to talk to your own elected officials and when.
Marian Mular, Government Relations, Association of Neighborhood Health Centers

8:30
Break out by legislative districts for role-playing a meeting and follow-up phone calls with your legislator. (Materials include pictures and background of each district legislator, fact sheets, and talking points)

9:00
Next Steps and Wrap-up
Hugh Barrios

Local Training Session

Legislative/policymaker breakfasts are held in a conference room or a restaurant function room before normal business hours. This time of day is very good for public officials and many community leaders and volunteers, but not so good for people with problems getting their children to school and attending an early morning meeting.

Small community meetings are often held in the evening or on the weekend in an accessible public place with parking (and sometimes even child care). The public nature of these meetings can be intimidating for some affected constituents, who might need coaching and support to speak up. Avoid stages and podiums. Arrange chairs in large circles, if necessary, to make newcomers feel comfortable and the policymaker human and approachable.

Accountability sessions are usually large affairs where public officials sit onstage and listen. After at least an hour in which constituents and community leaders present problems and solutions, the officials onstage respond. Their responses are recorded on large a posterboard on the stage. A labeled, empty chair onstage sometimes represents invited public officials who fail to attend these sessions. As you might imagine, many public officials hate this format. They will come, however, if the press covers the event or the sponsoring organization tells community members about their participation.

Victory Rallies/Award Ceremonies. Local public policymakers who work to solve a community problem deserve a thank-you party. Sometimes including marchers, bands, and music, these events are good ways for affected constituents to obtain support from community leaders and public officials alike. If you can't get the local press to come, take your own photos to submit to editors.

Follow-Up Activities

Getting a commitment is one thing, holding public policymakers to their commitment is another. Remember the legislator in the parable of The Endless Unlesses who thought the bill on neighborhood health centers looked familiar? Our short version of the story didn't mention how health activists had called once a week for a status report on the bill. Thank heaven for staffers who write down everything.

Letters. Public officials hate form letters but love Mom-and-Pop letters that end with "God bless." Good letters include a short personal note explaining the writer's involvement with the public policy problem, offer a solution, and ask for a commitment to help. Good letters also include the writer's full name and address. While it is true that legislators place more weight on letters from their constituents than on letters from people outside their district, statewide officials and legislators do pay attention to letters from constituents and community leaders on issues impacting state policy.

Calls. We advise calling public officials at their offices with a script. Use the Message Development Tool in this chapter, and add a request that the official get back to you with a reply. Don't be disappointed if your public official is not available to personally take your call. Staffers are probably more up-to-date on pending issues, anyway.

Petitions/preprinted postcards. These are excellent public awareness activities but do little to persuade public officials. Politicians figure, and so do we, that anybody will sign almost anything to get rid of the person circulating the petition or postcard. Calls and letters represent a real effort on the part of constituents; petitions and postcards don't.

E-mail. Most public officials haven't yet figured out how to value constituent e-mail messages. (Many depend on staffers to read or send their e-mail messages!) It's especially important to include your full name, address, and phone number in any e-mail communications, so they can respond to you by snail mail.

State Capitol Activities

A large event at the state capitol or county seat can be an empowering event for participants in a public policy campaign. It's exciting to be part of a huge gathering of people working on the same issue. It's fun to see and hear your organization's leaders on the podium with key players in the public policy arena.

It can also be discouraging when you get lost in the capitol annex and are late for your 10-minute meeting with your legislator, who then leaves early for a roll-call vote. Although we have already revealed our preference for district-based lobbying activities, we'll tell you how to pull off a couple of state capitol activities anyway.

Lobby days. Every organization likes to put on a lobby day to promote its legislative agenda. During legislative sessions, the state capitol corridors are jammed with folks from different trade associations, each with a lobbying package to hand to his or her legislator. Our best advice is to:

- arrange a short rally at the statehouse just before participants head off to visit their representative
- find a keynote speaker (coalition leader or legislator) capable of making a stirring speech
- help participants call their legislator for an early morning appointment well before lobby day
- distribute maps of the state capitol that include handicapped accesses and bathrooms.

Legislative briefing sessions. Complex, complicated issues like health care and illness prevention are perfect topics for an issue briefing aimed at legislators and policy staff. Get a friendly legislator to help you schedule these events in a room at the state capitol or in a private conference space close to the capitol. Show off political support from prominent coalition members, and display facts from experts at local universities or well-known think tanks. Although it's good to have one or two constituents telling their story, this is not an event for the whole coalition.

Victory rally/awards ceremonies. Every statewide public policy hero needs and deserves recognition in the presence of peers and media. As a way to reward friends with a bit of favorable public relations, many consumer organizations and trade associations have an annual awards ceremony near the state capitol. One critical element here is the press photo that's sent to local papers as hero proof positive.

A Special Note on Consultants ("Hired Guns")

> *You can get more done with a kind word and a gun than you can with a kind word alone.*
>
> —Al Capone

Fans of *The Untouchables* will find it easy to believe Al Capone used guns to encourage bootleggers to share profits with him; they may wonder, however, whether Capone wasted any time uttering words, kind or otherwise.

Issue advocates new to the public policy arena, however, usually have plenty of words—single-spaced on stacks and stacks of paper. They have reports analyzing the issue and proposing solutions, memos describing affected constituents and documenting their woes, and cost estimates. These all add up to an irresistible hero opportunity for a public official. If only they could get someone to pay attention!

And that's why the first hired gun, or consultant, that newcomers hire must have the experience to help them direct their campaign to the appropriate public policy stage:

- someone who knows the history and political dynamics in the executive and legislative branches
- someone who knows the hidden agendas of the key players
- someone who can help choose the perfect, powerful person in need of a hero opportunity

Finding a consultant is easy. In fact, after a few discreet inquiries, they will find you, as word of your search gets out among professional political consultants, lobbyists, pollsters, and public relations specialists. Newcomers find themselves deluged with phone calls and proposals from well-known political operatives, who all claim to have direct access to high-level public officials.

Choosing the right consultant is another matter. A political strategist's product is hard to define and harder still to evaluate. We will define it here as an ability to predict the behavior of the players in the public policy arena as they confront a public policy debate.

Political strategists use intuition and imagination as well as institutional knowledge, experience, and observation. In fact, a good political strategist's brain is like a computer, with imagination and intuition acting like a program that processes incoming data—institutional knowledge, experience, and observation of players and their interactions. It's fun to watch a bright consultant get fidgety and excited listening to a client's proposed policy campaign, hardly able to contain himself or herself from giving away free advice.

Another wonderful, but dampening observation comes from academia. There, consulting is comparable to teaching a required ethics course to graduate students—one gets to show people consequential things they'd rather not see, and tell them consequential things they'd rather not hear, and still get paid for it.

Developing a Job Description and Fee Structure

Using a media consultant as an example, let's start with the huge assumption that your campaign has a budget for the entire campaign. This campaign budget has a ballpark estimate for media expenses, including money for a part-time staffer for 6 months. The salary is based on comparable salaries among member organizations that have the money to hire a media person.

First, take the total salary listed in the budget and divide it by six to find out how much to pay per month. Develop a straightforward job description that lists specific tasks a part-time media person is expected to carry out. Write this up into a Request for Proposals, and start circulating the request among consulting firms and freelancers.

Campaign managers won't have to wait long to get good feedback from potential consultants. Some will say straight out that they can do the job more cheaply if they can work from home most days and only come in two mornings per week. Others will say that they would be happy to sit at a desk in the campaign office, but the fee would have to be increased to cover transportation and lunch expenses. Still others will say that their firm requires payment up front. Any negotiated arrangements can be put into a simple contract or memo of understanding outlining the work expectations, payment, and schedule.

A good system can be set up by organizing media people from member organizations to form an advisory committee to help choose a consultant and carry out a program of ongoing support and assistance.