

**SPEAK UP**  
★  
**SPEAK OUT**  
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**SPEAK HARD**

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**A Primer on Effective  
Advocacy Strategies**



**ACT Missouri**

Missouri's Youth/Adult Alliance  
Missouri Recovery Network  
Partnership For A Drug-Free America

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ACT Missouri has reprinted this booklet to assist coalition members and other members of the prevention network in developing relationships with their senators and representatives. Effective advocacy calls for the establishment of a working relationship with elected officials: one that not only benefits the legislator but your coalition and the substance abuse prevention, treatment and research field as a whole.

Many of us underestimate the advocacy power within ourselves and our coalitions. Members of the Missouri legislature are elected by you, their constituents; and their main responsibility is to vote on your behalf. There are many threads in our fields of expertise, but one unified call. Members of the substance abuse prevention, treatment and research field must come together and assume the responsibility of educating our elected officials. Keep your coalition and the field's agenda in the front of their minds. Become their expert. A well tended relationship will prove to be beneficial when you call to ask your elected officials to weigh in on an issue.

Whether you are a novice advocate or an expert advocate, you have to ***Speak Up*** in support of the issues important to the field; you have to ***Speak Out*** and educate those around you; and you have to ***Speak Hard*** by citing the facts.

# INTRODUCTION

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The balance of power in lobbying federal and state government has changed dramatically. The old days when influencing legislative action meant closed-door meetings between a few powerful special interest groups and a handful of powerful party leaders and committee chairs are over. Policy makers are influenced by their constituencies, community-based advocates, scholars, researchers, the media, their fellow lawmakers, as well as by their own personal life experiences.

Today, active, informed community-based advocates have an even more important role to play and an unprecedented opportunity to influence the legislative process. In the current legislative arena, you truly can make a difference.

To capitalize on this opportunity, you must first be aware of the obstacles you may encounter and how to effectively overcome them. More and more individuals and organizations are lobbying on more issues than ever before, making the competition fierce for a legislator's time and commitment.

In this increasingly cluttered environment of competing interests, you and your message can easily get lost in the shuffle. Understanding how the system works and how to maneuver it can help to ensure your message is powerfully and effectively delivered to its intended audiences.

This booklet is designed to give you the tools needed to communicate more effectively with your elected officials and achieve your individual or organizational goals.

# INDIVIDUAL VS. COLLECTIVE ADVOCACY

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There is a difference in both the goals and approaches of individual and collective advocacy. Understanding the distinction will assist you in achieving both your short-term and long-term goals.

## **Individual Advocacy**

You are speaking on behalf of yourself and often on an issue concerning one individual. You are often advocating that a program or service be delivered as it is intended. You are usually trying to ensure that the program or service does what it is required to do or that its funding is continued or increased as needed.

## **Collective Advocacy**

You are speaking on behalf of a group of people, those who are currently impacted by your issues as well as those who may be in the future. Your goal is to change, preserve, or expand the overall program or service, or a component of them, such as ensuring access, removing barriers, or increasing resources.

To build a strong base of support for your issue, seek out others with common interests who are willing to work as a group. Nontraditional allies should be explored to expand the perspectives that can be offered, and enhance the credibility of the group. Designating a leader, staying in touch with weekly conference calls or frequent e-mail correspondence will ensure the flow of information to all members of the group. Building a strategy based on the strengths, available resources, and personal connections of the various members of the group will also offer the greatest impact on the issue.

# FUNDAMENTALS FOR EFFECTIVE ADVOCACY

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## DO YOUR HOMEWORK

### **On Your Own Organization**

What is your organization's advocacy history and reputation with members, consumers and policy makers?

What is your organization's mission? It should be easily understood, realistic, and specific enough to achieve goals, and yet general enough that it will not become quickly outdated.

Who are your organization's members, how many are there, in what districts do they live, and do they have existing relationships with policy makers?

### **On Your Issue**

What is your position on the issue? Can you easily articulate it?

What is the opposition's argument on the issue? Can you easily articulate and rebut their reasons for opposing your position?

If you have a proposed solution to offer, what will be the impact of its implementation? Who will be affected, what will be the benefits, and what will be the costs or savings? Are there other instances where the solution was used and what were the results?

### **On the Policy Maker**

What if any position has the policy maker taken in the past on the issue? How does the issue and your suggested solutions complement or contradict the policy maker's overall goals? How could your issue help or hurt the policy maker politically? Why should a policy maker consider the issue a priority?

# **DEFINE YOUR GOALS/OBJECTIVES**

Goals and objectives are defined as results you desire to achieve, either within or by a specific time. Having these defined at the start of the advocacy process will focus your efforts and keep you from straying off track, thereby increasing the likelihood that you will be successful in reaching your goals.

Your goals and objectives should meet the following criteria:

- Specific
- Measurable
- Achievable
- Realistic
- Time-Based

Whatever approach of advocacy you employ, the following two overall goals should be kept in mind at all times:

- You want to build a relationship with your legislators that will make you a valued source of information for them on important issues, both now and in the future.
- You want to be able to influence your legislator's decision on a specific piece of legislation.

# **DEVELOP AN ACTION PLAN**

## **Identify your Targets**

- Who are the policy makers you need to influence?
- What is their jurisdiction?
- To whom do they report?

## **Hone your Message**

- Is your message clear and concise?
- Is everyone briefed consistently?
- Does your message convey the benefit to the policy maker should he or she follow your recommendations?

## **Choose your approach**

- What is the best approach or combination of approaches to deliver your message to the target policy maker?
- Who will participate?
- What will be the follow-up to each approach?
- Will you be advocating as an individual or as a group?

## **Optimize the Timing**

- What is the best timing to initiate your approaches?
- If using multiple approaches, is the timing of each one well coordinated?

## **Explore Networking Opportunities**

- What other consumers and organizations are you working within both the state and other areas of the country?
- What approaches are they going to take and when?
- Who are they planning to or able to target?

## **Leveraging the Media**

- Do you have a plan to involve the media?
- Which media format will best suit your approach?
- Is the message you want to convey brief and clear for the general public?

## **DO'S AND DON'TS**

In all advocacy approaches, you want to make sure that you do and say certain things and that you avoid others.

### **Always:**

- Thank the legislator for considering your views.
- Express your opinion honestly and thoroughly.
- Tell your legislators specifically what you want.
- Provide useful information to support your position.
- Ask for his or her support on the issue.

- Thank the legislator again for spending time with you, and indicate that there may be other issues you want to raise with him or her at another time.

**Never:**

- Express views that are excessively ideological or narrow.
- Confront or threaten the legislator.
- Behave arrogantly.
- Overwhelm the legislator with technical detail.
- Misinform the legislator.

## **GETTING TO KNOW YOUR ELECTED OFFICIALS**

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If you are unsure of who represents you in state or federal government, there are many ways to find out.

- Search the Internet: For members of Congress, go to [www.senate.gov](http://www.senate.gov) or [www.house.gov](http://www.house.gov). For state legislators, visit [www.ncsl.org](http://www.ncsl.org) or search for your state government internet site.
- Check with the local Democratic and Republican parties.

Once you know whom it is you want to influence, the following are opportunities that allow you to connect with your legislator:

- Attend candidate meetings during elections and introduce yourself. Volunteer to work on the campaigns of those candidates whose views are closest to your own.
- Contribute money to your chosen candidates, and volunteer to serve on the campaign finance committee.
- Regularly ask the question, “How can I help?”
- Participate in your legislators’ town meetings.
- Communicate with your elected officials through occasional visits, calls, and letters. Make yourself an informational source by providing officials with current facts on your organization, its mission, and its membership.
- Invite elected officials to attend events that positively reflect your organization and its mission. Encourage your organization to invite officials to visit your facilities in their district or state. Invite elected officials to attend annual meetings, fundraisers, as well as informal events.



## COMMUNICATING WITH ELECTED OFFICIALS

There are four ways to communicate directly with your elected officials to express your personal views.

- Personal letters
- E-mails
- Telephone calls
- Face-to-face meetings

## WRITING TO YOUR ELECTED OFFICIALS

Policy makers have been known to equate a single letter with the sentiments of many constituents. Here are some guidelines to consider when you write a letter to an elected official:

- The best letter is a personal one, not a form letter.
- When doing individual advocacy, write as a constituent, using your home address and not on company letterhead. When representing a group, use the appropriate letterhead to reflect the group's collective identity.
- Write only to your own elected officials. They're the ones you have the power to either re-elect or defeat.
- Be brief. Try to limit the letter to one page—absolutely no more than two pages.
- Ensure that your name, return address, and home telephone number are legible.
- Focuses on one issue—don't dilute your message by bringing up a variety of topics.
- Identify your subject, clearly describe the legislation about which you are concerned, and identify it by bill number if you are able.
- Point out how your background and experience make you an authority on this matter.
- Stress the public benefits or harm that will result from the legislation you are discussing.
- Emphasize how the legislator's constituency will be affected by the legislation.
- Support your position with facts.
- Ask the legislator to support your position. If you are opposing certain legislation, indicate the adverse effects, and suggest a better approach.

- Avoid angry or abusive comments, and never threaten to retaliate at the polls.
- Avoid using jargon and overly technical details.

After the letter has been sent, if you don't receive a response, or if you get one that is unsatisfactory, write again or call.

If the legislator votes in the way you requested, write again or call directly to express your thanks for supporting your position. If he or she doesn't vote in the way you hoped, send a note of thanks for considering your position, but express your disappointment. Either way, the official will know you're watching.

## **PROPER SALUTATIONS AND ADDRESSES FOR ELECTED OFFICIALS**

### **For State Officials:**

#### **Governor of a State**

The Honorable John Doe  
Governor, State of (State)  
City, State, and Zip Code

Dear Governor Doe:

#### **State Senator**

The Honorable John Doe  
(State) Senate  
City, State, and Zip Code

Dear Senator Doe:

#### **State Representative**

The Honorable John Doe  
(State) House of Representatives / Assembly / House of  
Delegates  
City, State, and Zip Code

Dear Representative / Delegate / Assemblyman /  
Assemblywoman Doe:

## **Chairman/Chairwoman of a Committee**

The Honorable John Doe  
Chairman/Chairwoman, The \_\_\_\_\_ Committee  
(State) Senate/House of Representatives/Assembly/House  
of Delegates  
City, State, and Zip Code

Dear Chairman/Chairwoman Doe:

## **For Federal Officials:**

### **President of the United States**

President John Doe  
The White House  
Washington, DC 20500

Dear Mr. President:

### **U.S. Senator**

The Honorable John Doe  
U.S. Senator  
Senate Office Building  
Washington, DC 20510

Dear Senator Doe:

### **U.S. Representative**

The Honorable John Doe  
U.S. House of Representatives  
House Office Building  
Washington, DC 20515

Dear Representative Doe:

## **Chairman/Chairwoman of a Committee**

The Honorable John Doe  
Chairman/Chairwoman, The \_\_\_\_\_ Committee  
Senate or House Office Building  
Washington, DC 20510 (Senate)  
20515 (House)

Dear Chairman/Chairwoman Doe:

## **E-MAILING YOUR ELECTED OFFICIALS**

While emailing is a fast and free way of communicating with your lawmakers, not all members of Congress and state legislators are equipped to effectively handle the volume of e-mails that pours into their offices daily. To guarantee they receive your message, you may also want to mail a copy of the letter.

To draft an effective e-mail message, follow the guidelines suggested in the previous section, "Writing to Your Elected Officials."

Make sure you include your name, address with zip code, and phone number on the e-mail. By including this information (especially your zip code), your lawmaker will know you are a constituent.

To find out your lawmaker's e-mail address:

### **For Members of Congress, visit:**

<http://www.senate.gov>

<http://www.house.gov>

<http://congress.org>

### **For State Legislators, go to:**

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

### **Individual state web pages can be found at:**

[www.state.\(insert state abbreviation\).us](http://www.state.(insert state abbreviation).us)

Example: Florida web page: [www.state.fl.us](http://www.state.fl.us)

## CALLING YOUR ELECTED OFFICIALS

A telephone call can be a highly effective way to communicate with an elected official. Follow the general approach outlined in “Writing to Your Elected Officials” and make sure you ask for the legislator’s support.

Your federal legislators have offices in Washington and in the local district. Your state legislators have offices in both the state capitol and in the local district.

Reaching members of congress by phone in Washington is especially easy. Just call the U.S. Capitol Switchboard at (202) 224-3121 and ask for the member by name. The operator will transfer you to the legislator’s office.

Whether you call your legislator in their local district office, in Washington, or at the state capitol, ask to speak with the member directly. Don’t be surprised if you are told the legislator is unavailable; instead, simply ask to speak to the aide handling the particular matter of concern to you. Explain your views to the aide carefully, asking that they be presented to the legislator and requesting a response.

Always follow up your call with a brief letter thanking the official and the staff member by name for their time and interest and restating your position.

## MEETING WITH ELECTED OFFICIALS

You can arrange a meeting with your elected official the same way you would arrange to visit any business or community leader.

**Follow these guidelines when scheduling your meeting:**

- Try to meet your legislator in the home district, rather than in Washington or the state capitol, whenever possible. He or she visits the home district regularly to “keep in touch,” and there are far fewer distractions.
- Call the legislator’s office and identify yourself as a constituent.

- Explain to the staff person who takes your request the nature of your concern, and indicate that you would like to arrange a brief meeting with the legislator.
- If the legislator’s calendar is full, ask if he or she will be available in the near future.
- If the legislator will not be able to meet with you before he or she votes on your issue, ask to meet with the staff person who is handling the issue or is most familiar with the issue.
- If a meeting time is arranged, send a brief written communication to the scheduler confirming the specifics of the meeting—include the date, time, location, and topic for discussion.
- To prepare for the meeting, do your homework and follow the same basic steps outlined in “Writing to Your Elected Official.”

**Follow these guidelines in preparation for, during, and following the meeting:**

- Do your homework on both your issue and the legislator.
- Be “on-time” for the meeting, but be patient if you have to wait. Lawmakers have busy schedules and are often interrupted.
- If meeting as a group, arrive at least 10-15 minutes in advance of the meeting start time to review talking points and the purpose of the meeting as well as to confirm what each person is expected to contribute to the discussion. Determine who will act as both “leader” and “closer” of the meeting.
- Be prepared to answer the lawmaker’s questions; if you don’t know the answer, tell the lawmaker you will get back to him or her with the right information.
- Provide a one-page summary of the issue you wish to discuss as well as the arguments in your favor. You should leave this material behind at the conclusion of your visit.
- After the meeting, send a brief thank you letter including the date, time, location, and topic discussed.

# ALTERNATIVE COMMUNICATION OPTIONS

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## LETTER TO THE EDITOR

Most newspapers include a section in which letters to the editor are printed. Letters to the editor provide a forum that allows citizens to speak out about a host of issues. Submitting a letter to the editor is an especially effective tool to convey your message because it ensures useful media coverage of the points you believe are most important in your own words.

Just as a letter sent directly to your elected official can have tremendous impact, so can a letter to the editor published in your local or state newspaper. Elected officials, their staffs, and other influential readers examine these pages every day. They read the letters to gauge constituent sentiment in their home district.

**Follow these guidelines in order to write an effective letter to the editor:**

- Find out the newspaper's requirements for considering letter and comply with them. (e.g. should it be typed and double-spaced? What is the maximum length the newspaper will consider? Rarely will a newspaper print a letter longer than 300 words.)
- Make it personal. An individual's letter should be customized to reflect their personal viewpoint.
- Keep the focus local. Editorial pages (particularly in smaller or weekly newspapers) like local news.
- Write as a concerned, informed citizen, and identify any special expertise you bring to the issue.
- Keep it relevant and timely. Make sure your letter has a "hook" to make it worthwhile to print. Add something new to the debate, rather than repeating what others have already said.
- Get to the point quickly. Concisely outline the legislative or regulatory action you believe needs to be taken.
- Make your own case rather than refuting someone else's. Support your assertions with facts. Explain how the public will benefit from your position.

- Sign your name, give your address and phone number, and offer to discuss the letter with the editor if he or she has questions. Most newspapers will contact individuals prior to printing their letters for verification purposes, although personal contact information will not be published.

**Other tips for letters to the editor:**

- Consider circulating draft letters to the editor for other supportive individuals and organizations to submit in order to have a consistent presence in newspapers across the state.
- Have letters ready for unfolding events. Monitor the news and have a template letter to the editor always ready to be customized to late-breaking news regarding your key messages and issues.
- Follow-up. If you have not seen your letter appear in the paper within a week of submission, call the newspaper and inquire as to their receipt of it and when they plan to run it.

## **TESTIMONY AT PUBLIC HEARINGS**

While public hearings may not be mandatory in all levels of government, the opportunity to provide testimony at public hearings is another effective way in which to convey your message to policy makers.

Public hearings provide an opportunity for public recognition and credibility for you and your organization, particularly when there is strong media coverage. It also provides a chance for you to meet others who may have concerns similar to your own, as well as to learn more about those who are opposed to your position and the reason why.

Once you have done all the aforementioned homework and drafted your testimony, consider the following tips to make sure you take full advantage of the opportunity to deliver your message in the most effective manner:

- Know why the hearing is being conducted. Is it required? Who called for the hearing? Is the timing close to an election?



- Try to be one of the first to testify. Find out the names and affiliations of whoever else will be providing testimony. Try to foresee your opponent's messages and shoot down their arguments before they can even make them.
- Make sure your message is sharp, clear, and concise. Think in terms of "sound bites."
- Provide hard copies of your testimony for all members of the panel and media.
- Weave in personal stories along with factual statements.
- Be ready for questions from panelists—this is a very good sign that the legislators have listened and are interested. Be careful not to confuse comments from panelists with questions.
- Be aware that a hidden agenda can exist that may stack the hearing against you.

**NOTES**

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