Advocacy Toolkit

MICHIGAN LEAGUE FOR PUBLIC POLICY

Advocacy

Where to Begin?

WHY ADVOCATE?

ad·vo·cate - v. to speak or write in favor of; support or urge by argument; recommend publicly.

WHERE DO WE BEGIN?

Develop a map that guides the work of the group. Begin by answering the following questions.

Q **What do we want?**

A Begin your advocacy effort with your goals for the long and short term. Know the public policy change you want and your process goals (e.g. including partners). Define your goals at the start in a way that can launch an effort, draw people to it, and sustain it over time.

Q **Who can give it to us?**

A Identify the people and institutions you need to move, those with actual formal authority to deliver the goods (e.g. legislators) and those with the capacity to influence the decision makers (e.g. the media and key constituencies, both allied and opposed). Know who these audiences are and what access or pressure points are available to move them.

Q **Who should deliver the message and make them care?**

A Identify the most credible messengers. They might be experts whose credibility is largely technical or they might be authentic voices who can speak from personal experience. Equip them with information and skills to increase their comfort level as advocates. The appeal should address the self interest of the decision makers.

Q **What are your assets?**

A Inventory the advocacy resources you already have, including past advocacy work, alliances already in place, staff and volunteer capacity, information, and political intelligence. In short, you don't start from scratch; you start by building on what you've got.

Q **What resources are missing?**

A Identify the advocacy resources you need. Look at alliances that need to be established, and capacities such as outreach, media (cautiously), and research that may be crucial to your effort.

Do your homework.

- Monitor legislation by visiting www.legislature.mi.gov.
- Investigate the history of the issue by asking the sponsor of the bill or similarly positioned groups for any background material they may have (pros and cons).
- Identify the supporters and opponents of the issue (policymakers and special interest groups).

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Collaborate with others.

- Share the information gathered with board, volunteers and others.
- Hold informal or formal gatherings of other groups with similar outlooks on the policy issue. This could be as informal as a few people gathering for lunch or as formal as a coalition meeting.
- Identify how the organization can work with others to make policy change. One group does not have to carry the load alone and by sharing the responsibilities the desired goal can often get further.

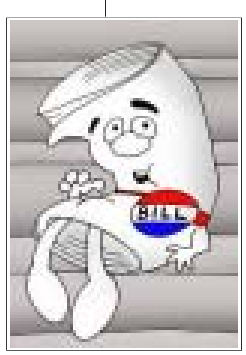
Collaborate

Communication Planning Tool

What types of advocacy activities should all nonprofits do?

Regardless of whether an organization decides to take part in policy change, there are a few activities that all nonprofits should do now to educate policymakers and the public about who they are as an organization, what they do and why they do it. It is important that policymakers view nonprofits as resources in their community.

- Send newsletters and annual reports to local, state and federal policymakers. A listing of state and federal legislators is included in the pocket directory in your packet. You may also visit www.mnanonline.org to download a spreadsheet with the federal and state policymakers' contact information, including labels with their addresses. For local government contact information you may contact your local municipality.
- Invite policymakers, their staff and the media to events and/or invite them for an informal visit to see the organization's work.
- Periodically visit policymakers in their district offices or in Lansing/Washington.
- Recognize policymakers at every opportunity—at events, in newsletters, etc.



Can 501(c)(3) organizations lobby?

Lobbying by groups that represent the public interest is an essential part of the governmental process. There are rules and regulations regarding lobbying that need to be followed. The IRS and state of Michigan require nonprofits to measure and report on lobbying activities. But none of these should discourage organizations from becoming active participants in impacting policy.

According to the state, lobbying is defined as "any direct contact with a lobbyable public official, whether face to face, by telephone, letter, electronic media or any other means, the purpose of which is to influence the official's legislative or administrative actions."

Reporting Requirements:

The Michigan Lobby Registration Act requires a person or organization to register as a lobbyist agent or lobbyist if they receive compensation or make expenditures in excess of the amounts listed below for lobbying. Under this act, an individual or organization must register as a lobbyist if they spend more than $2,000 to lobby a number of public officials or in excess of $500 to lobby a single.

How does the legislative process work?

How a bill becomes law:

- The progress of a bill can be followed on the Web at www.legislature.mi.gov. This website also provides a schedule of legislative sessions and of legislative committee meetings.
- Michigan—The Michigan Legislature is generally in session Tuesday through Thursday throughout the year except for summer and holiday breaks.
  - U.S.—Federal bills can be followed at http://thomas.loc.gov. This website also lists committee meetings and session schedules. The schedule for the U.S. House of Representatives and the U.S. Senate varies, but they meet

The Budget Process

MICHIGAN

The state budget process can best be monitored on the House and Senate fiscal agencies' websites at http://house.michigan.gov/hfa/ or http://senate.michigan.gov/sfa/. The Michigan Fiscal Year is from October 1 through September 30.

U.S.

The federal government follows a similar timeline for its budget process and has the same fiscal year as Michigan. The federal budget process can be tracked at http://thomas.loc.gov.

throughout the year with a break in the summer and in observance of holidays.

WHAT TYPES OF PUBLIC POLICY CAN BE CHANGED?

Being an advocate may include, but is not limited to, monitoring and taking action on the following issues.

Statutory Issues – A statute is a law enacted by a legislative body. Advocacy in this area may include, but is not limited to, encouraging legislators to introduce legislation, testifying at legislative committee meetings, and communicating in support of or in opposition to legislation.

Fiscal Issues – This includes advocating with the relevant department heads and legislators to provide for the needs of constituents or organizations.

Regulatory Issues – A regulation is an administrative rule. Administrative rules are implemented and interpreted by state/federal agency officials. An organization may advocate for or against the manner by which an agency interprets a law.

HOW CAN A BOARD AND STAFF BE PERSUADED TO BECOME ADVOCATES?

Four easy steps will encourage boards and staff to become involved in the governmental process. Once these four steps have been accomplished, boards and staff should be both willing and prepared to begin advocating.

1 **Stress advocacy's link** to the organization's mission. Again, the key components of an advocacy plan—building relationships, gathering information, collaborating and conveying your message—are not new to most organizations and are in support of most missions. As the American Catholic Bishops stated, "Charitable efforts cannot substitute for public policies that offer real opportunities and dignities."

2 **Reassure staff and board** that the limitations of the organization are understood. The financial and staff capacity of an organization should be taken into account when determining how active a group will be on public policy issues. It's important to remind a board and staff that the level of involvement in public policy can vary depending on resources available.

3 **Dispel the myths** regarding charitable lobbying. It is legal, ethical and encouraged by policymakers for nonprofits to advocate, and specifically to lobby. However, some boards are under the misconception that these activities will jeopardize a nonprofit's tax exempt status. To counter these myths, provide the board and staff with information such as the Michigan Nonprofit Association Handbook found on mnaonline.org. It may also be appropriate to provide trainings on the rules and regulations for lobbying and on effective strategies and tactics for advocacy.

4 **Establish an internal structure** for addressing public policy. Developing internal policies and procedures for how an organization approaches policy issues will often help relieve the concern of board members unsure of the group's involve-

ment. During this process the board can also determine the extent to which it wants to empower the staff to make decisions on policy.

Craft Policy Priorities

Nonprofits may consider drafting policy statements based on their missions to guide and shape policy work. It's important to make the priorities broad (not tied to specific legislation) and to make priorities relevant for multiple years. If possible and if relevant, staff should monitor policy and bring bills/regulations to the attention of the board. Policy brought to the board should be based on the organization's policy priorities.

Establish a public policy committee charged by the board to review public policy, make recommendations and suggest strategies for addressing the issues. It is especially helpful if the majority of the committee is composed of board members with the addition of advocates who work on the issues of importance to the organization. The recommendations of the public policy committee should then be presented to the board for a vote. This level of formality allows the organization to take a position on a controversial issue with significant support from its board.

The world of public policy can move very quickly. Therefore, it may be necessary for staff to bring a public policy issue to the attention of the executive committee or chair of the board to make a swift decision. Once the full board or executive committee has voted on an issue, staff would then be empowered to implement the decision.

Advocacy During Recess

U.S.—There are a few ways to effectively reach and influence your members of Congress when they are home. All strategies include being in touch with the district office. When Congress is in session, you are encouraged to contact the Washington, D.C. office, but, when on recess, the district office is where the action is happening, and staff in this office will know where the member of Congress is at all times. Members of Congress want and need to hear from their constituents, so take this opportunity to participate in activities that can raise awareness of your platform and get real results in Washington.

Michigan—The best way to effectively reach and influence your state legislators during recess is to attend coffee hours, events and town halls in the district. Recess offers a great opportunity to strengthen your relationship with your legislator and raise awareness of your platform. You can use the government resources pocket guide included in your packet to reach out to your elected official for events and scheduling information.

The most influential way to ensure your message gets heard is to schedule a one-on-one meeting with the senator or the representative in his/her office. Following are a few pointers on how to make the most out of your meeting.

- **Schedule your appointment in advance** and be flexible. Call the district office as early as possible and have a few dates and times in mind. Members of Congress try to squeeze vacations in during some recesses, so be sure to double check when they will actually be in town. Be as open as possible to alternative dates if they work better for the legislator.
- **Do your homework!** Craft your message, and do your research to support your points. To help you do this, look at the legislator's bio, committees he/she serves on and his/her voting record.
- **Be prompt and provide relevancy**. The legislator's time is limited, and you must make a local connection to keep the conversation relevant. No matter your topic of discussion, always bring it back to how the current practice is impacting the community/state and how a policy change would positively impact the situation.
- **Be armed with research**, information and handouts specific to your district. Support all of your talking points with recent and accurate information. The Michigan League has data and analysis to supplement your advocacy efforts. You want to back up your argument with fact!

- **Answer questions truthfully.** Listen to what the policymaker says and be sure to keep your cool if you do not like a response, and answer questions honestly. If you do not know the answer to a question, it is fine to say that you don't know the answer. In fact, not knowing the answer and promising to get back to him/her provides you an excuse to do our next step.
- **Follow up, follow up, follow up!** Be sure to get contact information for the policymaker and his/her staff member who works on the issues relevant to your organization and/or issue. After the meeting, send a thank you message and answer any questions that arise during your meeting. Continue to send the office information including articles on your programs, and stay informed on issues that Congress and the Michigan Legislature is working on so you can weigh in on how it impacts your community.

Using social networks for coalition building

Today's advocacy environment is always evolving. Traditional advocacy, such as face-to-face meetings and phone calls, is effective, but you may want to consider using other strategies, as well. The Michigan League for Public Policy uses social media networks to build and maintain a coalition of advocates, including nonprofits, legislators, individuals, advocates, institutions, businesses and more. We encourage you to join these outlets to receive and share advocacy resources.

The importance of real people in telling stories

> ***"Nobody ever marched on Washington because of a pie chart"*** — Andy Goodman, consultant, The Goodman Center

Why story telling is important

Sharing personal stories about programs building shared prosperity is a powerful way to show the impact deep cuts to these programs can have on ordinary people according to the Half in Ten Campaign.

A good story:

- Catches your attention and doesn't feed stereotypes or trigger judgments.
- Highlights inequities in the system or problems that need to be addressed rather than what an individual did right or wrong.

- Demonstrates concrete consequences.
- Helps readers understand the issue.
- Is free of "blame."
- Is easy to relate to.
- Helps promote more even-handed news coverage.

Capturing the story

Direct services providers and volunteers have a great opportunity to find good stories among those impacted by state and federal policy.

Tips:

- Explain how important their story is.
- If you will be writing up the story:
  - — Make time to listen.
  - — Identify specific causes and effects.
    - What caused their need?
    - What were the effects of this need on their life?
    - How did access to public programs affect their life?
    - And conversely, what would be the effect of losing that program?

- Listen for additional angles, and repeat the above.
- Thank them!

Writing the Story

- Every story has a . . .
  - — Main character (the beneficiary),
  - — A conflict (need), and
  - — A resolution (public benefit).

These stories also have a policy context. “What would happen if x program were cut?”

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