

**CIL-NET Presents...**

**Influencing Policy**

**A National Onsite Training**

**September 10-12, 2012**

**Baltimore, Maryland**

**Presenter:**

**Fred Newdom**

# INDEPENDENT LIVING

Is not doing things by yourself, it is being in **CONTROL** of how things are done.

- Judith Heumann



# Centers for Independent Living

Not-For-Profit -- 501 (c) (3)

- ☞ Community Based
- ☞ Consumer Controlled
- ☞ Cross Disability
- ☞ Cross Cultural
- ☞ Non-Residential



# Centers for Independent Living: 4 Core Services

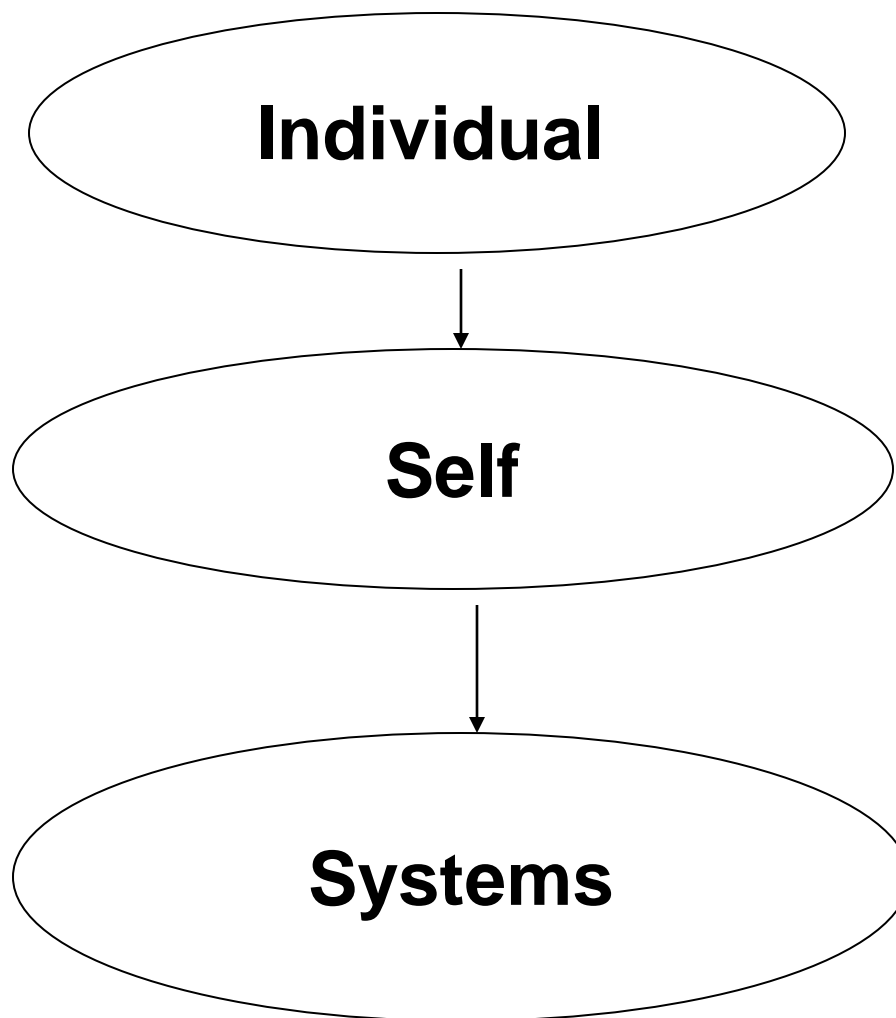
- SYSTEMS AND INDIVIDUAL ADVOCACY
- PEER SUPPORT
- INFORMATION AND REFERRAL
- INDEPENDENT LIVING SKILLS TRAINING



# The Independent Living Movement



# Kinds of Advocacy



# Influencing Policy



# Advocacy Activities

## Direct Action

- Letter writing campaigns
- Leafleting
- Rallies & demonstrations
- \_\_\_\_\_ins

## Voter Registration, Education and Mobilization

- Forums
- Questionnaires
- Information

## Litigation

## Lobbying

## Electoral

## Public Information and Media Work

## Education targeted at:

- Consumers
- Providers
- Funders
- Regulators
- The Public



# Voting – Making Our Voices Heard



# Voter *Registration*, Education and Mobilization



Know state laws on voter registration and voter registration campaigns

A good resource:

<http://www.nonprofitvote.org/voter-registration-toolkit.html>

# Voter *Registration*, Education and Mobilization, cont'd.

- Non-profits can do **non-partisan** voter registration.
- Non-partisan means not influenced by, affiliated with, or supportive of any political party or candidate.
- Bipartisan is **not** non-partisan.



# Voter *Registration*, Education and Mobilization, cont'd. 2

- Multi-organization collaborations are permitted if **all** the partners are strictly non-partisan.
- Promoting voting and registration can be done through signs, posters, staff and volunteer communication.



# Voter *Registration*, Education and Mobilization, cont'd. 3



- Let your consumers use your center as a mailing address for their sample and/or absentee ballots.
- Check if your center can become a polling site on Election Day.
- Appoint one person, staff or volunteer, to coordinate voter registration activities.
- Check on voter registration status when folks come in
- Have outreach workers do registration.

# Voter *Registration*, Education and Mobilization, cont'd. 4

- You **can** work to register people in the area where you provide services.
- You **can** focus on registering your consumers, their families and friends.
- You **cannot** target just those low-turnout areas likely to vote for one party.

# Voter Registration, *Education* and Mobilization



- You **can** sponsor a debate or candidate forum if you invite all qualified candidates to present their views **and** an independent (non-partisan) group develops any prepared questions **and** a range of issues is covered **and** the moderator is unbiased or neutral.

# Voter Registration, *Education* and Mobilization, cont'd. 2



- You **cannot** invite a candidate to make an appearance at a center-sponsored event that could turn into a “campaign appearance.”
- To avoid that possibility, it is best not to make such invitations during campaign season.
- You **can** invite elected officials to do a “site visit” to your center *after* the election.



# Voter Registration, *Education* and Mobilization, cont'd. 3



- You **cannot** try to influence people on how to vote, even indirectly.
- For example, you **cannot** say:  
“We need more voters who support independent living. Register here.”
- You **can** say: “Support Democracy – VOTE.” Or, “Housing, human services, food, jobs. You count.” A broad range of issues makes it OK.

# Voter Registration, *Education* and Mobilization, cont'd. 4



- You **can** develop and distribute non-partisan Candidate Questionnaires and Voter Guides.
- You **can** publicize your own issue agenda during an election.
- You **cannot** ask candidates to endorse your agenda.

# Voter Registration, *Education* and Mobilization, cont'd. 5



- You **can** give candidates information about issues of concern to your group.
- You **can** pose questions at a forum.
- You **can** ask candidates to take a public stand, as in asking them to state their position.
- You **cannot** ask for a Pledge of Support for your position on issues.

# Voter Registration, Education and *Mobilization*



- Organizational vehicles can be used to take people to the polls but the vehicle cannot have partisan bumper stickers, literature, campaign buttons, etc.
- The same applies to personal vehicles taking people to the polls as part of a center voter mobilization effort.

# Electoral Activity and Non-Profits



# Electoral Activity and Non-Profits, cont'd.



- Electoral activities of non-profits are regulated under the Federal Election Campaign Act (FECA) and the IRS Code.
- Non-profits tax exempt under article 501(c)(3) of the tax code are prohibited from “Express Advocacy.”
- “Express Advocacy” is defined by FECA as political communications that use the “Magic Words,” such as “vote for” or “vote against.”

# Electoral Activity and Non-Profits, cont'd. 2

- “Electioneering Communications” are prohibited to 501(c)(3) organizations
- “Electioneering Communications” are defined by FECA as paid broadcast communications that depict a candidate within 60 days of a general election or 30 days of a primary election.



# Electoral Activity and Non-Profits, cont'd. 3



- “Electioneering Activity” is prohibited to (c)(3) organizations, except for non-partisan voter registration and educational activities.
- *“Electioneering Activity”* is broadly defined as political activity designed to influence the election of a candidate to federal, state or local office.



# Electoral Activity and Non-Profits, cont'd. 4



- 501(c)(4) (social welfare) organizations can carry out “Electioneering Activity” but not as the “primary purpose” of the organization and only if it is relevant to the organization’s “primary purpose,” as stated in its IRS registration.
- Sample “Electioneering Activities” are issue advocacy directed at candidates, broadcast ads, polling, GOTV, etc.

# Electoral Activity and Non-Profits, cont'd. 5



- Both types of non-profits (as long as the organization's function is not primarily electioneering) may receive soft money raised by candidates, but not political parties, for permissible activities.

# Electoral Activity and Non-Profits, cont'd. 6



- 501(c)(4) organizations have fewer tax law restrictions than 501(c)(3) organizations with regard to political activity.
- Provided election activity is not the primary function of the 501(c)(4), they can participate in more partisan election-related activity under tax law than 501(c)(3)s.
- However, 501(c)(4)s must also be aware of their obligations under federal and state election law.

# Electoral Activity and Non-Profits, cont'd. 7



## 501(c)(4)s **MAY**:

- ✓ engage in all of the nonpartisan voter education activity that a 501(c)(3) can engage in
- ✓ engage in unlimited lobbying, including work on ballot measures
- ✓ endorse federal candidates for office to the organization's membership and share the endorsement with the organization's press list
- ✓ expressly advocate for a federal candidate's election or defeat when communicating with the organization's membership
- ✓ in some states, make cash or in-kind contributions to state or local candidates

# Electoral Activity and Non-Profits, cont'd. 8



501(c)(4)s **MAY NOT:**

- ✘ make communications to the general public that include express advocacy for a federal candidate
- ✘ make cash or in-kind contributions to federal candidates
- ✘ coordinate communications with a federal candidate or party
- ✘ engage in electoral activity as the organization's primary activity

# Direct Action



# Direct Action: Think Campaign

- Choose an Issue
- Develop a Strategy
- Select Your Tactics
- Plan Your Action



From: Organizing for Social Change (3<sup>rd</sup> Edition) (2001) by K. Bobo, J. Kendall and S. Max (Seven Locks Press)

# Direct Action: Choosing an Issue

- Will it improve people's lives?
- Will it give people a sense of their own power?
- Will it alter the relations of power?
- Will it be worthwhile and winnable?
- Will it be widely and deeply felt?
- Will it be easy to understand?
- Will it have a clear target?
- Will it be non-divisive?
- Will it build leadership?
- Will it be consistent with your values and vision?



# Direct Action: Developing a Strategy

- Be clear about long-term, intermediate and short-term goals.
- Think about organizational considerations
  - Resources you bring and can commit
  - How it will strengthen your organization
  - What internal problems will have to be considered?
- Think about constituents, allies and opponents
  - Who cares enough about the issue to join you?
  - Who opposes you and why?
- Identify your primary and secondary targets

# Direct Action: Selecting Tactics

- Can you really do it?
- Is it focused on either the primary or secondary target?
- Does it put real power behind a specific demand?
- Does it meet your organizational **and** issue goals?
- Is it outside the experience of your target?
- Is it within the experience of your members and are they comfortable with it?
- Are your leaders experienced enough to do it?
- Will people enjoy working on or participating in it?
- Will it play positively in the media?

# Direct Action: Action Planning

## When to use Actions

- In opening phases of a campaign
- To build the organization
- To test your ability to turn people out
- To test leaders' ability
- To move outside normal channels for getting things done



# Direct Action: Action Planning, cont'd.

## Goals (Demands)

- Successful demand formulating requires understanding power: yours and the opposition's.
- Understanding the cost to the opposition of meeting your demands will predict the strength of their resistance and the amount of power you'll need.

# Direct Action: Action Planning, cont'd. 2



## Goals (Demands)

- Demands are ranked according to whether they are main or fallback demands – “fallback” means asking for something useful but less than you want
- Every action should have one main demand and several fallbacks.
- Your final fallback demand should be a request for another meeting.

# Direct Action: Action Planning, cont'd. 3

## Tactics

- Every action must be fun **and** demonstrate real power.
- Three categories of tactics:
  - Tactics aimed at the target that show your power;
  - Tactics aimed at raising the morale of your members;
  - Tactics aimed at getting media coverage.



# Direct Action: Action Planning, cont'd. 4



## Action Planning Reminders

- Stay within the experience of your group
- Try to get outside the experience of your target
- Try to make an appointment to see the target rather than try for a surprise encounter
- “Case the joint”

# Direct Action: Action Planning, cont'd. 5



## Action Planning Reminders

- Hold a dress rehearsal for participants
- Have only one spokesperson in an Action
- Ask people to come to the action 15 minutes early
- If media are wanted (they aren't always), send a press release a week ahead of time
- Keep your demands clear and simple



# Letter Writing:



## Why write to elected officials?

- To inform an official about an issue or situation, giving background and history that s/he may not have.
- To explain to an official how a particular issue affects you or your group.
- To attempt to persuade an official to vote in a certain way on an issue, or to take other related action.
- To express support for or opposition to a proposed law, policy, or course of action.
- To demonstrate to an official that her/his constituents are aware of an issue and have a real interest in the outcome.

# Letter Writing: When should you write letters to elected officials?

- You want an official to consider a certain action or policy
- There is an upcoming vote on a policy that concerns your group. Letters are most effective when the vote is about to be taken. This is a good time to use e-mail.
- You want to respond (positively or negatively) to a completed action or a change in policy



# Letter Writing: When will it have the greatest impact?

- Just before an election.
- Right before an important vote. They will be hearing from lots of folks.
- Just before and in the midst of the budget process. If you have priorities for funding, now is the time to make them known.
- Immediately after an official has done something you approve or disapprove of. Hold them accountable.



# Letter Writing: How do you write letters to public officials?

1. *Decide on the recipient.* Get the name, title, and address of the official who will make the decision about your issue.
2. *Open the letter in an official manner* If you are writing to an elected official, use the title of the office, and the official's full name.
3. *Start by explaining your purpose for writing this letter*  
Let your reader know immediately what your letter is about. Tell him/her why you are concerned or pleased that a particular decision is being considered.

# Letter Writing: How do you write letters to public officials? cont'd.



4. *Summarize your understanding of the issue/decision being considered* State the general impact that you expect to occur if a particular decision is made.
5. *Explain your position on this issue* Describe in detail why you feel the decision made will lead to the impact you foresee.
6. *Describe what any changes will mean to you, and to others* Describe specifically the positive or negative effects the decision will have on you personally and on those you represent. The more people affected by the decision, the more convincing you may be.

# Letter Writing: How do you write letters to public officials? cont'd. 2

## 7. *Identify others who may be affected by this decision*

Tell the official which, and how many, people will be affected. Statistics can be very helpful here.

8. *Acknowledge past support* Mention appropriate actions and decisions the official has made in the past and express thanks for them.

## 9. *Describe what action you hope the official will take*

State specifically what action you (and those you represent) hope the official will take--and by what date, if there is a deadline.



# Letter Writing: How do you write letters to public officials? cont'd. 3

10. *If you have written a letter that opposes some action, offer an alternative.*
11. *If you have time and you are committed, ask how you can help*
12. *Close and sign your letter* Thank the official and sign your full name. Make sure your address, and phone number are included.



# Letter Writing Campaigns

## 1. Preparation is key.

A – Why might people be reluctant to write?

B – Explain why a campaign is needed

C – Provide a template

D – Have materials available/Laptops

## 2. Letters from people affected by the issue should include:

A – A description of who they are

B – The fact they are constituents or connected to the district

C – What they want the official to do

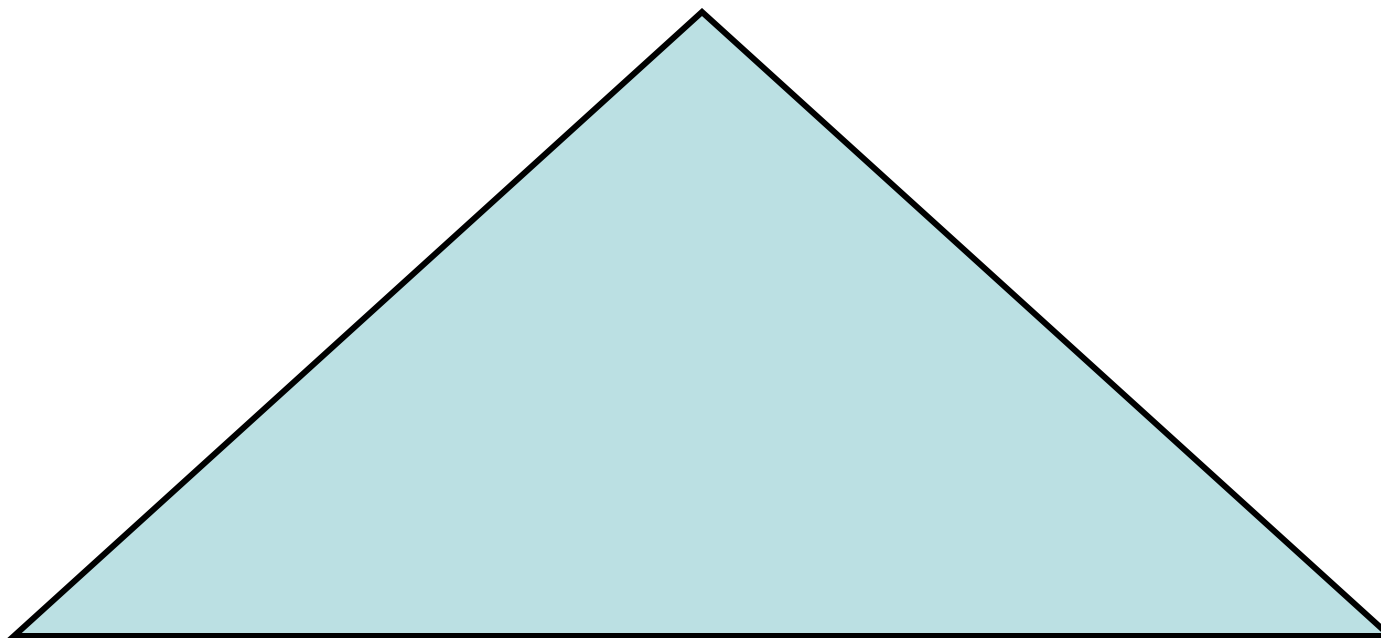
D – What the issue means to them or how they are affected





# Law Reform

## Getting a law passed



Regulation

Implementation

# Civil Rights Laws

1964 Civil Rights Act

1968 Architectural Barriers Act

1970 Urban Mass Transit Act

1973 Rehabilitation Act

1975 Developmental Disability Bill of Rights Act

1975 Education of All Handicapped Children Act

1978 Amendments to the Rehab Act



# Civil Rights Laws

1988 Fair Housing Act

1990 Americans with Disabilities Act

1992 Reauthorization of the Rehab Act

1996 Telecommunications Act

1997 Civil Rights of Institutionalized Persons Act

1997 Reauthorization of IDEA

1999 Ticket to Work & Work Incentives  
Improvement Act

# Lobbying Basics



# Advocacy and Lobbying

- **Advocacy** is acting to convince others of your position; **Lobbying** is advocacy directed at legislators
- Non-Profits may lobby
- Nonprofits are a critical information source for policy makers
- Restrictions on the amount and kind of lobbying that is permissible are set at the federal, state and local levels

# Key Facts About Non-Profits and Lobbying

- Typically, only non-federal funds may be used for lobbying by 501(c)(3) organizations.
- They can lobby subject to spending limits imposed on tax exempt organizations
- “Education” is permitted.

# Key Facts About Non-Profits and Lobbying, cont'd.



- Article 501(c)(3) non-profits can safely use 5% of their resources (“no substantial part” test) for lobbying.
- Those that elect 501(h) status can spend 20% of their annual expenditures for direct lobbying and no more than 25% of their lobbying budget for indirect lobbying **and** must report activities annually.
- State laws must be known and obeyed

# What is Lobbying?

## Communication:

- Directed at legislators or staff;
  - Referring to a specific piece of legislation;
- and*
- Expressing a view on that legislation.



## What is Lobbying, cont'd.

**Grass Roots or Indirect Lobbying** is communication that is an attempt to influence legislation by encouraging **the public** to contact legislators:

- Referring to specific legislation;
- Reflecting a view on that legislation; and ,
- Encouraging the recipient of the communication to take lobbying action on the specific legislation by:

## What is Lobbying, cont'd. 2

- Telling the recipient to contact a legislator to influence the legislation;
- Giving information on how to contact the legislator;
- Providing a petition, email link, postcard or similar means to contact the legislator; *or*
- Specifically identifying a legislator who will vote on the legislation as being opposed or undecided.

# Indirect Lobbying



**Tell Congress to Fund 1,000 housing vouchers** for people with disabilities transitioning out of nursing facilities and other institutions!

The U.S. House of Representatives appears on track to consider a year-end omnibus spending bill early next week. Your help is needed to tell Congress to fund 1,000 vouchers to enable people to transition from institutions into the community! **TAKE ACTION:** Tell Congress to Fund 1,000 Housing Vouchers! **Call your Representative today at <http://www.congress.gov> or (202) 224-3121** and urge them to include funding for 1,000 housing vouchers for people transitioning out of institutions.

**Targeted Members:** All Members of Congress should hear this message, as they will all vote on the final funding bill. However, if your Representative serves on the House Subcommittee on Transportation, Housing and Urban Development, and Related Agencies, your call is critical, as Subcommittee Members have more influence over this funding bill.

Members include: MAJORITY Chair: John W. Olver (MA). Ed Pastor (AZ), Ciro Rodriguez (TX), Marcy Kaptur (OH), David E. Price (NC), Robert E. "Bud" Cramer, Jr. (AL), Lucille Roybal-Allard (CA), Marion Berry (AR), Dave Obey (WI), Ex Officio MINORITY Ranking Member: Joe Knollenberg (MI), Frank R. Wolf (VA), Robert B. Aderholt (AL), James T. Walsh (NY), Virgil Goode, Jr. (VA), Jerry Lewis (CA), Ex Officio

# What is NOT Lobbying?

Communication that refers to and reflects a view on specific legislation is **not** lobbying if it is **nonpartisan** analysis, study or research.

Two tests: *Content* and *Distribution*

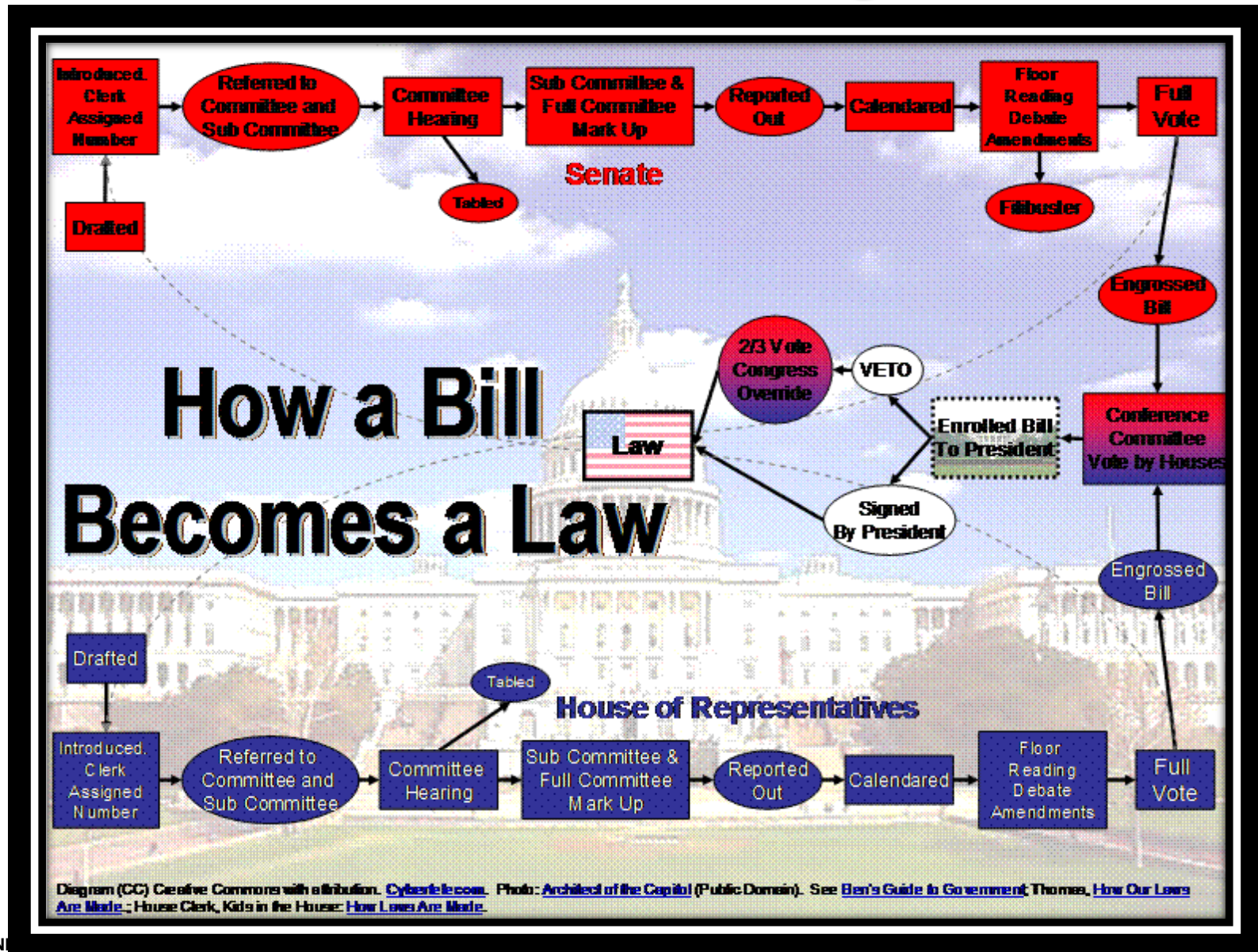
- **Content:** Must provide a sufficiently full and fair discussion of the facts to allow a member of the public to come to an independent conclusion.
- **Distribution:** Must be made available to general public; can be legislators; not limited to people only interested in one side of the issue.

**“I agree with you. I want to do it.  
Now make me do it.”**

-- Franklin D. Roosevelt, to reformers,  
upon taking office in 1933.



# The Formal Structure of Legislation



# Information on Federal Legislation

A great one-stop source for information on all things Congressional:

Thomas (Library of Congress)

<http://thomas.loc.gov/home/thomas.php>

# Government structure and gridlock

- One person's obstructionism is another's principled opposition.
- "The real outcome of most lobbying – in fact, its greatest success – is the achievement of nothing, the maintenance of the status quo" – Melinda Burns, *Miller-McCune Magazine*, as quoted in the *NY Times* (6/19/11)



# Lobbying Overview

The TWO Cardinal Rules for Elected Officials:

1. Get Re-elected
2. Never forget the first rule

# Lobbying Overview, cont'd.

<b>Bad Politics/Good Policy</b>	<b>Good Politics/Good Policy</b>
<b>Bad Politics/Bad Policy</b>	<b>Good Politics/Bad Policy</b>

## Key Advocacy Tasks

- Make Good Politics/Bad Policy into Bad Politics
- Make Bad Politics/Good Policy into Good Politics

# Sources of power in the political process

## Money



“There are two things that are important in politics. The first thing is money, and I can’t remember what the second one is.”

- Mark Hanna, 19<sup>th</sup> Century Political Boss

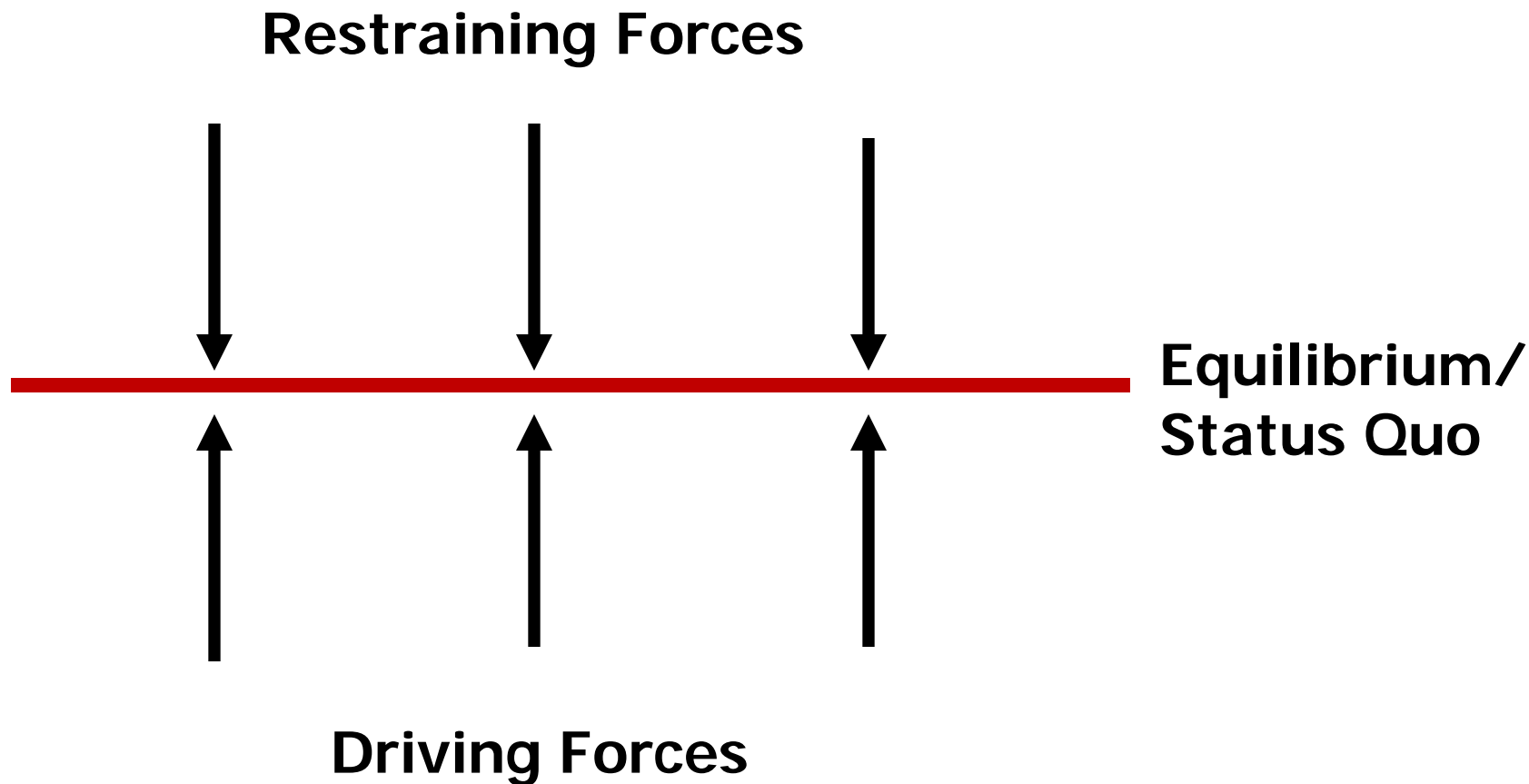


# More sources of power in the political process



- Numbers
- Proven capacity to mobilize
- Facts/information
- Credibility
- Ability to tell your story
- Relationship
- Commitment/Staying power
- Ability to embarrass

# Force Field Analysis



# The Three Rules for Influencing Public Policy

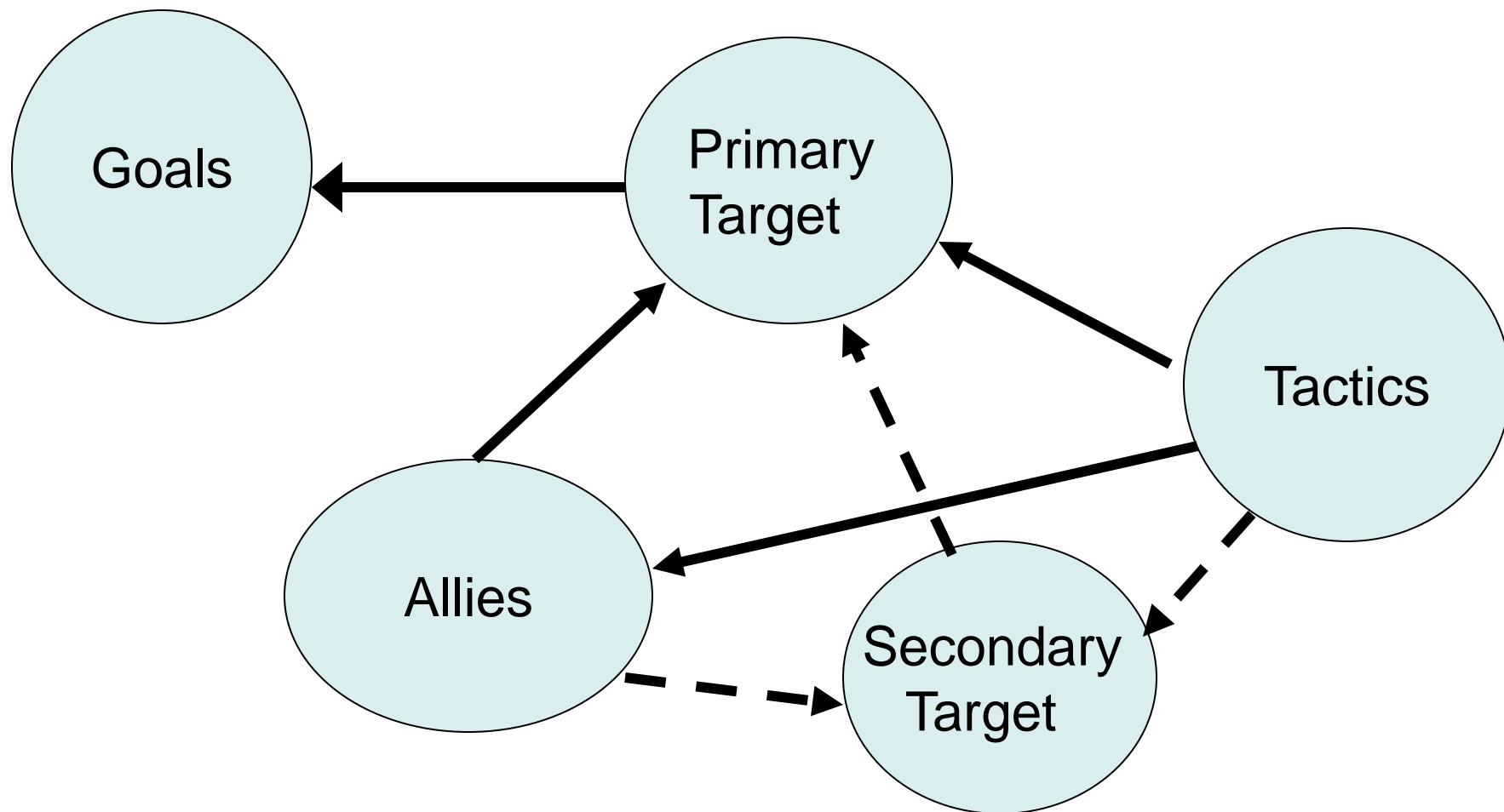


1. Elected decision-makers make different decisions when watched by the affected constituents.
2. Get the right information to the right person at the right time.
3. Public policy-makers weigh opinion as equal to fact.

# Strategy Chart – Campaign Planning

Goals	<u>Constituents/Allies</u>	Targets (Sequenced)	Tactics
<u>Long term</u>		<u>Primary</u>	
<u>Intermediate</u>		<u>Secondary</u>	
<u>Short term</u>	<u>Opponents</u>		

# Strategy Chart - 2





# Lobbying

## Outline of 30 minute meeting

- 10 minute prep before entering the office

### The visit

- |                            |            |
|----------------------------|------------|
| • Introductions            | 5 minutes  |
| • Introducing the issue(s) | 5 minutes  |
| • Key points/substance     | 10 minutes |
| • Get commitments          | 5 minutes  |
| • Wrap-up                  | 5 minutes  |

# Lobby Meeting Preparation

- Who is going?
- What is each person's role? (Leader, Reporter, Expediter, Featured Speaker)
- What is the "constituent connection"?
- Do your homework – why should (s)he care?
- Practice your key messages
- Bring a camera

# Key Messages

What are the 3 **key points**  
you want to make?  
(for example)



- Disability is a problem of the environment and not the person
- People with disabilities are the best experts on their needs
- Nothing about us without us

## Some Helpful Hints

- Why do they care? Why do you?
- Paint “word pictures”
- Avoid jargon
- Be brief
- Stay on message – What do you want?
  - This is not a “normal” conversation
  - “The most important thing I can say is.....”

# Final Lobbying Principles

- Know the legislative process
- Know your facts
- Correct errors immediately
- Know your opposition
- Cultivate your allies
- Plan, coordinate and follow up on each contact

## Final Lobbying Principles, cont'd.

- Avoid being a zealot - no permanent friends or enemies
- Don't argue with the person you're meeting with
- Don't do all the talking
- Grow thick skin – it's not personal
- Win

# Regulation



# Federal Register

12-19-03  
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## Regulation, cont'd.

The Administrative Procedure Act (APA) defines a "rule" or "regulation" as..

”[T]he whole or a part of an agency statement of general or particular applicability and future effect designed to implement, interpret, or prescribe law or policy or describing the organization, procedure, or practice requirements of an agency.



## Regulation, cont'd. 2

Administrative agencies carry out legislation in several ways, including enacting regulations to carry out what the agency believes is the legislative intent. Agencies generally formulate proposed regulations and then open up rule-making proceedings in which interested parties can testify and comment on them. The agency then issues a rule or policy that binds the agency in future cases just as statutory law does.



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## Regulation, cont'd. 3

In administrative rule-making proceedings:

- formal hearings must be held,
- interested parties must be given the opportunity to comment on *proposed* rules, and
- the adopted formal or *final* rules must be published in the *Federal Register* and on the website of the agency at least 30 days before they are to go into effect.



## Regulation, cont'd. 4

Some regulations require only publication and an opportunity for comments to become effective.

Others require publication and one or more formal public hearings.

The enabling legislation states which process is to be used in creating the regulations. Regulations requiring hearings can take several months to become final.

## Regulation, cont'd. 5

For all regulations, a detailed cost-benefit analysis must be performed. Regulations with an estimated cost of \$100 million or more are designated "major rules," and require completion of a more detailed Regulatory Impact Analysis (RIA). The RIA must justify the cost of the new regulation and must be approved by the Office of Management and Budget (OMB) before the regulation can take effect.

All federal regulatory agencies fall under the controls of the Congressional Review Act. The Congressional Review Act (CRA) allows Congress 60 in-session days to review and possibly reject new federal regulations issued by the regulatory agencies.

# Regulation: Tips for Submitting Effective Comments



- Read and understand the regulatory document you are commenting on
- Feel free to reach out to the agency with questions
- Be concise but support your claims
- Base your justification on sound reasoning, scientific evidence, and/or how you will be impacted

# Regulation: Tips for Submitting Effective Comments, cont'd.



- Address trade-offs and opposing views in your comment
- There is no minimum or maximum length for an effective comment
- The comment process is not a vote – one well supported comment is often more influential than a thousand form letters

# Regulation: Submitting Comments



Your Voice in Federal Decision-Making

You can submit comments on-line at Regulations.gov or you can make a submission via mail, e-mail, or agency docket centers.

<http://www.regulations.gov/#!home>

# COALITIONS





## Coalitions, cont'd.

- Definition: An organization of organizations working together for a common goal.
- Goal: To bring together organizations to build a base of power capable of winning on issues of shared concern.
- Strategic Tip: Think “unusual” suspects.

# Coalitions: Advantages and Disadvantages

## Advantages:

- Win what couldn't be done alone
- Build an ongoing power base
- Increase the impact of an individual organization's efforts
- Develop new leaders
- Increase resources
- Broaden scope



# Coalitions: Advantages and Disadvantages, cont'd.

## Disadvantages:

- Distracts from other work
- Weak members can't deliver
- Too many compromises
- Inequality of power
- Individual organizations may not get credit
- Dull tactics

# Coalitions: Principles for Success

- Play to the Center with tactics
- Recognize that contributions vary
- Structure decision making carefully
- Achieve significant victories
- Urge stable, senior Board representatives
- Clarify decision-making procedures
- Distribute credit fairly

# Coalitions: Principles for Success, cont'd.



- Choose unifying issues
- Hire neutral coalition staff
- Understand and respect institutional self-interest
- Help organizations to achieve their self-interest
- Develop a realistic coalition budget
- Agree to disagree

# Coalitions: Is it appropriate for what you want to accomplish?

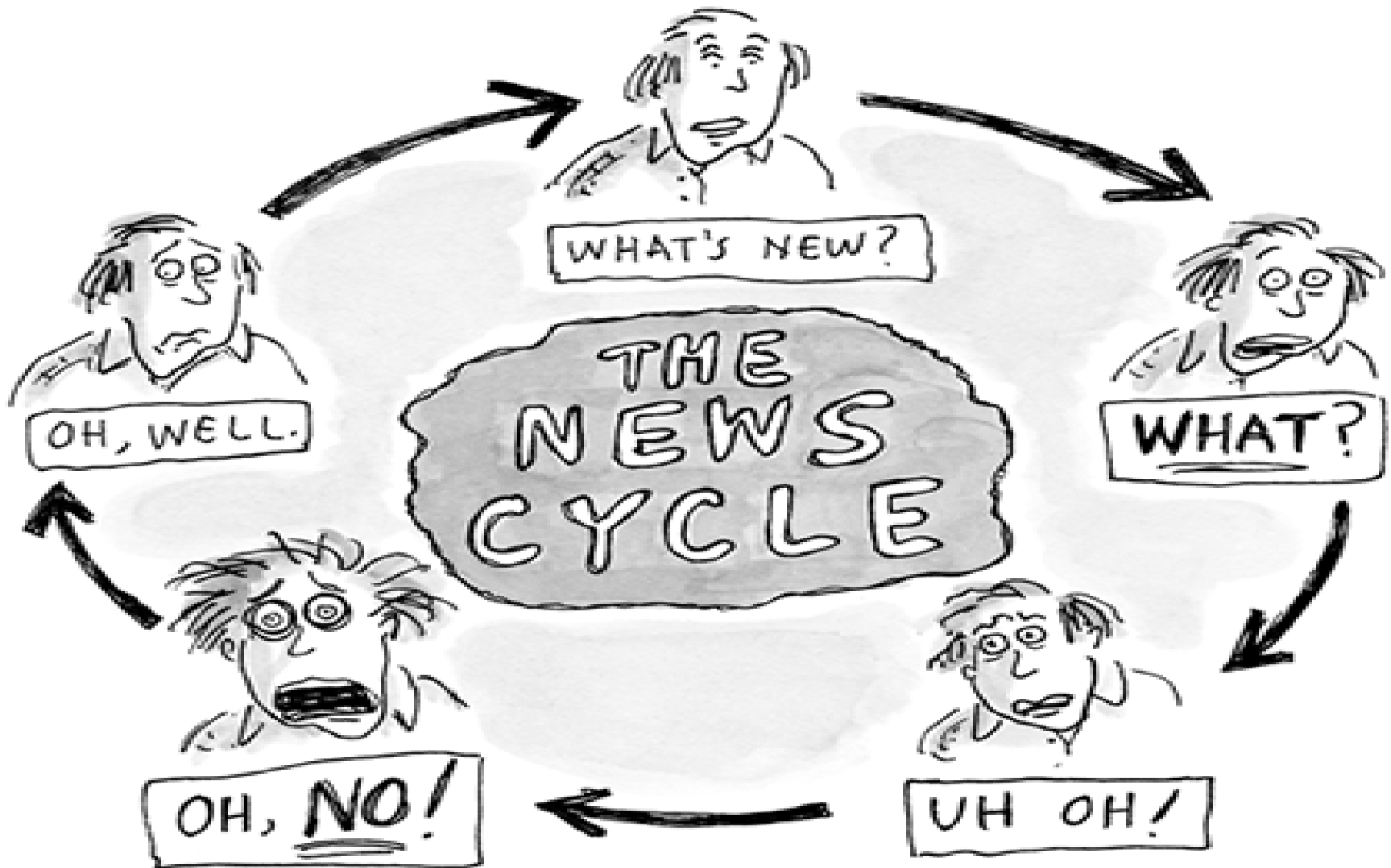


- Will you be able to advance your own organizational agenda?
- Is your group strong enough to carry out two campaigns at once?
- Can you afford another organization on your turf?

# Influencing Legislators Through Media



# The Short Attention Span of the Media





# Public Information/Media: Getting your story out

## Hard News

- Media Advisory
- Press Release
- Press Conference
- Press Briefing
- Interviews

## Opinion

- Letter to the Editor
- Op-Ed Piece
- Talk Shows



# Public Information/Media: Media Advisory

- Informs the press of an event
- Provide basics: date, time, place, speakers, purpose, sponsor
- Provides background materials



# Public Information/Media: Press Releases

- A press release is not the message.
- The action or event is the message.
- The press release is just an advertisement to get the media to cover the event.



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# Public Information/Media: Press Releases, cont'd.



- The first sentence should capture the reader, and give them a reason to be interested in the event.
- In the following paragraphs, provide the details of who, what, why, where, and when (including street address and time of event).
- Use clear language that explains the issue, reason for event, and demonstrates why it is newsworthy. Local press picks up readily on local connection.

# Public Information/Media: Press Conferences



- Most effective for “big name,” “hot” news, or releasing a major report
- Lots of work
- Can’t control how information will be reported
- Competing with other possible stories

# Public Information/Media: Press Briefings



- To educate reporters on issues
- Usually an informal setting, a few reporters and 2-3 experts
- Most effective if you do them regularly
- Establishes your expertise and status as a source

# Public Information/Media: Interviews

An interview is **NOT**....

- X An interrogation
- X A deposition
- X A debate
- X A conversation



# Public Information/Media: Interviews, cont'd.

An interview **IS**....

- ✓ A *presentation* tailored to the issue and the audience
- ✓ Your chance to tell/sell your story
- ✓ It's all about *Mutuality*





# Public Information/Media: Interviews—What is Your Message?



- ◆ What's the story you want to see?
- ◆ Knowing your subject vs. delivering your message
- ◆ "Selling the product"

# Public Information/Media: Interviews—Three Key Messages



1 ...

2 ...

3 ...

# Public Information/Media: Interviews—Key Elements



...for Getting your Interview into the News

- ◆ Offer supporting statistics
- ◆ An anecdote or story
- ◆ Absolutes or superlatives
- ◆ Third party endorsements
- ◆ Relevant personal experience

# Public Information/Media: Interviews—Selling the Message



## ◆ Flagging

- ◆ “what’s most interesting is...”
- ◆ “what your readers will want to know...”
- ◆ “what we’re most excited about is...”
- ◆ “the real news is...”

# Public Information/Media: Interviews—Common Mistakes

- ◆ Using too much jargon
- ◆ Assuming the reporter “gets it”
- ◆ Being afraid to say “I don’t know”
  - ◆ Instead say “but I can tell you...”
- ◆ Using the reporter’s vocabulary
- ◆ Repeating negatives

# Public Information/Media: Interviews—The Ground Rules

- ◆ “On / Off the record”
- ◆ When is the interview over?
  - ◆ NEVER!!!
- ◆ Edited? Not edited?



# Public Information/Media: Interviews—Common Concerns

- ◆ How long?
- ◆ Where do I look? At camera or at interviewer?
  - ◆ Look at whoever is talking
- ◆ Avoid distractions
  - ◆ In Studio, in the Field



# Public Information/Media: Interviews—Telephone Interviews

- ◆ Never take a cold call
  - ◆ *Who's really* on the line? Tape rolling? Sting?
- ◆ Prepare and call back
- ◆ Keep it brief
- ◆ Expect follow-ups





# Public Information/Media: Interviews—Print Interviews



- ◆ Trade publications
  - ◆ Read by other reporters and folks in field
    - professional journals, *Ragged Edge*
- ◆ Daily Newspapers
  - ◆ Live on forever online
- ◆ More time, expertise
- ◆ Subjective
  - ◆ One set of eyes seeing/interpreting you

# Public Information/Media: Interviews



- Use a designated spokesperson
- Become “the expert”
- Understand both sides of the issue(s)
- Know what point(s) you want to make
- Develop quotable “one-liners”
- Have a person affected by the issue available and briefed

# Public Information/Media: Letters to the Editor

- Most likely to get printed when several letters come in on same topic
- Organize letter writing campaign
- Best to react to recent editorial, article or letter
- Always sign your name, give contact info, and use organizational affiliation
- Letters page states ground rules



# Public Information/Media: Op-Ed Pieces—Getting Started



- **Research.** Look at the editorial pages of your local newspaper for several days to get an idea of how it covers opinion (op-ed) material.
- Get a sense of the tone of the op-ed pieces published by the paper.
- Find out who to send op-ed pieces to and send your article directly to him/her.

## Op-Ed Pieces—Writing Your Commentary

- If the op-ed is newsworthy right now, get it in immediately. However, you might think about preparing a piece long before it is timely or newsworthy. For example, in advance of a relevant anniversary, or in anticipation of an event you are sponsoring.
- If you prepare the op-ed piece well in advance, you can fine tune it and have it ready to go when something newsworthy happens related to the issue you've written about.

# Public Information/Media: Making Your Op-Ed Successful



- **Tie your op-ed to a good “news hook”** related to breaking news, whenever possible.
- **The op-ed editor must realize this is BIG NEWS.** Be sure to have information that shows this is a big news story, use articles that have appeared over the past few months (called clips.) Use this “news hook” and lead your op-ed with that.

# Public Information/Media: Pointers for Getting Published



- Make it timely
- State your point of view well
- The article should be by an authoritative person
- Know and respect word limits
- Keep it simple – no more than 3 major points
- Close on a strong note

# Public Information/Media: Talk Shows

- For local radio and TV, contact show's producer
- Spokesperson should:
  - Be articulate
  - Know the points you want made
  - Be well-versed, know both sides
  - Have facts and statistics ready
  - Have interesting way of presenting material
- Know the show's and moderator's views first
- Get information: Other guests? Live call-ins? How long? In studio or on phone?





# Media Checklist:



## What makes your story newsworthy?

The more newsworthy elements your story contains and the broader the audience it interests, the more likely it will show up on the evening news or in the newspaper

- ◆ Controversy/conflict: Are there adversaries or other tensions in the story?
- ◆ Broad interest: Does this story affect a lot of people, or does it relate to groups of special concern, like children
- ◆ Injustice: Are there basic inequalities or unfair circumstances

# Media Checklist:



## What makes your story newsworthy?

- ◆ Irony: What is ironic or unusual about this story? Is there hypocrisy to reveal?
- ◆ Local peg: Why is this story important or meaningful to local residents?
- ◆ Breakthrough: Does the story mark an important historical "first" or other event?
- ◆ Personal angle: Is there a person with direct experience of the issue who can provide an authentic voice in the story? (Make sure such people are trained advocates as well as traditional "victims.")

# Media Checklist: What makes your story newsworthy? cont'd.



- ◆ Anniversary peg: Can this story be linked to the anniversary of a local, national, or topical historical milestone?
- ◆ Seasonal peg: Can this story be attached to a holiday or seasonal event?
- ◆ Celebrity: Is there a celebrity already involved with or willing to lend his or her name to the issue?
- ◆ Visuals: What interesting visuals can you create or take advantage of to give journalists something interesting to shoot?

# Media Checklist: Components of a successful media bite



- ◆ Keep it short and simple – 15 seconds *maximum*
- ◆ Speak to shared values
- ◆ Talk to what is at stake
- ◆ Use reasonable language
- ◆ Use irony, if appropriate – highlight the absurdity of opponent arguments
- ◆ Evoke pictures – help your audience “see” what you are talking about
- ◆ Take a stand – present a solution
- ◆ Frame the problem and your proposed solution in terms of institutional accountability rather than individual responsibility – who is responsible for taking action?

# Media Checklist: Framing

- ◆ Translate individual problem to a social issue
- ◆ Assign primary responsibility
- ◆ Present a solution
- ◆ Make a practical appeal
- ◆ Develop story elements
  - ✓ media bites
  - ✓ compelling visual and symbols
  - ✓ social math – break down numbers by time or place or make comparisons with familiar things
  - ✓ authentic voices

# Public Information/Media: Final Tips for Getting Coverage

- Develop and maintain a media list.
- Think pictures.
- Fax/E-mail press releases.
- Follow up press releases with calls.
- Respond to coverage of your issues.
- The smaller the media outlet/market, the greater the likelihood of coverage.

# Education



# Education, cont'd.

Goal: To change attitudes and policies toward people with disabilities by providing information about and understanding of Independent Living.

## Targets for Education

- Consumers
- Providers
- Funders
- Regulators
- Public



# Education: Consumers

Goal: To end self-limiting beliefs, attitudes and behaviors by providing information on and demonstrating the philosophy and history of Independent Living.

- Introduction to IL philosophy and history
- Supporting movement from being advocated for to self-advocacy
- Information on policies affecting people with disabilities and how to change them
- Encourage and support participation in systems advocacy activities

# Education: Providers

Goal: To help providers understand their role in supporting the independence of people with disabilities.

- Offering content on Independent Living in programs training human service workers
- Providing on-going training to workers in organizations serving people with disabilities
- Consulting with human service organizations on policies and practices that limit independence
- Identifying and challenging negative policies and practices in any organization serving people with disabilities

# Education: Funders

Goal: To promote improved access to resources for IL organizations by increasing the knowledge of IL among grant-makers

- Identify funders potentially receptive to IL philosophy and activities
- Provide orientation to IL for key influentials in grant-making organizations
- Offer on-going information on IL activities, achievements and challenges to data base of grant decision-makers

# Education: Regulators

Goal: To sensitize regulators to the specific issues facing people with disabilities and IL organizations in the implementation of public policies

- Educate regulator-staff in key public agencies about IL in advance of specific legislative issues
- Develop IL-friendly regulatory principles for sharing with regulators
- Identify key regulatory players: staff, allies, potential opponents for targeted preemptive educational efforts

# Education: Public

Goal: To infiltrate spaces where policy makers and the public interact to change attitudes and policies toward people with disabilities.

- Get people with disabilities on boards, commissions, committees, etc.
- Create mechanisms for accountability to CILs
- Have people with disabilities participate in public hearings, legislative sessions, etc.
- Assure that the voices and views of people with disabilities are heard where decisions get made

# Social Media

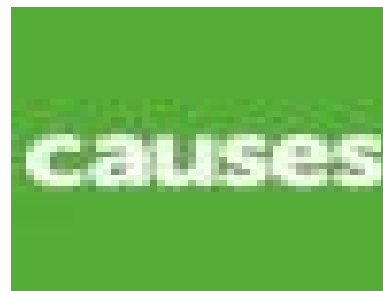
twitter



flickr<sup>®</sup> from YAHOO!

You Tube

tumblr.



## Social Media, cont'd.

Social Media is the production, consumption, and exchange of information through online social interactions and platforms

# Social Media—Facebook



- Facebook is a social networking service & website with over 900 Million users (estimated 41.6% of the U.S. population)
- Ranked 2<sup>nd</sup> most accessed website in the U.S. (Nielson Media Research Study, Dec 2011)
- Users create a personal profile to interact with others, exchange messages, join interest groups, share information, and keep in touch.
- Join at [facebook.com](https://www.facebook.com)



# Advocacy Tips



- *Status Updates* allow users to post news related to important issues, which will then appear on others' News Feeds
- Your *News Feed* provides you with real-time updates of what others are posting, allowing you to follow individuals and organizations related to your cause
- *Notes* provide users with space to write notes (similar to blogs) and “tag” others in these notes, drawing their attention to an issue

# Advocacy Tips, cont'd.



- Create a profile of your organization, group or cause... make the community aware of your presence
- Use Facebook to advertise virtual or real-world events and advocacy efforts and rally support
- Encourage dialogue through wall posts, status updates and notes
- Share photos, videos, and links to breaking news articles or other web sources
- Raise awareness around an issue

# Causes



- Causes is built for change. It provides free and easy tools for passionate people to spread the word, find supporters, raise money, and build momentum.
- Get started by customizing one of their templates – petition, page for capturing videos, etc. – for your goals.
- About 30% of people who visit their pages take action, and over 20% of them share it with friends. So far, over 170 million people have taken action for over 500,000 unique causes, making it the best place to run an action campaign or get involved in one that interests you.

## Causes, cont'd.



- Every campaign on Causes is automatically integrated with Facebook's custom open graph, which means that your actions are easily shared via Timeline and newsfeed.
- The ability for supporters to tweet, email, and post a Facebook status update is a click away on every campaign page.

# Causes: Choose an Action



Start with the end in mind: What do you want to accomplish?

- I want to advocate for change → Create a Petition

Example <http://www.causes.com/causes/658114-stop-trade-in-rhino-stir/actions/1644204>

- I want people to make a commitment → Create a Pledge

Example <http://www.causes.com/causes/679-surfrider-foundation/actions/1646112>

- I want to raise money → Create a Give Action

Example <http://www.causes.com/causes/77274-amazon-watch/actions/1531518>

# Causes: Tips for Success



- **Do your homework** - Knowledge is power. Make sure you have all the facts and can really educate people on why taking action now matters.
- **Tell a story through video and photos** - Facts become clearer when coupled with a compelling story. Include a photo or video with your action to illustrate the problem or the solution you're working towards.

# Causes : More Tips for Success



- **Treat your goal like a milestone** - You don't run a marathon without some markers along the way. On Causes, your goal is editable - so even if your dream is to engage 1 million people in your campaign, start with 100 and increase the goal as momentum builds. Once you know what to expect from your supporters, you can confidently launch campaigns with higher goals.
- **Proofread** - Your title and descriptions should be grammatically correct and spell-checked. (Avoid using ALL CAPS -- it feels like you're YELLING.)

# Causes: Get the Word Out



- Get Personal
- Use your online social networks
- Pitch your story to the media
- Get offline with an event
- Post frequent updates



# Causes : Follow Up and Celebrate



- Post an update to wrap up the campaign
- Create a video and take photos
- Plan an event
- Get feedback

# Social Media - Twitter

The word "twitter" is written in a light blue, rounded, lowercase font with a white outline and a subtle drop shadow, giving it a 3D effect.

- Twitter is an online social networking and microblogging service that enables its users to send and read text-based posts of up to 140 characters, known as "tweets."  
Over 140 million active users
- Can be a useful platform for individuals or organizations

# Twitter Basics



Join at [twitter.com](https://twitter.com)

- @ to address or mention another twitterer
- # to tag a message with a keyword
- Can upload and link to pictures or videos
- Retweet (RT) a tweet from another user, further spreading the word about something

Example: See HHS Sec. Sebelius's blog post on 13th anniversary of Olmstead, landmark SCOTUS **#disabilityrights decision**

<http://ow.ly/bLHS3> #mhsm

# Twitter: Advocacy Uses

twitter



- Used to organize protests – important factor in the Arab Spring and other political protest
- Used as emergency communication system for breaking news
- Reach your followers (also known as “tweeps”); your tweets can be publicly visible or sent to only your followers

# Twitter: Advocacy Tips

twitter



- Use hashtags to tag important issues. You can create and use a tag to mobilize a cause (for example, #ASDay is used for Autism Speaks Day, add #autism to make more recognizable)
- Get strategic – capitalize on trends that users are already tweeting about
- Follow events in real-time
- For links to applications and programs that will help you make the most of Twitter, see SocialBrite.org (<http://www.socialbrite.org/sharing-center/tutorials/>)

# Social Media - YouTube



YouTube is a video-sharing website on which users can upload and share videos such as movie clips, TV clips, music videos and amateur content. Anyone can view the videos without signing up for an account.

# YouTube: Advocacy Uses



- Videos can be up to 15 minutes in length
- Great avenue for amateur video documentation
- Raise awareness of events, campaigns, issues, social protests etc. (ex: history of the disability rights movement <http://www.youtube.com/watch?v=X-LAPLKr71w&feature=topics>)
- Post interviews, call an audience to action, network with ally organizations, inform viewers about your cause/campaign, and make Facebook or Twitter content more engaging.

# YouTube: Tips for Producing Effective Videos



## You Tube

1. Be positive
2. Get Their Attention
3. Make it Personal
4. Invoke the Mainstream Media
5. Pull the Heartstrings
6. Make it Time Sensitive
7. Make it Simple
8. Make it Real
9. Give it Scale
10. Use Celebrities
11. Create Events
12. Make it Easy



# Social Media - Blogging



- Tumblr, Wordpress, and Blogger are the most common blogging platforms
- Users post multimedia and other content to short-form blogs, and can subscribe to others' blogs

# Blogging: Advocacy Uses

- Use blogs to provide in-depth background information on an issue
- Keep followers aware of key issues, developments and action alerts.
- Blogs can be used as a hub to engage supporters in conversation. Most blogs allow followers to leave comments, which can create lively discussions.
- Try to blog at least weekly – keep your followers engaged.

## Social Media – Flickr



- Flickr is an image- and video-hosting website, web service suite, and online community
- Users share personal photographs, and bloggers often use flickr to host images in their blogs
- Registered users can create a profile, connect with other users, and join groups around common photographic interests
- Free and Pro accounts available (Pro allows unlimited uploading)

# Flickr: Advocacy Tips



- “A picture is worth a thousand words”
- Take your camera with you everywhere.
- Give others a glimpse of what your organization is doing.
- Use captions and descriptions to tell your story.
- Use the slideshow feature to narrate a story in images.
- Use tags to link an image to a certain topic. This makes your image easily searchable by others.

## Flickr: Advocacy Tips, cont'd.



- Share images with specific contacts to gather support.
- Connect your Flickr account with your blog or Facebook/ twitter accounts.
- Set up a Flickr “group” and ask others to upload photos pertinent to your issue.
- Hold a contest where supporters submit pictures and captions of a certain issue. The winning image and caption could be used for a campaign poster, and you’ve engaged your supporters more in the process.
- Browse Flickr to keep up with current events. Search for pictures others are putting up around the world.

# 15 Best Practices for the Social Web

(SocialBrite.org)

## **Social media is about people not the tools**

- 1) Think of social media as a way to talk with your supporters, partners, colleagues & stakeholders.
- 2) Don't rush in with an "ask."
- 3) First, build relationships and a foundation of trust and collegiality.
- 4) Be a connector. Reciprocate. Follow back. Retweet and link to material from outsiders.
- 5) Don't think in terms of audiences. You're building a community.

# Social Media—15 Best Practices

- 6) Conversations can't be controlled or managed. But they can be engaged, informed and elevated.
- 7) Be authentic and transparent about your connection with your organization.
- 8) Be personal. Use your own voice rather than an institutional one.
- 9) Visuals are key. In blog posts or Facebook updates, use photos or videos to help tell a story.

# Social Media – 15 Best Practices, cont'd.



- 10) Trust your fellow team members. Mistakes will be made. That's OK. When someone goofs, admit it.
- 11) It's not all about you. Give more than you take.
- 12) When people leave comments or retweet you, respond, even if it's just a "thanks."
- 13) Don't be defensive—be open to critical feedback.
- 14) Successful campaigns stir authentic enthusiasm. Use social media to amplify the love.
- 15) Don't get overwhelmed!



# 12 Steps to Mobilize your Cause with Social Media



(SocialBrite.org)

- 1.Listen.** Observe what your target community is discussing and engage before asking for support.
- 2.Set clear goals.** Determine the metrics you want to measure to see how your campaign is doing
- 3.Define a clear theme.** Use a strong single sentence.
- 4.Tell a personal story.** Make an emotional connection, use photos and videos – make people *feel*.
- 5.Create lightweight media.** Use Flips & simple technology – don't depend on professional production.
- 6.Create a clear call to action.** Inspire people to act with clear, motivating steps. Keep it simple.

# 12 Steps to Mobilize your Cause...



7. **Create a conversation hub.** Use a blog or high-volume platform to engage with supporters.
8. **Consider a mobile component.**
9. **Find your champions.** Identify and connect with high-value influencers for your cause. Establish rapport and only then reach out.
10. **Use immediacy.** Use headlines (play off current events that people are already talking about) and deadlines (set a hard stop date for your campaign).
11. **Generate an attention wave.** Enlist your supporters to spread the love.
12. **Key off of offline events.** Use online activities to spur supporters to attend real-world events when you can form a deeper connection.

# Litigation



# Litigation

A **class action** is a lawsuit brought by one or more representatives of a group on behalf of all the members of the group.

The members of the group, known as the “class,” must be ascertainable, and must share a common interest in the issues of law and fact raised by the class representatives

## Litigation, cont'd.

1975 – Willowbrook Consent Decree - Deinstitutionalization

1976 – *Disabled in Action of Pa. v Coleman* (Transbus lawsuit) – All buses purchased by public transit authorities receiving federal funds must be wheelchair accessible

1979 – *Southeastern Community College v Davis* – programs receiving federal funds must make reasonable modifications to ensure access

1988 – *Honig v Doe* – Requires due process hearing to move disabled children from setting agreed on in IEP

## Litigation, cont'd. 2

1995 – *Holland v Sacramento School District* – right of disabled children to attend public school with non-disabled children

1995 – *Helen L. v Snider* – continued institutionalization of disabled person, when not medically necessary and where home care an option, violates rights under ADA – grants right of people in nursing homes to personal assistance services

# Litigation – Organizing a Class Action Lawsuit

1. Understand the legal terms
2. Research the scope of the problem
3. Hire an attorney who specializes in the type of lawsuit you are pursuing
4. Determine with your attorney whether your lawsuit has broad appeal
5. Send notices to potential members of your class
6. File your case, then a motion for class certification
7. Prepare your case and get ready to go to court



# Organizing a Class Action Lawsuit

## Tips and Warnings:

- You can be the lead plaintiff acting on behalf of the other members in the class
- A class action suit can prove to be more efficient for the judicial system and reap larger settlements
- Talk to journalists at legal newspapers and magazines to get an objective perspective
- Select your lawyer carefully
- Be patient



# CIL-NET Influencing Policy Resource Page



[http://wiki.ilru.net/index.php?title=Influencing\\_Policy](http://wiki.ilru.net/index.php?title=Influencing_Policy)

# For more information

Contact:

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