

# Strategic Thinking: Pre-Campaign Activities

## THE BASICS

### *Putting Rule One into Practice*

You have been asked to put together a local meeting of people whose lives will be positively affected by your public policy campaign. You may have been given a list. You may already have a list. Or like the adoptive parent group, you may have to start with a short list of family and friends. The goal of the meeting is to persuade new people to join you in an organized effort to fix a bad public policy that is affecting their lives. The purpose of the meeting is to give everyone the necessary information they will need to go together and present a compelling "Hero Opportunity" to their own delegation of state policymakers.

**Organizing a Meeting  
of Affected  
Constituents in Your  
Community**

**The Timing**

A constituent meeting is useful at any time during a campaign. At the start, you will be planning the best way to approach your local policymakers. In the middle of a campaign, you will be demonstrating a growing critical mass of affected constituents. Close to the end of the campaign you will need to demonstrate patience and vigilance. After the campaign is over you will be celebrating and saying thank you. Of course the timing will affect the agenda and the message you will be delivering to the local policymakers. Before the campaign you will be asking participants to sign up for a group meeting with the local legislative delegation. After the end of the campaign you'll be asking participants to sign up for an award ceremony for local heroes.

**THE BASICS**

**The  
Setting**

The meeting should be informal and friendly. A table up front for speakers is friendlier than a podium. Newcomers are more comfortable sitting around tables already equipped with background materials, sign-up sheets and writing materials for note taking. It's good to have a host or hostess at each table to welcome newcomers and answer questions.

**The  
Participant**

Invite people whose families, neighbors and friends will directly benefit from the proposed policy change. Invite providers whose programs will be directly affected, along with community leaders from the faith community, related social service agencies and neighborhood organizations. In these early meetings, you should resist inviting local policymakers. They cannot avoid being viewed as experts and will hinder the planning discussion.

**Materials**

You should have available:

- ✓ A one-page fact sheet;
- ✓ A four- or five-page summary that explains the problem and the proposed policy solution;
- ✓ A chart and timetable of the legislative or budget process;
- ✓ A list of the names and office addresses of local elected and appointed policymakers; and
- ✓ A short "Story Book" form. (See page 35 in this chapter about the Story Book.)

THE BASICS

**Sample Annotated Agenda**

**COMMUNITY MEETING – PARENTS AND FRIENDS OF CHILDREN**

**Welcome and Introductions** (Will Muñoz & David Kelly – Co-Chairs, Regional Chapter Parents of Special Needs Children): *Very brief opening statement: “We are here because of a particularly un-informed and wrong-headed policy problem that affects many of us in this community.” Describe policy solution and invite participants to learn how they can help. Go over agenda and materials. Ask everyone in room to introduce themselves and tell the other participants how they have been impacted by the policy problem. Introduce speakers. Twenty minutes, maximum.*

**Together we can win!** (Kate Cowell – State President, Parents of Special Needs Children): *Reviews policy problem and solution by using the fact sheet and materials. Tell some stories of other families from across the state and encourage participants to speak up with their own personal stories. Describe statewide effort, talented volunteers working around the state capital supported by a powerful district based network of affected constituents. Thirty minutes, maximum.*

**Who’s Who in Our State Capital – Our Regional Policymakers** (Alex Joseph – Volunteer Expert on State Capital Political Dynamics): *An involved volunteer with some experience at the state capital, a former staff person, a former elected official, a reporter, a political operative of some kind. His job is to go over the names of the local delegation and provide straightforward information including: official district lines, length of terms they have served, leadership positions held and some of the local and state issues they have championed or fought against. Encourage participants to speak up if they have any connections or additional information to share with the group. Twenty minutes, maximum.*

**Telling Our Story to Policymakers** (Julia Kelly & Jim Forrest – Co-Chairs, Regional Campaign Coordinators): *Committed volunteers who announce their commitment to organize an evening or Saturday meeting with local policymakers and solicit participants to sign up. Also announce their willingness in keeping volunteers updated on the progress of the campaign via email, phone trees and additional meetings. They ask for volunteers who are willing to include their family’s story in the Story Book and to communicate with their district policymakers no more than six times in the coming year. Twenty minutes, maximum.*


**Wrap up and Next Meeting** (David Kelly and Will Muñoz): *Collect sign up sheets, summarize plan for meetings, set date for next meeting in six weeks and invite all to stay for coffee and cookies.*

## THE MESSAGE

### Making Your Campaign Story Book

We're all suckers for a "good story," even when we know the storytellers are trying to get us to help them to fix their problem. Even when we know that helping the storytellers will take a lot of work. Even when we know that it will take a long time. There is something about real stories of real people with real problems that makes us want to be able to help – especially when we are in a place with the expertise and the power to fix their problem for them. For elected and appointed policymakers a book of good stories about a critical mass of constituents with a fixable policy problem is an invitation to a Hero Opportunity.

What you see below is a sample form for your campaign story book. Use the form below to collect good stories from your community. Make sure you protect the privacy of families who are unwilling to reveal their true identities by letting someone else – a neighbor, friend or relative – tell their

 You can find a blank story book form to collect good stories from your community in Appendix I, p. 3.

stories for them.

<b>Campaign Story Book</b>	
Name	<i>Mary and Ron Newman</i>
Contact Information	<i>617-555-1212 3 Maple Lane, Boston, MA</i>
Story	<i>Jewish couple already parents of twin girls, 7 years old. interested in adopting 3 mixed race sisters (3, 2 and 1 yrs old).</i>
Willing to Talk to Policymakers?	<i>yes</i>
Willing to Talk to local Press?	<i>yes</i>



Here's an example of how you would write up the story for your policymaker:

Mary and Ron Newman are a Jewish couple who live in Boston. They are the parents of twin 7-year old daughters and are interested in adopting three sisters who are of a mixed ethnic background. However, because of the law currently in place that prevents them from adopting children of a different religious background, they are not able to do this. They are interested in talking with you and with the press to see if they can see their dream of adopting these children into a reality.

### ***Other examples***

Louisa, an adoption worker, has a caseload of twenty children who range from four to twelve years old. Some have siblings and some are suffering from mild disabilities. They were all born of Catholic mothers. She knows many Protestant and Jewish parents who are eager and waiting to adopt, but because of the adoption law, they aren't able to adopt any of the children in her caseload. She thinks that this is a really sad situation.

Mary L. had begun to sign the release forms so that her daughter would be adopted. During the process she saw that she was asked to identify her religious background so that they could match her child with parents who had the same background. She was surprised at this – if you had asked her what kind of parents she hoped for her child, above all she wanted her daughter to be with kind, responsible and loving parents, not necessarily parents who were Catholic. It seemed like a sad thing, that something she wasn't considering as a factor ultimately would determine who her child would be placed with.

### ***Presenting your story book***

The format for presenting your story book is up to you and your campaign. There are several easy options for putting all your stories together into a fun and effective format to present to you policymakers and other coalition participants.

The simplest way to make a storybook is to put several stories onto one page. Feel free to make it double-sided if you need more space. This format is easy to layout on the computer and inexpensive to make copies of. Also, use pictures of your storytellers if you have them available - putting a face to a name and story makes it more real. A tri-fold brochure is another way to tell your stories and also offers a little more space for


providing the details of your campaign message. Both the one-page handout and the brochure are convenient for distributing to policymakers. You can also put the stories into a poster format to use at campaign events and to distribute in your community to raise awareness about your issue.

Visit [www.realclout.org](http://www.realclout.org) for examples and instructions on how to create a storybook brochure and poster.

## THE STRATEGY

You have agreed to organize a committee of community supporters to help plan and organize an introductory meeting with your local delegation of policymakers, i.e., the representatives and senators who are elected to represent your community, as well as the regional managers of the public agency that administers the policy you are trying to change. The goal is for the elected and appointed policymakers to listen to you – real people with real stories about the effects of a bad policy and informed constituents who represent a statewide campaign with some good, effective and affordable ideas for fixing that bad policy. Of course, you also will hope that they will respond by at least supporting your ideas whether it's a proposal to amend the law, repeal a regulation or add money to a particular budget. Maybe they may even agree to be one of the statewide champions of your cause and take a lead role at the state capital.

Use the checklist below to plan your community meeting.

 You can find a blank checklist in Appendix I, p. 4.
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<b>Checklist for Community Meeting Planning</b>	
<b>Who We Are</b> Decide who will sign the invitation on behalf of your group. (Is now the time you finally have to designate official leadership or name a steering committee, and maybe even give your group an official name?)	✓
<b>Who Should Attend?</b> Names and contact information of local policymakers (Refer to your Policy Faces Book in Appendix I) who will receive an invitation.	

<b>When Should We Do It?</b> Early evenings and weekend mornings are generally best for public officials and working people.	
<b>Where Should We Hold It?</b> Find a meeting room in a friendly and supportive private agency or church. Avoid meeting in a public official's office.	
<b>What Kind of Materials Will We Need?</b> A meeting agenda, fact sheets or background information about your campaign's proposed policy solution, a sign-up form for attendees and Policy Faces forms to record policymaker's responses.	



THE STRATEGY

**COALITION FOR ADOPTION REFORM C/O THE OPEN DOOR SOCIETY**

Families for Interracial Adoption • Child Welfare League • Jewish Family and  
Children's Services

Dear Friend:

We are happy to invite you to our first coalition meeting on January 3, 2005. Our agenda is as follows:

**Sample Annotated Agenda – Community Organizing Meeting**

**Welcome and Introductions** (Karla Fortunato, Community Campaign Co-Coordinator)

*Reviews agenda and materials and introduces the people sitting at both tables. Introduces storytellers, and other presenters. Ten minutes.*

**Storytellers – Real People or their surrogates.** *Four minutes each; twelve minutes total.*

**Our Policy Change Proposal** (A Policy Expert from the Campaign)

*This presentation could be made by a self-made expert from your community who can confidently present the political winnability and cost implications of your proposal. An experienced expert from the state capital does have a little more credibility with everyone. Ten minutes.*

**A Report on the Status of Our Campaign – Next Steps** (A Local Advocate)

*This presentation can be made by a local person who first walks the audience through the legislation, regulations or budget charts to show them the status of the bill, regulation or budget item. This report should lead into the next item on the agenda, sometimes referred to as 'THE ASK.' Ten minutes.*

**'THE ASK'** (Karla Fortunato)

*Karla re-introduces the policymakers on the stage and offers them an opportunity to publicly express their willingness to help move the policy change campaign through the next steps. Instructs everyone at table to find the Policy Faces form they can use to record the policymakers' responses. Four minutes each.*

**Wrap Up** (Karla Fortunato)

*Ask the audience to sign up for network alerts and announce the next meeting for the local committee.*

Please contact...

You can make a simple letterhead using the 'header/footer' command in MS

## TOUGH QUESTIONS AND EASY ANSWERS

### **On Non-Profit Lobbying**

Q: Our PTA is coordinating our budget campaign and hopes to restore the money the Governor cut from special education in public schools. It is NOT incorporated as a separate 501(c)3 but is a volunteer organization of parents authorized by the school department for every school. For years we have been testifying at our local school committee's budget hearings to support the funding of all the important extracurricular music and sports activities for our kids. Nobody's ever given us any problem about advocating at the local level, but our State Rep and State Senator both asked us if the PTA was "funding" our lobbying activities and if we were asking them to support a specific budget amendment in the state budget. Just for the record our PTA does raise money through tag sales and such to purchase "extras" for the school music and sports programs. We even pay the janitor if we have a night meeting and buy our own refreshments!!

A: *Assuming your PTA neither pays you a stipend nor reimburses you for your time lobbying your state public officials, you should figure out a way to politely inform your State Rep and State Senator that you are a volunteer and exercising your individual rights under the first amendment to "petition Congress for a redress of grievances." One suggestion is to collect the signatures of all other volunteers – including grandparents, neighbors and friends – working with you to demonstrate the Hero Opportunity available to your state officials. During our adoption reform campaign we shamelessly organized all three generations of adoptive families, and included neighbors and our pastors and rabbis for good measure. It's funny how only 15 people can represent a "critical mass of constituents"!*

### **On Working with Nontraditional Partners**

Q: I'm a volunteer in a local statewide immigrant advocacy organization. We're part of a statewide campaign to allow immigrants to get drivers' licenses using their federal tax ID number, because the so-called Patriot Act has jammed up the process for legal immigrants with work visas to get their SS number. A big automobile dealer who also owns an auto insurance agency came to us – his father was an immigrant and built the business – and offered to contribute a sizable donation to the state campaign and to solicit his colleagues to do the same.

He suggested buying full-page ads in local papers and organizing meetings with legislators. He fully admits his direct self interest – this policy would be good for his business and good for other auto dealers and other local businesses in communities without public transportation, besides providing used car dealers with a Hero Opportunity. He's a nice guy, but it feels too self-serving somehow.

**TOUGH QUESTIONS AND EASY ANSWERS**

*A: We're going to create a third rule of lobbying for you: "Be quick to take advantage of what luck brings you." Congratulations! You are a first-class Hero Maker for a network of business leaders and opinion makers!*

**On Communications and the Media**

*Q: We're trying to demonstrate to the community how immigrants contribute to the economy of our region by featuring profiles of immigrants who work and live in our area – starting with our local auto dealer. Many of the newcomers are nervous about doing this though because not all of them have legal papers, and are afraid that any attention to the community at ALL will alert the INS and they will be deported. Many of the employers – especially the restaurants – are nervous too because they practice a sort of, "Don't ask, don't tell" policy and think they could also get in trouble for employing illegal aliens.*

*A: Great idea for a public education campaign! Think of yourself as a sort of Hollywood central casting agent and look for sympathetic legal immigrants with excellent papers ready to show to the reporter while they tell the tale of how difficult and time-consuming it is to keep your papers up to date. Try to find folks who are applying for citizenship for extra points, but don't be afraid to feature a person is still loyal to his homeland and his extended family while paying taxes and making a real contribution here. Your organization must have access to an immigration lawyer who can coach your leaders and maybe even sit in on the interview to answer technical questions.*