

Strategies for Effecting Positive Systemic Change

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Introduction

Advocacy – Systems Advocacy

Advocacy is used to promote an issue in order to influence policy-makers and encourage social change. Advocacy plays a role in educating the public, swaying public opinion or influencing policy makers. Advocacy protects and empowers people with disabilities. Anyone can be an Advocate. They just need to be determined to bring about positive systemic change. Toward that end, your participation in our Advocacy Group is greatly needed to maximize our chances for success. So, are you interested in how the political system works, how we can make an effective Systems Advocacy Network and how you can become involved in this progressive movement as a catalyst for Effecting Positive Systemic change?

In an ideal world, public policy issues would be developed and addressed based on need. In the real world of American politics, public policy issues are designed to move in an incremental manner. This gives time to evaluate various solutions and their impact before taking action. Therefore, under these circumstances, it can take at least three to five years to move a specific piece of public policy into serious consideration. The major exception is the occurrence of extraordinary events, such as the World Trade Center attack, which necessitates immediate action. However, there are four other factors that can influence the outcome of public policy issues:

1. MONEY
2. VOTES
3. EXPOSURE IN THE MEDIA (i.e., positive or negative). and,
4. COALITION BUILDING

They can be utilized to adopt or amend policy, as well as block the passage of negative policies.

1. *Money is the top influencer*

Citizen Action of New York State published a report in 2000 that clearly indicated that special interests can fast track policy with significant political campaign contributions.

2. *Voting*

Beginning with the Presidential voting debacle of 2000, the importance of the vote took on another dimension of importance, especially for persons with disabilities. However, the most effective and powerful voice is one that speaks as one. Constituents must vote in a block to be as effective as possible. Voting - in its pure nature - is the most equalizing force or catalyst for change. Regardless

of whom you are or your status in society, your individual vote is no more or less powerful than anyone else's. However when combined within a group/coalition the dimensions of the singular vote take on a whole new perspective that will not be denied!

Building Advocacy through Voting

People with disabilities may be the largest minority voting block in America, yet many candidates forget about the importance of making their campaigns accessible to people with disabilities. Your vote can make a significant impact in an election. Some issues to consider regarding the voting process:

- Polling place accessibility
- Voter registration
- Training for election officials
- General or disability specific voting questions
- Voting rights training
- Accessible political campaigns

3. **Exposure, The Media**

The media can be a "double-edged sword." If the coverage supports your point of view, it can advance your issue or stop an opposing effort dead in its tracks. Even coverage contrary to your point of view isn't fatal, it still provides an opportunity to respond and promote awareness about your perspective. The worst scenario is when a reporter puts a different "spin" on your issue to create conflict that will help sell papers, rather than do any justice to the issue in question.

Develop a Message

- Keep it simple.
- Keep it local and make use of your coalition members' locations by crafting the coalition's message to fit local audiences.
- Keep it relevant. The message should reflect the concerns of the audience.
- Repeat your message over and over (and over again).

Building Advocacy through the Media

"If you don't exist in the media, for all practical purposes, you don't exist."

-Daniel Schorr, commentator, National Public Radio

Building advocacy through the media harnesses the tools of the digital age to raise the volume, change the conversation, and leave an impression.

Gaining access to the media

- Create a media list
- News releases
- Letters to the editor
- Write an opinion piece to be run on a newspapers opinion-editorial page
- Arrange an editorial board meeting to persuade editors of newspapers of the worthiness your cause

- Give interviews to newspapers, television and radio
- Create a media event

10 Essential Tips to Ensure Your Press Release Makes the News.

1. Make sure the information is newsworthy.
2. Tell the audience that the information is intended for them and why they should continue to read it.
3. Start with a brief description of the news, then distinguish who announced it, and not the other way around.
4. Ask yourself, "How are people going to relate to this and will they be able to connect?"
5. Make sure the first 10 words of your release are effective, as they are the most important.
6. Avoid excessive use of adjectives and fancy language.
7. Deal with the facts.
8. Provide as much Contact information as possible: Individual to Contact, address, phone, fax, email, Web site address.
9. Make sure you wait until you have something with enough substance to issue a release.
10. Make it as easy as possible for media representatives to do their jobs.

Gaining access to the media

Gaining access to the media is the first step for media advocates who want to set the agenda. This is important for two reasons. First, the media tell people what to think about — the more coverage a topic receives on the news, the more likely it is to be a concern of the general public. Second, media is a vehicle for getting the attention of specific decision-makers and opinion leaders, such as politicians, government regulators, community leaders, and corporate executives.

Shaping the debate

Getting the media's attention and having stories air or appear in print is often the easy part of the job. The difficult part occurs when advocates have to articulate their issues and approaches in the media and in front of the people they want to reach. Advocacy groups tend to be very knowledgeable when talking about problems, but less skilled at clearly articulating solutions. Journalists will always ask at least two questions: What is the problem? And, what do you want to see happen? Or, what is the solution? Advocates working through the news media must always know where they want to end up before they develop media strategies. The fact is, one cannot have a media strategy without an overall strategy. Media advocacy should be planned in the context of a broader solution or policy goal. When the advocate does not present a clear solution, the journalist will fill in the blank with his or her view — most often an individual-level, behavioral approach.

4. **Coalition Building**

A campaign to change public policy (a movement) begins with passion, anger, energy and frustration. There must be people who make demands on policymakers, e.g., demands to expand civil rights protections, enhance employment incentives or expand community-based services, consumer-directed personal assistance services. But a movement alone is not enough to effect change. To be effective in changing public policy, there must be an organized coalition rather than a haphazard response to issues or events.

Why an organized coalition is critical.

A campaign to change public policy (a movement) begins with passion, anger, energy and frustration. There must be people who make demands on policymakers, e.g., demands to expand civil rights protections, enhance employment incentives or expand community-based services, consumer-directed personal assistance services. But a movement alone is not enough to effect change. To be effective in changing public policy, there must be an organized coalition rather than a haphazard response to issues or events.

- ❖ First, policy-makers expect/demand organized coalitions. Policy-makers do not function in isolation; they depend on other stakeholders who share a common vision to bring about change. In general, elected officials do not undertake policy initiatives without broad-based support from other elected officials and members of the public affected by the policy. Staff members working for policy-makers do not recommend supporting policy initiatives without substantive backing and day-to-day assistance in building the political base. The organized coalition is the vehicle for providing the support needed and/or expected by elected officials.
- ❖ Second, a policy campaign depends on power. There is power in numbers, especially when the coalition is cohesive and speaks with a unified voice. Cohesiveness is especially important for the disability community because other sources of power such as wealth and status are rarely available to this community. Thus, keeping the disability community together is essential. Coalitions have more power when they include groups representing diverse needs as well as groups that traditionally do not join forces. Policy-makers (particularly elected officials) respond most favorably to broad-based coalitions consisting of "strange bedfellows." The message to policy-makers from such coalitions is that if divergent groups can come together to support a policy proposal, the issue must be compelling and the policy proposal must be viable.
- ❖ Third, there is a much greater force in combined and cooperative action when separate organizations join together. A policy campaign depends on rapid, effective, dependable, competent responses to the various states of affairs affecting the political process. For example, staff may need help in preparing "talking points" in response to assertions made by the opposition, garnering grassroots support or expert proposed solutions. An organized coalition brings together persons with a broad base of knowledge, skills and expertise who are more likely to deliver the necessary support in a timely fashion. Diverse members of an organized coalition also are effective in gathering "intelligence" about what opponents are saying and doing. They report back to key persons (Systems Advocates – Independent Living Centers etc.) who can use the information to further coalition objectives.

Developing an Advocacy Strategy

- What is the problem you are highlighting? Be specific.
 - Is there a solution? What is it?
 - Who can make the solution possible? Whose support do you need to gain to make it happen?
 - What do you need to do or say to get the attention of those who can make the solution happen?
1. sponsoring a statewide caucus
 2. developing a disability action agenda
 3. organizing participation at hearings, rallies and press conferences
 4. issuing action alerts

5. distributing news releases
6. providing ongoing training opportunities
7. negotiating
8. meeting with state and national leaders and,
9. developing broad coalition support.

Create a Coalition Structure

- Identify roles needed for the coalition to function then assign those responsibilities across the membership.
- Assign a coordinating function to one organization – someone needs to hold the group together and manage communications.

Define Objectives and Environment

- Define the issue and the coalition's objectives. What is the issue from your organization's point of view? What is the coalition trying to accomplish by coming together?
- Define the environment in which the issue resides. What is the political climate? Where is public opinion?
- Identify Stakeholders and Possible Allies
- What other organizations or stakeholders will benefit from this legislation?
- Look beyond "the usual suspects" – think outside of the box in looking for allies.
- Find the right mix – coalitions of organizations that are frequent political opponents can be powerful.

As you can see, there are some strong forces out there. However, regardless of these strong forces, which may interfere with the success or the accomplishment of our goals, one thing is very clear, out of the four main factors (money, voters coalition building and exposure) the individual has significant control over three (3) of them. Clearly, you control voting! If you ever needed to know if voting makes a difference all you have to do is look at what happened in Florida with the Presidential election. If the vote did not matter, the situation in Florida would not have been such a big deal - but it was. The other factor, which contributes to the power of the vote, is the amount of money spent by those wishing to obtain political office. Would you spend money on something that does not matter? The other feature of which you have some control over is the expansion of your base or foundation. This process may or may not be accomplished by utilizing the media. However, the goal is to; educate, share common principals, persuade and recruit. Granted, you do not have the kind of control over coalition building and exposure through media as you do over voting however, some control and participation in systems change is better than passively being oppressed and feeling alone with no connection to others who share your plight. Although money is a very significant and integral part of our system, it is not the only one. Do not despair over what you do not have - or have no control over but take great pleasure and advantage of the power that you do have. There are three (3) extremely powerful tools at your disposal; thought, behavior and action and, the most important tool out of those three is action. Individual action is powerful but group action is much more powerful. Although group action is much more powerful than individual action, it all begins with the actions of an individual and that individual is YOU!

The coalition and/or Advocacy Group must be built on trust and respect for the internal rules of the organizations and individuals comprising the coalition. In particular, the coalition must respect the

process required for securing formal support of coalition actions by member organizations. Although it is important to understand and respect these constraints, it is also critical that member organizations are capable of responding to the realities of the political process. It is not unusual for a crisis to suddenly develop, necessitating immediate action or reaction by the coalition. As a result, the coalition as a whole must not be hampered by the constraints of some of its members, it must be able to respond rapidly to the exigencies of a situation, otherwise, the coalition's effectiveness and dependability is undermined in the view of policy-makers.

The coalition must also respect the tactics which member organizations and individuals are willing to use. It is a mistake to assume that all coalition and individual members abide by the same set of ethical standards or strategies when it comes to the "means" an organization is willing to use to accomplish a particular "end." Some organizations may be willing to or even insist on using direct action techniques such as demonstrations and sit-ins, whereas other organizations believe that dialogue and discussion are more appropriate tactics. Some groups may be confrontational when they meet with elected officials; others may take a more respectful approach. It's all about the strategy.

Continuity, effective and timely information

Given the dynamic nature of the policy process, it is essential that there is effective and timely communication among coalition members. Coalition members cannot be working at cross-purposes or be "in the dark" about what others are doing and saying. Further, the failure to communicate may result in coalition and/or individual members abandoning the coalition or Advocacy Group. Differences among individual members will always surface; the key is to resolve the differences behind closed doors. Opponents will wait to pounce on any appearance of disagreement and use it to show that the coalition's/Advocacy Group proposals lack consensus and therefore are not viable.

Delegation of tasks.

Groups work best when individual members are accountable for implementing specific roles and functions. The challenges are to match roles and functions with skills and commitment and to coordinate efforts.

Decision-making.

Coalitions must agree to a decision-making process. The coalition must make key decisions together in order to ensure that all member organizations and individuals have a stake in carrying out a strategy.

Systems Advocacy Strategies

There are seven basic systems advocacy strategies that can help address a defined need and move it toward a systems change result. When a need is identified, it usually requires policy development, coalition building, and negotiation to reach serious consideration. Often, a variety of factors can delay progress. This could necessitate the use of the media, public action, direct action/civil disobedience, or even legal action. Hopefully, a strategy, or combination of strategies, can make the need a greater priority and return the parties involved toward achieving a result. Compromise might require further policy development and negotiation. The process can continue until it results in an effective systems change, stall, or eventually lose momentum and consideration.

These basic systems advocacy strategies are as follows:

1. Policy Development: People versed in various laws - who are themselves directly experiencing a systemic barrier, and/or possess the technical writing skills to develop the solution to address the defined need. The policy could be a new law, amend an existing law, or take the form of an executive order. Sometimes, the law reflects a court decision or consent decree. Policy changes could also seek to impact the administrative practices or "everyday work" of a public or private entity – modifying policies and practices.

2. Coalition Building: It is a natural process to coalesce around issues. Common interests allow groups to back priority agenda items. Creative partnerships can also draw significant attention.

3. Negotiation: Once policy has been developed and coalition support obtained, someone or a small group knowledgeable on the issues and skilled in negotiation needs to meet with key staff of state leaders to advance the issues. This process can stop and start on a regular basis. There always needs to be an honest evaluation of how much compromise is too much and whether or not the meetings are productive. Is the staff of state leaders really making a good faith effort to reach a successful result? The answers to these questions will constantly direct continued negotiation or the need to heighten awareness about the issue through the use of the media, public and/or legal action.

4. Media: A coordinated media strategy helps raise awareness about an issue. Public opinion can influence the attention that an issue receives. If effective, it can prioritize the need to make a systemic change. Why? Elected officials are made accountable through the media and the vote. It is important to develop a consistent message that will help to advance the issue past a current barrier. This can be done through a press release, which is distributed to various media markets. At times, it may be necessary to coordinate a media strategy with a public action to make an issue newsworthy among other competing interests. Also, it is important to link media advocacy to grassroots organizing work. In order to cover an accurate and compelling story, reporters require interviews with real people who are feeling the impact of the issues or policies in question. The real-world impact of the policies that need to change can and should drive media advocacy, policy work, and grassroots organizing.

5. Public Action: When progress stalls, public attention is needed to reprioritize the issue. A variety of public events can be utilized toward this end. They may include a press conference, a formal call-in day, letter writing campaign, petitions, visits to elected officials, rallies, etc. It is important to ensure that any activity have a consistent theme and message. The only variation might be to allow people to convey their personal experience with an issue or how it plays out in their community.

6. Direct Action/Civil Disobedience: Direct action techniques are another distinct method of moving policy advocacy and negotiations forward. Reverend Martin Luther King, Jr. wrote that:

"Direct action techniques can work together with other types of systems advocacy to heighten public awareness and pressure, start or unblock negotiations, and bring explicit moral claims to bear on an issue."

7. Legal Action: When all else fails, the only avenue left to consider is legal action. It just has to be used. Options include filing formal legal complaints, a lawsuit, a class action lawsuit, etc.

Investigation of a formal complaint may provide an opportunity to negotiate or resolve an issue, depending on the interests of the parties involved. Realize that a lawsuit could take several years and allow the other parties to avoid discussion of the issue because they are involved in litigation. Discussion may occur if both sides wish to settle. The importance of the issue, ability to obtain competent council, and unpredictability of the court system all weigh in to the final decision of whether it is prudent to take legal action to require action or compliance with an issue.

I would like to take this opportunity to welcome you to participate and explore the philosophy of Independent Living - more importantly - become involved, participate and take action. The Independent Living philosophy is about choice - individual choice. You could sit at home and choose to do nothing about all the barriers confronting persons with disabilities, or you could participate in a variety of ways, which will serve to bring about positive change. Most importantly, by participating in our "Advocacy Group", you will not be alone. Participation can take many forms but one thing is very clear, you will not have to do anything you do not want to do. Therefore, what do you have to lose? Join us so we can all work together toward improving the very system we live in. In advance, I would like to thank you for any effort, support and/or assistance you can provide toward removing barriers. "When the system is free of barriers, there is no end to how far we can go!"

TOP TEN TIPS FOR ADVOCATES

1. Be an advocate not an adversary.
2. Know your audience. Everyone has a unique perspective and you need to understand the perspective of the person you are dealing with, make it as personal as possible.
3. Give this person credit and praise for every great idea (even if it started out as yours).
4. Be ready, willing and able to provide as much information as is necessary to follow through with the idea or request.
5. Put important requests in writing and provide a timeline.
6. Allow a reasonable time for requests to be processed, then follow up with phone calls and letters.
7. Bring a friend, family member or fellow advocate to appointments and meetings when you need someone to take notes, bear witness or just be there for emotional support.
8. Before a meeting or appointment, prepare a list of the points you need to make and the questions you need to ask. Also, plan your responses to any questions or comments that you can anticipate. It's easier to stay calm if you are not caught off guard.
9. If you get what you want (which won't always happen even if you are a great advocate) express gratitude. This is true even if the person should have done it without your intervention. Everyone responds to appreciation.

10. Remember that advocacy is something we all do every day. Sometimes the issues are national, sometimes they are personal, but they are always important because they are our; children, sister, brother, parents or grandparents.

TIPS ON VISITING YOUR MEMBERS OF CONGRESS OR LEGISLATURE

One of the most effective ways to get your message across is a personal visit with your Congressional and/or Legislative leaders or their staff. Members of Congress, Legislators or Local Government Officials do care about the concerns of their constituency and a visit will be the first step in establishing a long-term relationship. Do not be disappointed if you do not have the opportunity to meet with the Member personally. Staff members often are more informed about the specific legislation and can share your views with the Member. Make every effort to visit your Representative in your home state/ district or request that the Member attend an event.

- ❖ Arrange with several friends and/ or local parent groups members to visit together. Call ahead for an appointment with the Member and/ or legislative assistant (L.A.). If you represent a group, say so, and say how many people in your group will be in attendance.
- ❖ If you are a family member of a person with a disability, have the self-advocate participate in the visit, if feasible.
- ❖ Be on time and be prepared to wait.
- ❖ Do not be surprised if you have an appointment with a Member but end up seeing a staff person instead.
- ❖ Introduce yourselves and mention your group's name, if you are representing one.
- ❖ Establish yourself and your organization as integral members of your community. You may briefly mention your involvement in PTAs, civic or business groups, Independent Living Center, etc. during the conversation.
- ❖ Be polite, never argumentative.
- ❖ Be brief and to the point. Limit the number of issues you discuss to one or two at the most. Plan to have two or three points about the issue you are trying to get across.
- ❖ Share your personal story about how the legislation will affect you and your family. However, do not discuss personal complaints about local problems at any length. You are not expected to be an expert on laws or details of the proposed legislation. You are an expert on yourself/ your child and your family's experience.
- ❖ Encourage your Legislator to support the issue you are addressing.
- ❖ Thank him/her for their time and interest.
- ❖ Follow up with a thank you letter, even if your legislator did not support your point of view. Follow up later with a request for your Member to speak with your group, attend an event, etc.
- ❖ Contact your local; group, Systems Advocate, president or legislative chair to share information about your meeting.
- ❖ See if your Legislator is hosting an Open House and attend so the Legislator and the office staff can begin to know who you are.
- ❖ Whenever possible, attend any event your Legislator is involved in – recognition.

TIPS ON WRITING YOUR MEMBERS OF CONGRESS OR GOVERNMENT OFFICIAL

It only takes a few minutes to pick up a pen or sit at a keyboard and write a letter to your Members of Congress, Legislature or Local Government Officials. While a personal visit has the most impact, a

personal letter is the next best thing! A short letter is worth fifty form letters or a hundred postcards. Not sure how to write or what to say? Follow these simple guidelines-

Use the correct address and salutation,

The Honorable
United States Senate
Washington, D.C. 20510

Dear Senator:

The Honorable
U.S. House of Representatives
Washington, D.C. 20515

Dear Representative:

- ❖ Try to keep to one typewritten page; two at the most. If writing a regular letter, do not write on the back of a page. If writing longhand, be sure to write legibly. When sending an email, always use proper net etiquette (avoid using upper case letters) and include your postal return address so the Representative can see that you are indeed a constituent of theirs.
- ❖ Type or write clearly. Include your return address on the letter. Envelopes can be thrown away.
- ❖ If writing for a group, the president, chair or spokesperson should send the letter on your group's letterhead and state the group's position.
- ❖ State why you are writing as well as your position in the first sentence. Focus on one issue only. If the subject of your letter is a bill, cite it by name and number.
- ❖ Be brief, clear, specific, polite, factual and accurate. Use your own words. Avoid emotional arguments, unless it somehow part of your strategy.
- ❖ Explain why the legislation you are writing about is good or bad from your point of view and how it will affect you and your family. Explain how the legislation will affect the Member's district or state, mentioning specific groups, schools, etc.
- ❖ Ask for the legislator's views, but do not demand support. Even if they do not support you on this issue, they may support you the next time.
- ❖ Say thank you for any previous support or assistance.

**For further reading
on advocacy:**

Organizing for Social Change: A manual for activists in the 1990's, (second edition) by Kim Bobo, Jackie Kendall, and Steve Max. Santa Ana, CA: Seven Locks Press, 1996.

The People Rising: The campaign against the Bork nomination, by Michael Pertschuk and Wendy Schaezel. New York: Thunder's Mouth Press, 1989.

The Initiative Cookbook: Recipes and stories from California's ballot wars, by Jim Schultz. San Francisco: The Democracy Center/Advocacy Institute West, 1996.

The Activists Handbook, by Robert Shaw. Berkeley: University of California Press, 1996.

Roots to Power: A manual for grassroots organizing, by Lee Staples. Westport, CT: Praeger Publishers, 1984.

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The Fight for Public Health: Principles and practice of media advocacy, by Simon Chapman and Deborah Lupton. London: BMJ Publishing Group, 1994.

Media Advocacy: Reframing public debate, by Michael Pertschuk and Phillip Wilbur, with "A Case for Paid Media," by Anne Marie O'Keefe. Benton Foundation Strategic Communications for Nonprofits, edited by Larry Kirkman and Karen Menichelli, Washington DC, 1991.

Prime Time Activism: Media strategies for grassroots organizing, by Charlotte Ryan. Boston: South End Press, 1991.

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Issue I was written by Lawrence Wallack, DrPH and Lori Dorfman, DrPH.

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