Policy Planning Templates

- Developing a Policy Initiative
- Choosing An Issue: Reality Checklist
- Capability Index
- Ally Matrix
Developing A Policy Initiative
This form was inspired by materials by the Midwest Academy, Doris Marshall Institute, The Marin Institute, and Berkley Media Studies Group

It’s not enough to simply react to issues with demands and counter demands. At some point, if we are serious about building community power, we must shape and initiate public policy. Below are basic steps in shaping proactive, community-generated policies. Of course, this worksheet is not a recipe but a guide from which to begin your strategy.

1. Clearly Define The Problem

This requires gathering as many reports, surveys, personal observations and other resources that accurately describe the problem you wish to address. It is difficult to effectively address problems in the environment with simply an intuitive, "we see a number of youths without much to do." Know, among other things, the number of youth arrests, injuries and other incidents; what options (if any) do they have; what young people actually think about the situation; local funding issues; and the impact of corporate institutions. Another reason to have detailed information to substantiate your policy recommendation is that all legislation must be based on a finding or set of facts that provide the rationale for enacting the law. If you are interested in seeing your policy recommendations codified, then you must be prepared with the facts. Above all, be able to describe the problem clearly in ways that help your community grasp the seriousness of the problem – and hold the right players accountable.

2. Develop Policy Goals

All policy must be developed within the framework of your organization’s purpose and long range goals. It's important to compare your organization's goals with the goal for your issue. In your assessment you should ask yourself: what constitutes victory? How will this policy address the problem/have an impact on the quality of life of your constituents/members and/or community?

Take time to assess each of the objectives you must achieve to meet your campaign goal. Examples of short-term objectives are the support of local politicians, other gatekeepers, or regulatory agencies before winning changes in local or state institutional policy. This assessment requires developing a scrupulous list of all the steps necessary to accomplish each short term objective.

3. Assess Your Ability To Undertake A Campaign To Implement These Goals

Another important consideration is your organizational health and survival. Can you win? Or perhaps more importantly, can your organization afford to lose? Advocacy campaigns can strengthen organizations by building a sense of team spirit, expanding the leadership base, deepening the leadership's level of experience and expanding an organization's membership and contact base. Of course, your organization must bring something to the
campaign in the first place (i.e., membership, staff, money, reputation, facilities, press contacts, allies, etc.). Make a careful assessment of your assets as well as any liabilities you bring to the effort.

4. Assess Community Resources

As stated above, the best kind of campaigns build a sense of community and build community power. Building broad, cohesive coalitions is critical to these efforts. One way to think about coalition building is by developing a list of groups and individuals who share the different parts of the problem you’d like to address and what would each party gain from supporting the effort. Of course, these issues are not black and white. Assess each parties depth of support, what they - and you - risk by coming together, what they bring to the effort and how much effort will it take to reach them and maintain their presence in the coalition.

5. Assess Who Has the Power To Enact the Policy

Any discussion on doing advocacy would be incomplete without taking a look at who you may have to target to achieve your goal. Once you’ve decided what institutions or individuals have power or influence to enact your policy, then you must (through research) determine all the ways you can access and influence the process (personal contacts, media, as voters or taxpayers, freedom of information requests, etc.).

6. Develop An Action Plan

Once you’ve assessed your organizational and community capacity, your allies and opponents as well as the gatekeepers who have the power to enact your policy, you are ready to develop an action plan for your campaign. The actions you take should be flexible and engage your community. Make sure that your target is clear and that the policy recommendation(s) are: within its/their power; specific; and can be articulated in a way that is easily understood. Set time limits for certain tactics and develop an alternate plan if your original tactics are not yielding results. Also, make sure you include a plan for monitoring your target institutions and the policies once they are implemented. Above all, be tenacious and remember that changing policy means changing minds - and that takes time.

Media Action Planning

Effective use of media is also a critical tool in any advocacy campaign. Media enables public health advocates who gain access to capture public attention on behalf of a particular issue or policy change. Media has often turned the tide by informing the public (and policy makers in particular) of a particular problem; providing ideas and opportunities for public action; and facilitating a shift in the focus from policy that holds individuals accountable to policies that seek to effectively regulate institutional actors as well. Your action plan should also include how you plan to use the media.
7. Evaluate Your Success

Evaluation, if done well, informs your work on an ongoing basis. Your organization should periodically review each step of your action plan to assess if it's working. Some questions to ask yourself:

- Did we do what we said we would do?
- What have we gained (people, resources, exposure - related and not related to your goals)?
- What have we changed (policy, community or press relations, etc.)?
- What still makes sense to continue?
- What isn't working?

Use your evaluation information and make any necessary changes to your action plan. Also, make sure that you just don't focus on your shortcomings. This is hard work. Take time to celebrate your achievements no matter how small they may seem. You deserve it!

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Defining the Problem

You have now identified a variety of issues in your community, and policy options to be used in reducing those risks. To begin the process of planning, work with your group to choose an issue that you would like to use the tool of policy change to address. Make sure that the problem is immediate (within your sphere of influence), specific (can you measure it?), and winnable (will taking this on strengthen your organization, as well as increase agency in your community?).

The Problem is (25 words or less):

List as much information that you, as a group, can about the problem:
List five sources outside of your organization for further information:

Developing Policy Goals

Write a brief summary of the purpose and long range goals of your organization.

Using no more than 30 words, state the policy goal for this issue:

Name three concrete improvements that would be won by achieving this goal:
How will achieving this goal contribute to building the community's sense of their own power?

What is the relationship between organizational goals and the policy goal?

Name three non-policy goals (i.e., expanding membership, etc.) that can be aided by this effort:

<table>
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<tr>
<th>Setting Objectives</th>
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<tr>
<td>Brainstorm with your group a &quot;laundry list&quot; of steps necessary to accomplish your goal. Don't take longer than 5 minutes on each part of this step for now. Revisit them after you've gone through the exercises entirely.</td>
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<tr>
<td>What short-term victories must you first win (i.e., support of regulatory agencies, minimum signatures to place issue on the ballot or before council, etc.) to achieve your policy goal?</td>
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</table>
List steps necessary to accomplish each short-term goal listed above:

Assessing Your Organizational Capacity

Review your policy goal. With that goal in mind, list three specific ways in which your organization needs to be strengthened in order to achieve your goal:

List the resources your organization brings to this campaign (i.e., membership, staff, money, reputation, facilities, press contacts, allies, etc.).

List three internal problems that have to be considered or overcome.
How will the campaign strengthen the organization, if you win?

If you lose?

How can the campaign weaken the organization?

Assessing Your Targets
List who/what institution has/have the power to solve the problem and grant your demands? When possible, list specific names. Identify which is the most important target for achieving your policy goal.

Who must you get to first before those listed above? Be specific:

List strengths and weaknesses of each target:

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<th>Strengths</th>
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</table>
Which targets are appointed? Elected?

How do you have power/influence with them (as voters, consumers, taxpayers, etc.)?

What is the self-interest of each?

Who would have jurisdiction if you redefined the issue (e.g. turned a tobacco advertising issue into a fair business practices issue)? Does this help you?
Assessing Your Opposition

List people and institutions who may oppose you. When possible, list specific names. Identify which are likely to do the most “damage”.

List strengths and weaknesses of each opponent:

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<th>Opponent</th>
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<th>Weaknesses</th>
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Assessing Your Opponents
Which are appointed? Elected?

How do you have power/influence with them (as voters, consumers, taxpayers, etc.)?
Assessing Community Resources

<table>
<thead>
<tr>
<th>List who shares this problem?</th>
<th>What would they get out of joining you?</th>
<th>Who else would they bring in?</th>
<th>Who would their presence alienate?</th>
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Rank each group named above from 1 to 5 (with 5 being the highest) with regard to your issues taking into account the following factors: self-interest, depth of concern, risk in joining you, and level of difficulty to reach/organize.

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<th>Group</th>
<th>Self-interest</th>
<th>Depth of concern</th>
<th>Risk in joining you</th>
<th>Difficult to reach/organize</th>
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Effective Policy Advocacy Training Materials (p. 18 )
The Praxis Project [www.thepraxisproject.org](http://www.thepraxisproject.org)
Assessing Community Resources (Continued)

For each group named above, list the specific power they have over your targets:

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<tr>
<th>Group</th>
<th>Target</th>
<th>Power</th>
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NOTES:
MEDIA PLANNING FOR POLICY CHANGE

Write here your policy goal:

List three goals for your work with the media. At least one should be related to your policy goal:

Whom do you want to reach? Remember the allies and targets you identified in your policy exercises.

Allies you must reach using media:

Targets you will influence using media:
Distill your policy message into a 15-word (maximum) statement that will get the point across. Remember: a message is not the same as a soundbite. It is the overall theme of your initiative that you are trying to communicate.

What are good images for conveying the message?

Who are good spokespeople for conveying the message?

List arguments of the opposition:

Develop two soundbites that convey your message and address important issues raised by the opposition. (Remember: you are not debating them. You are delivering the message.)
Monitoring and Evaluating Your Campaign

Who will be responsible for monitoring activity?

What activities are necessary to insure the effort is monitored properly?

What will constitute success? (Be specific. Refer back to your goals and objectives)
Developing Your Action Plan

Now you have what you need to develop an action plan. Don’t forget give yourself time to review your answers. Be sure to set dates for the completion of each step.

Policy Goal-

Main Target-

Our Opposition-

<table>
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<tr>
<th>What Information We Need</th>
<th>Where to Go For It</th>
<th>By When</th>
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Short Term Objectives/Victories (in chronological order) Be sure to include any tasks concerning your target(s). Attach an extra paper if necessary.

Victories we need to accomplish our policy goal:
Developing Your Action Plan (Continued)

Tasks we need to accomplish to gain each victory:

We want to work in coalition with the following groups/individuals:

Tasks we need to accomplish to make this happen for each listed above:

We have identified the following secondary targets as critical to our goal:

What we want from each target:
Developing Your Action Plan

Actions we need to undertake to make this happen:

Tasks we need to accomplish for each action

Action #1:

Action #2:

Action #3:
CHOOSING AN ISSUE: REALITY CHECKLIST

*Based on action kits developed by the Midwest Academy, the Praxis Project and other community organizing groups

Because an issue is important, it does not mean it’s the right time to tackle it. Use the reality checklist below to evaluate the issue chosen in the previous worksheet, and to help you think through the strengths and weaknesses of your advocacy initiative/campaign.

Ideally, the whole yes column would be checked to increase the likelihood of success. But given the sudden battles brewing over budget deficits and cuts, and the unexpected need to advocate and organize, if no’s are checked evaluate why and move forward only if the reasons are compelling and sustainable.

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>YES</th>
<th>NO</th>
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<tr>
<td>Results in real improvement in people’s lives</td>
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<td>Gives people a sense of their own power</td>
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<td>Affects the organization and people in a tangible way</td>
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<td>Is widely felt</td>
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<td>Is deeply felt</td>
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<td>Offers opportunities to build the organization</td>
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<td>Builds lasting organization and alliances</td>
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<td>Creates opportunities/builds capacity for traditional disfranchised people to be involved in leadership positions</td>
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<td>Develops new leaders</td>
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<td>Promotes awareness and respect for rights/human rights</td>
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<td>Has a clear political and policy solution</td>
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<td>Has a clear target and timeframe</td>
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<td>Links local concerns to global issues</td>
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<td>Provides opportunities to raise funds</td>
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<td>Forces the organization to do things it hasn’t done before / Enables the organization to further its vision and mission</td>
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<tr>
<td>Challenges institutional racism, classism and other forms of oppression within the organization and its work</td>
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<td>Gives the organization and constituents experience for the next campaign</td>
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<td>Can be supported, funded, and managed by the organization</td>
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<td>It’s easy to understand</td>
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<td>It’s specific and winnable</td>
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ISSUE: Effective Policy Advocacy Training Materials
Capability Index

VOLUNTEER RECRUITMENT

-I have recruited volunteers and/or conducted training for them (say which one you’ve done after your name)

-I have and manage a database or list of volunteers

-I have or work with a phone bank or other system to contact volunteers by phone:

-I have or work on a system for rewarding/acknowledging volunteers:

COMPUTERS

-I know the following software (name and software)

-I have access to a computer and have an e-mail address (name & e-mail address)

-I have done desktop publishing:

-I have installed hardware and/or software:

POLICY

-I have called an elected official on a specific issue

-I have helped draft legislation

-I have testified at a public hearing

-I have organized a community hearing on an issue

MEDIA ADVOCACY

-I have held a press conference

-I have called a reporter

-I have been interviewed by a reporter

-I have written a letter to the editor or op-ed piece that was published

FUNDRAISING

-I have organized a fundraising dinner or other special event

-I have written a proposal that got funded

-I have run a direct appeal campaign (asked for money by mail or over the phone):
-I have run a membership drive

**ORGANIZING**

- I have done door-to-door canvassing
- I have organized a house meeting
- I have worked on or coordinated a rally
- I have worked on or coordinated an electoral campaign

**COMMUNICATIONS**

- I have run a phone tree or fax tree
- I have produced or worked on a newsletter
- I have produced or worked on a video
- I have worked to generate letters from others on an issue

**MORE GRASSROOTS QUESTIONS:**

**EVENTS**

I can cook meals for events
I can do child care
I can help with interpreting for others (Name and Language(s) including sign language)
I can do outreach to get people to the event

**LANGUAGES**

I can speak another language other than English (Name and Language(s))
I can write in another language other than English (Name and Language(s))
I can translate documents from English to another language (Name and Language(s))

**AFFILIATIONS**

I belong to a religious organization in my community (Name and faith institution or organization)
I belong to my home alert or other neighborhood group (Name and group name)
I am active in local community organizations (Name and no more than two main groups you work with)
Ally Matrix

Brainstorm a list of potential allies who care about your issue and might be willing to take some action. Allies can be formal organizations with staff (e.g. non-profits), volunteer organizations (e.g. tenant associations, block associations), church groups, non-profits, community organizing groups that work with diverse communities of color, or individuals. However, do not identify a category of people (e.g. welfare recipients) unless there is a viable way of developing a relationship with them (e.g. through a welfare rights group).

After you have developed your initial list of allies, place their name in the first column of the table below. Then check off each appropriate box to the right that describes this ally. The more checks that follow a particular ally, the more valuable they are and the more emphasis you should place on involving them in your budget advocacy. In addition, you should also look for partners who complement your own abilities. For example if you have strong influence with legislators, you might lower the priority of this attribute when evaluating potential partners.

In the example below, the tenant association is identified as a potential ally who sees their issue as tied to yours and can bring other constituents to the table. Organizations/individuals with more checks would be better potential allies, unless the tenant association attributes are particularly weak areas of your developing coalition.

<table>
<thead>
<tr>
<th>Potential Ally</th>
<th>Do you have an existing relationship?</th>
<th>Do they see their issue tied to yours?</th>
<th>Do they have influence w/ legislators or decision-makers?</th>
<th>Can they bring other constituents to the table?</th>
<th>Do they have strong media contacts?</th>
<th>Do you have other reasons to build a relationship with them?</th>
<th>Will you build a relationship with a new racial/ethnic group?</th>
<th>OTHER consideration unique to your organization/program</th>
<th>OTHER considerations unique to your organization/program</th>
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<tr>
<td>e.g. Tenant Assn</td>
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Base and Coalition Building

- Tips on Base Building
- Sample Rap and Tally Sheet
- Building Diverse Community-Base Coalitions
Tips on Base Building: there are no short cuts!
Developed by Greg Akili

1. **Why have an identifiable base?**

   1.1 People make a difference if you go to them; it is not enough to have a good idea or a good issue.
   1.2 An organization must have a base of people that can be counted on to achieve the goals.
   1.3 More can be accomplished with people who feel part of an organized group.
   1.4 The level of comfort is increased and people will participate and be involved in public actions when there is an identifiable base.

2. **Why should people get involved? What do they get for it?**

   2.1 People get involved based on their personal interest or because of a crisis.
   2.2 America does not encourage involvement. Many people believe that their vote or voice will not count.
   2.3 Many people in America are made to feel powerless, especially people of color and women because of racism, white supremacy and sexism.
   2.4 The people are not to blame. They are not obligated to participate or work on an issue.

3. **Appreciate the total, don't just focus on the core.**

   3.1 Too often people complain because there are not more people involved. The outer circle of support is dismissed because involvement is measured by how many people come to the monthly meeting.

   **A. Level of supporters**

   1. Core supporters of (5-7) key volunteers can always be counted on.
   2. Active supporters (20-25) will support most of the activities and will attend some meetings.
   3. General supporters (50-70) will do one thing, one time, rarely come to meetings.
   4. The public.

   3.2 The key is working to get each level of supporter to move to the core by asking more from people at each level and showing appreciation for the core while displaying gratitude at each level.

4. **The Science of Numbers**

   6.1 The essence of base building is numbers and volume.

   **A.** In order to get 50 people to show up when the issue is not hot, 150-200 names are needed.
   **B.** If the names are cold and the people are not familiar with the group or issue, more names will be needed.
   **C.** Thirty percent or more of the people called will not be at home; 15-20% of the numbers will not be good numbers; 25-30% will be no's; 25-30% will say yes. Of those who say yes, only a small percent will actually show.
   **D.** Out of the 20 people talked to, 9 will say yes and 3-4 will show.
7. Methods for Mobilizing

7.1 House meeting: A key volunteer/staff/supporter visits new people and gives them the rap, asks them to invite 8-10 of their friends over so key volunteers can talk with them to get them involved.

A. The host is asked to make up a list and call their friends right then. This approach is the hardest and takes the most time, but offers the best results. Time is spent with the individual and a relationship is developed. Keys:

1. Strong rap; tracking system
2. Getting the person to make a list and call their friends
3. Consistent follow-up calling, regular check-ins and reinforcement
4. Getting the host to call their friends the day of the house meeting

B. Phone banks recruitment: 4-5 phoners calling at least 4 nights a week. Keys:

1. Strong rap and tally
2. Dedicated phoning for at least 2-1/2 hours a night
3. Large pool of names to call, at least 3 times the number of names for the number of people expected to turn out
4. Volunteer phone bank to recruit phoners to staff the phone banks

4. The need to build and rebuild

4.1 Every 3-4 months there will be a need to rebuild with a new group of people. People will move on to another level involved in something else or become inactive.

4.2 Develop ways to assist people to move from level to level. Core supporters need to work with new people; conduct orientation, plan parties for new supporters

5. The importance of knowing what to say, tracking, follow-up and accountability. Raps, tallies, reminder calls and no-show call. Supporters will be successful:

5.1 The rap is like a map. All rap/scripts should have the same elements.

A. Introduction: who you are and identify the group
B. Statement of conditions and the need to take immediate action
C. There is hope because people can make a difference and we need people's help because we can't do it alone.
D. What you can do: Come to the meeting....
E. Get a commitment: Will you join us, yes or no; maybes cannot be counted or measured. Tell the person, we are counting on you.

5.2 How to know how many people are expected

A. Tallies:

1. Number of yes's
2. Number of no's
3. Total number of people talked with (add yes's and no's)
4. Total number of attempts

5.3 People will forget; they must be reinforced and reminded often and regularly.
A. Reminder calls should be made at least three times before the event and twice the day of the event.

5.4 No-show calls

A. If people say yes and they do not show, they must be called to find out why.
B. If the person keeps saying yes but never shows, they should be written off.

Agenda for Volunteer Orientation

1. **Introductions**

2. **What we are doing and why it is important**

   - Each of you is important and valuable and we thank you.
   - We want you to feel **comfortable, capable and confident**.
   - We are going door-to-door and telling people about *(Our action...)*
   - Asking the people in this neighborhood to get involved and to join us.
   - Because we know that when people like you get involved and take action, that is how we improve our community.

3. **Don't's and Do's**

   **DON'T'S**
   - Don't be judgmental and make assumptions.
   - Don't argue with people and preach to them.
   - Don't spend too much time with one person.

   **DO'S**
   - Do smile and sound urgent.
   - Do look people in the eyes, make eye contact.
   - Do be polite.

4. **Review what to say, the "Rap," and what is in the packet.**

   - Read rap aloud; ask people to read with you.
   - Introduction
   - Statement of conditions
   - Get an agreement.
   - Believe that people want to get involved and take action.
   - Get a commitment, **will you join us? (then PAUSE)** yes or no.

5. **Role play**

   - Divide into pairs, each person take turns demonstrating the rap

6. **Wrap-up**

   - Volunteers return and fill out tally sheet.
   - Review what happen, what were the comments the low's and high points
   - Ask everyone to come back for the next action.
What to Say: "The RAP"

Hello is Ms/Mr ____________ home? My name is ________________ and this is ______. We're volunteers from ______________ school. The schools are starting a very exciting program for our children and parents next week.

You know, our children are falling behind other children. We're falling behind in reading, we're behind in math, we're behind in everything except dropping out.

That is going to hurt your child and the other children when they get older. [pause]

Don't you think we need to start now to turn this condition around? [pause]

(If yes) Great!

We know that our children do better when we as parents get directly involved.

The Center for Parent Involvement and Education and __________ school have started parent education sessions to help you and other parents understand how you can assist your child and improve education...

We're getting together for our first session ________. We meet at ___ AM and ___ PM. Which one can I sign you up for?

(If yes) Great! There are a couple of questions I need to ask you

• Is your phone number still ____________________? Yes  No  New #

• Is there a need for childcare?  Yes  No  # of children

• How many adults will be attending?

(If no or don't know) We can't overemphasize the value of family participation.

You sure you can't make one session?  (If no)

Is there another adult who can join us, an aunt, uncle, older brother/sister, friend?

[Ask the person for the other adult's name and phone number.]

Thank you very much for your time. We look forward to working with you.
SAMPLE

Recruitment Script

Hello, is Ms/Mr ___________ home? My name is _______________________.
I’m calling from Campaign to Ban Handguns.
We have come together with other groups to help make Milwaukee safe.
Don’t you think there have been too many killings in the city? [pause]
We are collecting signatures to ban the possession of handguns in Milwaukee.
We have to collect 30,000 signatures in the next 10 days, and we need your help.
We're calling all our supporters and asking them to join us this Saturday for our weekly mobilization. We meet for a few minutes at the Jobs with Peace office; then we go out in teams for a couple of hours and collect signatures.
Will you join us? [pause] (If yes) Great! We meet at 9:30 AM at the Jobs with Peace office at 750 North 18th Street, between Wells and Wisconsin.
(If no, can't come Saturday) Will you come by our office and pick up some petitions, get them signed and return them? [We would rather not mail the petitions: it takes too much time; we have less than 15 days.] Will you stop by the office? [pause]
What's a good time for you to stop by the Jobs with Peace office at 750 North 18th Street, between Wells and Wisconsin?
We look forward to seeing you [write down the day & date & time].

PHONING INSTRUCTIONS

1. Don't put down the receiver.
2. Don't leave messages.
3. Only mark YES, NO or DISCONNECTED [DISC] and the DAY & DATE & TIME. [Please do not mark anything else.]
4. Fill out a tally sheet after calling.
Follow-up with Petitioners

Hello, is _______ home? My name is ________. I'm a volunteer with Neighbor to Neighbor. Thank you for helping put a single payer health care plan on the ballot.

We have kicked off our campaign and we collected over _____ signatures. I'm calling to follow up with you; we have to report to the state operation daily.

How many signatures have you collected?

(If they have not started yet) We have to collect 677 signatures a day to make our goal of 50,000 signatures in San Diego. When will you start? [Make sure to get a date.]

Will you bring in your completed petitions this Saturday, and will you join us this Saturday and Sunday for one shift? The shifts are on Saturday at 10 AM and 12 noon; and Sunday at 12 noon and 2 PM. Which shift is good for you? [Write down day and shift.]

(If no) Is there a Saturday or Sunday shift that you will join us? We need your help!
PLEASE FILL OUT A TALLY SHEET WHEN YOU FINISH

Center for Parent Involvement & Education

DAILY TALLY

Date: ________________________

Team Names ______________________________________________
____________________________________________

School ______________________________________________

Number of Yes's for AM ________ PM ________

Number of No's

Total number of people talked with (add yes's and no's) ____________

Comments:

What was good:
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

What could be better:
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________
DAILY PHONE TALLY

Please fill out tally sheet after calling.

Date: _________________________

Name: _____________________________________________________________________

ONLY COUNT THE PEOPLE YOU TALK WITH.
DO NOT LEAVE A MESSAGE.

Number of Yes's will pick up _______________________

Number of Yes's for Saturday _______________________

Number of No's _______________________

Total number of contacts (add yes's and no's) _______________________

Comments:
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
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__________________________________________________________________________

Effective Policy Advocacy Training Materials (p. 38 )
The Praxis Project www.thepraxisproject.org
<table>
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<tr>
<th>Volunteer Name</th>
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Building Diverse Community Based Coalitions

"The world is changing and anyone who thinks they can get anything meaningful done without the input of all a community's leadership is simply not paying attention. Inclusion is more than a buzzword. It's a necessity."

-- Dr. Jewelle Taylor Gibbs, internationally recognized sociologist and author

Most activists have figured out that engaging a broad cross-section of people in support of an issue is a good thing. They can recite the litany of rationale: There's power in numbers; richness in variety of perspectives; value in diversity, etc. Yet, even with the intellectual understanding of how critical diversity is to collaborative leadership, many groups can't seem to "make it so." Many cite lack of contacts in professional, religious and/or racial and ethnic communities that are different from their own. Another barrier is fear of conflicts that may arise as various groups learn to work together.

In most cases, groups who aren't working together today have reasons deeply rooted in the past. Diversity, or lack of it, in a group only mirrors relationships in the "larger" community. Moving beyond the way things "are" to what they "could be" requires an understanding of past tensions that helped forge the current reality. The first step is to conduct a bit of research either through personal interviews, old newscloppings and documents, or both. Try to map potential allies using the guiding questions below.

**YOU ARE HERE: MAPPING POTENTIAL ALLIES**

1) How are resources allocated to support the various groups and/or communities with which I want to work? Have there been tensions over resources? How did these tensions evolve and who were the key players?

2) What is the group's experience with previous collaborations? Were they satisfying/did they meet their needs? Was it a positive or negative experience overall? Why?

3) What are the prevailing attitudes about collaboration? Are there issues (i.e., in professional training or culture, mistrust, etc.) that make collaboration difficult? Easier? What concerns the group most about getting involved with a collaborative project? How can those concerns be allayed?

5) Who are the key opinion leaders in the group? Who is most open to collaborating? Who is least open? Do we or someone we know have a relationship with any of them? List names.

6) What would the group need to get out of collaborating with others? What can we offer? What would the group be willing to contribute? What do they risk in joining us?

7) What interests do we both share? Will this collaboration offer a vehicle for mutual benefit?
Make A Plan

Once you have the answers to these questions, you are ready to frame an initial recruitment plan. A recruitment plan identifies prospective partners, their probable interests, and background information to help you begin the work of building relationships. It's important to choose candidates carefully because the first groups to accept your invitation will signal volumes to the rest of the community.

Candidates need not be the most prominent community members, only that they are trusted in their community, you share common ground, and they are concerned enough about the core issues to make a solid commitment. Big name affiliation without any commitment will not build working relationships. They just breed resentment and reinforce the status quo. Additionally, a big name usually means the candidate has more to risk when they do get involved. Collaborations require partners who are deeply concerned and have a strong self-interest in the initiative and low enough risk in getting involved to truly be "there" for other partners. Use the form attached to identify potential partners in your community.

Making the Pitch

Often, any candidate has at least one friend or colleague that you know as well. These "go-betweens" are excellent resources for information and may even consent to initiate contact with the candidate. If possible, discuss your pitch with a colleague who knows the candidate well. Try role-playing certain approaches and discussing the candidate's potential responses. A good recruitment pitch comes from detailed background information and plenty of practice.

The Comfort Zone

Once you've gotten a candidate to agree to join you, the hard work begins. Review your organizational structure. How are decisions made? Who holds the information and resources? Will there be room for your new partner to make a meaningful contribution to the initiative's direction? What steps do you have in place to make new partners feel at home with the group? What language, or level of language, is spoken at meetings and gatherings? Will it alienate or welcome new partners? In short, retaining new partners for the long haul means really integrating them into the team. Of course, this is not a blending process where everyone ends up acting and talking the same. It's more of a salad approach where every partner is tossed lightly until the new partner is "in." Some organizations develop new partner orientations and assign a partner to the new member to help with the transition. That partner makes the introductions, brings the new members up to speed and works with them to identify potential areas for participation. When possible, it really helps to recruit at least two people from a community to help minimize feelings of isolation.

"If you've done a good job of selecting people to participate, you're going to have -- in our traditional way of thinking about power -- dramatically different levels of power that people hold," observes John Parr, former head of the National Civic League and
seasoned veteran in creating public-private partnerships. "How do you create a situation where there is, in effect, a level playing field? In many ways it's a challenge to the facilitator to, frankly, spend some of their time coaching people -- both those with power and those without power -- about how to be a more effective participant."

**Confronting Conflict**

Conflict happens even in homogeneous groups. It is an inevitable fact of life. Yet, when conflict happens along group lines in diverse collaborations, partners are more likely to give up and walk away. The key to moving through the tough times is keeping the focus on the concrete, work related issues. What structural problems are exacerbating conflict? Are mechanisms for gathering input and making decisions clear? Are there contextual issues (i.e., group histories, resource sharing, external political forces, etc.) that are shaping organizational dynamics?

Facing conflict within a group requires a skilled facilitator and enough safe space in a discussion setting to identify concrete issues and outcomes. For example, a general discussion about perceptions and attitudes among partners will not be as useful as identifying barriers (including misperceptions) to working together toward the common goal, and strategies to address those barriers. Remember, not everyone is a skilled negotiator. Leave room for different styles of expression and try not to take it personally.

**Good Ideas To Try At Home**

**Power Analysis**

A long time community organizing tool, power analyses chart a community's power structures and identify places of influence and power. Start with identifying government, business and nonprofit organizations and their leadership. More informal channels of power will emerge in personal interviews. Identify self-interests, constituencies and connections between institutions as much as possible. By mapping the power "sources" in a wide range of communities, you also map potential venues for collaboration.

**Move the Meeting**

One way to build commitment and comfort is to rotate meeting locations and responsibility for meeting planning among the various partners. Encourage partners to be creative, and open and close meetings in ways that reflect their group customs, "culture," or identity. It also helps to attend each partner's own group meetings to get ideas for building a combined, "team" meeting culture.
Building Skills and Capacities

Training and professional development can be an effective tool for forging shared language and approaches to advancing shared work. It’s a good idea to focus on best practices as there’s no need to reinvent the wheel. Internet searches using keywords on the specific issue or more general terms like "capacity building," "community development," and/or "building diversity" can lead you to a treasure trove of resources.

It's also important to note that capacity building should not just focus on getting new partners to "understand" how to work with more established partners. Existing collaborations should regularly evaluate their form, structure and group process to ensure they are accessible to newcomers. Review issues like access for those with disabilities (i.e., offering sign language interpretation, or access for those using wheelchairs); the need for language translation (are there communities who can not participate because there is not translation capacity?); and the meeting times or settings. For example, are meetings during the day so only those with flexible work situations can attend? Are meetings late at night preventing senior participation? Is the meeting located near public transportation? Are youth and children welcome? Are there emerging groups in our community for whom we should be preparing to make room? How might their participation have an impact on the group?

Make It Policy

The best way to guarantee inclusion is to write it directly into a group's policy. By identifying "seats" for key constituencies -- like youth representatives, faith groups, etc. -- a certain degree of representation is assured.
### Assessing Community Resources

<table>
<thead>
<tr>
<th>List who shares this problem?</th>
<th>What would they get out of joining you?</th>
<th>Who else would they bring in?</th>
<th>Who would their presence alienate?</th>
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Rank each group named above from 1 to 5 (with 5 being the highest) with regard to your issues taking into account the following factors: self-interest, depth of concern, risk in joining you, and level of difficulty to reach/organize.

<table>
<thead>
<tr>
<th>Group</th>
<th>Self-interest</th>
<th>Depth of concern</th>
<th>Risk in joining you</th>
<th>Difficult to reach/organize</th>
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Media Advocacy

- Media Planning template
- Key Related Beliefs
- A Good Framing Strategy
- Framing for Access
- Rats 1,2,3: A Framing Exercise
- Principles for Talking About Race to the Media
MEDIA PLANNING CONSIDERATIONS: A Checklist

Write here your main three program goals:

List three goals for your work with the media. At least one should be related to your program goals:

Whom do you want to reach? Remember any targets you identified.

<table>
<thead>
<tr>
<th>Organization/Constituency</th>
<th>Why do we want them?</th>
<th>What do we want them to do?</th>
<th>What do they care about? (values, vulnerabilities)</th>
<th>What/whom do they read, watch, listen to?</th>
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What are you trying to communicate? Try to distill your message into a 25-word (maximum) statement that will get the point across. Remember: a message is not the same as a soundbite. It is the overall theme you are trying to communicate.

What are good images for conveying this message?

Who are good spokespeople for conveying the message?

What are the best media for conveying this message for each target? (List targets and choose one or more that fit. Try to focus on not more than three)

- Large Academic Publications
- Professional development or journal articles
- News media: ___ print ___ radio ___ television __ on-line __ opinion
- Entertainment media
- Other on-line media
- Personal networks
- Other _______________________________________________________

List arguments of the opposition:
Develop two soundbites that convey your message and address important issues raised by the opposition. (Remember: you are not debating them. You are delivering the message.)

**Planning**

List upcoming events and products, date they are scheduled to be completed and whether they have any piggybacking opportunities:

<table>
<thead>
<tr>
<th>Event/Product</th>
<th>Date to be done</th>
<th>Media opportunities</th>
</tr>
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</table>

List other events and products you know about (annual conferences, anniversaries, etc., that provide opportunities to communicate with others and advance your goals:
Organize these events in chronological order and prioritize which are the communications opportunities you’d like to follow up on.

Identify what tasks need to be done and by whom in order to complete the follow up:
### Key Related Beliefs

<table>
<thead>
<tr>
<th>We say</th>
<th>They say</th>
</tr>
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<tbody>
<tr>
<td>IT’S THE SYSTEM - Poverty and other economic problems are systemic, not natural.</td>
<td>IT’S “SOME” PEOPLE - Poverty is the result of lack of initiative; individual failing</td>
</tr>
<tr>
<td>WE ALL DESERVE GOOD - All human beings are basically connected and deserve the same things</td>
<td>THOSE “OTHER” FOLK CAN’T HANDLE GOOD – And trying to do them good will only hurt your good. Negative perceptions of the “other”. Only a few people are worthy.</td>
</tr>
<tr>
<td>GOVERN TOGETHER - Public/government a good place to handle social issues (public common good – public/institutional accountability). People can and should govern collectively.</td>
<td>ONLY “LEADERS” CAN GOVERN - Government is ineffective, it should be run like a business – or individuals should handle. One leader (preferably a white guy) not a collective. Collaboration is messy</td>
</tr>
</tbody>
</table>

### Building a Majority -- You Know You Have One When:

1. Organizing sector has passion, strategy, common vision(s).
2. Large numbers of people that comprehend what’s at stake.
3. People associate support with key values.
4. It will cost if you break agreements with us related to the issue.

### Telling the Big Story

**Landscape vs. Portrait**

- Role of institutions
- Impact and nature of systems
- Stories match/reinforce solutions

### Taking on the Undercurrent

- Relate our stories of injustice as patterns
- Confront unfairness directly (research that compares, exposes)
A Good Framing Strategy Should:

*Translate individual problem to social issue.* The first step in framing is to make sure that what you say is consistent with your approach. It's hard to justify an environmental approach to an issue if all media interviews frame it from an individual perspective. Further, a social issue is news, an individual problem is not. Translating an issue helps others to see why it is important and newsworthy.

*Assign primary responsibility.* Again consistency is key. If the issue is tobacco sales to kids, it's hard to justify a new ordinance if spokespeople assign primary responsibility for the problem to parents. Framing for content means framing your message in ways that support your initiative goal and explains to others why the target you chose is the right entity to address the issue.

*Present solution.* The message should clearly articulate what the initiative can address. To use youth access to tobacco as an example, the solution offered in this case is to make it harder for merchants to profit from youth smoking.

*Make practical policy appeal.* This is where the initiative comes in. It should be communicated as practical, fair, legal, affordable and the right thing to do.

*Develop pictures and images.* If a picture is worth a thousand words and the average media bite is seven seconds, developing compelling visuals that illustrate your perspective is critical.

*Tailor to audience.* Remember who you are communicating with in each case. Communities are fragmented with lots of different interests and concerns. Tailor your message to your audience, which is usually your target.
Framing for Access

Getting media attention means getting the news media, that moving train, to stop and pay attention to our issue. Framing a story for the media so it gets their attention is called *framing for access*. There are many framing techniques for getting the media's attention. Featuring celebrities is, of course, one way to attract the media. Here are some other elements of newsworthiness to consider:

*Controversy, conflict, injustice.* The news media is in the storytelling business. These make stories interesting.

*Irony or uniqueness.* Something that makes viewers sit up and pay attention; that catches the eye.

*Population of interest.* Media outlets are businesses that must reach consumers in order to stay profitable. Oftentimes, some demographic groups (and therefore, stories that appeal to them) are of greater interest than others. Call the advertising department of your local media outlet for its package to prospective advertisers. These materials are free and often outline an outlet's target markets.

*Significant or serious.* Although this is often subjective, any story affecting large numbers of people is usually considered significant.

*Breakthrough, anniversary, milestone.* Something new and amazing -- like a discovery or new drug; or the commemoration of something important.

*Local peg, breaking news.* Piggybacking on a news story that is already getting media attention can be an effective strategy. Advocates artfully used the O.J. Simpson case to raise public awareness of the tragedy of domestic violence.

*Good pictures.* All media, including print media, need good visuals for their stories. Some groups provide balloons and beautiful backdrops. Others opt for more dramatic visuals like candlelight vigils or deteriorating neighborhoods in order to provide news media with some direct experience of the issues advocates seek to address.
Rats

Rats bite infant

An infant left sleeping in his crib was bitten repeatedly by rats while his 16 year old mother went to cash her welfare check. A neighbor responded to the cries of the infant and brought the child to Central Hospital where he was treated and released in his mother's custody. The mother, Angie Burns of the South End, explained softly, "I was only gone 5 minutes. I left the door open so my neighbor would hear him if he woke up. I never thought this would happen in the daylight."

Source: Prime Time Activism: Media Strategies for Grassroots Organizing, by Charlotte Ryan, South End Press, 1991
Rats bite infant: Landlord, Tenants Dispute Blame

An eight-month old South End boy was treated and released from South End Hospital yesterday after being bitten by rats while he was sleeping in his crib. Tenants said that repeated requests for extermination had been ignored by the landlord, Henry Brown. Brown claimed that the problem lay with the tenants' improper disposal of garbage. "I spend half my time cleaning up after them. They throw garbage out the window into the back alley and their kids steal the garbage can covers for sliding in the snow."

Source: Prime Time Activism: Media Strategies for Grassroots Organizing, by Charlotte Ryan, South End Press, 1991
Rat Bites in the City's "Zone of Death"

Rats bit eight month old Michael Burns five times yesterday as he napped in his crib. Burns is the latest victim of a rat epidemic plaguing inner-city neighborhoods labeled the "Zone of Death." Health officials say mortality rates in these neighborhoods approach those in many third world countries. A Public Health Department spokesperson explained that federal and state cutbacks forced short-staffing at rat control and housing inspection programs. The result, noted Joaquin Nunez, M.D., a pediatrician at Central Hospital, is a five-fold increase in rat bites. He added, "The irony is that Michael lives within walking distance of some of the world's best medical centers."

Source: Prime Time Activism: Media Strategies for Grassroots Organizing, by Charlotte Ryan, South End Press, 1991
**Principles for Talking About RACE to the Media**

**Document the Racism**
Some media folks have a hard time seeing it

**Prepare for Racist Assumptions**
Ask yourself: What’s the racist explanation for what’s going on?
– Pre-empt the set-up

**Challenge the Terms of Debate**
Reject the question – Propose a new question

**Name the Enemy**
Otherwise it might be people of color

**Frame for Institutional Accountability**
Don’t let a single “bad-egg” racist be blamed as the problem

**Challenge the lies**
Lies based on stereotypes have power

**Claim the Moral High Ground**
No one wants to be morally wrong
Policy Advocacy Resources

- Options for Policy Action
- Policy Options Beyond Legislation
- Equity Impact Statement
Options for Policy Action

Voluntary Agreements

- Identify institutional actors that have an impact on the issue.
- Research their role(s) and possible actions these actors could take to reduce harm in the community.
- Develop a "wish list" of actions you'd like the institution(s) to undertake.
- Identify both "sticks" and "carrots" for their participation and your power to back up any agreement.
- Negotiate (and never negotiate alone. At least two members of your coalition should be present at all times)

Legislation

- Identify existing laws and how they can be enforced.
- Try to get them enforced.
- Do stings and other investigations to gather data.
- Identify policy "ideas" that help address the problems or advance community vision; try to ensure that the initiative helps build community power and agency as well as addresses the issue.
- Identify levers of power and influence in the decisionmaking body and undertake a power analysis to identify allies, opposition and legislative champions.
- Develop an organizing plan to advance the policy initiatives you identify.

Lawsuits and Other Legal Options

- Lawsuits often drag out, are cumbersome and can pull much needed energy away from organizing so consider them carefully before engaging. They are best used when there are enough resources to continue other mobilizing efforts without interruption. Lawsuits and injunctions can also be effective in halting an action that requires further study and input.
- If the siting of negative land uses appear to correlate with the presence of traditionally disfranchised populations, explore Title VI and other legal remedies concerning discrimination.
If a local jurisdiction is being sued by an industry as a result of public health regulation, your organization might be able to intervene with an attorney to ensure community interests are addressed.

File complaints about bad or illegal practices with regulatory agencies. For example, alcohol ads that appeal to children are violations in many states. Find out who enforces what public health regulations and work accordingly.

**Moratoriums**

- Suspend a policy until there can be further study of its impact and any possible alternatives.
- Suspend an administrative practice or procedure at the institutional level.
- Use a moratorium to prevent a policymaking body from making a decision or even suspending a policy by halting all action until further study.
- Determine the most appropriate body and methods of community input for assessing the issue.

**Developing policy goals**

All policy initiatives must operate within the framework of your organization's purpose and long range goals. It's important to compare your organization's goals with the goal for your issue. In your assessment you should ask yourself: what constitutes victory? How will this policy address the problem/have an impact on the quality of life of your clients/members and/or community?

When developing policy initiatives, try to incorporate features that help to address your coalition's long term vision. Good policies can:

*Build community capacity.* Effective policy leaves the community improved and with more involved community members than before. The experience of advocating for the policy expands the base of leadership.

*Pay for itself.* Advocates must develop creative ways to fund new policies. One way is user fees -- where the licensee or the storeowner or whoever is using the service or selling the product, must pay a fee for the privilege of using that service or product. Examples: local permit fees for alcohol and/or tobacco outlets, fees for one-day special event permits for the sale of alcohol by private parties. A handy formula for calculating fees is to divide the cost of regulating the activity or enforcement by the number of projected "users."

Another way is to require the diversion of funds (either funds seized through drug busts, special levies or other means) to support your program. Some agencies develop economic development plans within their prevention policy with an eye toward self-sufficiency in the long term.
Solves real problems. When developing a policy, ask how does this solve the problem? Your answer should be clear, concise, and 25 words or less.

Contributes to a sense of community. How do we regulate liquor stores? Closed administrative hearings for outlet owners with clear regulations and standards, or open community hearings with those same standards administered by neighborhood people in their own neighborhood? Which is easier? But which will bring more people together, give them a sense of their own power and build a new cadre of skilled leadership?

What do we do to develop policies for seniors? Do we develop a free meals project or a credit bank where seniors contribute skills and goods in exchange for others? One senior can take another shopping, another can do carpentry. Which one builds bureaucracy? Which one builds capacity?

Lays the foundation for more good policy. Look to the future. Policy should be incremental and should take you somewhere. The policy you develop today should open the door and set the stage for further progress tomorrow. What will you gain from this initiative? How will it bring you closer to your ultimate goals?

Brings us closer to our ideal world. We have to reflect upon and revisit that idealistic place; that place where we dream and see the best in everything. We must make sure that whatever we do will, in the long run, help make that dream a reality.

Other things to think about

Policy development can be complex. It helps to secure the help of a pro bono (free of charge) attorney to help your organization navigate the process. However, remember that laws are not inflexible or carved in stone. They reflect the power relationships and agreements in effect at any given time. An attorney should be a partner in your efforts to shift those relationships in the public interest. Legal issues are important but they should not drive your efforts. Take care to keep your goals and community interests firmly in place.

Non-profit organizations must take care when entering the policy arena. Check with the Internal Revenue Service, your state tax exempt certifying agency and any grant compliance officers to ensure that your organization is in compliance with relevant regulations.

Common Stages in the Development a Policy Initiative

Most initiatives go through a development process characterized by seven stages. These stages are not sequential per se, but tend to overlap -- more like a gradual spectrum than a straight line. Often, groups are working at more than one stage at a time once an initiative is underway. For example, groups will continually "test the waters" throughout the life of an initiative and use that feedback to refine and improve their work. Effective initiatives rarely miss any of these stages in development. Poor initiatives often do. I've often heard groups say that they went ahead without much preparation because of some unique opportunity that just wouldn't wait. It's true that the right timing can provide important levers for an initiative's success, but usually groups wish they had waited and were better prepared. In any case, there's nothing like good
preparation and solid organizing to help a group take better advantage of the opportunities that exist -- as well as create new ones.

It's also important to recognize that policy is a process of negotiation and compromise. When working on a policy, for which there is little precedence, remember that local governments are often afraid to be the first jurisdiction to adopt a new, untested ordinance. First ordinances are usually more conservatively written and less comprehensive than those that follow it. It's always helpful to know about similar policy initiatives that have been enacted without legal challenge or, at least, upheld in court. Without some precedence, making a case for a new policy can be tough -- but not impossible. In any case, it helps to decide early on what you can give up and what's non-negotiable. Remember that you can go back and make changes later but it's a lot easier to get it "right" the first time.

Stage 1: Testing the Waters

At this stage, most groups are focused on the problem and are just beginning to develop ideas for solutions. It is that first sense that something concrete can be done about an issue but no one is sure exactly what. Often, a number of approaches are "tested" and screened for community support, legality and likelihood of success. When a San Diego community group organized in the wake of a shooting death of a local youth, their first target was gun control. After conducting research on the legislative remedies available to them, they focused on a ban of junk guns -- and ways to locally regulate bullets. A key lesson: the coalition was flexible and moved where residents wanted to go.

Stage 2: Defining the Initiative

Once the primary issue is defined, it must be refined into a clear, practical policy initiative. The best initiatives come out of residents articulating their "ideal" policy and then looking for the best mechanisms for bringing their vision into reality. The Coalition on Alcohol Outlet Issues wanted less liquor stores in Oakland and wanted better regulation of those in operation. In their ideal policy, they wanted storeowners, not public funds, to pay for enforcement. They took their idea to city council who then instructed staff to find a way. They did. The ordinance requires merchants to pay higher conditional use permit fees to support an augmented regulatory structure.

Stage 3: Strategy and Analysis

Once the initiative has been identified, groups will conduct what is known as a power analysis to identify targets, allies, opponents and other important factors in the campaign. Often, the initiative is refined further in light of this information. Living wage coalitions omitted construction work from their initiatives as a strategic and political consideration.

Stage 4: Direct Issue Organizing

Informed by the power analysis and strategic planning, the organizing begins. In city or countywide campaigns without a neighborhood focus, organizing is usually done through outreach to other organizations. For example, much of the organizing for living wage campaigns
focused on unions, advocacy organizations and affected (unorganized) employees. Neighborhood oriented campaigns tend to conduct more canvassing operations. In Los Angeles, the Community Coalition for Substance Abuse Prevention and Treatment had organizers go door-to-door and hosts house parties as neighborhood meetings. They focus on neighborhoods with problem liquor stores in order to build a solid base of support among those most affected by the issue. It is during this stage that media work also begins in earnest.

Stage 5: In the Belly of "The Beast"

At some point in every initiative, advocates must meet with policymakers and begin the long process of getting the policy enacted. This stage is characterized by intensive work with city or county staff, negotiations and accountability sessions. It is important to stay focused on the group's initial goals during this phase, as it is easy to get caught up in the politics of the bureaucracy. Working with policymakers is an "inside" game but it need not mean getting disconnected from grassroots support. As veteran organizer Greg Akili often says, "Don't start to talk like them or take on their ways. If you do you'll confuse the people you're working with and you become untrustworthy. Stay connected. Always go in groups and rotate the people who attend the meetings so that you build leadership and confidence."

Stage 6: Victory and Defense

If an initiative is lucky enough to get enacted, celebration and evaluation is definitely in order. However, for most ordinances, soon after the partying is over, the litigation begins. Prepare for the possibility of litigation at the beginning of the initiative and be ready to play an active role in any legal action even if the local government (and not your group) is the defendant. Some organizations like the Community Coalition and the Coalition on Alcohol Outlet Issues got intervener status in litigation directed toward their city government. Baltimore's Citywide Liquor Coalition made sure their attorney worked closely with the City Attorney throughout the process making sure to carefully craft public testimony with an eye toward building a strong public record in preparation for the inevitable litigation.

Stage 7: Enforcement

After the policy is enacted and clear of court hurdles, the work begins to get the new law enforced. For initiatives with powerful opposition, negotiation continues around issues like the timeline for implementing the policy, interpretation of particular clauses, and fitting the new policy in with other staffing priorities. It is important to maintain grassroots involvement throughout this process.

All Phases Are Important

One common mistake is to launch policy initiatives without any preparation or prior analysis as required in the first three stages of development, before direct advocacy begins. Numerous policy initiatives skip stage four and therefore suffer from inadequate grassroots support because not enough attention was paid to community organizing. Advocates in this case often go directly to stage five, working with policymakers, without grassroots support or even public awareness of their efforts in hopes that policymakers will be swayed by the "sensibility" of their initiative.
However, policy is not about sensibility as much as it is about interests. Advocates must never assume support based on the logic of their argument or the strength of a personal relationship.

One coalition in a small town in the Midwest did just that. They took their initiative directly to a local policymaker without building support, identifying allies or even working through the details of their initiative. Their idea seemed straightforward and simple: to have their local hospital keep track of alcohol related gun trauma. They were completely caught by surprise when the hospital administrator did not agree to simply enact the policy at their request. It was an honest mistake. The group had a warm relationship with the administrator but had not thought through the implications of such a policy on staff resources. By doing the necessary preparation, groups can effectively manage these issues and plan accordingly.

**The Role of Information and Research**

Policy should have a strong research foundation that supports the initiative's particular strategy or approach toward addressing the problem. This is of particular importance in the case of progressive, regulatory policies as they usually receive greater scrutiny than policies perceived to be pro business. The extra scrutiny can be a good thing as it forces proponents to make sure their policies have an effect on real life issues that are of concern to communities.

Initiatives should start with a strong and respectable database. And groups don't have to start from scratch or conduct their own studies. There are an incredible amount of studies that have never been widely disseminated that can support progressive initiatives. In children and family services, for example, there are literally hundreds of well crafted studies that examine the impact of poverty on children; and hundreds more on drug policy, employment, race relations and so forth. A search of the various social science indexes or a guided "surf" on the Internet can be very helpful in this regard.

Data can guide the development of an initiative in at least three ways. It can direct how the policy should be targeted by providing detailed information about the problem. Data can indicate the impact and severity of the problem and justify social action. Finally, by showing that some groups are disproportionately affected by the problem, the data establish that the problem is not random but linked to specific social and environmental factors.

Practically speaking, research should provide a clear analysis of the issues your group wants to address. It is one thing to say, "We have a problem with youth drinking." It's quite another to say "We have alcohol-related problems because merchants are selling alcohol to local youth at these particular stores." The difference is community-based research. Gather as many reports, surveys, personal observations and other resources that accurately describe the problem in order to identify effective policy options. Using the youth drinking example, it would be helpful to know among other things, the number of youth alcohol related arrests, injuries and other incidents; where alcohol is purchased; what kind and brand youth prefer; and where they go to consume it.

Research can shed light on existing policy initiatives and suggest new ones. When community groups in Oakland, California formed a coalition to fight youth access to alcohol and tobacco they expected to propose policy initiatives concerning billboard regulation. However, research conducted on possible policy options and their effectiveness in other communities indicated that...
their efforts might be better rewarded if they focused on alcohol outlet licensing issues. The group adjusted strategies accordingly and moved on their city council soon after. In less than a year, they had convinced their council to pass what is currently among the strongest ordinances regulating alcohol outlets in California -- one which included the passage of a moratorium on new outlets in certain high density areas.

Another reason to have detailed information to substantiate policy recommendations is that all legislation must be based on findings or a set of facts that provide the rationale for enacting the law. These findings are important because they constitute much of the legal case if the law is challenged in court. Above all, have information that clearly describes the problem in ways that help your community, coalition, and the media grasp how serious it is.

This requires some research and information gathering in the beginning of an initiative -- most of which can not be confined to the library. Activists often identify these issues by spending time talking with their neighbors, walking around observing their neighborhoods with "fresh eyes," and identifying the assets (or protective factors) and factors that put neighbors at risk.

Environmental Factors

Any behavior or activity operates within a context or an environment that shapes it. Assessing environmental factors in a community means shifting the focus from individual problems to the context in which these problems take place. This shift is important because environmental factors can play a major role in proliferation and prevention of problems in a community. This shift from an individual to an environmental perspective is much like shifting a camera lens away from a simple portrait to capture the "big picture" or landscape that surrounds it. There are different levels and dimensions of a community landscape.

Identifying risk and protective factors requires attention to a community's environment, or the context in which these assets and challenges exist. Risk factors are those policies, issues, norms, problems, needs, deficiencies, etc., that are barriers to healthy communities. Protective factors are those norms, institutions, policies, etc. that support and enhance community health and development. All communities have both. Some factors will fit under both categories. An initiative plan has three main parts:

**Goal or what we want to accomplish.** The goal should be easily understood and should meet as much of a group's criteria as possible. A good goal requires cutting or shaping the issue into effective, doable action that engages community interest and support.

**Target or decisionmaking body with the power to enact the action sought.** The difference between education and advocacy efforts is that advocacy seeks concrete institutional changes. Having broad segments of the community as target populations are fine for outreach and health education, it simply doesn't work as well in advocacy initiatives. Every initiative must identify a clear target or decisionmaking body that can enact the institutional change required to achieve the goal. For example, when developing an initiative to ban alcohol and tobacco billboards near schools, the group must identify whom best to make this happen. City council zoning ordinance? Billboard company policy? State law? Each potential decisionmaking body or
target will mean different organizing strategies. Identifying the target is central to initiative planning because it focuses the rest of the outreach toward moving the target to action.

Note: Don't confuse target and allies you need in order to win. Primary targets are always the individuals or decisionmaking body that ultimately have the power to grant group goals. There are lots of folk to work with and convince along the way, but they are not targets. (See materials on assessing targets in the back of this section for more information).

*Objectives necessary to achieve the goal.* Once the group has identified the goal and target, they are ready to develop an action plan or set of objectives and timeline to make it happen.
Policy Options Beyond Legislation

(Adapted from *Making Policy Making Change: How Communities Are Taking Law Into Their Own Hands* by Makani Themba)

Before undertaking any initiative, it is important ascertain which policy approach is best to address the issue at hand. Policy isn't always legislation. Sometimes, it just isn't practical to get legislation enacted. It may be too soon to try to address the problem directly so other actions are needed to set the groundwork for regulation down the line. Advocates have a number of tools they can choose from that can be used instead of legislation -- or as a complement to legislative strategies. The four most common policy actions (in addition to legislation) are voluntary agreements, lawsuits, moratoriums and mandated studies.

**Voluntary Agreements**

Voluntary agreements are pacts between a community and institutions that outline conditions, expectations, or obligations without the force of law. This is a good option in places where there isn't support for more formal regulations. Voluntary agreements need not be limited to cordial words and a handshake. Communities can still negotiate written memoranda of understanding that clearly spells out the conditions of the agreement.

Getting a solid agreement still requires research and organizing. It helps to start by identifying all of the institutional actors that have an impact on the issue. Once these actors are identified, research their role in, and possible actions they could take to reduce harm in the community. Then, develop a "wish list" of actions you'd like the institution(s) to undertake. It's especially important (since this agreement will not have the force of law) to identify both "sticks" and "carrots" for institutional participation as well as any community power to back up any agreement. Of course, it will take some negotiating and community pressure to actually reach an agreement. Make sure no one ever negotiates alone. At least two members of your coalition should be present at all times.

**Lawsuits and Other Complaints**

Lawsuits and other court actions can be tedious and expensive. Therefore, groups should carefully consider all options before deciding to take on a lawsuit. If an organization has the resources (in staff, money or pro bono legal support), a well-framed legal intervention can accomplish much in both the short term and long term -- even if it simply gets the other side to the table. The framing of any action is important. Care should be taken to name the right defendants including parent companies and others who profit from the action that the group wants stopped.

Activists can also learn much from the skillful use of interrogatories -- requests for information and documents from the opponents. In some cases, groups will consult with other activists to identify useful information for regulation beyond the current legal action. For example, one group engaged in a lawsuit against an alcohol company for copyright infringement solicited items for their interrogatory from alcohol policy activists nationwide. The documents yielded from that single lawsuit provided the foundation for years of policymaking -- even though the case was eventually settled out of court.

Other legal actions commonly pursued by groups include injunctions against the implementation of laws before they have had a chance to take effect; organizing victims with standing to sue
polluters or other institutions causing damage to a community; and civil suits when an
institutional action has a pattern of discrimination or damage to certain populations (i.e., people
of color, women, people with disabilities).

Sometimes, an organization has no choice but to get into the legal fray. It's simply a matter of
defending their legal rights. Also, companies are increasingly suing local governments, groups
and individual activists for their efforts to hold industries accountable.

Lawsuits can be scary and distracting if not properly integrated into the organization's overall
organizing strategy. The first, most important rule is to never keep a lawsuit or a company's
threat of one a secret. Make sure to publicize the company's action widely. If the target of the
lawsuit is the local jurisdiction that enacted the policy, your organization may be able to
intervene with an attorney to ensure community interests are addressed. Intervenor status
enables a community group to participate in a lawsuit and argue its case almost as if it were a
defendant. This kind of participation can make a real difference when a local jurisdiction is not
strongly committed to defending an ordinance in court.

In addition to lawsuits, it also helps to simply file complaints about bad or illegal practices with
the appropriate regulatory agencies. For example, alcohol ads that appeal to children are
violations in many states. Pollution, labor practices and fair trade are other areas of regulation
that can be pursued. If one regulatory agency is notoriously slow to act, try redefining the issue
so it fits under the purview of a more active regulator. For example, redefining a violation from a
bad business practice to a health concern often brings a whole new set of actors into play. In
any case, find out who enforces what relevant regulations and work accordingly.

Moratoriums

Sometimes you just need to stop policy activity until there can be further study of its impact and
any possible alternatives. Common moratoriums include bans on new alcohol outlets,
billboards, dumpsites or office construction. It isn't enough to enact a time-limited ban, any
moratorium policy should use the time to gather more information and assess policy options.

Mandated Study

Research can be costly and time consuming. If time and support allows, why not get local
government to do the research? Through policy that mandates a study or data collection,
resources can be set aside to do a thorough job of information gathering. The policy can set
parameters for the kind of group or institution that can conduct the study; key questions framing
the study; resident involvement and monitoring of the study; and the plan for dissemination and
use of the results. A Los Angeles, California coalition got the city to conduct its study on living
wage. The resulting data was hard to dispute when it came time to discuss the need for the
living wage law. It was the city's own.
RESOURCES (a very abbreviated list)

Land Use and Planning Equity

American Planning Association
Joanne Garnett, President
1776 Massachusetts Ave., NW
Washington, DC 20036-1904
Phone: (202) 872-0611
Fax: (202) 872-0643
Email: lulzd@planning.org
Website: http://www.planning.org/switchbd/apadirec.html

Land Use Law Center
John R. Nolon, Director
Pace University School of Law
78 Broadway, White Plains, NY 10603
Phone: (914) 422-4262
Email: landuse@law.pace.edu
Website: http://www.law.pace.edu/landuse/
Useful Gateway for planning issues
Website: http://www.cyburbia.org/

Housing Policy Equity

National Low Income Housing Coalition (NLIHC)
Sheila Crowley, President
1012 Fourteenth Street NW, Suite 610
Washington, D.C. 20005
Phone: (202) 662-1530
Fax: (202) 393-1973
Website: http://www.nlihc.org/

National Housing Institute
Harold Simon, Executive Director
439 Main Street Suite 311
Orange, NJ 07050
Phone: (973) 678-9060
Fax: (973) 678-8437
Website: http://www.nhi.org/

Equity in Economic Development

Economic Policy Institute
Jeff Faux, President
1660 L Street NW
Suite 1200
Washington, DC 20036
Phone: (202) 775-8810
Fax: (202) 775-0819
Website: http://www.epinet.org/

Center for Community Change
Andrew Mott - Executive Director
1000 Wisconsin Avenue, NW
Washington, DC 20007
Phone: (202) 342-0519
Fax: (202) 333-5462
Website: http://www.communitychange.org/

Corporation for Enterprise Development (CFED)
Brian Dabson - President
777 North Capitol Street, NE, Suite 410
Washington, DC 20002
Phone: (202) 408-9788
Fax: (202) 408-9793
Website: http://www.cfed.org/

Poverty & Race Research Action Council
Chester Hartman, Director
3000 Connecticut Ave, NW
Suite 200
Washington, DC 20008
Phone: (202) 387-9887
Fax: (202) 387-0764
Website: http://www.prrac.org/topics/resources/hungerresources.htm

United for a Fair Economy
Chuck Collins
37 Temple Place 2nd Floor
Boston, MA 02111
Phone: (617) 423-2148
Website: http://www.ufenet.org/

Food Access

America's Second Harvest
Deborah Leff, President
116 S. Michigan Ave., #4
Chicago, IL 60603
Phone: (312) 263-2303
Website: http://www.americanharvest.org/

Poverty & Race Research Action Council
Chester Hartman, Director
3000 Connecticut Ave., NW, Suite 200, Washington, DC 20008
Phone: (202) 387-9887
Fax: (202) 387-0764
http://www.prrac.org/topics/resources/
hungerresources.htm

Equity and Fairness in Crime Policy/Law Enforcement

The Sentencing Project
Marc Mauer, Director
514 - 10th Street, NW
Suite 1000
Assessing Racial and Gender Impact

Applied Research Center
Gary Delgado, Director
3781 Broadway
Oakland, CA 94611
Phone: (510) 653-3414
Fax: (510) 653-3427
Website: http://www.arc.org/

Center for Women Policy Studies
Leslie R. Wolfe, President
2000 P St., NW, Suite 508
Washington, DC 20036
Phone: (202) 872-1770
Fax: (202) 296-8962

American Association of University Women (AAUW)
Sandy Bernard, President
1111 16th Street, NW
Washington, DC 20036-4873
Type: advocacy
Phone: (202) 785-7793
Fax: (202) 466-7618
Website: http://www.aauw.org

Ms. Foundation for Women
Marie C. Wilson
120 Wall Street, 33rd Floor
New York, NY 10005
Phone: (212) 742-2300
Fax: (212) 742-1653
Website: http://www.ms.foundation.org/

Institute on Race and Poverty
Gavin Kearney
415 Law Center
229 19th Avenue
Minneapolis, MN 55455
Phone: (612) 625-8071
Fax: (612) 624-8890
Website: www.umn.edu/irp
Disability Equity and Access Issues

National Council on Disability
Ethel D. Briggs, Executive Director
1331 F St., NW, Suite 1050
Washington, DC 20004-1107
Phone: (202) 272-2004
Fax: (202) 272-2022
TTY: (202) 272-2074
Website: http://www.ncd.gov/

National Association of Developmental Disabilities Councils
Charlotte Duncan, President
1234 Massachusetts Ave, NW, Suite 103
Washington, DC 20005
Phone: (202) 347-1234
Fax: (202) 347-4023
Website: http://www.igc.apc.org/NADDC/

Age Discrimination and Ageism
AARP
Joseph S. Perkins, President
601 E. St. NW
Washington, DC 20049
Phone: (800) 424-3410
Website: http://www.aarp.org/

Public School Equity
ERASE
Terry Keleher
3781 Broadway
Oakland, CA 94611
Phone: (510) 653-3414
Fax: (510) 653-3427
Website: http://www.arc.org/

Rethinking Schools
Bob Peterson
1001 E. Keefe Avenue, Milwaukee, WI 53212
Phone (800) 669-4192
Fax: (414) 964-7220
Website: http://www.rethinkingschools.org

National Coalition of Education Activists
PO Box 679
Rhinebeck, NY 12572
Phone: (914) 876-4580
Fax: (914) 876-4461
Website: http://members.aol.com/ncaweb/

Employment
Good Jobs First
Greg LeRoy
1311 L Street NW
Washington, D.C. 20005
Tel: (202) 737.4315
Fax: (202) 638.3486
Website: http://www.ctj.org/itep/gfj.htm

Labor/Community Strategy Center
3780 Wilshire Blvd, Suite 1200
Los Angeles, CA 90010
Phone: (213) 387-2000
Website: http://www.igc.org/lctr/
Effective Policy Advocacy Training Materials (p. 79)
The Praxis Project www.thepraxisproject.org

Center for Budget and Policy Priorities
Robert Greenstein, Executive Director
820 First Street, NE, Suite 510
Washington, DC 20002
Phone: (202) 408-1080
Fax: (202) 4088-1056
Website: http://www.cbpp.org

Jobs With Justice
501 Third Street NW
Washington DC 20001-2797
Phone: (202) 434-1106
Fax: (202) 434-1477
http://www.jwj.org/corepage.htm

Environmental Quality

Earth Island Institute
Robert Wilkinson, President
300 Broadway, Suite 28
San Francisco, CA 94133
Phone: (415) 788-3666
Fax: (415) 788-7324
Website: http://www.earthisland.org/

Greenpeace USA
Damu Smith
1436 U Street, NW
Washington, DC 20009
Phone: (202) 462-1177
Fax: (202) 462-4507
Website: http://www.greenpeace.org

The Preamble Center
Kim Freeman
2040 S Street, NW
Washington, D.C. 20009
Phone: (202) 265-3263.
Website: http://www.preamble.org/

Fair Budgeting

Center for Budget and Policy Priorities
Robert Greenstein, Executive Director
820 First Street, NE
Suite 510
Washington, DC 20002
Phone: (202) 408-1080
Fax: (202) 4088-1056
Website: http://www.cbpp.org

OMB Watch
Gary D. Bass, Executive Director
1742 Connecticut Avenue, NW
Washington, D.C. 20009
Phone: (202) 234-8494
Fax: (202) 234-8584 fax
Website: http://www.ombwatch.org/
Local Application of International Human Rights Policy

International Human Rights Law Group
Gay McDougall, Director
1200 18th Street, NW
Suite 602
Washington, DC 20036
Telephone: (202) 822-4600
Fax: (202) 822-4606
Website: http://www.hrlawgroup.org/

International Possibilities Unlimited
Dr. Deborah Robinson, Executive Director
5113 Georgia Ave., NW
Washington, DC 20011
Phone: (202) 723- 5622
Fax: (202) 723-5637
Website: www.ipunlimited.org

Transportation

Labor/Community Strategy Center
3780 Wilshire Blvd, Suite 1200
Los Angeles, CA 90010
Phone: (213) 387-2000
Website: http://www.igc.org/lctr/

Surface Transportation Policy Project
1100 17th Street, NW 10th Floor
Washington, DC 20036
(202) 466-2636
www.transact.org
About The Praxis Project

"Who suffer the effects of oppression more than the oppressed? Who can better understand the necessity of liberation? They will not gain this liberation by chance but through the praxis of their quest for it, through their recognition of the necessity to fight for it."

- Paulo Freire

Mission
Praxis’ mission is to support and partner with communities to achieve health justice by leveraging resources and capacity for policy development, advocacy and leadership. Praxis uses innovative participatory approaches that bridge theory, research and action.

What is health justice?
A community’s health is as much the result of institutional policies and practice as it is personal choice. Which communities have fresh, nutritious food? Where do governments allow dumping? Who is more often targeted by advertisers with unhealthy products? Which communities have state-of-the-art medical facilities? Which ones don't?

All of these factors are symptoms of the bias and privilege that shape virtually every aspect of our lives. It is no secret that across nearly every indicator of health status, poor people and people of color are more likely to be sick, injured, or die prematurely. Great brochures and good advice are not enough. It will take organizing from the ground up; social change that transforms the current systems of neglect, bias, and privilege into systems -- policies, practices, institutions -- that truly support health for all. That's health justice.

Why Policy?
Policies determine our quality of life. They are the agreements, the codes that shape every aspect of our lives. That is why all around the country, people are turning to advocacy and policymaking as tools to improve their communities.

Training: Building Skills and Community
Community groups are often trained in service provision, education or public health. They need new and different skills to enact policy changes -- media advocacy, community organizing, legislative advocacy, etc. However, building skills is not enough. These advocates also need a supportive community in which they can explore new models, forge new alliances and learn from each other’s experiences. Praxis is dedicated to the principles of popular education. Staff is experienced in training and education approaches that value participation and experiential learning. Guiding principles of the training component are closely tied to Praxis' overall commitment to capacity building.

Technical Assistance
Even with the best training, advocates need support in implementing their advocacy and policy initiatives. The best technical assistance is the right help at the right time, a sort of policy triage that flexibly and effectively anticipates the fluid, changing needs of advocates. This means the
development of mechanisms via mail, phone and on-line to respond to requests quickly and efficiently.

**Evaluation that Matters**

To truly evaluate policy approaches, process measures must reflect an understanding of where the "transcript" of the policymaking process is "written" (i.e., in meetings, in phone conversations and press conferences) and how to make explicit this transcript of events (or body of evidence) so that the process can be explained to readers, so they can replicate it and that process can be credibly linked to the outcomes. This requires a fair amount of ethnography and attention to the process as one resembling political science more than medical science. Strong interviewing skills, extensive experience with the policymaking process, the ability to write clearly and effectively for people outside of academia, and the ability to effectively translate those skills into the development of an appropriate evaluative framework are critical elements of Praxis' approach.

**Research for a New Climate**

This is the Information Age and research is the new currency in policymaking. Praxis is committed to developing information to help shape policy and strategy in this shifting social climate. Focus group testing, polling, media content and data analysis are a critical part of our research component. We examine the context as well as the content of policy initiatives to provide credible information that advocates can use.

**Who We Serve**

Praxis is committed to serving community groups and institutions (both public and private) that want to address social issues through environmentally-focused policies. Why an environmental focus? Most policymaking focuses on the punishment and surveillance of individuals -- often individuals who are poor, disfranchised and/or are people of color. Whether at the national, state or local level, we will work with groups to shift the balance toward approaches that address root causes and increase corporate and institutional accountability. Serving those disproportionately affected by social problems is a priority.

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[the praxis project](www.thepraxisproject.org)
Other Resources
"Organizers! This is the book you have been waiting for."

Heather Booth


Used as a text in many of the leading schools of social work.

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