

# Successful Advocacy

A VALUES-BASED APPROACH



Metropolitan Group  
the power of voice

[www.metgroup.com](http://www.metgroup.com)

## Contents

Introduction. . . . .	3
The Advocacy Process at Work. . . . .	6
Step 1: Defining your Purpose . . . . .	7
Step 2: People—Identifying and Understanding your Audiences . . . . .	10
Step 3: Persuasion—Messages and Strategies that Get to Yes! . . . . .	13
Step 4: Performance—Measuring your Success . . . . .	22
Get Going . . . . .	24
About the Author . . . . .	25
Additional Resources . . . . .	26

### ACKNOWLEDGMENTS

We thank our clients for their inspiration, impact and focus on creating a just and sustainable world. We especially thank our advocacy and systems change clients for the opportunity to work with and learn from them and their communities.

### AUTHOR'S NOTE

Major portions of this content may be found in toolkit format with worksheets and supporting documentation in *The Library PR Handbook*, published by the American Library Association, and in "Libraries Prosper with Passion, Purpose and Persuasion," written by this author and originally published by Public Library Association, a division of the American Library Association.

# Successful Advocacy

A VALUES-BASED APPROACH

In communities throughout the United States today, change is the buzz word. The face of America has become many faces, reflecting our increasing cultural and ethnic diversity and simultaneously highlighting—in the wake of an historic presidential election—common values shared by all Americans such as opportunity, education, fairness, and family. And while it can be argued that there have never been wider gaps between those who have and those who don't, those who succeed in school and those who don't, those who can afford homes or healthcare and those who can't, there has not been a time in modern memory when the need to address these gaps has been more a part of the public discourse. It is against this backdrop that social purpose organizations shine as examples of vehicles that can serve to level the playing field.

Today's social purpose organizations face ongoing challenges: funding shortages and lack of clarity about the resources, role, and the significant value of social purpose organizations. Too often, people have outdated views of the social purpose world that do not include the dynamic role played in advocacy for policy change, social service delivery and community vitality in today's environment. The issues addressed range from health care to environmental justice, workforce development to economic recovery, literacy to hunger, mental health to human rights. These and other challenges are real and urgent, and they call for solutions based on our shared values.

The need for you as a social purpose leader to play an increased role in advocating for your organization and your issues (and by extension for the potential and opportunity that exist in every community) has never been greater. And make no mistake about it—advocacy is indeed your role. You do it every time you highlight how a program creates access to critical health services, or showcase the value of job resources to individuals who seek a better life for their families, or invite the community into your facility to learn about the programs and services you provide to your community. Your organization connects with your customers every day based on what they need and what is most valuable and useful to them—in short, what aligns with their values.

Your organization's advocacy efforts can and should do the same thing. This article highlights an approach to advocacy that is based on community values and builds upon other commonly used communication approaches. We'll examine first the broad communication approaches, then dig a bit deeper into what we mean by advocacy, and ultimately walk through a series of questions that serve as your guide to building effective advocacy plans yourself.

At the heart of the role of effective advocacy lies communication, the ultimate purpose of which is always to gain a response from your audience. Clearly, audience response and action are a core need for organizations of all types and sizes in all locations. Gaining audiences' response requires that you are establishing true opportunities for two-way communication. This dynamic approach begins with listening to your community's and stakeholders' needs and values, evaluating them, and then illustrating the ways your organization delivers service that responds to what your constituency believes matters most. A variety of communication practices are commonly used by social purpose organizations. Each deserves attention. They include: marketing, public relations, and advocacy. While each has a distinct purpose, all are approaches to telling the story of your organization on an ongoing basis and to increasing perceived value among your constituencies for your valuable resources, programs, and services. Remember, external audiences do not know or care which department or function generated the communication; they perceive it all as coming from you, and their response will be to their aggregate experience.

While the focus in this article is advocacy, it's helpful to understand how advocacy is different from other efforts and what types of challenges are best addressed by each. This helps us see the ways in which a well-crafted communication program can combine communication approaches, more effectively ensure that your organization is connecting with the people who use, support, and fund you, and enable you to build support for core issues and policies that can advance your mission and vision.

**Let's turn first to marketing.** Marketing is focused on creating a relationship between a customer and the provider of a service, program, or product. It often creates immediate-term action and impacts. Marketing is best used by social purpose organizations to do some of the following:

- Increase program participation
- Increase the number of members
- Reach special populations for programs
- Engage specific audiences to use key services

Promotions are used to gain participation in upcoming events, bring people to hear a speaker, and encourage them to use a service, program, or resource. Advertising, websites, brochures, posters, fliers, e-mails and other traditional tools are commonly used for marketing purposes.

**Closely related to the marketing function is a practice known as public relations.** Public relations efforts focus on deepening mutually beneficial relationships between an organization and the audiences that are key to its success over the long term. It differs from marketing in that it is not intended to build single transactions, but rather long-term relationships.

Public relations is best used by social purpose organizations to create and sustain long-term relationships with stakeholders, members, funders, voters, community leaders, potential partners, media and others whose influence and contributions are necessary. *It supports marketing and advocacy efforts because it is focused on the long term and enables you to build relationships with your media outlets, key community organizations, opinion leaders and other groups within your institutional structure (e.g., other departments, city and county work units, colleges, nonprofit organizations, foundations, businesses, etc.).* Stories in community, institutional and mass media outlets, partnerships developed to benefit your organization, sponsorships that help further your goals, and many of the same tools used in marketing are also common tools in public relations.

**The third leg of the communication stool is advocacy.** The Merriam-Webster dictionary simplifies it this way: “to support or urge by argument.” In other words, advocacy is building a case for support for a cause or issue and getting your audience to say “yes.” Advocacy is best used by social purpose organizations to advance specific proposals, such as funding or policy questions, and to advance specific issues (e.g., budget approval, bond or levy funding, healthy food choices for school children, tobacco-free communities, literacy, waste reduction, community development investments, etc.). It is also a powerful tool for social purpose organizations to use in advancing causes beyond their specific institutional needs but relevant to the fulfillment of their mission (freedom of information, free speech, civil and human rights, etc.).

## The Advocacy Process at Work

Successful advocacy begins with asking questions. Before you start your advocacy work, it is vital that you inquire into what the real issues or problems are and that you explore the reasons why these issues or problems exist at the deeper social level, not just in your organization. These are critical steps because they help you begin to frame your case in terms of the needs of your audience and explore solutions that help your organization advance the broader social good. This approach ensures that your advocacy is grounded in reasons that actually matter outside the walls of your organization. This article is organized around a series of questions that should guide all of your advocacy efforts. These questions are grouped into four categories: Purpose, People, Persuasion and Performance. There are four steps and a series of questions that include:

### *Step 1: Purpose*

- What is the problem/need and WHY is it a problem/need?
- How do you propose addressing this problem?
- What do you want as an outcome? (What is your specific proposal?)

### *Step 2: People—Identifying and understanding your audiences*

- Who are the people (audiences) who can help you make this outcome a reality?
- What are their values/needs/motivators? (What is important to them—not necessarily about your organization, but more generally in their day-to-day lives?)

### *Step 3: Persuasion—Messages and strategies that get to yes!*

- Why should your audience support your proposal?
- What does your audience need to know in order to take the action you want? *(The answer here should align with their values/needs/motivators.)*
- Who is the best person to share this story (best messenger)?
- How can you get the audience to listen to that person?
- What channels of communication are the best for the audience (not what is the most convenient for you)?

### *Step 4: Performance—Measuring your success*

- What did you do? (Output)
- What happened as a result? (Outcome)

As you read further, you'll see each of these questions addressed using an example that illustrates a fictional social purpose organization with a funding need.

## Step 1: Defining Your Purpose

At the start of your advocacy efforts, it's essential to step back and ask these formative questions:

- What is the problem or need we are trying to address?
- What is the cause?
- Why do you need to address this problem?
- How do you want to solve the problem/meet the need? How will your solution address the broader needs?
- What is your goal?

The first step in defining your purpose is to get clarity about the problem or need itself. Often, advocacy efforts don't work because we have not accurately defined the problem or need and we aren't clear about how to address it or what we want others to do about it. Other times we have artificially limited the problem in a way that focuses on how the problem affects your organization and not on the broader community or audience need that your organization may be unable to meet or address unless the problem is solved.

Let's turn to the challenge faced by the fictional institution known as "Health First," which provides health promotion and prevention programs and services in the community. Here's what we know: Health First is funded in large part by contracts from the city (tax revenue), and as a result it is a part of the budget of Cityville, a mid-sized community located about an hour from the largest metropolitan area in Anystate. Over the past 10 years, Cityville has experienced substantial changes as a community. The population has increased by 50 percent; the economy of Cityville, which was once one of the strongest in the state, has been deeply impacted by the recession; and more than 25 percent of new residents have come to Cityville from adjacent metropolitan areas with well-funded (and much larger) program and service providers, bringing with them urban expectations of services that are more robust than Cityville is currently able to meet. The population is fairly split between long-time residents, most of whom have grown children who have long since left Cityville, and new residents, who are predominantly young families, and include a significant number of Russian immigrants as well as a large and growing Latino population. Both of these cultural communities have been actively served by Health First. Despite the population growth, Health First has experienced a number of budget cuts over the last few years, resulting in shortened hours and limited ability to provide direct health-related services, including a reduction in availability of the community health nurse who has been a heavily relied upon resource. In addition, community outreach workers have been cut back, and Health First no longer has a health nurse who is fluent in Spanish. Despite the economic challenges, the community continues to need increased services and resources; however, the city government generally believes that the organization is "doing fine" and plans to invest heavily in public safety (police and fire) in the next budget cycle, with no additions to the

community health programs. The task for Health First is to advocate for restoration and then growth of the organization's budget to meet the community's needs. A volunteer group called Advocates for Health has come together to support the organization and wants to be a partner in Health First's efforts.

Applying our questions to the situation, let's look more closely at this scenario.

### **1. What is the problem or need?**

Health First recently conducted a needs assessment of Cityville residents to learn more about what programs and services were most needed. Community members sought increased access to health information, including healthy eating, smoking cessation, and chronic disease prevention; increased access to school-based health care (currently provided by the school-based health center); expanded access to materials in Spanish; more support in the form of programs for young people; and increased access to the community health nursing staff. The demand is greater than Health First's ability to meet it. (Note: The need is being defined here in terms of the community's need, not the organization's need.)

### **2. What is the cause?**

Changing demographics, an increasing population base and decreased funding to support community health services. (Note: When assessing cause, be sure to look at what has or has not changed. Examples: population increase, loss of a major employer, decreased general fund resources.)

### **3. Why do you need to address this problem?**

Community members seek access to affordable health services. The community is currently unhappy with the level of service being provided to them and the negative health impacts on residents, especially English language learners. Health First is clearly identified as a provider of community health services for Cityville and is seen as an "arm of the city." Without addressing these community needs, Cityville will risk reversing its trend of being responsive to community needs, which it believes is one of the reasons why it has had success in attracting new community members and in continuing to grow and diversify the economy. Residents have high expectations of Cityville, and unmet expectations translate into unhappy voters. (Note: You should frame the "why" in terms of the social impact vs. the social purpose organization-centric impact of not enough money.)

#### **4. How do you want to solve the problem/meet the need?**

Health First proposes to meet the needs of the community by expanding hours of the community health nursing staff to seven days a week and adding back bilingual outreach staff who were cut from the budget last year. (Note: The solution is not money; money is what pays for the solution. This distinction is important because when the argument becomes focused on money alone, your opportunity to build a persuasive case is diminished.)

#### **5. How will your solution address the broader needs?**

This solution enables service delivery at a level the community demands and expects, and it helps families access quality health services and information so they live healthier, more productive lives.

#### **6. What is your goal?**

Health First wants to expand hours of the community health nursing staff to seven days a week and add back outreach staff who are bilingual in English and Spanish in order to meet community needs. To implement the solution, Health First must convince Cityville to increase funding to Health First by four percent.

Armed with this understanding of your situation and the approach you seek to take to address it, you can begin to look at how to reach your goal. The next step is to understand who can help.

## Step 2: People—Identifying and Understanding Your Audiences

The next step is defining and understanding what motivates your audiences. There are two questions that must be answered in this step:

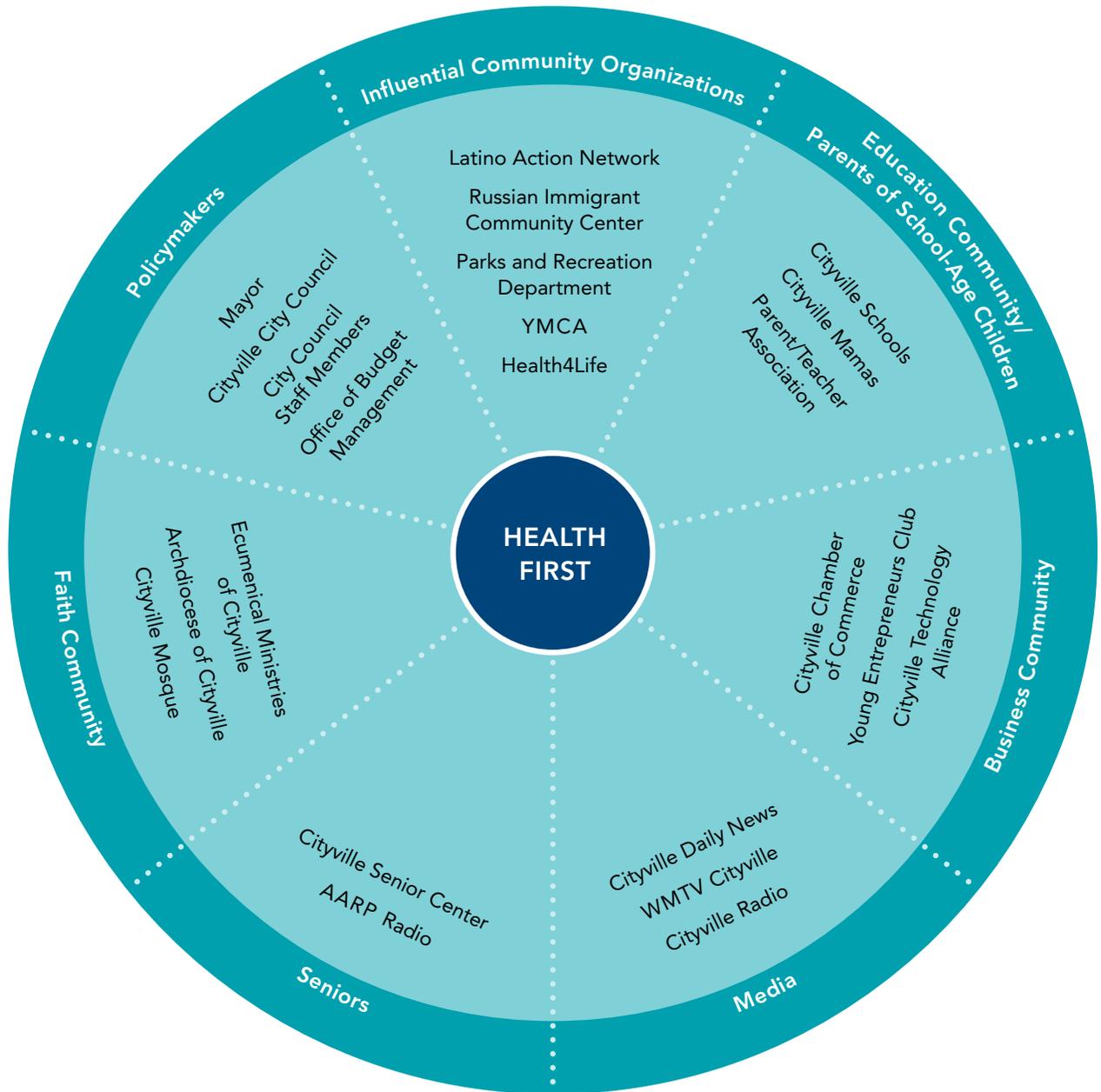
- Who are the people (audiences) who can help you make your goal a reality?
- What are their values, needs and motivators? (What is important to them—not necessarily about the organization, but more generally in their day-to-day lives?)

In order to achieve your advocacy goals, you must focus on the people who can help get you what you want. You probably already know many of the people or kinds of people who could help you successfully advocate for your issue. The illustration below shows some of the broad categories of audiences for social purpose organizations. It is important to think about your community and its specific social, economic, political and cultural audiences. Remember, effective advocacy must be targeted. You can still serve your entire constituency, but in order for your advocacy efforts to be successful, you need to focus on getting key audience groups to take action.

It is helpful to think of your audiences in two major categories: primary audiences and secondary audiences. Primary audiences are those people who can actually make the decision you are advocating. In our example, the elected officials on the Cityville City Council are the audience that will make the decision. Secondary audiences, who influence the primary audience, are often the best messengers to help advocate for the solution you proposed. In the Cityville example, secondary audiences could include leaders of education and cultural institutions in the community, business leaders and employers, realtors, medical associations, large health care providers, community opinion leaders, and individuals who can speak first-hand about the importance of the resources Health First offers to them, their families or the community as a whole. In many communities, specific priority individual influencers would include large or consistent donors to city council members' campaigns as well as known advisors or appointees to commissions and committees. The knowledge of existing trusted relationships between secondary audiences and the primary decision makers can help increase the efficiency and impact of your advocacy efforts.

## Priority Audiences

Using our Cityville example, the priority audiences would look like the figure below.



Once you know who your priority audiences are, then you can evaluate what their primary needs and motivators are and take a close look at what kinds of information they need in order to make a decision to support your request. The grid that appears below gives you an easy way to walk through each audience group and assess the information that would be most motivating to them.

It shows the process of analysis using two of the Cityville audience groups.

ANALYSIS STEPS	SAMPLE AUDIENCES	
<b>Audience/Segment</b> Who are the people we are trying to reach?	Policymakers (elected officials)	People with school-age children
<b>What do they need to know in order to take action?</b> What are the key motivators?	How the action meets community and constituency expectations; whether action is a wise investment (fiscally responsible)	How the action supports or creates opportunity for success of my child
<b>Who influences this audience?</b> Who do they listen to?	Policymaker's staff Constituents Business leaders Campaign donors Community leaders	Other parents Teachers
<b>Priority Ranking</b> A: Must reach in order to achieve stated goal(s) and/or help us reach other priority audiences. B: Need to reach in order to achieve goals. C: Helpful, but not immediately necessary to achieve goals. Invest less time with them.	A	A

## Step 3: Persuasion—Messages and Strategies That Get to Yes!

With your purpose and your audience clearly defined, you are ready to move into the action phase of your advocacy planning. This section addresses two parts: your message and your strategies. The questions you'll answer in forming your messages include:

- Why should your audience support your proposal?
- What does your audience need to know in order to take the action you want?

(The answer here should align with their values/needs/motivators.) A message sequence that you can adapt for your own use is included in this section.

### Building Effective Messages

Before you get started collecting facts and figures, it is useful to remember how decision-making happens. Most people make decisions first based on how they feel about something (with their heart) and then look for the data to support their emotional choice (with their head). To effectively persuade others, you need proof that speaks to both the heart and the head. This heart-and-head equation is essential to successful messages for any communication effort and is especially critical in building supportive action from your advocacy audiences. Remember, the burden of proof is yours. You simply can't assume people will make the connection between what you have to offer and what they care about. You have to make that link for them and show them how acting in support of your request is acting in support of their own values and interests.

Of course, the best starting point is to determine what the community (broadly) values most. Over the past decade, we have worked extensively with social purpose organizations using a values-based message platform that connects the social purpose organization with the things that people already value and are most likely to support. Education, economic vitality, health, and stable communities are excellent starting points. The section that follows describes an approach to use when building your advocacy messages.

Advocacy messages are most effective when they follow a logical sequence that begins with the ways in which the social purpose organization or desired policy change affects the things a community already values. It is difficult if not impossible to persuade an individual or a community to adopt a new value. Instead, you must understand how what you are advocating for—in this case, Health First—connects to the things that people already value. Using this sequence and the sample messages in this article, you can refine and customize your messages for your specific audiences. Though the exact way a message is delivered will likely change for different audiences, the basics should not.

A common sequence used in effective advocacy is illustrated in the graphic below and is subsequently described in more detail. Using this sequence to build your messages takes you through a series of steps for building effective arguments that begins with identifying how your organization supports key community values and ends with a specific call to action.



1. **Value themes:** These messages describe how your organization impacts/benefits the things a community already values. To ensure that this approach is useful to as many types of social purpose organizations as possible, the sample messages that we've used focus on four of the most broadly held value areas: community vitality and stability; education and lifelong learning; health and well-being; and economic health and return on investment. You may see other important values in your own community. If you know what they are, use them. If you don't know, conducting a survey or looking at other existing community research about priorities can help you further refine your approach.
2. **Need:** These messages define the community need, how the social purpose organization can meet that need, and what action is required for that to occur.
3. **Cost:** These messages define the cost/investment required from the audience in order for the social purpose organization to meet the community need (always in as simple terms as possible; for example, taking the overall budget figure and breaking it down per household, or per individual).

4. **Benefit:** These messages describe what the community receives in exchange for its investment. When you are developing benefit messages, it is important to remember to go back to the value messages in number one above. Ultimately, you should be able to illustrate how supporting your proposal results in improvement in areas that your audience values most:

- community vitality and stability
- education and lifelong learning
- health and well-being
- economic health and return on investment

These should be made real to audiences with tangible examples (expanded clinic hours in Cityville, five additional bilingual public health nurses, etc.).

5. **Call to action:** These messages ask the audience to take action and support the organization. Note: When the decision-making audience is the public and the organization is a public agency, these messages may need to be delivered by supporters outside the organization to ensure that you are respecting the boundaries established for public employees and the use of public resources. Organizations (including public agencies) can and should be actively using the first four elements of the message sequence to educate all your audiences.

One way that you can make the best use of this message framework is to keep the value themes (defined in section one above) consistent, so that all of your communication efforts reinforce one another. The needs, cost, benefit, and call to action can evolve as your organization continues to respond to your community's evolving needs and priorities.

When using and customizing these messages, place yourself in the shoes of members of your audiences. One of the biggest mistakes organizations make is crafting messages that appeal to those on the inside (preaching to the choir). Messages must be tailored to resonate with each specific audience and connect to what motivates them.

Let's look at how our friends at Health First have used the sequence in their community. For the sake of this example, we have assumed that the priority value themes in Cityville are health and community stability (including good choice-making about the investment of public resources).

#### **Value Themes**

- Health First helps residents live healthier lives by providing access to health information and community health services that enable seniors and young families to access low- or no-cost services. This allows citizens to be better advocates for their own health and well-being as well as for that of their children and grandchildren. *(Every story you tell should link back to this theme.)*

- Health First helps create a vital, stable, livable community here in Cityville by providing valuable health services and education to the community.
- Like many Americans, a significant portion of Cityville residents don't have health insurance. For them Health First is an essential health resource.
- Health First delivers an excellent return on community investment that has repeatedly proven to reduce the overall cost of health care in the community.

#### Need

- Health First is committed to meeting the needs of the community. Our recent survey shows that working residents need access to community health nurses seven days a week and want us to add back community outreach bilingual staff so we can continue to meet the diverse needs of our growing community.

#### Cost

- Just a four percent increased investment from Cityville in Health First meets this critical community need, bringing the city's investment up from \$4.69 to \$4.87 per resident.

#### Benefit

- The community has asked for increased access to community health nursing and outreach workers who provide for critical health needs in our community.
- A minor increased investment in services through Health First will enable us to meet these needs and invest in keeping our community healthy, strong and vital.

#### Call to Action

Be specific to the audience, but always translate your call to action into a specific form of support. Examples include:

- Tell a friend
- Support the organization (volunteer, donate resources or services)
- Endorse the organization's proposal
- Pass the budget
- Vote

*(Note: If you are a public agency, before you make a call to action, be sure to check with your legal counsel about what is and is not allowed.)*

Using Health First as an example, the call to action could be "e-mail or call your city council member and urge his or her support of the Mayor's proposed budget increase for health services in our community."

## Strategies for Successful Advocacy

Once you have actively defined your messages, it's time to determine how you'll share them and what supporting tools you need. This section discusses the strategies and tools you'll need to implement your advocacy plans.

The questions you'll answer to define strategies include:

- Who is the best person (messenger) to share this story?
- How can you get the audience to listen to that person or those people?
- What channels of communication are the best for the audience (not what is the most convenient for you)?

Successful strategies and the activities that flow from them can't be created using a cookie cutter approach, but there are some approaches that are more useful than others and don't cost a small fortune to implement. The most important consideration is to select approaches that are responsive to the needs and preferences of your audiences. The centerpiece of your advocacy strategy is linking your organization to existing community values, so you can tap into things people already care about. There are three approaches to demonstrating the connection between your organization and the values of your community:

1. **Direct outreach** — Share your message directly with those in your community who have the ability to influence others in favor of your issue and those who are or will be directly affected by your issue.
2. **Grassroots outreach and partnership development** — Connect with the organizations and businesses that have member, customer, employee and other types of networks that can join you in advocating for your issue because they share the same or a similar concern.
3. **Media and online communication** — Use traditional media, websites, e-mails, social media and other channels to support other forms of outreach and amplify your message.

In addition to these formal approaches, you can use print materials to support your efforts and further distribute your message. Be sure that if you do use print materials, you have a clear plan for distributing them and you are certain that they are in a format that is appropriate to your priority audiences. Remember, however, that people are most persuaded by other people, not by posters or fliers.

Word of mouth and word of mouse are among the most powerful and cost-effective approaches. They work by reaching audiences through existing relationships, establishing an endorsement frame, and building momentum. This approach is especially useful because it can be used effectively inside and outside your organization by staff, friends, stakeholders, community advisors, boards, etc. Make sure you arm your staff, volunteers, customers, suppliers, community partners and other stakeholders with the information they need to be effective messengers. Talking points and fact sheets that provide easy-to-repeat messages that reflect community values and needs can be great tools for this purpose.

### Tools and Tactics That Support Each Approach:

The activities and tools described below are grouped together under each of the three approaches so you can see the menu of things you could choose to do in your advocacy efforts. Remember that you are selecting tools based on what will work with your audience, not just based on what is easy or convenient.

#### i. Direct Outreach

*(typically involves individuals or small groups you meet with directly)*

- *In-person meetings*—Often the most effective outreach is a direct conversation. One-on-one or small group meetings with key influencers or decision makers provide the opportunity to make your case, build relationships, and request support in the most powerful person-to-person way. It is ideal to have an influencer with a direct relationship set up the meeting and participate in it. It is often beneficial to have one-to-two volunteer advocates (who are peers with the prospective champion) participate in the meeting and make any direct policy and advocacy requests that an employee cannot or should not make.
- *Coffees and brown bags*—Often used with elected officials or other community leaders, this type of meeting is an informal opportunity to share your point of view.
- *Meetings or town halls*—Elected officials frequently hold meetings or town hall forums when they are in the community. Make sure you attend. Recruit members of the community to attend and speak up for your cause using your key messages. You can also partner with your elected official to create a meeting focused on the value of the social purpose organization to the community.
- *Community meetings and public forums*—You can use existing community meetings and public forums about a variety of topics (schools, planning, etc.) to highlight your advocacy message, or you can create your own to talk specifically about the issue or cause. If you are trying to gather information about the needs of your community, these are good places to reach an informed and interested resident population.
- *Staff and committee meetings*—Elected officials typically have staff who deal with specific community issues and also serve on committees. In addition to connecting directly with your elected officials, form relationships with the policy staff.
- *Organization and partner events*—Utilize your organization's and your partners' events to communicate your advocacy messages, to engage additional advocates and to demonstrate the value of your organization.
- *Program outreach*—Use existing program outreach such as tabling at community events, education programs, etc., to share your messages.
- *Speakers bureaus*—Create a speakers bureau of trained messengers who can advocate for the organization and your key issues at a wide range of events.

Let's look at how Health First and its partner Health4Life used this direct outreach approach as a major focus of the work done by Health First to secure funding from Cityville. The first step the organization took was to talk with staff and volunteers who had been involved in the recent community assessment and to confirm the Health First board's approval of plans for securing increased funding from the city. The staff and volunteers created a regular e-mail update that they sent out biweekly to keep staff and community partners informed of the progress of the funding effort, to demonstrate the key messages, and to provide updates from the organization's board chair and from the volunteer leaders of the Health4Life group.

Health4Life then worked with Health First to host fruit breaks (their custom version of the traditional "meet for coffee") with key influencers and meet one-on-one with Cityville City Council members, as well as to attend regular meetings of the City Council. They recruited key community, business, neighborhood, and health care leaders to attend and testify at town hall forums about the city budget. In addition, information handouts that explained the organization's goal of expanding services and resources to meet community needs were available at all Health First facilities and programs and at joint programs conducted by the organization and the Latino Action Network. They created and consistently updated a Health for Cityville Facebook cause and a Twitter account for followers.

## 2. Grassroots Outreach

Building relationships with other community organizations can result in access to new communication channels that increase or convey your message to many members of their networks and the community. Grassroots outreach often involves making connections through a partner or ally in the community such as Boys and Girls Clubs, schools, the YMCA, cultural organizations, and community centers. Grassroots outreach can also be conducted directly to your volunteer, donor and support base.

- *Action alerts*—These are best utilized once a stakeholder group is engaged and becomes part of your grassroots network. These short messages are used to motivate action about a time-sensitive issue that requires immediate attention. The call to action usually involves contacting an elected official or media outlet to advocate for the desired action.
- *Social media campaigns*—By utilizing tools such as Facebook, Twitter, Flickr, YouTube and others, advocates can provide frequent updates, engage others to provide information and perspectives, and drive immediate action.
- *Phone campaigns*—This campaign technique is conducted by issuing an action alert asking participants to contact a person or group, or by convening in a phone bank location, such as an office with enough phone lines to have multiple callers making calls at the same time. Many organizations also conduct cell phone campaigns in which volunteers bring their own phones and are provided with a call list and script.

- *Partner mailings/postings*— You can expand communication channels by acquiring partners' mailing lists, by including social purpose organization information in partner publications, and by using partners' websites and social media tools.
- *Hearings*— Public hearings are held by many policymaking bodies and are a critical forum to ensure that the right messengers (diverse community members and influencers of the decision makers) are in attendance and deliver testimony that conveys the advocacy message and becomes part of the public record.
- *Lobby days*— A group or coalition of groups with similar interests organizes a lobby day to gather a large number of people at a capitol, city hall or county seat to conduct personal meetings with elected officials about a key issue or upcoming vote.

In our example, Health4Life took the lead on the grassroots outreach aspect of the advocacy work for Health First by connecting with several local groups, including Cityville Mamas (a child advocacy group) and the Latino Action Network (one of the community's largest cultural organizations), as well as the local YMCA and the Spring to Action Network (an outdoor recreation and health advocacy organization). Each of the groups had previously held community forums on behalf of Health First where community members shared their ideas and needs with Health First representatives. Health4Life asked these partners, as well as the Cityville Chamber of Commerce and the Cityville public schools, to host information sessions and share materials with their constituencies via mailings, e-mail and websites. They agreed to work with Health4Life to distribute information about the plan to expand resources and address needs to endorse this important investment in community health. They also formed a joint opinion leaders task force that met personally with elected officials and attended budget and other council meetings to advocate on behalf of funding for Health First. Health4Life organized several phone campaigns with volunteers from the partner organizations, generating numerous calls to city council members in support of the increased health investment.

### 3. Media Outreach

Media outreach includes using formal and informal media channels to extend the reach of your message. You may be familiar with a broad array of media relations tools. The information provided here focuses on the ways in which media can most effectively be used in support of advocacy efforts.

- *Editorial board visits*— Request a meeting with the editorial staff of a publication to share your story and ask for an editorial endorsing your position and urging readers to take action (vote, call their city council member, etc.).
  - *Editorials*— The official opinion of the newspaper, these articles appear in the editorial section of the paper. They are developed by editorial staff but can be influenced by advocates. Your goal is to get the editorial group to write a positive editorial about your issue.

- *Op-ed, opposite the editorial*—These signed opinion pieces are submitted to an editorial page for consideration. They can be submitted by an organization's Executive Director, board member, stakeholder or other advocates.
- *Letters to the editor*—These can be proactive letters of support that emphasize key advocacy messages and proof points. They can be used effectively as responses to editorials or key issues. (Remember, not everything requires a response.)
- *News announcements*—These announcements are the official way of releasing news to the media. Your news must be factual and timely. If it's neither, it's not news.
- *Feature pitches*—Pitching an idea (usually in an e-mail or conversation) to reporters, editors or producers to write a story on an issue, trend, personality or other relevant story that builds the case for the need or the organization's value related to the need, or that increases understanding of a key service.
- *Public service announcements*—These announcements inform the public about safety and health information, community services or public affairs.
- *Radio and TV programming*—This includes appearing on local radio or TV current events programs to talk about your issue.
- *Paid advertising*—While not traditionally something most social purpose organizations can afford, supporting groups may use this tool to reinforce the organization's message. This tool can include print, radio, television, outdoor, transit, or Web-based advertisements.
- *Social media campaign*—Proactive posting of campaign messages and calls to action on your blog, Facebook, Twitter and other venues and engaging other partners and advocates to comment, add content and advance advocacy messages both on your social media venues and on their own.
- *Web*—This includes your own website as well as those of media or partners.
- *E-mail campaign*—A letter-writing campaign can be conducted using e-mail.
- *Blogs*—Although community blogs are a more informal tool than your website, they are often read by respected opinion leaders.
- *Social media*—Facebook, MySpace, Twitter and the like are all excellent ways to distribute information via advocates and supporters to their social networks, and they are increasingly becoming a means of surfacing stories that may end up in other media. The use of social media as a tactic is most effective for advocacy purposes when it is authentic and truly facilitates the engagement of supporters or advocates.
- *Intranet (your own and those of partners)*—Internal websites (not available to the public) are another information outlet for messages about the organization.

Health4Life again played an active role in working with social purpose organization leadership to visit editorial boards, write letters to the editor, and share information on their own websites as well as on Facebook, Twitter and intranets, and ultimately convinced the four former mayors of Cityville to write a joint opinion editorial that was published in the local paper advocating for expanded resources for Health First’s vital services. The Fab Four (as the former mayors became known in the media) also produced a video that was distributed on YouTube calling for support of Health First’s important programming. Other partners used their websites to post information endorsing the budget increase and e-mailed their constituents asking for their support. These tools were used by all of the partners through the placement of links on their own websites to the newspaper editorial page and the video in both Web and social media forums. This particular campaign did not employ advertising as a tool because it was not the most effective way to reach the goal.

## Step 4: Performance — Measuring Your Success

Measurement and evaluation are critical tools for understanding how your advocacy efforts affected your goals. Too often, this step is skipped because it seems difficult, unnecessary, or self-evident (e.g., we got the funding). Whether your efforts succeeded beyond your wildest expectations, failed miserably, or hit somewhere in the middle, measurement and evaluation can help you understand what worked—and what didn’t—and how to adapt your strategy appropriately. In ongoing advocacy efforts, measurement can serve as ongoing “touch points” in a constant process of evaluation and evolution.

The first step in successful measurement and evaluation is setting goals and objectives that are measurable. The second is knowing your starting point—which is just one more reason to conduct even a simple community survey.

There are two primary ways to measure your accomplishments: process measures and outcome measures. Process measures look at activity (how many people attended open houses, how many fact sheets were distributed, etc.), while outcome measures look at what is different as a result (number of positive votes on the city council, actual policy and budget change, number of advocates and endorsing organizations, increases in patients served at clinics and by public health nurses, healthier people in the community, etc.). Each is a valid measure in its own right, but to create better understanding of what happened and why, you should measure and analyze both. (Note: For further information on measuring impact, see “Measuring What Matters,” an article on measuring social impact: [www.metgroup.com/MeasuringWhatMatters/](http://www.metgroup.com/MeasuringWhatMatters/).)

### Sample Process Measures (What did you do?)

- How much “stuff” did you create (fliers, postcards, bookmarks, brochures, media material, etc.)?
- Where and to whom did you distribute your materials?
- Did you conduct outreach? To how many people and where?
- Did you engage the media? If so, which ones and with what frequency?
- Did you engage the staff, board, administration, or other leadership of your own institution? If so, how?

### Sample Outcome Measures (What happened?)

- How many people saw your materials?
- Did you receive positive media stories?
- Did you earn endorsements from other organizations or individuals? If so, who?
- Who got involved? What did they do?
- Did you achieve your end goal? Did the policy change?
- What data do you have about the social impact of your effort (e.g., fewer sick people, higher literacy rate, decreased number of smokers, etc.)?

You can gather this information formally through surveys, interviews or focus groups, or informally, based on your own anecdotal evidence. Using both approaches will give you the fullest range of information. This information will help you assess what worked and what didn't. Most importantly, it will help you make adjustments in your approach as you continue to refine and improve your organization's important advocacy and communication work.

## Get Going!

Walk yourself through the steps outlined in this article. Ask yourself the questions and build your plan for successful advocacy. Whether you are advocating for funding for an issue that affects your organization's service delivery or to change policies that advance your mission and vision, you have a critical role to play. You must be an advocate, because if those closest to the organization aren't championing its role in meeting community need, why should anyone else? Furthermore, you and your colleagues have a unique perspective on how your organization changes people's lives and how it addresses community needs. You can also convert other community stakeholders to be champions and advocates for your organization's mission. It is through many voices and many perspectives that the relevance, impact and importance of your organization and your issues are best delivered. Remember, the approaches and tools outlined in this article are not strategies to be kept in reserve and used only when challenges arise; they are a set of practices that can greatly enhance your ongoing work, community engagement, program delivery and communication.

What you do every day matters. Social purpose organizations play a critical role in creating healthy, stable, vital, livable communities. Social purpose organizations also play a special role in empowering people to advocate for themselves, their families, their communities and the collective good. By empowering people as advocates for vibrant, fair and sustainable communities, social purpose organizations advance their missions and build capacity for continued efforts to improve our communities. Changing policies and practices really boils down to a question of who has the power of voice and thus a seat at the table. By embracing the role of advocates and applying advocacy approaches to the ongoing work of your organization, you amplify the voices of others and create powerful champions for the meaningful, equitable, healthy and civil society for which your organization stands.

## About the Author and Metropolitan Group

### Laura K. Lee Dellinger, Senior Executive Vice President



Laura is a principal and senior executive vice president of Metropolitan Group, a full-service communication and social marketing agency. An award-winning professional, she leads MG teams throughout the nation in the development of communication, branding, public education, advocacy and public will building campaigns, capacity-building and training programs, strategic plans and public affairs strategies. Laura is the principal in charge of MG's Portland office and heads the firm's strategic communication practice. Laura is sought after on a national basis for her deep expertise in the use of community engagement to mobilize stakeholders in community-based solutions to social challenges and issues. She has been with the firm since 1996. Current and recent clients include NYAC (National Youth Advocacy Coalition), King County (Washington) Library System, U.S. Health and Human Services Children's Bureau, Louisville Free Public Library Foundation, Oregon Department of Health and Human Services/Tobacco Prevention and Education Program, Illinois Department of Human Services, Mental Health Division, City of Portland Bureau of Planning and Sustainability, and Trillium Family Services.

### Contributors

*Thank you to our colleagues who contributed to the development of this framework:*

Eric Friedenwald-Fishman, Creative Director/President  
Jennifer Gilstrap Hearn, Vice President  
Nicole E. Carter, Senior Associate  
Jason Petz, Senior Graphic Designer

### Design

Jay Young Gerard, Vice President/Director of Visual Communication  
Jason Petz, Senior Graphic Designer

### Metropolitan Group

Metropolitan Group is a full-service social change agency that crafts and integrates strategic communication, resource development and creative services that empower social purpose organizations to build a just and sustainable world.

Metropolitan Group was founded in 1989 and has offices in Chicago; Portland, Oregon; San Francisco; and Washington, D.C.

We work exclusively on behalf of social purpose organizations—nonprofits, foundations, socially responsible businesses and government/public agencies. We work as a team with our clients to create results, including sustainable attitudinal and behavioral change, increased product and program use, and expanded revenues and capacity.

Our four practice areas are:

Strategic Communication

Resource Development

Multicultural Communication

Organizational Development

## Additional Resources for You from Metropolitan Group

### Trainings & Workshops

Metropolitan Group offers small and large group trainings, customized workshops and planning intensives on a wide range of topics, including:

Advocacy

Marketing Communication

Multicultural Communication

Public Relations/Media Relations

Public Will Building

Resource Development/Fundraising

Strategic Planning

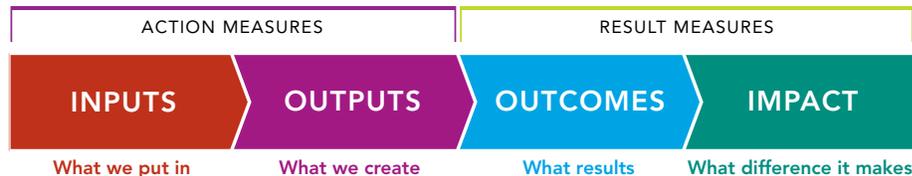
**Building capacity for the world's change agents.**



### Measuring *what* Matters

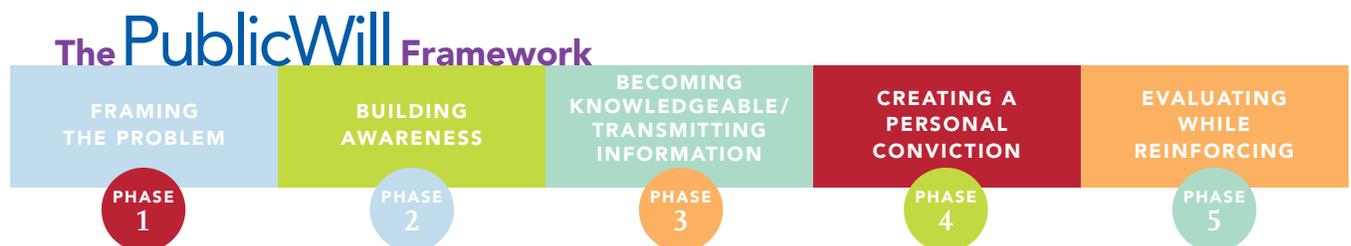
Measuring social change, from the actions we take to the results they generate, allows us to determine what's working and what's not, and to make the modifications required to align our human, financial and political capital in pursuit of that change.

Visit [www.metgroup.com](http://www.metgroup.com) to download our article.



Download our article on **The Public Will Framework**, a process that creates lasting impact by connecting issues with closely held values and leveraging grassroots and traditional media strategies.

Available at [www.metgroup.com](http://www.metgroup.com)



---

## INCREASING **Relevance** | **Relationships** AND **Results**: PRINCIPLES & PRACTICES FOR EFFECTIVE MULTICULTURAL COMMUNICATION

Effectively engaging diverse audiences unlocks new resources and brings additional perspectives and talents to the table to develop innovative and sustainable solutions to our most challenging social, environmental and economic issues. Visit [www.metgroup.com](http://www.metgroup.com) to download our article.

- |              |  |
|--------------|--|
| PRINCIPLE 1: | Check Your Assumptions at the Door: <i>Begin with yourself</i>               |
| PRINCIPLE 2: | Understand the Cultural Context(s) of Your Audience: <i>Do your homework</i> |
| PRINCIPLE 3: | Invest Before You Request: <i>Create community-centered partnerships</i>     |
| PRINCIPLE 4: | Develop Authentic Relationships: <i>Maintain a long-term perspective</i>     |
| PRINCIPLE 5: | Build Shared Ownership: <i>Engage, don't just involve</i>                    |
| PRINCIPLE 6: | Walk Your Talk: <i>Lead by example</i>                                       |
| PRINCIPLE 7: | Relate, Don't Translate: <i>Place communication into cultural context</i>    |
| PRINCIPLE 8: | Anticipate Change: <i>Be prepared to succeed</i>                             |

---

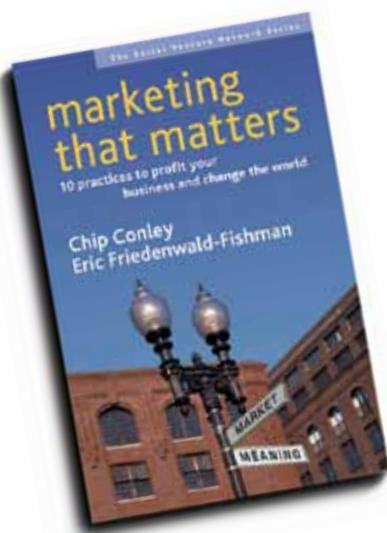
## Marketing That Matters: 10 Practices to Profit Your Business and Change the World

**The book on socially responsible marketing.**

Metropolitan Group's Creative Director/President, **Eric Friedenwald-Fishman**, co-authored *Marketing That Matters* with Chip Conley, founder and CEO of Joie de Vivre Hospitality ([www.jdvhospitality.com](http://www.jdvhospitality.com)). *Marketing That Matters* is a practical guide to strategic marketing that helps large and small organizations improve their bottom line while advancing their values.

Published by Berrett-Koehler and translated into Spanish, Chinese, Japanese, Korean and Portuguese.

Available at most local bookstores and at [www.svnbooks.com](http://www.svnbooks.com), [www.powells.com](http://www.powells.com), and [www.amazon.com](http://www.amazon.com).



Strategic Communication

Resource Development

Multicultural Communication

Organizational Development

Portland 519 SW Third Avenue Suite 700 Portland OR 97204  
Phone 503 223 3299

Chicago 35 East Wacker Drive Suite 1850 Chicago IL 60601  
Phone 312 628 1447

San Francisco 55 New Montgomery Street Suite 619 San Francisco CA 94105  
Phone 415 343 7588

Washington DC 2639 Connecticut Avenue NW Suite 250 Washington DC 20008  
Phone 202 355 9098

[www.metgroup.com](http://www.metgroup.com)

Metropolitan Group crafts strategic and creative services that  
empower social purpose organizations to build a just and sustainable world.



Metropolitan Group

the power of voice

