The Leadership Conference Education Fund

GRASSROOTS CAMPAIGNS & ADVOCACY

a toolkit to help you make change happen

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The Leadership Conference on Civil and Human Rights is a coalition charged by its diverse membership of more than 200 national organizations to promote and protect the rights of all persons in the United States. The Leadership Conference works toward an America as good as its ideals.

The Leadership Conference Education Fund is a 501(c)(3) organization that builds public will for federal policies that promote and protect the civil and human rights of all persons in the United States.

Access this material online at *http://www.civilrights.org/action_center/toolkit*.

The Leadership Conference Education Fund

Dear Friend:

Motivated individuals and community organizations are the engines that drive successful movements. The Leadership Conference on Civil and Human Rights and The Leadership Conference Education Fund have created this guide to provide you with useful tools for making change.

The Leadership Conference is a coalition charged by its diverse membership of more than 200 national organizations to advance and protect the civil and human rights of all persons in the United States. Through advocacy and outreach to targeted constituencies, The Leadership Conference works toward the goal of a more open and just society—an America as good as its ideals. The Education Fund builds public will for federal policies that promote and protect the civil and human rights of all persons in the United States. The Education Fund's campaigns empower and mobilize advocates around the country to push for progressive change.

Our founders shared a commitment to social justice and the firm conviction that the struggle for civil rights would be won, not by one group alone, but together in coalition. They were right. The Leadership Conference has led critical coalition efforts to win passage of laws that changed America, including:

- Civil Rights Act of 1964, which outlawed unequal application of voter registration requirements and racial segregation in schools, workplaces, and facilities that serve the general public;
- Voting Rights Act of 1965, which outlawed discriminatory voting practices that were responsible for the widespread disenfranchisement of African Americans, and its renewal in 2005;
- Fair Housing Act of 1968, which prohibited racial discrimination in the sale and rental of housing;
- Americans with Disabilities Act of 1990, which prohibits discrimination against people with disabilities in employment, transportation, public accommodation, communications, and governmental activities, and its 2008 amendments;
- Civil Rights Act of 1991, which reversed the impact of Supreme Court decisions that had undermined the original Civil Rights Act of 1964;
- Lilly Ledbetter Fair Pay Act of 2009, which reversed a Supreme Court ruling that denied many workers who had been discriminated against their ability to receive just compensation in court;
- Matthew Shepard and James Byrd, Jr. Hate Crimes Prevention Act of 2009, which expanded federal hate crimes law to include violent crimes based on a victim's actual or perceived gender, sexual orientation, gender identity, or disability;
- Violence Against Women Act reauthorization of 2013, which continues the investigation and prosecution of violent crimes against women and expanded the scope of protection.

As The Leadership Conference and The Education Fund continue to grow, our reach has expanded to work with allies around the country to advance the vision our founders had more than 60 years ago: working together for an America that is true to its promise of equal justice and equal opportunity. We are proud to partner with individuals and community organizations that share our commitment to achieving that vision, and we hope you'll find this toolkit helpful in advancing that goal.

Wade Henderson, President and CEO
The Leadership Conference on Civil and Human Rights
The Leadership Conference Education Fund

The Leadership Conference Education Fund

Dear Friend:

This toolkit was created with you in mind. Its purpose is to educate, equip, encourage, and empower you to make change.

Our goal is to provide you with the basic structure and strategies needed to plan and carry out an effective grassroots public education or advocacy campaign. It's possible to write an entire book on each of the areas covered in this toolkit – in fact, many have been written. But you don't have to read half a dozen books to put together a strong campaign.

What you need to do is establish your goals, create a strategy, make a step-by-step plan, and mobilize the people, partners, and resources to make it all achievable. This toolkit is meant to be a concise guide to accomplishing that. And we include plenty of suggested resources if you want more in-depth information.

The Leadership Conference and The Education Fund provide leadership and coordination to coalition efforts and support the work of national and local partners by providing strategic and technical assistance, preparing materials, offering training, and identifying resources to support coalition efforts. Information on training for grassroots advocacy is provided by The Leadership Conference; information relating to education and coalition building is provided by The Education Fund.

We believe in the power of coalitions to bring people together for a common purpose. History shows that change can be made when diverse voices unite around a shared goal. We hope you will consider us your partners in making needed change happen. You can learn more about our work at www.civilrights.org. You can also reach The Leadership Conference field staff at 202-466-3315 or at grassroots@civilrights.org.

Onward!

Ellen Buchman, Vice President, Field Operations
The Leadership Conference on Civil and Human Rights
The Leadership Conference Education Fund

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The Leadership Conference Education Fund

SETTING SMART GOALS

The first step in any campaign is setting goals and identifying benchmarks toward achieving them. Having explicit goals makes it easier to map out a strategy and to explain a campaign to potential supporters. One approach to clarifying goals is to use the acronym **SMART**: goals that are **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imed.

Specific
Having a specific goal makes it easier to determine the precise steps needed to achieve it. In addition, a specific goal is more measurable.

For example, "raising awareness" of an issue or "educating the public" are not very specific. What would it take for a campaign to be successful? Even if a goal seems obvious, try making it as specific as possible. An alternative to a vague goal like "making public officials more accountable in our state," might be something like this: "The creation of a new office of ethics and accountability that meets these four standards…"

Measurable
Clear and measurable goals can also help to raise money. Many funders want to be able to verify that funds are being put to work effectively. Having measurable goals can also help recruit, retain, and motivate volunteers; evaluate progress; and keep a campaign team on the same page.

Some goals are easier to measure than others. If a campaign is focused on changing a law or a regulation, it's easy to know whether or not success has been achieved. If a public education campaign is being carried out on an issue, create some qualitative and quantitative measures of success. Do you want to speak to a dozen new potential coalition partners? Have a volunteer leader featured in the local paper? Give media training to 20 local leaders? Earn a certain number of mentions in specific media outlets? Double traffic to your website?

Achievable
A goal that seems achievable with hard work can motivate activists to sacrifice time and energy to help accomplish it. A goal that seems unattainable or unbelievable may have the opposite effect; donors and volunteers are less likely to invest in what feels like an impossible quest. Are there any legal barriers to the change you want to make? Insurmountable political obstacles? Is there enough time to develop and deploy your campaign to meet your deadline?

Realistic
Evaluating whether a goal is realistic is less about the external environment and more about self-assessment. Among the kinds of questions to consider:

- What kind of financial resources will the campaign require?
- Can you identify likely sources of funding?
- Do your coalition partners have enough staff and volunteers to do what is needed?
- What are the competing demands for your time and energy? Will this campaign have a high enough priority to keep your coalition partners engaged?
- Are you likely to get support from influential community leaders?

Timed
Set deadlines. Assigning a time-frame to an ultimate goal and to the major steps in an action plan will help budget time and money, and will give you a way to hold people accountable for responsibilities they have taken. You may not always make your deadlines, but

having a timeline provides a valuable structure for the campaign. Some timelines may be set externally, like the dates of a legislative session. Others may depend more on how much groundwork is required to identify allies and build a coalition.

Getting SMART

Here's an example of a goal that is noble, but not SMART:

> *To ensure that schools collect and report data on high school dropout rates so that we can better evaluate disparities in educational opportunities and outcomes.*

That may be a good way to describe the mission or purpose of an educational coalition, but it is not specific or measurable enough to build a campaign around. Here's one way to make that a SMART goal:

> *To add a provision to the pending education bill before the end of this legislative session that would require high schools and state education departments to collect and report data on dropout rates that will permit comparisons between students of different racial and ethnic backgrounds.*

This is specific, measurable, and time-framed. It's possibly achievable as long as the legislature is still in session. Figuring out if it's realistic requires an honest assessment of your situation and resources.

With SMART goals in hand you are ready to think through your strategy and come up with an action plan. That plan will probably include a number of intermediate goals or objectives that will be stepping stones to your ultimate goal. Keep thinking SMART with each step you take.

Developing Strategy

Strategic planning is the bridge between setting goals and taking action. It is a process of thinking through and mapping out the steps it will take to achieve your objectives and reach your goals.

There's no single campaign template. Some campaigns may depend on generating media attention or mobilizing a specific constituency. Other campaigns may depend more on working behind-the-scenes to influence key decision makers. However, there is a set of questions to ask that will help you and a planning team prepare and implement a strategic plan.

A planning team should be a small group of people who work well together and who trust each other with frank opinions and honest disagreements.

TIP:
Obtain Data to Set Goals and Evaluate Progress

You may set a goal that requires you to collect some data. If your goal is to shift public opinion, you'll need to know where you stand at the beginning of the campaign. On many issues, polling data will be publicly available. If not, you might be able to partner with a polling unit at a university, or add a few questions to another survey.

Some government data is regularly reported and freely available. If what you're looking for requires some digging, you may need to fill out a written request under the federal Freedom of Information Act (FOIA) or your state's open records or "right to know" law. The U.S. Justice Department provides information on using the federal FOIA at www.foia.gov.

Ask the Right Questions

Developing a strategic campaign plan is a process of asking and answering a set of essential questions. During this process you may find yourself needing to revise or clarify goals and intermediate objectives.

Who are the decision makers?

Identify the people and/or institutions that have the power to make the change you are seeking. If you're trying to win passage of a law, identify the people who will determine whether or not you will succeed:

- Who is in the best position to introduce the measure?
- Which committee or committees will have to approve your bill or can include your provision in broader legislation?
- Who leads those committees?
- Who are the other influential committee members?
- Who has the credibility and influence to be an effective sponsor or public spokesperson for the measure?
- Which respected legislators can help you get a majority to support your bill?

And in a campaign focused on legislation, the mayor, governor or president will decide whether to sign or veto it.

Your campaign might not be about a legislative change. You may, for example, want a state or federal agency to adopt a regulatory change. You may want to push an agency to do its job better—to more effectively enforce voting rights provisions, exercise better oversight for recipients of social service funding, or better publicize the availability of resources for low-income families. The first question to ask is always the same: Who are the important decision makers?

- Which agency is in charge?
- Who in that agency has the ability to move your proposal forward?
- Who is the ultimate decision maker?
- What official process do they have to follow? Does an official have the authority to make a change on their own? Is there a formal process, with opportunity for public input? Is there an appeals process that you (or your opponents) may employ? What is the timetable that must be followed?
- What do they think about your issue?

Once you've identified the key decision makers, pull together what you know about their record and positions:

- What is their voting record?
- What is their record on issues similar to your campaign?
- What kind of public statements have they made?
- Have you or any of your colleagues had a private conversation with them?

You can take a direct approach to gathering information by calling or writing the office of a public official to ask if they have a position on your issue. Even a form letter response will tell you something.

What makes them pay attention?
Try to understand what is important to key decision makers, and how they make decisions.

- What issues do they most care about? Do they have passionate interests that you can find a way to connect to your campaign?
- Who do they listen to? Figure out whose opinions your decision makers trust. It might be that many legislators look to one of their colleagues who's an expert on an issue, or who is well-liked or respected. It may be that there are some lobbyists, donors, or other community leaders who are particularly close to a decision maker.
- How do they usually approach an issue? Are they people who generally focus on the financial implications of a proposal, or are they more likely to explain their positions in moral language? Do they tend to focus on the big picture (the welfare of the state) or on the details (the impact of a decision on a neighborhood or individual people)?
- What is their political situation or professional interest? Is an election coming up? Do they face a competitive election? Are they hoping to move into a higher position of authority? Can you make the case that leadership or effective resolution of your issue will help them reach their own goals?
- What else makes them tick? If you happen to know what kind of hobbies they enjoy, or where they worship, you might find other ways to connect with them.

Assess Your Capacities and Capabilities
What tools do you have to work potential levers of influence?

Existing Relationships

Evaluate the existing relationships that you or members of your coalition can use to influence the decision makers:

- Who among your team or coalition is particularly well-respected in the community?
- Who understands the political dynamics of your decision makers' constituencies?
- Which organizations have political influence or the ability to apply political pressure?
- Who has personal or professional relationships with the key decision makers or members of their "inner circle" of friends and advisors? Who volunteered or worked on their campaign? Who went to school with them? Served with them on the boards of community organizations?

Internal Resources

Do your resources match your ambitions? If you want to generate 250 phone calls to a key decision maker, does your organization or coalition have the ability to organize that? If you want to hold a public rally, do you have the staff or volunteer time to organize it, and the financial resources to cover expenses? If media outreach will play an important role in the campaign, do you have people who know how to work with media?

If this is a major campaign, you may be able to hire or dedicate staff, such as a campaign manager, field organizer, or media coordinator. If you won't have the resources to hire staff, assess the time commitment that existing staff and volunteer leaders will be able to make for the campaign.

TIP:
Work the plan, but don't be afraid to adjust it.

Any plan and timeline should be solid enough to guide your work and evaluate your progress. But it should also be flexible enough to respond to unexpected obstacles and adjust to new developments.

Create a budget that is based on the campaign plan. Don't forget to budget for the costs of fundraising itself, which can include printing, postage, staff time, travel, meals with potential donors, and the cost of fundraising receptions or other events.

If you determine that you are missing needed resources, you may need to review your goals and revise your strategic thinking. Do you need to broaden your team or your coalition? Is there a way to start small and expand as you gain visibility and access to additional funds?

Create a Written Action Plan

Put into writing the steps that the team has decided to take to reach your goal. It should include a timeline as well as intermediate deadlines for key objectives. Assign clear responsibilities for carrying out or overseeing each task. This can be as simple as making a chart so that everyone can see what needs to happen next, who is responsible, and what timetable they have agreed to.

Don't forget to take into account the external environment. Is it an election year? Is your state in the midst of a budget crisis? Are there particular issues dominating public debate? Are there public events during your timeline that provide organizing or communications possibilities?

Choosing the right mix of tools

Which of these tools you choose to use, and when, depends on what has the best chance to influence your decision makers.

Is the first objective to convince a key committee chairperson to sponsor and push legislation? That probably requires a behind-the-scenes "grasstops" effort to identify his or her key advisors and allies, and get their support. A different stage in your campaign might require a broader-based "grassroots" strategy that mobilizes constituents to weigh in with targeted legislators and generates a media spotlight.

Your team should decide in advance on a system of accountability. How often will you meet to evaluate your progress? How will you work together to make sure that people meet the tasks for which they have accepted responsibility? Making those decisions up-front can help make sure that members of your campaign team work together well and reduce the chance that you'll be distracted by internal tensions.

Resources:
Spitfire Strategies offers the "Just Enough Planning Guide" to campaign planning at *http://www.justenough-planning.org* and its "Smart Chart" guide to communications planning at *http://www.smartchart.org*.

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RAISING MONEY

Fundraising is essential to any campaign. It takes resources to set up information tables at public festivals and events, do mailings, keep volunteers happy with some food and drink—and of course pay for staff and advertising if that is part of campaign strategy. Putting together a campaign plan, and estimating costs for each element of your plan, provides a clearer sense of your fundraising goal.

Getting Ready

For an effective fundraising effort, you will need:

- A clear statement of the campaign's purpose (the need it fulfills or the problem it solves);
- Specific and measurable campaign goals and outcomes;
- A well-conceived strategy and plan for reaching goals;
- A reasonably detailed budget for putting the plan into action;
- A detailed plan for approaching funders and enlisting their help; and
- A willingness to ask for money.

Work with members of your own board and fundraising staff, as well as coalition partners and other allies, to put together a campaign budget and fundraising strategy. Identify local foundations, individual philanthropists, labor and civic organizations, and social and political clubs that might be willing to support a well-thought out campaign that can result in real and long-lasting benefits to the community.

Statement of Need

Foundations, other institutional donors, and major donors may require a statement of need to explain why they are being asked to support your campaign. A statement of need describes the problem that needs to be addressed or resolved.

A statement of need could be just a couple of paragraphs. Here's one example of a very short statement of need from the Foundation Center:

> *"Breast cancer kills. But statistics prove that regular check-ups catch most breast cancer in the early stages, reducing the likelihood of death. Hence, a program*

TIP:
Make your case to potential donors

- Identify the human need or social problem you will address.
- Document the need with data or validation from a respected source.
- Explain how the campaign is designed to address the need. Be specific about the outcomes.
- Establish confidence in your campaign's strategy, expertise, ability to succeed.
- Discuss the beneficiaries of a successful campaign: individuals, communities, the country.
- Identify the resources you need and what you are asking for.
- Make it easy for a donor to give.
- Build on success by cultivating donors for future giving.

to encourage preventive check-ups will reduce the risk of death due to breast cancer."

Concrete Goals & Objectives
Funders are interested in having measurable ways to evaluate the effectiveness of their giving. Many will require an outline of specific "deliverables" or "metrics" that will be used to evaluate whether and how well you accomplish your goals. For a public education campaign this could include the number of people you plan to reach through various public activities and events, the number of news stories you generate (or approximate audience for them), or the number of individuals who take a specific action. *For more information, see the "Setting Goals" section of this toolkit.*

Action Plan
Show potential funders that you have a strategic plan of action. A campaign plan should spell out the strategy as well as a calendar or timeline of key events or campaign milestones.

Budget
Create a budget based on your campaign plan. Every potential donor has different expectations about budget details, however they generally will want to see that you have thought through the costs of your campaign, including staff time and other direct expenses. Don't forget to estimate and budget for costs of fundraising itself, which can include printing, postage, staff time, travel, meals with potential donors, and the cost of fundraising receptions or other events. If your budget ends up being bigger than what you think you can reasonably raise, take another look at your campaign plan and figure out where you might trim. But don't be afraid to ask for what it will take to carry out your campaign.

Identifying Potential Donors
Consider the most likely funding sources.

- Do you have board members or donors who would be able to make a special contribution to this project?
- Remember to enlist as many solicitors and validators as you can. The more people that work with and model your fundraising plan, the more likely you are to succeed.
- Are board members or donors willing to approach their colleagues?
- What other members of the community may be willing to contribute?
- What about local labor unions, political organizations, or other institutions that should have an interest in the outcome of your campaign?
- Are there churches or other religious congregations with community-focused funding who will see your campaign as fulfilling part of their social justice mission?
- Are there local foundations that focus on the well-being of your state, city, or community?
- What kind of fundraising events could you hold?
- Who can you reach by e-mail, Facebook, or other social networks to ask for financial support?

Create a spreadsheet of potential donors, beginning with those closest to you, such as board members and the organizations they represent. Give yourself a place to note donors' interests and activities so you can acknowledge and connect with things that are important to them. Keep

Things to consider when budgeting for a campaign:

- Personnel costs and/or consultant fees
- General office expenses (phone, copier)
- Events (space rental, permit fees, equipment rental, materials, refreshments for volunteers)
- Materials (printing, distribution, and writing and design, if not done in-house)
- Advertising
- Staff and volunteer travel expenses
- Fundraising expenses (printing, mailings, events, meetings with potential donors)
- Website maintenance and management
- Workshops and trainings
- Organizational development support
- Travel
- Translations and interpretation services
- Lease and venue rental
- Equipment
- Office maintenance
- Media
- Evaluation and monitoring

keeping track of donors: sample spreadsheet

General Contact Information

FUNDERS					
Name	Organization	Address	Phone	Email	More Information
Funder, John	Foundation of Awesomeness	12 Generous Way Minneapolis, MN 55401	(651)555-2310	funder@awesome.com	Details on John Funder (click here)
Giver, Anita	Wonderful Giving, Inc.	72 Evergreen Street Charlotte, NC 28202	(980)555-7763	giver@wgi.com	Details on Anita Giver (click here)
Donor, Jessica	Best Bakery in the Bay (business)	801 Market Road San Francisco, CA 94501	(510)555-4398	donor@bestbakery bay.com	Details on Jessica Donor (click here)

Details on John Funder	
Contact in our organization	Felicia Tailor, VP for Communications
Notes	Felicia met John at a School Board meeting, where he expressed interest in giving. She will follow up with him by 7/16
Contact History	Initial meeting 3/18; Donor expressed interest in supporting our work.
Donation Information	Potentially up to 5K

Campaign Relationship
Who knows and is responsible for outreach

Amount to Request

Donor Notes & Contact History
Track conversations with donors, noting questions, concerns and other key information

Be sure to also include a **record of donations pledged and received**, and a column to record your **thanks and follow-up** communications with the donor

TIP:
Taking Care of Donors

People who have given to your campaign are your most likely source of additional support as long as you make them feel appreciated and connected. Here are a few tips:

- Thank donors personally and promptly. Hand written notes and thank-you calls can make a strong impression.
- Find ways to recognize their support publicly at events or on campaign materials.
- Keep them connected with campaign updates and invitations to campaign events. Email is a low-cost way to stay in touch.
- Ask for their ideas, input, and participation as well as their financial support.

track of who on your team is responsible for contacting each donor, and what kind of response they get.

Broaden your initial list by asking board members and fellow activists to open the door by introducing you to their friends and contacts. Some donors may give because they share the goals of the campaign; others may give primarily based on their relationship with the person asking. Don't be shy about casting a wide net. It never hurts to ask—the worst thing that can happen is that someone says "no."

Keep in mind that institutional funders, such as community foundations, may have a specific timetable for considering funding requests and a long lead time in making grants. Tailor your fundraising letter and other materials to meet their requirements.

Know Your Donors
The more you know about potential donors, the more you can make a connection between their interests and your campaign, and the better you'll be able to secure your donation.

The best chance of success in securing donations is an in-person meeting. Next best is over the phone. Direct

food for thought from a veteran fundraiser

Why People Give

- They want to.
- They are asked to by other people.
- They see their gifts as opportunities.
- They believe in the organization and its mission.
- They believe the organization can meet the community's needs.
- They are involved in the organization.
- They want public recognition.
- They want tax benefits.

Why They Don't

- The wrong person asked.
- The case wasn't strong enough.
- The appeal wasn't personal enough.
- No one suggested a specific amount.
- No one suggested alternative ways of giving.
- No one followed up.

mail, or online, even if compelling, will yield smaller contributions or fewer responses. All strategies are necessary. Keep in mind that knowing your donors makes all of these successful strategies easier.

Come up with an appropriate request. Some people may be able to give $1,000 while others may have to stretch to give you $10. When you put together your donor list, try to determine what level of giving is possible for people. You should know the giving history of your own board members and donors. A little research on foundations, other institutions, or prominent members of the community can guide you in setting targets.

Write a Fundraising Letter
Write a letter that you can send to potential donors. Use a personal tone and a direct style. Explain how a donor's support for your campaign will make a difference in your community or for the causes the donor cares about. For smaller donors, ask for a specific amount of money. For potential major donors, ask for the opportunity to talk with the donor in person or by phone.

Fundraising Events
Fundraising events, such as a reception, luncheon, car wash, block party, music festival or auction, can build energy and showcase the campaign for a lot of people at once. But events can take a lot of time and energy to pull off, and many campaign managers find that they are not the most cost-effective way to raise money. If you have a good track record with events, or if your community has a habit of turning out for them, make them part of your campaign plan. But consider your time as well as how you'll cover costs and make money.

Online Fundraising
New media and social media sites offer other possibilities for building your base of supporters. *See the "Using Social Media" section of the toolkit for more information.*

Develop Your Elevator Speech
Know your stuff. Before you start talking to potential donors, practice making a quick and effective case for supporting your campaign until it comes naturally. Some people call this the "elevator speech"—a way to make your case in the few moments you might have their undivided attention. Think of it as a more conversational version of your written mission statement. Be sure to have some personal stories about people who are affected by the problem your campaign is addressing that you can weave into a longer conversation.

The Ask
Start a personal conversation by thanking your potential donor for their time and interest. Make your case and answer any questions. Ask unapologetically for a specific amount and don't be afraid to sit in silence while the donor considers your request. Be a good listener. The donor is likely to identify his or her personal interests that identify areas of common ground with your campaign.

Follow Up
After you have finished a meeting or phone call, jot down some notes about your conversation. Did they have questions you couldn't answer? Did you offer to send any specific information? You can use these notes to personalize your thank-you note and develop a stronger relationship over time.

Additional Resources

- The Foundation Center offers free online tutorials and training courses in budgeting, proposal writing, and other topics, and sells books and other resources: http://www.foundationcenter.org.
- You can find information and advice about putting together a fundraising plan, writing good fundraising letters, and maintaining relationships with donors here: http://nonprofit.about.com/od/ fundraising/ Fundraising_Tips_and_Tools.htm.
- The National Committee for Responsive Philanthropy and the Center for Community Change produced this advice on fundraising for community organizers: http://www.ncrp.org/files/publications/ seizingthemoment.pdf.

"Encouraging Words"

Don't be afraid or ashamed to ask for money. You believe in what you're doing and people will respond if you let your passion come through. Don't be discouraged if some people don't respond right away, or can't give at the moment. Asking for money gets easier with practice. The more people you ask, the more will give.

The Leadership Conference Education Fund

BUILDING AND SUSTAINING COALITIONS

A coalition is a group of organizations that agree to work together toward shared goals. It may be a more permanent and structured coalition, like The Leadership Conference, or a less formal collaborative working group that comes together for a specific campaign. Many coalitions will not have their own staff, but function as a team of people representing the coalition's members. For example, the *Transportation Equity Caucus* includes national organizations that work together to monitor legislation and promote policies to prevent taxpayer funded discrimination. It doesn't have its own staff or budget, but functions based on what each group is able to bring to the table.

Working in coalition is essential for bringing about change that would be impossible for a single organization to achieve on its own. Coalitions require their own investment of thought, energy, good will, and open communication.

Identify and Recruit Potential Coalition Partners

A diverse coalition can draw interest and resources from across a community. For example, the coalition that pushed for passage of federal hate crimes legislation included not only traditional civil rights organizations and groups that advocate for particular communities (including the rights of women, people with disabilities, and LGBT people), but also law enforcement groups.

While diversity can bring strength, it should not come at the expense of shared purpose. It is essential to any successful coalition to have clear goals to which all partners are committed.

Building with Purpose

Start by making a list of groups whose missions are clearly aligned with the goals of your campaign. Expand it to include others that generally share your values.

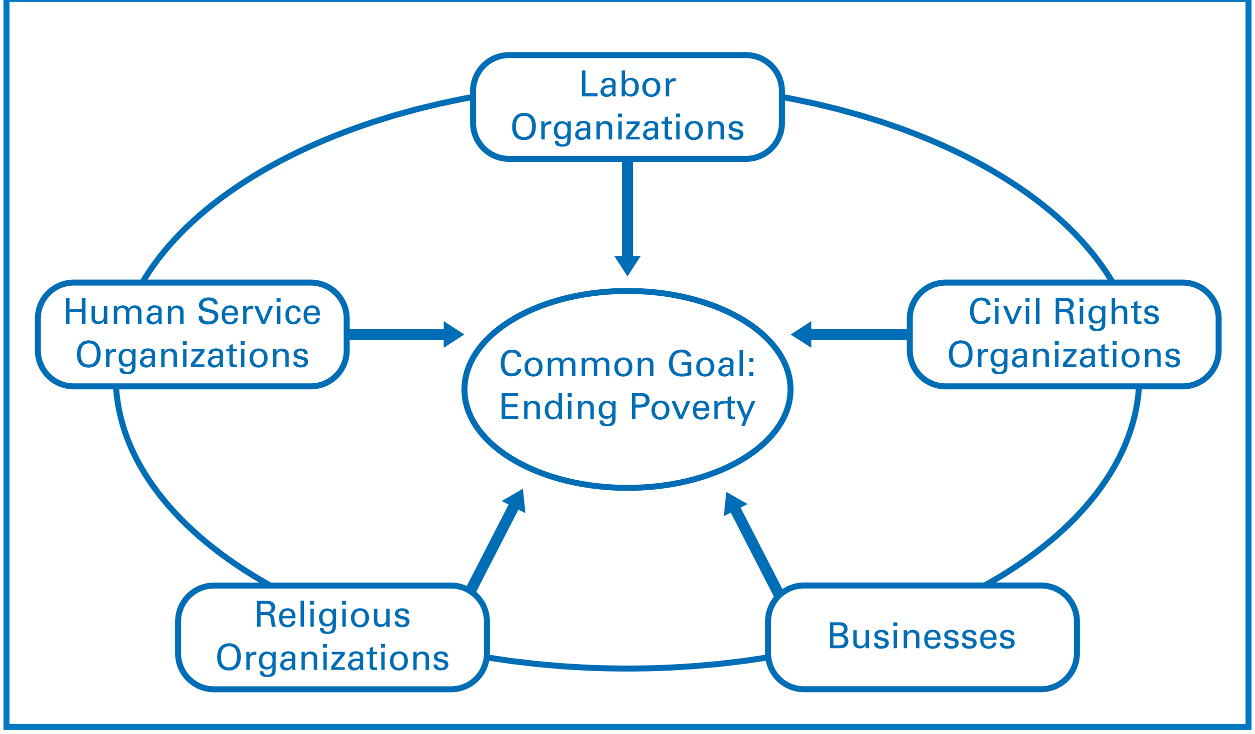
> The Leadership Conference on Civil and Human Rights is the nation's oldest and largest civil and human rights coalition, with more than 200 national organizations. The Leadership Conference and The Leadership Conference Education Fund believe in the power of coalitions, because every day we see how the diverse expertise and abilities of organizations working together strategically can create a whole that is more effective than the sum of its parts.

For example, if the goal is to create a new ethics commission, start with groups that focus on ethics and accountability in government, such as Common Cause and the League of Women Voters. Next, consider organizations that are likely to share the values that the campaign will promote: honesty and accountability. That might include ministerial associations, interfaith coalitions, and local community groups. Then approach other potential allies: community service organizations, state or local bar associations, public employee unions, state and local chambers of commerce, and other public interest advocates who may see favoritism and corruption harming their ability to do their work or damaging the community's reputation.

Unexpected allies can help get messages to new audiences. For example, in 2015, The Leadership Conference Education Fund was among the founders of The Coalition for Public Safety, which will work to make the criminal justice system more just, fair, and effective. The coalition brought together an ideologically diverse set of groups who often find themselves on opposing sides of other policy debates, a fact that helped generate national news coverage of the coalition's launch.

Start with people you know personally. When you've enlisted their support, ask them to suggest other participants. If they have personal or professional relationships

SAMPLE COALITION



with some of your potential partners, ask if they'll make the first contact or introduce you.

Have a short written description of the coalition's goals and objectives ready to send as a follow-up to your conversation. Give people different ways to be involved; if they can't serve on the steering committee, perhaps they can name a staff liaison to the campaign. If they can't commit to long-term participation, maybe they can co-sponsor a single public event.

Some organizations may have to follow a formal process before signing on. These are opportunities to make new allies and sharpen your ability to make a compelling case for your campaign. Collect business cards and follow up with each person you meet. Maintain a database of contacts—like an Excel spreadsheet—to keep track of who you have met, what level of information you shared, and what kind of response you received.

Coalition Structure

Every coalition will have different needs and dynamics. If the coalition is more than a few representatives, it may need a steering committee or executive working group that will serve as a functional board. There is an inherent tension between the need for a relatively small group that can make decisions nimbly and the importance of having partner groups feel that they have a voice in decision-making. Minimize potential conflict by having an agreed-upon and clearly understood procedure for coalition decision-making.

It may also be useful to create task forces that take responsibility for different aspects of a coalition's work or a specific campaign. Here is one way to envision the structure for a campaign being run by a coalition.

Keeping the Coalition Together

Sustaining agreement on a coalition's purpose, strategy, and activities can be challenging. Even when you share a common goal, it's easy for disagreements to arise among people with different perspectives, levels of expertise, personal histories, and organizational interests. Here are some general tips for trying to keep a coalition running smoothly.

Clarity is your friend. Having clear goals, plans, procedures, and assigned responsibilities is one of the best ways to minimize potential conflict. Be sure everyone

TIP:

Public attention may bring more allies to you. But that's more likely if you have made an effort from the start to be broadly inclusive. Some groups may resent being asked to add their names to what feels like a finished product without opportunity for input. Others will be grateful to have had someone else do the planning and will be content to lend their support as long as the demands on their time will be minimal. Keep in mind that it's only human to want to feel included—and respected.

> **TIP:**
> Be careful not to take a polite expression of interest as a commitment. Never put anyone's name on a list of coalition members or a public sign-on letter without written confirmation.

understands and accepts how decisions will be made. After each meeting, recap what has been decided, who has taken responsibility for which tasks, and when they have agreed to complete them. Putting things in writing helps avoid misunderstandings.

Be aware of power dynamics. If one or two organizations dominate a coalition, others' commitment might diminish over time. Remember that each organization has its own priorities and needs for visibility, membership engagement, and fundraising. Find ways to share the coalition's voice. One way to work around potential problems is to design campaign messages and online presence that use institution-neutral branding. A coalition of organizations working on immigration reform chose "Keeping Families Together" as an umbrella that appealed to a shared value and under which coalition members could share more specific messages of interest to their constituencies. But the website is focused on telling immigrants' stories, not promoting the organization's member organizations.

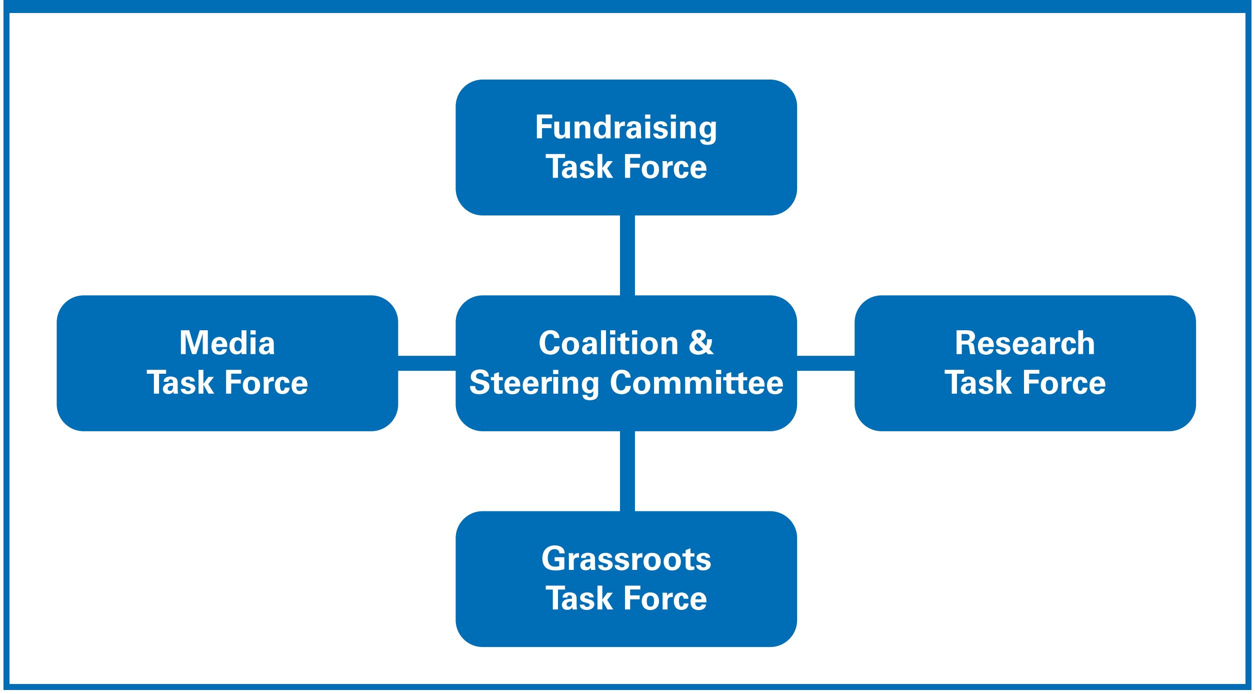
Communicate frequently in a way that everyone agrees will be efficient. Monthly or weekly meetings may work to track your progress and make necessary adjustments to your plan. If you have a larger coalition or campaign team, you may need separate meetings for the executive committee and task forces organized around specific projects. Be sure that different parts of the coalition communicate decisions and progress to each other.

Disagreements are to be expected and resolving them is part of the process of managing a successful campaign. If serious disagreements arise that threaten the group's ability to work together or disrupt progress toward the goal, deal with them honestly and directly. Here are some tips:

- Recognize the problem directly and respectfully.
- Seek clarity on the nature of the problem: Is it a disagreement about strategy? A struggle over turf or visibility? A personality conflict between members of the group?
- Try to identify a coalition member or community leader who might be able to mediate the differences or propose a resolution.

If sincere efforts fall short of resolving disputes, try to determine whether they can be worked around (for example, by placing people with difficulty working

SAMPLE COALITION STRUCTURE



together on different task forces) or whether there's an acceptable compromise on strategy or tactics that all sides can live with.

TIP:

When you can't meet in person

People may find it easier and less disruptive to their schedules to hold some meetings by conference calls. Larger organizations may have their own conference call systems. If you don't have an organization with that capability, you can arrange conference lines through services such as *www.freeconferencecall.com*.

One of the best ways to communicate quickly with a large number of people is to set up a group email list. It's virtually free and instantaneous and will probably be your primary means of getting information to everyone in the coalition. If there's anyone in your coalition who doesn't yet have an email address, you can help them get one through a free service such as Google's Gmail (*www.gmail.com*). Both Google Groups (*http://groups.google.com*) and Yahoo Groups (*http://groups.yahoo.com*) allow you to set up email lists for free.

The Leadership Conference Education Fund

ORGANIZING YOUR COMMUNITY

Our campaigns have no power unless our communities are organized. Successful organizing requires building knowledge of a need or issue, developing a shared understanding of who has the power to make the desired change, and motivating people to take the actions necessary to influence those in power. Crucial to any successful organizing effort are messages that resonate with the people you want to engage, trusted messengers, and opportunities that make it easy for organizations and individuals to participate.

Listening is an important skill for an organizer. Take time to hear and understand the concerns that are motivating the people you want to organize.

You can reach people through in-person engagement, such as one-on-one networking, door-to-door canvassing, and public events, and through tools such as the mail, phone, email, and social media.

Starting Small

Holding small informal meetings early in your campaign can help you learn about people's values, needs, and priorities. Small gatherings allow organizational and community leaders to learn about your campaign, share their concerns, and ask questions they might not feel comfortable asking in a large public setting. They may also alert you to challenges or resistance you might face or help you identify people willing to serve as messengers and campaign leaders.

TIP:

You can save money if other organizations co-sponsor the event, share costs, or provide materials or refreshments. Often, local businesses and coalition partners will provide in-kind resources, space, food, and other commodities if given the opportunity to be listed as a cosponsor. You might be able to make a deal with a local copy shop and get free copies in return for advertising its name on the back of your brochures and flyers. Be creative!

Integrate small educational events into existing programs and activities. If your organization hosts classes or regular information-sharing sessions, have campaign materials available and encourage people to take part. If a group of service providers has a monthly meeting, ask to talk about the campaign and ask for input and participation.

Reaching Ready-Made Audiences

Take advantage of public events that will give you visibility and access to groups of people you want to engage in your campaign. Block parties, music concerts, and cultural festivals may give you good opportunities to set up information tables or have volunteers distributing information.

Here's a checklist for working public events:

- ☑ Understand the ground rules for setting up a table or distributing materials (for example, you may need to rent a table or get a permit to set up in a public space).
- ☑ Make sure the space is accessible for people with disabilities.
- ☑ Create engaging visuals: banners, signs, recognizable t-shirts for your volunteers.
- ☑ Ask everyone who shows interest to give you their contact information. Give people an easy way to take action, like signing a postcard or petition.
- ☑ Offer candy, stickers, or other small give-aways to draw people to your table.

- ☑ Prepare materials: fact sheets, flyers, palm cards, postcards that people can send to public officials, etc.
- ☑ Budget for the cost of renting a space, if any, as well as the cost to produce materials and provide refreshments for your volunteers and people who stop by.

Creating a Larger Community Event
One way to raise awareness of an issue or build energy and enthusiasm for a campaign is to organize a larger-scale town meeting, panel discussion, public debate, or more informal event like a block party. Here are things to consider as part of your planning.

Budget
An event doesn't have to cost a lot of money to produce, especially if you have access to rent-free space and equipment. But producing an event will take some money. Plan for the costs of space, food, materials, promotion, sound system, staff time, and parking.

Timeline
Develop a timeline of steps needed to plan, promote, and carry out your event. Give yourself enough time to get the word out once you've nailed down the time and place. Work backward from the date of the event and see where certain deadlines fall, such as being listed in a community calendar or having materials printed. Assign staff or volunteers responsibility for getting each task done.

Space
Identify a location that is convenient for the people you are trying to reach that has free parking; is accessible for people with disabilities; can accommodate a sound system and maybe some video. Make sure the space is a good fit for your expected turnout. Turning out 100 people is a big accomplishment but won't feel that way in an auditorium that holds 1,000. Consider whether the location feels like neutral or common ground rather than being associated closely with one leader or group.

Publicity and Outreach
Media publicity is helpful, so you should approach local columnists for coverage, ask community newspapers to include the event in the calendar sections (be aware of lead times!) and see if local radio stations will run public service announcements or let you come on the air. But individual contact is the most essential element to getting good turnout. Create flyers and have them distributed at the offices and service centers of local community organizations. Encourage congregations to publicize your event in their newsletters. Create a Facebook page for the event and encourage members of participating organizations to promote the page to their friends.

"Encouraging Words"

Don't be afraid or ashamed to ask for money. You believe in what you're doing and people will respond if you let your passion come through. Don't be discouraged if some people don't respond right away, or can't give at the moment. Asking for money gets easier with practice. The more people you ask, the more will give.

One of the most important things you can do is ask coalition partners to commit to turning out a certain number of people. And make sure all your sponsoring organizations make phone calls. When the Washington Interfaith Network held a town hall meeting with the new mayor to address issues of jobs and affordable housing, the meeting started with a representative of each organization or congregation stepping to the microphone to say how many people they had committed to bringing to the meeting, and how many were actually in attendance. That's accountability!

Format
How your space is set up physically will affect how people can interact. For a presentation or discussion among a small group of people, use a square or U-shaped conference table. For a larger event focused on presentations from speakers or a panel, set up a head table with the audience in rows, in a theater-style setting. If you want to encourage discussion among participants, or plan to have them break into small groups to discuss issues or strategies, set the room up with tables like a banquet room, with speakers at a head table.
No matter how your room is set up overall, be sure to have tables near the door where people will sign in when entering, and sign up for future actions or take materials when leaving.

Agenda
Think about your goals as you put together your agenda and speakers. Are you representing the diversity of your coalition and community? Is your event designed to draw people into your campaign? Include speakers who can energize people as well as educate them. High-profile community leaders and local "celebrities" can drive up turnout.

TIP:

A flyer or poster advertising an event is meant to get someone's attention and stir interest in attending. It's not meant to explain the issue in-depth—that's what the event is for. Keep the text minimal and make it eye-catching.

Sample Event Agenda:

11:30 am: (30 minutes)
- Set up tables, chairs, signage, food, etc. Make sure AV equipment is set up and working, name placards and water are on the table for the speakers.

12:00 pm: (5 minutes)
- As participants arrive, have them sign in and provide name tags.
- Direct speakers to their seats.
- Coordinate people getting food and getting seated.

12:05 pm: (5 minutes)
- Forum leader introduces moderator and key organizations involved.
- Moderator thanks everyone for coming. Thanks organizations who helped co-sponsor this event, outlines the agenda for the event and gives a brief background on why the coalition organized event.
- Moderator introduces panelists.

12:10 pm: (15 minutes)
- Panelist A speaks for 5 minutes.
- Panelist B speaks for 5 minutes.
- Panelist C speaks for 5 minutes.

12:25 pm: (30 minutes)
- Moderator leads Q&A discussion session with audience.
- Coalition members should think of a few questions in advance just in case people are too shy to ask questions at first.

12:55 pm: (5 minutes)
- Forum leader wraps up with key messages, a call to action (what people can do in their community), and thanks all for participating.

1:00 pm:
- Conclusion of forum.
- Clean-up.

Materials
In addition to basic fact sheets about the campaign, you might want worksheets for small group brainstorming, a suggestion box, flyers for upcoming events, and palm cards for participants to distribute.

Engagement
Give people something to do before they leave the meeting. Have them sign a petition or postcard, sign up to volunteer for a campaign committee or task force, or pledge to distribute information.

Canvassing
Sometimes the best way to reach residents of a particular neighborhood or electoral district is through door-to-door canvassing. Canvassing is a labor-intensive effort that requires good planning, careful organizing, and serious attention to the recruitment, training, and management of volunteers. Members of your group or coalition who have taken part in political campaigns may have experience in setting up and overseeing a door-to-door operation. If you don't have that experience among your core group, you could ask local elected officials or political party activists for suggestions on people who have experience in running a canvass.

Key things to remember:

- Have training sessions for volunteers to make sure they understand your campaign's key messages and know how to handle any difficulties that may arise.
- Set up a plan to cover the neighborhood and a record-keeping system to track which households you've contacted. Canvass on weekends or late afternoons when families are most likely to be home.
- Try to recruit volunteers who live in the neighborhood where you are going to canvass.
- Try to recruit bilingual volunteers in neighborhoods where many people speak languages other than English.

TIP:
Increasing Turnout

- Attend community meetings and ask permission to make announcements about your event.
- Get coalition partners to publicize your event in their newsletters and other communications with members or constituents.
- Submit listings to newspapers and radio stations with community calendars and columnists.
- Create a Facebook page for the event and ask members of participating organizations to invite their friends.
- Ask coalition groups and allies to make specific commitments to turn out a certain number of people and follow up with them to make sure they are planning to do it.
- Call your own members, constituents, and supporters and ask for commitments to attend. Try to get people to commit to bringing one or more friends with them.

- Consider a block party or other event to launch a neighborhood canvass, recruit volunteers, and let people know that someone may be contacting them.

Virtual Events

You can also create events that don't require people to leave their home or office by setting up conference calls or webinars.

Conference calls
Conference calls can reach a large number of people in order to hear a motivational speech from the campaign manager or a public official; to update activists (and media) on new developments or campaign milestones; or to allow activists to share success stories with each other. Readily available conference call technology can allow you to have several speakers in different locations who can also talk with each other before speaking to the wider group of participants. You can "moderate" the call in order to control audience participation, create an orderly Q&A process and more. For a simple conference call you may be able to use in-house technology for your organization or a coalition partner. Also available are services like freeconferencecall.com and a number of companies who provide the service for a fee.

Webinars
Webinars are conference calls with the added ability to share visual information on participants' computers. People phone into a shared conference call number and use the Internet to join the webinar. You could use a webinar to discuss polling results, share first drafts of materials for discussion, or show recruiting videos or advertisements. Webinars can be highly interactive, allowing participants to raise questions by phone or email, or to edit materials live while other participants watch. Participating in webinars generally requires people to have a decent computer and Internet connection, and download some software. A number of companies provide webinar services, such as anymeeting.com.

Organizing Online
Social media sites like Facebook (www.facebook.com) provide opportunities to create and build communities of support for your campaign and promote specific events. See the "Using Social Media" section of this toolkit for more in-depth information.

Resources:
Activation Point, a report by Spitfire Strategies on what moves people to action, is available at www.activation-point.org.

For a simple conference call you may be able to use in-house technology for your organization or a coalition partner. Check out available services like www.freeconferencecall.com. Or, if you have more complicated needs, try a company such as www.copperconferencing.com.

For more information on webinars see www.idealware.org/articles/fgt_online_conferencing.php.

For tips on planning a successful webinar, check out www.techsoup.org/learningcenter/training/page11252.cfm.

For other technical questions, see www.techsoup.com.

The Leadership Conference Education Fund

COMMUNICATING EFFECTIVELY

Not every campaign needs to incorporate a media component, but getting your messages out through print, broadcast, and online media is one of the most effective ways to reach the people who need to hear your message. To be effective while engaging with the media, you should consider how your activities can help drive news coverage in your community and which writers and broadcasters with whom you should build relationships.

Components of a Communications Strategy

How will media coverage help you achieve your ultimate goal? Figure out what you want to gain from media coverage and let that be the driving force behind your media strategy. Other things to consider:

- Audience(s): Who are you trying to reach?
- Messages: What messages will move people to take the action you want?
- Spokespeople: Who will be credible and effective in getting your message across to the people you're trying to reach?
- What kinds of media do your audiences pay attention to? What other ways can you reach them?
- Information and Events: What information do you have, or events can you create, that will interest the media enough to place stories or get your spokespeople in print or on the air?
- What are the campaign milestones that will make good stories?

Who's Your Audience and How do You Reach Them?

The media is not your target; it's an intermediary between you and the audiences you need to reach. The first step is to identify who those audiences are and the best way to reach them.

If you are building support for legislative action, the audiences you need to reach might include specific elected officials or their constituents, staff, and donors. Finding out the media that these individuals respect is an important starting point.

If you want to demonstrate credibility or power to your constituents or funders, you may want to generate coverage by mainstream media that you can share with them.

What's Your Message?

Messaging will be the heart of your communications campaign. A public education and advocacy campaign has to educate people and motivate them to take action. Your messages should accomplish both. Once you have refined your messages, get everyone involved in your campaign to use them. Repetition is key to a message sinking in.

Developing effective messages is as much art as science. But it's not rocket science. Here are some characteristics of good messaging.

Keep It Short and Simple

Prepare a short list of key campaign messages or talking points. If you have several different audiences, you might also have one or two special messages for those audiences. Each message should be short enough for a speaker to remember and repeat easily, and for a listener to understand and remember.

Inspiring and Motivating

Ground your messages in the values and priorities of the people you are trying to reach. Your main messages should let people know how taking action in your campaign will help them advance their values and create the kind of community and country they want to live in.

Use Accessible Language

Avoid jargon, overly technical terms, or acronyms that will mean more to insiders than to your audience. Also avoid having your main messages get too far into the details of a policy proposal. You'll need to explain those details, but the main messages should get a sense of the change you want to make and the values you want to advance.

For example, if you were running a campaign to boost state support for nutrition programs by 20 percent for people living below the poverty level or trying to expand the availability of breakfast programs for children of poor families, your main messages might be something along these lines:

- We can build stronger communities by building healthier families.
- Students learn more and schools work better when children have a healthy breakfast.

Tell stories

Find ways to illustrate your main messages with stories that give them a human face. Personal stories can be more effective than policy language or political rhetoric in helping people understand what is at stake and how your campaign will make a difference in peoples' lives. Be sure to make a clear link between your story and your message.

Here's how a campaign spokesperson might link a story to a campaign message:

> *I've been a teacher for 15 years and I know that students who come to school without a decent breakfast have a harder time concentrating. That makes them more likely to be distracted and to distract other students. It's one more barrier to learning for children who face a lot of them. Students learn more and schools work better when children have a healthy breakfast. In my experience, it's a great investment.*

Test your messages

It's always a good idea to get feedback on your intended messaging from people who are part of the audiences you are trying to reach.

Ask members of your coalition to identify a few people who would be willing to have a conversation over lunch. Or identify a church or community group that would be willing to host a conversation with some of its members. Present your draft messages, show them draft campaign materials, and encourage honest feedback. Have someone who is good at engaging people in conversation act as a moderator, probing for more than one-word answers. Larger campaigns with a budget for research often use focus groups, a professionally managed version of this process, to generate ideas that might be tested further in polling.

Identify Spokespeople

Every campaign needs a spokesperson who can convincingly communicate and reinforce your campaign messages. Your spokespeople should:

- Understand what they're talking about. Expertise in a community or issue area is the greatest asset an organization can bring to the media.
- Be considered credible, likable, and trustworthy by you, the media, and your audience.
- Be willing to be team players and stick to your campaign plan and messages.
- Have experience with media or be willing to spend time learning and practicing how to do it well.
- Be willing to commit time to appearing at public events or speaking with reporters.

Media is just one way to reach your audiences. See the "Organizing Your Community" and "Using Social Media" sections of this toolkit for discussions about reaching audiences through in-person and on-line organizing strategies.

The news media is often interested in "unexpected allies." So you may try to include people who might be viewed more typically as adversaries, such as a union official and a business leader, or political figures from different parties. You might demonstrate a breadth of community support by including religious leaders from different faiths or denominations.

Media Engagement

Make a list of the different ways you can reach your target audiences. Your media list could include "mainstream media"—such as the daily paper and local TV stations—as well as weeklies like neighborhood papers and publications targeted to specific audiences such as African Americans or Latinos. What radio stations are most popular in your target communities, and what local news or community affairs programs might interview your spokespeople? Are there major churches with newsletters that cover community affairs? Don't overlook newspapers and broadcast outlets that are in languages other than English. And don't forget the Internet; most areas now have online news outlets and bloggers that cover community affairs and local politics. Many of them have influential audiences, which include mainstream journalists.

Once you've made a list of news outlets you want to reach, identify the key media people you need to reach.

Don't Wait Until You Want Coverage to Introduce Yourself

Media relations is often about building relationships with journalists and columnists who are likely to be interested in the work you do. Sending a cold email or picking up the phone to introduce yourself to a reporter that covers the issues you work on is a much better way for him or her to learn about who you are than through a press release blast.

If you or the organizations in your coalition don't already have contacts in the media, you can build your own list including:

- Newspaper reporters who cover the issue you're working on.
- The reporter who covers your area for the Associated Press news service (www.ap.org).
- Columnists who write about politics or community affairs.
- Producers for local television and radio news.
- News anchors and reporters who cover public affairs.
- Bloggers and local opinion leaders on social media.
- Calendar editors that curate events in your region.

If you don't know the right person to talk to at a particular outlet, call the news room or assignment editor and ask who covers your issue.

Your goal is to establish a relationship that gets reporters to start thinking of you as a resource that can help them get their job done. You should:

- Provide them with useful information or help them find it.
- Return their phone calls or emails quickly.
- Find out what their deadlines are and do everything you can to meet them.
- Learn what kind of stories they write or produce, figure out angles that will work for them, pitch them ideas, and put them in touch with people they need to talk to.

If a reporter asks for information "on background" or "off the record," be sure you know exactly what he or she means by those ground rules. Background generally means the reporter can use the information without attributing it to you. Off the record means that you're giving information that can't be used in a story. You can't apply these retroactively—by telling a reporter something and then saying, "That's off the record!" It doesn't work that way.

Most of the time, you should stay on record with a reporter. One exception might be to ask to speak on background if you want to be able to have a conversation and talk freely without making sure every sentence is put together well. You could suggest that the conversation be on background, and that at the end of the conversation you can give on the record quotes in answer to any particular question.

Grabbing the Media's Interest

What makes a good story?

As you develop a media outreach plan, keep reporters' needs in mind. A reporter needs to be able to tell a good story. And television producers or reporters need visuals to go with any story. Here are some elements of a good story that can help you get reporters interested:

- Reasons to care—how can the story make an impact on people and the community.
- Good messengers—spokespeople who are interesting or compelling.
- A particular angle or niche—a specific detail is a good way into a story, such as the number of people served by a local health clinic.
- Something specific to the calendar—a relevant anniversary, an important deadline for qualifying for federal assistance, etc.
- Making "news"—launching a campaign, releasing a report, calling for an official investigation
- Good visuals—especially for TV.
- Ease of coverage—make journalists' jobs easier by offering clear information, compelling spokespeople, and quick responses to any questions.

TIP:

Be aware that conflict and controversy are often good stories from the media's perspective. If a reporter invites you to start or fuel a conflict, be thoughtful about how you want the story to be framed. Will fostering the conflict be helpful to your message or will it distract from the focus you want the story to have?

"Pitching" journalists
Your "pitch" is what you tell a journalist to generate interest in covering your campaign generally or a specific event. It should be short and to the point. It should take into account a journalists' need for news and a good story. Before you pick up the phone, write down your pitch and practice saying it until it sounds natural and conversational. If you have the time, it's a good idea to read or watch some of that reporter's work to get a feel for what interests them and how they approach a story, and demonstrate that you're familiar with a journalist's work when you're on the phone. If you have a hard time reaching a journalist on the phone, you can put your pitch in a written memo. Some reporters prefer to get information by email.

Here's an example of what a short pitch might look like:

> *Hi, Mark, this is Sheila Jackson from the Community Needs Coalition. I've seen your coverage of affordable housing issues, and I wanted to let you know that the upcoming census will have a big impact on local housing funds. Rev. Susan Schmidt, who you've spoken with in the past, is helping lead a new coalition effort to make sure everybody in our city gets counted, which has a direct effect on grant funding for housing. She'll be speaking at a press conference on Wednesday and would be happy to talk with you about the new campaign. Can I send you some more information? Would you be interested in attending the press conference?*

Be polite, but persistent. Don't be afraid to push a little if a reporter doesn't immediately show interest, but also respect that a reporter may be in the middle of something urgent. Don't take it personally if you get a quick no. Pitching in the morning is usually best for reporters' schedules.

Keep detailed records of all your conversations with reporters so you can refer to them the next time you're ready to reach out.

Making the Most of Your Interview Opportunities

Stay on message
Always know what you're going to say before talking to a reporter. This means knowing your campaign's messages and practicing them until you can say them easily and naturally. If a reporter asks you a question that seems off-topic, or wants you to comment on something you're not ready to talk about, you don't have to answer

TIPS for TV:

People who will be representing your campaign on television should either have experience doing television or be willing to spend some time preparing. At a minimum, practice for a television interview with a video camera (or in front of a mirror) until you feel confident making your main points without stumbling. Some tips for television:

- Keep your answers short. Practice getting your campaign's primary messages across in short, simple sentences. Include only as much detail as you need to answer the question or get your point across.
- Smile! A huge part of how people take in information from television is visual—what you say may leave less of an impression than how you say it. You want to come across as likeable, knowledgeable, comfortable, and enthusiastic about your campaign. A big smile might feel unnatural but it will keep you from coming across as angry or sulking.
- Keep your cool if the conversation gets contentious or unpleasant.
- Posture and eye contact. If you're standing and talking to a reporter while being filmed by a cameraman, look at and talk to the reporter. If you're in a studio being interviewed by someone in another location, look directly into the camera. If you're seated, don't lean or slump back in your chair: leaning slightly forward will give you much better energy and look better on camera. Keep hand gestures to a minimum, and keep them away from your face.
- Dress for success. Wear clothes that are appropriate for the setting. If you're being interviewed on a news program, wear business dress in solid colors. If you're being interviewed in a field setting, it may be appropriate to be dressed more casually. In either case, you don't want flashy patterns, jewelry, or accessories to distract attention from you and your message.
- Don't ever assume that the camera or microphone is off.

TIPS for Pitching:

Assume reporters are busy and respect their schedules.
Start a call by asking, "Are you on deadline?" If the answer is yes, ask for a good time to call back. Reporters are more likely to be on deadline and less likely to be able to talk to you in mid-to late afternoon. Morning or early evening calls are a better bet.

Be prepared.
You won't have a lot of time to make your pitch. Practice your delivery so that you can make your points quickly and smoothly. And have background information or detailed data at your fingertips in case the reporter starts asking questions.

their question directly. You can deflect it and get back to one of the main messages you want to get out. Don't worry about being repetitive—repetition is key to getting your message to sink in.

Don't ramble
Keep your sentences short and direct and stop when you've said what you want to say. Some reporters use silence to get you to ramble. Don't be afraid to stop and wait for them to ask the next question.

Reporters will often end an interview with a sort of wrap-up question such as, "Do you have anything else to say?" Use this as an opportunity to repeat your basic message as you'd like it to be used.

Take time if you need it.
If a reporter calls with questions, it's okay to take a little time to collect your thoughts. You can ask a reporter what kinds of things they want to talk about, and ask if you can call back in a few minutes. Then you can think about your main points, write out a few sentences if it will help you be clear about what you want to say, and call back. The basic goal is to know what you're going to say before you say it.

Always tell the truth—Never fake it
If you give false information to a reporter, you and your campaign will have a hard time regaining credibility. If you're asked about anything that you don't know the answer to, don't make it up. Just say, "I'm not sure about that detail, but I'll find out and get back to you." And then be sure to follow up.

Be friendly, but not a friend
You should assume that anything you say to a reporter could end up in print or on the air. Be careful about a reporter asking casual, "What do you really think?" kinds of questions after a formal interview seems over. You don't want to create an "interesting" story that would distract from your main message. The same goes for communicating by email. Don't be lulled by informal communication and write something you'd be unhappy to see in a column or blog post.

Holding a Press Conference

You don't have to have a press conference to talk to reporters. If you have information you want to share, you can just send it and follow-up with a phone call. You can invite media to cover events where actual campaign activity is taking place, such as a public rally, debate, or canvassing campaign. Only hold a news conference when you are releasing information that is new or important enough to be considered news by reporters, when you can present a great visual (such as a big group of supporters), or you have speakers who by virtue of their own position or celebrity will draw reporters to you.

If you decide to hold a press conference:

- Pick a time and location that is convenient for reporters.
- Reserve the room or get any necessary permits for an event on public property.
- Make sure the space is accessible for people with disabilities.
- Email a media advisory a few days before the event.
- Follow up in the days before the event with phone calls pitching the event to reporters—practice your pitch so you can quickly and convincingly describe the event, the news, and if appropriate, the good stories and visual images that will be available.
- Think about the visual that your speakers and supporters will present. Will they show the diversity and breadth of your coalition?

Among the basics you might need:

- Podium.
- Sound system, microphones, and an audio mult box for TV or radio reporters.
- Campaign banner or other visual backdrop.
- Water for the speakers.
- Materials that will make it easier for reporters to get the story right: a press release for the event, a short paragraph identifying each of the speakers, written copies of speakers' remarks, and whatever campaign materials or background information will help explain the issue and the campaign.

Don't let your press conference drag on. You don't want reporters to lose interest or feel like you're wasting their time. Aim for a few speakers (ideally no more than four, with the most well-known or newsworthy speaking last) each talking for a few minutes, so that you get from presentations to reporters' questions in 15 or 20 minutes.

If possible, record your own event with a digital video recorder. That way you'll be able to create your own news by putting the event or edited highlights on a website and send it to local bloggers and news outlets. The same goes for taking still photographs.

After the press conference, send the press release and other materials to reporters who did not make it to the event and follow up with phone calls offering them the opportunity to speak with one or more of the speakers.

Holding a Telephone Press Conference

A telephone press conference can be a great alternative to a traditional press conference. Among the benefits of a teleconference: you don't need to find (or rent) a location; speakers from different places without traveling; it's easier for reporters to cover the event while working at their desks; and you can reach out to reporters from a broader area, including other parts of your state or nationally. The main drawback to a teleconference is that you won't get television coverage or an opportunity to make your own videos of the event.

The planning process for a teleconference is much the same as with a traditional press conference:

- Pick your speakers carefully.
- Be sure your speakers are prepared (ideally, your speakers will do a practice run-through of their planned remarks before the call).
- Promote the teleconference with a media advisory followed up with phone calls.
- Record the event for your own use with a digital audio recorder or ask the teleconferencing service to record it for you and/or provide a transcript.
- Follow up with reporters who joined the call to see if they have any other questions.
- Contact reporters who don't call in and offer to send them copies of the report released or audio files of the presentations.

If you expect just a few participants, you could use a standard conference call number, where everyone calls in and can speak and be heard by others. However, there are real downsides to an open conference call, including background noise from other callers, the disruption of

Sample Media Advisory

Community Leaders to Launch 'Every Voter Counts' Campaign

Local Voters

With access to the ballot under attack, a group of labor, civic, and religious leaders will launch an diverse grassroots campaign to make sure every voter in the state knows their rights. A press conference will be followed by a town hall meeting will take place at the City Labor Center.

What: Press conference to launch 'Every Voter Counts' Campaign

Who: Dr. Jane Doe, State Advocates for the Ballot

Bill Smith, President, Eastern University Student Association

Joe Washington, City Labor Council

Rev. Sue Rodriguez, City Ministerial Alliance

When: Tuesday, October 10th at 10:00 a.m.

Where: City Labor Center steps (rain location— City Labor Center Room 210)

Why: Launch campaign to ensure all voters are aware of recent changes in state voting rights laws, discuss stakes for different constituencies, and talk about campaign strategies for overcoming challenges that new voting rights laws that voters may face.

For more information, contact Joe Johns at 222-222-2222.

Sample Messages and Talking Points

Below are some suggested points regarding the *Shelby* decision, and the need for Congress to act in a bipartisan manner to address the decision with legislation that would restore the Voting Rights Act's vital voter protections:

- **The Rights of Millions of Voters Have Been Put in Peril:** The *Shelby* decision essentially suspended the use of the most effective protection voters had against racial discrimination in voting. While other important sections of the Voting Rights Act remain in force, those sections alone are not sufficient, especially in places with a recent and persistent record of voting discrimination.

- **The Public, Members of Congress, and the Supreme Court Agree that Voting Discrimination is a Serious Problem that Requires a Solution:** There is nearly unanimous agreement that voting discrimination remains a serious problem. However, the Court's decision took away the most effective enforcement tool our nation has to identify and prevent this discrimination. Congress must now modernize the law to ensure that the right to vote, which is the right that fundamentally protects all other constitutional rights, is not denied or abridged.

- **Protecting Voting Rights Is an American Issue, not a Partisan One:** There is a strong bipartisan consensus that voters must be protected from racial discrimination. Since the *Shelby* decision, many Republicans and Democrats in Congress have issued statements about the need to restore voting protections. Time and again, members of Congress from both parties and across the country have come together to reauthorize and strengthen the Voting Rights Act. Many of the members who supported the last reauthorization are still serving in Congress.

- **Congress Is Already Engaged in a Bipartisan Process to Ensure Nondiscrimination in Voting:** Since the *Shelby* decision, the House of Representatives and the Senate have held hearings on the decision and the importance of the protections of the Voting Rights Act. Congress must act thoughtfully, but swiftly, to ensure that minority voters are protected. The process should be bipartisan, consensus-driven, and a model for how successful legislation is developed. Democrats and Republicans must work together to support the strongest voting rights protections possible.

- **Congress Has the Constitutional Authority and Moral Responsibility to Protect our Voting Rights:** Congress has the express authority under the 14^{th} and 15^{th} Amendments of the Constitution to protect voters from racial discrimination. It is critical that Congress modernize the Voting Rights Act to protect voting rights for all.

- **To Win Bipartisan Support for Fixing the *Shelby* Decision, We Must Maintain Our Focus on Restoring the Voting Rights Act:** While there are other important voting and election issues, it's paramount that we ensure that every American can exercise his or her constitutional right to vote free from racial discrimination. Congress must come together in a bipartisan way to restore the Voting Rights Act and protect real voters from racial discrimination. While other important sections of the Voting Rights Act remain in force, those sections alone are not sufficient to protect voters.

"hold music" if one of the callers puts the conference on hold, and a lack of control over questions. Commercial services can set up moderated calls that gives you complete control over the question and answer session. *See the "Organizing Your Community" section of this toolkit for more information on these services.*

Media Advisory

A media advisory is a document used to invite reporters to cover some kind of event, such as a press conference, forum, or rally. A media advisory should be short and to the point.

The goal of any advisory is to make the event sound interesting, newsworthy, and easy for reporters to quickly figure out the details. Give some thought to the visuals that could make it more appealing for a television reporter or news photographer to cover—and spell them out. You can use a media advisory to let people know about a formal event, like a news conference, or something less formal, like the fact that campaign activists will be working the crowd at a street fair or community event. *See the example on page 23.*

Press Release

A press release is a document that tells the story about an event, report, or news item. One trick to writing

TIP on Press Releases:

Approach your release as a reporter would. The fact that your group is putting out a report isn't news—it's what your report has to say. So your headline and opening sentence should not start with "Local group releases new report" but "New report documents urgent need for change on big issue."

a press release is to pretend that you're writing the story you would like to read in the paper the next day. Start with the news that you're making, include quotes from one or more of your spokespeople close to the beginning, and be sure to include the most important messages you want people to hear. You don't have to include every detail. A press release should be short enough (usually one page) for reporters to quickly get your key messages. You can provide more background in a fact sheet or in a conversation.

Letters to the Editor

One of the most widely read sections of any newspaper is the page featuring letters to the editor. The letters page is a great way for your campaign to get its message out. Most papers print short letters, so you're better off if you can get your message across in fewer than 200 words. Letters are more likely to be printed if they are responding to an event or a story that ran in the paper.

Keep an eye out for news stories on topics that are relevant to your issue, and respond regularly. For example, with the census:

- If there's a story about people without access to health care, you can point out that federal and state health funds will be distributed to communities based on census figures.
- If there's a story about school funding, or the poor condition of local roads, that gives you an opportunity to point out that funding for key services and infrastructure are based on population figures from the census.

You don't have to be complaining about coverage to get printed—you can use a letter to the editor to reinforce a good story and get its messages into the paper one more time. Most papers don't want to run a lot of letters from the same person, so encourage different community leaders and advocates to write letters.

Resources

The Spitfire Strategies Smart Chart for Assessing Communications, from Spitfire Strategies. *www.spitfirestrategies.com*.

Strategic Communications for Nonprofits: A Step-by-Step Guide to Working with the Media, by Kathy Bonk, Emily Tynes, Henry Griggs, and Phil Sparks. Published by the Communications Consortium Media Center. *www.ccmc.org*.

SPIN Works! A Media Guidebook for Communicating Values and Shaping Public Opinion, by Robert Bray, and other publications on communications strategy. *www.spinproject.org*.

Sample Letters to the Editor

To the Editor:

The recent story on voting rights ("Update To State's Voting Rights Laws," January 10) makes it clear why a civic education campaign like "Every Voter Counts" is important. If local voters are not informed and up to speed on the drastic changes that we have seen in voting rights law, many voters will find that their vote will not be cast. The "Every Voter Counts" campaign will provide vulnerable populations such as seniors, students and the low-income with the tools they need to ensure they are ready to cast their ballot free of confusion.

Joe Doe

To the Editor:

Your story about new voting rights legislation creating a toll on voters demonstrates the importance of doing everything we can to ensure all voters throughout the state are prepared for Election Day. The "Every Voter Counts campaign was created by a statewide coalition that has identified the most important tools and tactics that must be utilized if voters throughout our state will be prepared to head to the polls during on Election Day. It's time for all of us to work together to ensure democracy remains a reality in our state.

Julia Esquivel

Sample Press Release

For Immediate Release
(DATE)
Contact: (NAME, Contact Information)

(STATE/COMMUNITY) Parents and Advocates Urge Senator(s) (NAME) to Maintain Strong Federal Role in Education Bill

(CITY, STATE ABBREVIATION) – On (DATE), (NUMBER OF PEOPLE) (STATE/COMMUNITY) parents and advocates met with Senator (NAME) to discuss the importance of a strong federal role and state accountability in education.

Parents and advocates discussed with Senator(s) (NAME) the upcoming reauthorization of the Elementary and Secondary Education Act (ESEA), a law that has, for more than five decades, helped ensure that all children—especially children of color, children living in poverty, children with disabilities, and children learning English—have fair access to the quality education they deserve.

During the meeting(s), parents and advocates spoke with Senator(s) (NAME) about (MEETING TOPIC(s) OF DISCUSSION).

Senator(s) (NAME) told the group that (SENATOR(s) RESPONSE/COMMENTS)

"We believe that a strong federal role in the reauthorization of ESEA is imperative to the success of all of our students, and we are concerned about attempts in Washington to weaken this critical law. We thank Senator(s) (NAME) for meeting with us to discuss this crucial issue, and urge (him/her/them) to protect the rights and interests of all our students," said (NAME).

USING SOCIAL MEDIA

Social media is a broad term used to describe the ever-growing array of interactive communications, networking, and organizing activities that take place using digital and mobile technologies. Among the key characteristics of the changing social media environment are democratization and interactivity.

There are fairly low barriers for individuals, organizations, or campaigns to produce and share material and build and engage networks of friends and supporters. And the flow of information is no longer a one-way street from publisher to follower, but a robust and widening sharing of information, opinion, and opportunities for engagement.

Social media provides organizations with inexpensive—and often free—ways to reach out not only to their own followers and supporters, but to additional target audiences and the much wider universe of online users and activists. It blurs and sometimes erases the lines between what we think of as news outlets and what we think of as advocacy, community building, and political organizing.

Social media services like Facebook (www.facebook.com), Twitter (www.twitter.com), Tumblr (www.tumblr.com), Instagram (used primarily on mobile devices), and others provide opportunities to create and build powerful communities of support for your campaign. Facebook, for example, has more than 1 billion monthly active users, close to 900 million mobile users, and more than 700 million daily users. Twitter has more than 284 million monthly active users and is supported in more than 35 languages.

Using Social Media to Advance Your Campaign

A Campaign Website

Creating a website is one step to building an online presence. People who see something about your campaign in the news or hear about it from one of their friends will have a place to go to learn more, read campaign materials, find out how to get involved, and make financial contributions. The complexity of your website will depend on the size and scope of your campaign, and whether you're using the site to recruit and manage contact with your supporters. The cost of setting up a basic website is fairly minimal, or it could potentially cost nothing at all. You could create a campaign page on an existing organizational website, if you have one. Or you could use a page on Facebook as your campaign hub, which wouldn't cost anything.

Some guidelines for an effective website:

- Give some creative thought to your campaign graphics. Make your home page attractive and engaging and make sure it gives people a clear sense of what your campaign is about. Cover the basics: who you are, what your mission and goals are, what kind of activities you're engaged in, and what individuals can do to make a difference.
- Designate someone to update the website regularly with news about the campaign, short notes from the campaign manager, interviews with activists about why they are volunteering, videos taken from campaign events or trainings, etc.
- Make it easy for people to volunteer, sign a petition, or report contact with a targeted public official. Make it easy for people to donate.

Create a Blog

A blog is generally less formal and more interactive than a website. It's a place where you and your colleagues can share breaking news relevant to your campaign, post updates about events and campaign milestones, interact with volunteers, and generally build enthusiasm for the campaign. It will take someone's time to keep the blog updated, to monitor readers' comments if you set up your site to allow them, and to respond as necessary to comments from supporters or opponents. If you permit readers to post comments, you'll need a policy in place to deal with offensive comments. Some sites require users to register to discourage destructive, anonymous commenting. You can sign up for a free, easy-to-use blogging platform at www.wordpress.com or www.blogger.com.

In addition, identify important "influencers" -- other bloggers and activists who write about the issue you are working on. Reach out to them in the early stages of your campaign, and invite them to help you plan the online portion of your outreach and organizing strategies. You can reach a wide readership more quickly by getting attention (or writing your own guest post) on a blog with an established audience than by building your own blog audience from scratch. Once written, sharing blog posts on any social media sites your campaign is using will help amplify your message.

Create a social media presence

More than seven in 10 online adults use Facebook, and almost a quarter of online adults use Twitter. The odds are that many of your own board, staff, coalition partners, and campaign allies are on Facebook, Twitter, and other social media sites, and you should be on them too.

Think of a campaign page on Facebook as an extension of your website, with an important difference: people won't have to come to your site to get information (or remember, a Facebook page, for some campaigns, may serve as the primary website). With some creative thinking about your messaging you can build a large network of followers, fans, and supporters. Learn more about Facebook organization pages at www.facebook.com/pages/learn.php.

Facebook

Facebook is optimized for sharing of photographs, so consider creating a graphic image to reach more people than with text-only status updates. According to online strategists at Social Movement Technologies, the emotions that provoke sharing are anger, awe, and anxiety—your messages should be designed to evoke at least one of those emotions. Links to those images can also be sent by email and text.

Facebook also offers an affordable way to reach very specific target audiences with advertising.

Twitter

Twitter takes you one more step into an active conversation with people who are interested in your cause or campaign. The most notable feature of Twitter is that the size of your tweets is limited to 140 characters. These short messages will reach your followers online or via a mobile device. Your goal is building your number of followers and keeping them engaged with interesting, entertaining, empowering and up-to-the-minute news about your campaign and calls for urgent action. There's an art form to sending out short tweets that grab people's attention and encourage them to "re-tweet" to their own followers. They can link back to your latest video or call for action.

One feature of Twitter—which is now used on other social media platforms—is called a "hashtag." These are used to help people follow what others are posting on a topic. Hashtags start with a "#"—or hash sign. For example, people following comprehensive immigration reform might use #CIR as a hashtag and follow messages on that topic. If a lot of people are tweeting with a hashtag, that topic will be identified by twitter as "trending," and will be promoted even more widely to other twitter users.

Online activism can be a powerful way to capture the energy of a particular moment and galvanize others to take action. The hashtag #BlackLivesMatter, created by activists in response to the lack of indictment in Trayvon Martin's death, became a focus for organizing in response to police killings of unarmed Black men. #BlackLivesMatter provides both a message and a widely accessible means of sharing information, discussing strategy, and promoting lasting calls to action for a decentralized grassroots movement.

Organizing by Text Messaging

The number of people using mobile devices like smartphones has skyrocketed; a mobile device may be the only regular Internet access for some people. Text messaging has become an important organizing tool. At an event or on written materials you can ask people to send a single-word text message to a specific number

Tweeting for Change

Here are some online tools for effective Twitter advocacy:

For petitions: http://act.ly/

For following and communicating with members of Congress: http://tweetcongress.org/

For following and indentifying influential progressive voices on Twitter: http://tweetprogress.us/

or "short code"—an easy way for you to get someone's contact information, and for them to connect to your campaign. You should try to collect cell phone numbers at every opportunity; people are much more likely to read a text message than an email.

Online Video

Online video is a powerful tool for educating and engaging viewers. A video doesn't have to "go viral"—experience explosive growth in viewership because people share it widely—in order to have an impact. It is easy to set up a channel on YouTube and post videos there. You can use short interviews to introduce the campaign, promote highlights of public events, and tell the kinds of stories that show what kind of impact that people can have by helping you reach your goal. Use other social media like Facebook and Twitter to help drive traffic. The most effective videos, like effective messages, generate an emotional response that taps into people's core values.

Reaching Out to Online Media

Most newspapers have both websites, which are essentially online versions of the daily paper, and blogs, which give their reporters a chance to write and comment quickly and often more informally about topics they normally cover.

Reporters are often doing double-duty, writing standard news stories for the newspaper and looking for quicker tidbits for the blog. When you reach out to blogs and bloggers who are associated with mainstream journalism outlets—newspapers or magazines—treat them as you would other journalists. Introduce yourself and your campaign, encourage them to cover you and consider you a source. Pass along anecdotes, bits of inside information, and other material that might not make it into a straight news story but will help them fill out the blog. *See more about guidelines for talking with and working with members of the media in the "Communicating Effectively" section of this toolkit.*

Many blogs that are not affiliated with major news organizations also function at least partially as news aggregators, compiling links to other news sites, and as producers of content. They may serve as outlets for you or members of your campaign to post your own commentaries.

Other blogs are organized around political ideologies or specific issues. Whatever your issue, there are almost certainly blogs focused on it, some associated with advocacy organizations and others run by individual activists. There are well-read blogs focusing on communities of color, people with disabilities, LGBT advocacy and politics, and more. Many state capitals and other urban areas have influential blogs covering state and local politics and community affairs. Among their readers will be people you are trying to influence: journalists, public officials, and people who work for public officials or government agencies. Get to know blogs relevant to your campaign. Contact the editor(s) to see if you can post a guest blog or become a regular contributor. Reach out to contributors who seem to attract a lot of readers and commenters. Add your own comments to relevant posts.

Advertise Online

Many public education and advocacy campaigns don't have big advertising budgets with the ability to buy ads in newspapers or on local television and radio. But you might be able to afford online advertising. It is possible to target online advertising in an extremely focused way to people who are searching for information about your issue, to websites that attract members of your target audience, or even directly to the personal pages of people on social networks such as Facebook.

One of the simplest forms of advertising is Google's Adwords. This program allows you to have a sponsored link appear when someone searches for topics related to your campaign. The cost of the ad will vary, but you pay only when someone follows your link, and Google gives you a lot of flexibility in limiting your overall spending. Google has a *grant program* that provides free advertising for qualified 501(c)(3) organizations and offers *extensive guidance* in getting the most out of those free ads.

New Possibilities

The constantly changing world of new media offers new ways to educate and energize activists, identify and recruit new supporters, create visibility for your campaign, and potentially reach huge audiences at little cost. In addition, the interactive nature of blogs and social networks can help you benefit from the ideas and enthusiasm of supporters who take their own responsibility for spreading your message. And that can help you create a longer and stronger connection with individuals and a more powerful personal commitment to your campaign.

If social media is a new world for you, don't be intimidated. Find colleagues or volunteers who live and breathe this world and tap into their expertise. Look for opportunities to recruit student interns who have grown up in the online world. And take advantage of online websites and discussion boards that can help you understand how to make new media work for you. The following resources can get you started.

Social Media Resources

The New Organizing Institute (*www.neworganizing.com*) runs a progressive advocacy and campaign training program focused on cutting-edge online organizing techniques (e.g. writing effective emails, engaging bloggers, leveraging social networks, utilizing video), political technology (e.g. using data effectively, progressive technology infrastructure), and the intersection with field and management of these areas of new organizing. Its *online organizing toolbox* provides an array of how-to videos on story-telling, online video, advertising, fundraising, integrating online and field organizing, and more. You can read its Encyclopedia of New Organizing, watch previously recorded webinars online, and sign up for activist gatherings and trainings such as its Rootscamp, an interactive "unconference" where participants create the agenda and share their own successful stories and strategies.

- The Case Foundation's "Gear up for Giving" project includes links to free tutorials about social media strategy, blogging, Facebook, Twitter, YouTube, and more at: *www.casefoundation.org/social-media-tutorials*.
- The article: "Dissecting the craft of online political advocacy" can be found at www.epolitics.com. Epolitics (*www.epolitics.com*) has specific sections on the use of different social networks like Facebook.
- K Street Café is a blog where experts from a variety of backgrounds share new and novel ways technology, the Internet and social media are being used to shape public policies at: *www.kstreetcafe.com*.
- Companies such as Democracy in Action *http://salsalabs.com/democracyinaction* offer a package of tools for managing building an email list, creating advocacy alerts & petitions, and collecting donations.
- Network for Good also has some free tools for online fundraising at *www1.networkforgood.org/*.
- Google for Nonprofits is also a good resource for online tools at *www.google.com/nonprofits/*.
- EchoDitto is a new media firm that provides some free advice on best practices and can be found at *www.echoditto.com/best/organizing*.
- Here's an article about how one progressive religious campaign, Standing on the Side of Love, used social media in its campaigns to support LGBT equality and immigration reform: *http://krausnotes.com/2010/04/10/finding-faith-a-look-at-the-standing-on-the-side-of-love-campaign/*.
- Frogloop (*www.frogloop.com/*) is a blog about social networking and online organizing for nonprofit organizations sponsored by Care2. It also has tips about using social networks and tracking their effectiveness.
- M&R Strategic Services is a communications consulting firm that helps nonprofits use online tools. You can find a set of case studies and articles at: *www.mrss.com/publications.html*.
- There are a number of tools for adding text to images to create graphic "memes" for Facebook and other social media. Among them are Preview (for macs), Paint (for PCs), *Imgur.com*, *Pixlr.com*, and *Quickmeme.com*.
- Social Media Technologies is a nonprofit that offers a number of resources for organizing effectively online, including a *free 90-minute webinar that covers 14 tools and tactics to win campaigns in the digital age*.
- Salsa Labs, Green Memes, and a number of other organizations have collaborated to produce "The Most Amazing Online Organizing Guide Ever," which is free to use and share. The 80-page guide covers the use of Facebook, Twitter, memes, use of photography, and running an effective meeting. It also includes several case studies and a list of resources.
- *The Shorty Awards* honor "social good" marketing campaigns.

EDUCATING AND ENGAGING PUBLIC OFFICIALS

State legislators, governors, members of Congress, and state and national executive branch officials have the ability to make and shape policies that have a huge impact on people's lives. Think, for example, of the number of lives that have been saved by public education campaigns to combat drunk driving.

When meeting with public officials as a constituent, keep in mind that your leaders are in office to serve the public. You have a unique story and they won't know what you think unless you tell them.

Understand the Legislative Process

Knowing how the legislative process works, and tracking the progress of legislation you are interested in, will help you organize communication with legislators when it is most needed.

Educating Public Officials

Individual Meetings with Legislators and/or Staff

Most members of Congress and state legislators are happy to schedule meetings with constituents. Call the local office to find out when your elected official will be in town and ask for a meeting. Fridays and Mondays are often good days to find them in-district, as well as during a longer congressional recess. Their calendars can fill up quickly, so don't be surprised if it takes time to get a meeting scheduled.

If you are trying to set up a meeting on behalf of a local coalition or group of leaders, be sure to let the scheduler know how many people you expect to attend. Ideally it should be a relatively small group representing a diversity of constituent groups and interests. You may be able to get a meeting sooner—or with a higher ranking staff member—if you note in your request that a particularly well-regarded member of the community will be attending.

Be Heard!

Some people who work for, serve on the boards of, or volunteer for local nonprofit organizations, are wary of getting involved with advocacy campaigns. Some worry that campaigns to educate elected officials might appear partisan and damage existing relationships. Some fear crossing a legal line that could threaten their institution's tax-exempt status. There are good answers to these concerns. Don't let them prevent you from getting your message heard. If your voice isn't heard when public officials are considering action on issues important to you and your community, you'll miss out on a chance to influence their decisions.

Keep in mind that the congressional schedule is frequently changing, and you may end up meeting with staff rather than the legislator. Don't think of this as a lost opportunity. Staff members may in fact be more familiar with the details of an issue and may have more time to spend hearing your views.

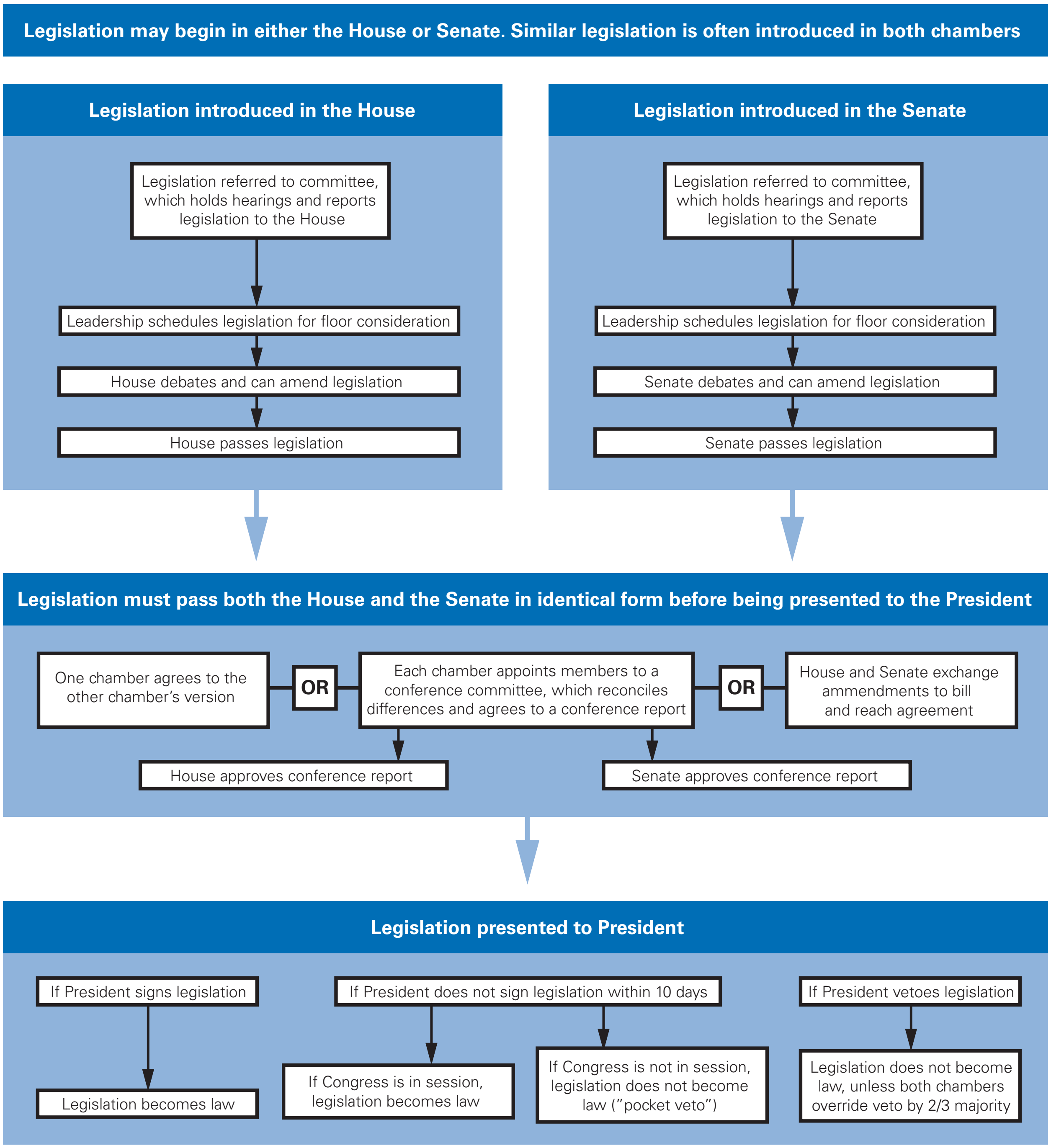
It can be frustrating to deal with staff at very busy legislative offices, and they may seem brusque or impatient with you. Remember that they are often operating under stressful situations. They're likely to remember you favorably if you show patience, respect, and understanding of their situation while making a request or advocating for your position.

Meeting with Your Elected Officials:

Prepare in Advance:

- Find out if the legislator has recently been in the media, and for what reason(s). That may tell you something about his or her current priorities.

United States Congress Legislative Process Flowchart



- Do enough research to understand the legislator's interests, positions, and voting record on the issue you are advocating for. If you are there to talk about a specific bill, be sure you know its current legislative status. Has it been introduced? Who supports it? Is it likely to be voted on soon?
- Anticipate the kinds of questions or concerns that will be raised and have clear answers ready. It's especially important to anticipate what your opponents would say to the same legislator or staff member.
- Know your message. Practice making your case clearly and quickly. If it's a busy day, your meeting may last as few as 10 minutes. If there are several of you, work out in advance who will speak first and what they will address. Don't waste people's time with long or repetitive presentations. Not everyone may be able to speak.

The Leadership Conference Education Fund

Sample Sign-On Letter/Letter to Congress

Cosponsor and Pass Without Delay the End Racial Profiling Act

Dear [Decision Maker],

The End Racial Profiling Act (ERPA S. 1670) has now been introduced in the House and Senate, and I am writing to urge you to cosponsor and pass the bill without delay. ERPA was introduced in the same month that we honored Dr. Martin Luther King Jr., who famously called on Americans to judge people not "by the color of their skin but by the content of their character."

Racial profiling refers to the practice used primarily by law enforcement officials of targeting and/or treating individuals unfairly based on their perceived race, ethnicity, religion, or national origin. The act of racial profiling was wrong when King urged its end; and it is wrong now.

Horrific examples of racial profiling are occurring all over the country. These incidents are tragically common practice in some places as a result of anti-immigration laws like those passed in Arizona and Alabama. Similarly, in the years since 9/11, the federal government has diverted massive investigatory resources on Arabs and Muslims, singling them out for questioning, detention, and other law enforcement activities based on their religion or ethnicity rather than their individual behaviors.

If we act now, we can begin to re-establish trust in law enforcement and ensure that everyone who lives in our country is protected.

- If you are meeting with a group, be clear on each person's role and the speaking order. It may be helpful to identify someone to open and close the conversation. Prepare materials to leave behind with the legislator or staff, such as fact sheets or a memo summarizing your positions.

Make the Visit Count:

- Introduce yourself and start on a positive note. Can you start by saying thanks for a recent vote or public statement?
- State your positions, concerns, or requests clearly and directly. Bolster your facts with personal stories about how the issue affects the legislator's constituents and district.
- If you don't understand your legislator's opinion or legislative obstacles to success, ask for an explanation.
- If you're not sure how to answer a question, say so honestly, promise to get the information, and follow through quickly.
- Leave several copies of your materials and contact information for yourself and your coalition members.
- Be sure to thank the legislator and/or staff for spending time with you.

Following Up:

- Write or call legislators and staff after the visit to thank them for their time.
- If they agreed to take any actions, remind and thank them—and offer your assistance if appropriate.
- If you promised to get them any additional information or answers to questions, do so promptly.
- Share any information or insights you gained from the meeting with your colleagues and coalition members and decide together if any additional follow-up is needed.
- Maintain a relationship with people you met with by sending them updates on your activities.

Briefing a Group of Staff

You may be able reach a number of congressional or state legislative offices at once with a staff briefing. Use a staff briefing to share the results of polling or other research, discuss a new report, or talk about the formation of a new coalition and its plans. A briefing can be particularly useful when you have a prominent speaker, like a pollster or issue expert, who would not have time to visit numerous offices with you. Start with the office of a legislator who is friendly to your cause; a staff member can help you reserve a room in the Capitol or a legislative office building and should be able to help you reach out to relevant staff in other offices. Make your presentation brief to encourage questions and conversation. Have plenty of written materials. Get everyone to sign in so that you can follow up individually with everyone who attends.

Presenting Testimony

Presenting testimony at a congressional or legislative hearing is an extremely good opportunity to make your case to legislators, establish credibility as an expert voice on an issue, and raise the visibility of your organization or campaign. Hearings don't have to be about the pros and cons of a specific piece of legislation; they can be organized to explore an important issue or examine options for dealing with a problem. Encourage friendly legislators on committees relevant to your issue or campaign to plan hearings and invite your campaign's spokesperson(s) to present testimony. Be sure that you, or anyone who is providing testimony, knows your issue in enough depth to anticipate opposing viewpoints or hostile questions and prepare answers in advance. Practice, practice, practice.

Calls, Letters, and Emails

Generating large numbers of calls, emails, or letters into legislators' offices can be an important and effective organizing strategy. Follow the legislative process carefully to know when key legislators need to hear from your supporters. Generate calls or emails through your own newsletter, email list, or through volunteer phone banks.

Congressional offices receive a large volume of communications, especially on controversial issues or legislation. And they pay attention to the number of calls or other contacts as a way to gauge the intensity of their constituents' interests on different sides of an issue.

As you would expect, thoughtful individual letters will have a much greater impact than a form letter or pre-printed postcard. If you're able to get a number of community leaders to write their own letters explaining why your issue or campaign is important to them, that message will be heard. You can also gather multiple signatures on a single letter. A sign-on letter can be useful in demonstrating the breadth and diversity of support for your proposal or issue campaign and in generating media interest. You might even consider multiple sign-on letters, such as one from business leaders, one from religious leaders, one from educators, etc.

Unless you have a strong personal relationship with your legislator, you aren't likely to get through on a phone call, but it's worth asking. If you can't reach the legislator directly, ask to speak with the staff member who works on the issue you're calling about. If you are calling about a specific piece of legislation, especially if it's controversial, the person answering the phone may be getting a lot of calls and may simply take your position to tally it one way or the other.

It is entirely appropriate and legitimate for nonprofit organizations as well as individuals to meet with public officials to educate them on issues, provide them with information about organizational priorities, and answer questions from elected officials and staff.

If you have questions about tax-exempt nonprofit organizations engaging in a certain amount of legislative advocacy—or lobbying for passage of a particular piece of legislation, the Alliance for Justice is a great resource. The Alliance for Justice educates and trains nonprofit organizations about how to legally be effective advocates for those who are often left out of the policy making process. Get more information at *www.afj.org/for-nonprofits-foundations/about-advocacy/*.

Calling Members of Congress

It's most effective to call your own senators and representatives, but there may be times when you want to call other members if they serve on a committee or serve in a leadership position that puts them in position to help get a bill passed. You can reach any congressional office by calling the Capitol switchboard at 202-224-3121 and asking the operator to be transferred to the office you are trying to reach. Tell the person who answers the phone why you are calling and what issue you are calling about. You may be asked to speak to a staff person who deals with the issue you are concerned about. If an office is being flooded with calls for and against a particular piece of legislation, the person answering the phone may simply tally your position.

The Leadership Conference Education Fund

MAKING CHANGE HAPPEN

This toolkit has been designed to give you both a big-picture approach to planning a public education or advocacy campaign and specific suggestions for putting your organizing and communication plans into action.

No matter how well you create a plan, or how well you execute it, you'll need to stay flexible. You may have to adjust your strategy if there's a major shift in the political climate you're working in. You may need to revise your work plan if you don't raise quite enough money to do everything you had wanted to do—or if you raise more than you expected. You may come up against unanticipated obstacles—or unanticipated allies who bring new perspectives and resources to the campaign. You may decide one part of your strategy isn't working so well and needs to be reconsidered. In other words, make adjustments and course corrections as needed, but keep your eye on your goal, and hold yourself and your campaign colleagues accountable to commitments you have made to each other.

Some campaigns will be like a sprint, with an intense focus on a short-term goal. But more often, changing public attitudes and public policies is a long-distance race that requires planning, training, stamina, and teamwork.

We encourage you to let us know whether this information is useful—and what other kinds of information you would like.

And we would love to hear and share success stories from your own campaigns. Get in touch with us at *grassroots@civilrights.org*.

Make change happen!

The Leadership Conference
The Leadership Conference Education Fund

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Notes

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