



## SECTION 8: EDUCATING & ENGAGING PUBLIC OFFICIALS

Thinking Inclusively

The Power of Diverse Coalitions

BUDGETING WISELY

GRASSROOTS ADVOCACY

FUNDRAISING

NETWORKING

EDUCATE, MOTIVATE, ACTIVATE

Tracking Legislation

Getting Out There: Canvassing

BUDGETING WISELY

Reaching Your Goals and Beyond



The Leadership  
Conference  
Education Fund

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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](http://www.civilrights.org/action_center/toolkit).

Dear Friend:

This toolkit was put together 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 smart 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 on Civil and Human Rights and The Leadership Conference 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 <http://www.civilrights.org>. You can also reach The Leadership Conference field staff at 202-466-3315 or at [grassroots@civilrights.org](mailto:grassroots@civilrights.org).

Have fun!



Ellen Buchman  
Vice President, Field Operations  
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The Leadership Conference Education Fund



The Leadership  
Conference  
Education Fund

# The Leadership Conference on Civil and Human Rights Field Department

The Leadership Conference on Civil and Human Rights Field Department (the field team) provides grassroots consultation, advocacy coordination, support, and assistance to national, state, and local organizations regarding field campaigns around important civil and human rights issues. The team is based in Washington, D.C., with a satellite office in Atlanta, Georgia.

## Overview of National, State, and Local Work

Nationally, the field team convenes and provides field outreach and guidance to the coalition's more than 200 national civil and human rights organizations on a broad range of issues. With that focus, the field team provides field outreach and advocacy, and public education campaign guidance, on a broad range of issues.

For example, through national coalition efforts, the field team has played a role in implementation of field campaigns for legislative victories, including: the Americans with Disabilities Act Amendments Act of 2008, the Lilly Ledbetter Fair Pay Act of 2009, the Matthew Shepard and James Byrd, Jr. Hate Crimes Prevention Act of 2009, and the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010.

Further, when resources permit, the field team works in collaboration with local organizations to conduct national direct-service, public outreach campaigns such as the Digital Television Transition (DTV) campaign or the 2010 Census education campaign.

The field team also works throughout the country with local organizations to provide assistance and support to local coalitions' work in their communities. This support includes field outreach and advocacy,

and public education campaign guidance. The team collaborates with leaders in states including: Arizona, Colorado, Georgia, Maine, Mississippi, Nebraska, Pennsylvania and Texas. As just one example, in Nebraska, the field team has worked with coalitions to preserve equal opportunity, as well as judicial nominations and immigration reform education.

In concert with The Leadership Conference's policy and communications departments, the field team works proactively to create rapid response mechanisms on important federal civil and human rights issues with national coalitions in Washington D.C., and state and local coalitions in key states.

## Support Provided to National and State Coalition Members

The field department is proud to offer an array of services to both national and local partners to help support their work. These services include:

- Strategic Campaign Development, Guidance, and Execution (when applicable)
- Webinars, National Conference Calls, and Legislative Updates
- Legislative Email Action Alerts
- Trainings and Workshops on Coalition-Building, Community Outreach, Grassroots Advocacy, and Key Civil and Human Rights Issues
- Media Readiness Training (in conjunction with the Communications Department)
- Educational Material Development, Grassroots Toolkit, Resource Guides, and Fact Sheets
- Support in Organizing Press Briefings, Lobby Days, and Coalition Convenings

# EDUCATING AND ENGAGING PUBLIC OFFICIALS

**P**olicymakers, opinion leaders, and other public officials are some of the most important audiences for many public education and advocacy campaigns. 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 the public education campaigns waged over the years to combat drunk driving. By shaping public opinion and by encouraging legislators to take action to discourage underage drinking and driving under the influence, advocates have brought about significant cultural and legal changes.

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. And if you aren't pushing for passage of any particular piece of legislation, it doesn't count as lobbying and shouldn't raise any concerns for your board or

supporters. In fact, it's good for your organization and its profile to be seen as a useful and credible source of expert information.

Also, it's entirely appropriate for tax-exempt nonprofit organizations to engage in a certain amount of legislative advocacy—or lobbying for passage of a particular piece of legislation. There are plenty of good resources to help you figure out the best ways to engage in legislative advocacy while knowing the legal limits. Among them are:

- The Center for Lobbying in the Public Interest, <http://www.clpi.org>, has a wealth of information available, including *Make a Difference for Your Cause: Strategies for Nonprofit Engagement in Legislative Advocacy*.
- 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/](http://www.afj.org/for-nonprofits-foundations/about-advocacy/).

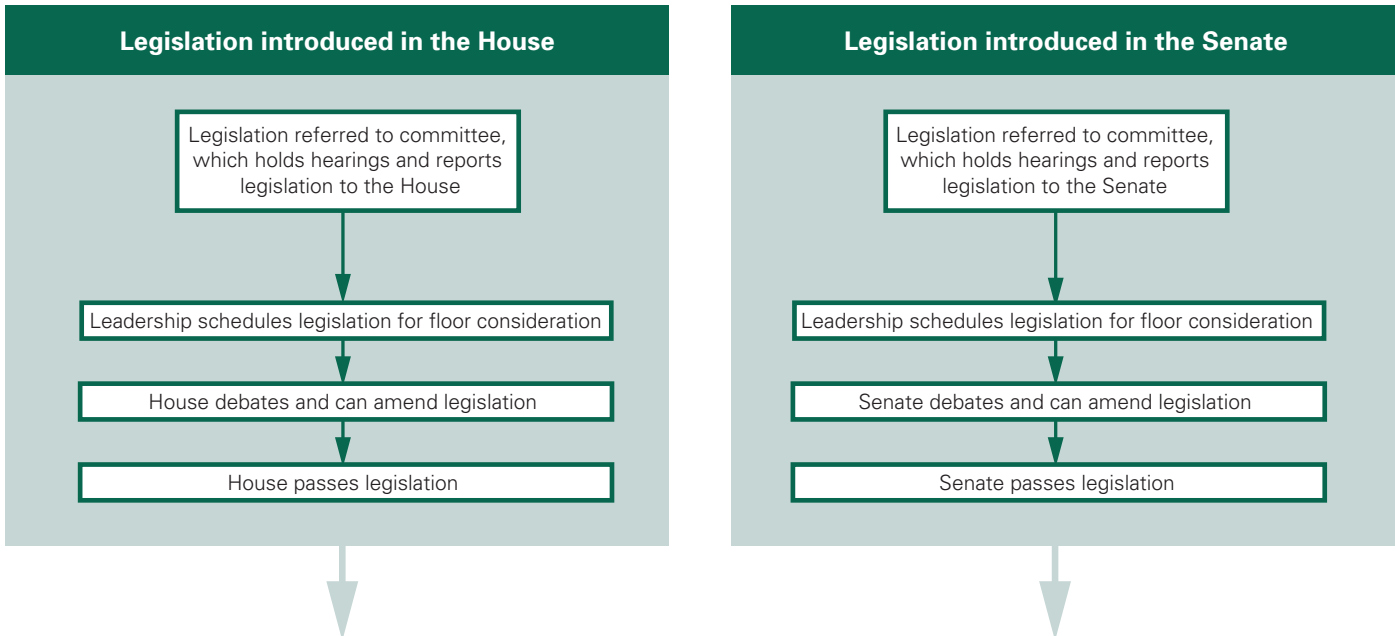
## be heard!

Some people who work for, serve on the boards of, or volunteer for local nonprofit organizations, are wary of getting involved with advocacy campaigns. They might be worried that campaigns to educate elected officials might appear partisan and damage existing relationships. Or they might worry about crossing some 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.

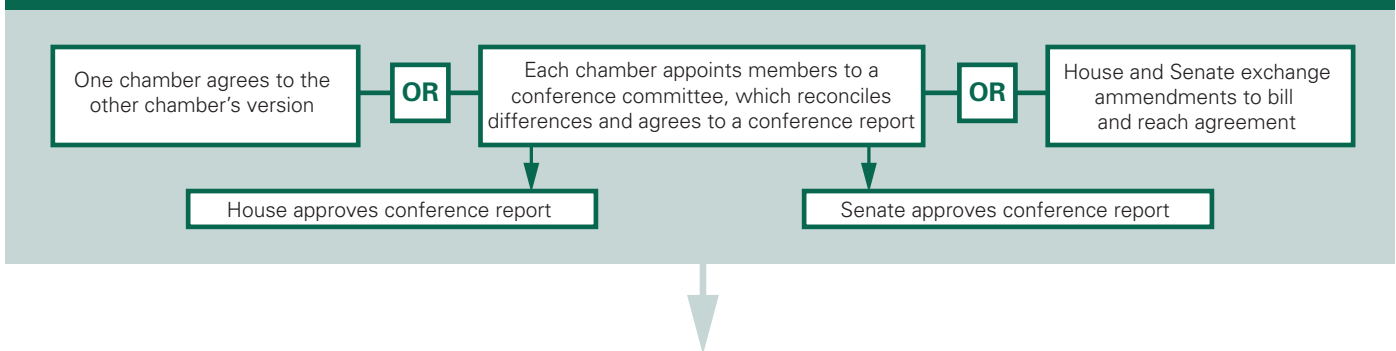
## Understand the Legislative Process

It is important to know how the legislative process works and track the progress of legislation you are interested in.

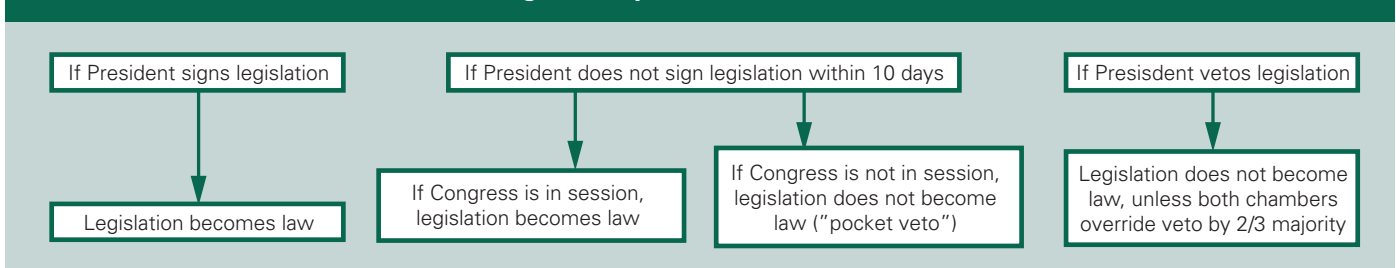
**Legislation may begin in either the House or Senate. Similar legislation is often introduced in both chambers**



**Legislation must pass both the House and the Senate in identical form before being presented to the President**



### Legislation presented to President





## 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. You can request a meeting when the member of Congress is home for the weekend—Fridays and Mondays are often good days to find them in-district—or 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.

National organizations and coalitions will often bring local members or affiliate staff to Washington, D.C., to meet with members of Congress or their staff. Keep in mind that the congressional schedule is frequently changing, and you may end up meeting with staff rather than the legislator. However this should not be thought of as a lost opportunity. Staff members who work on your issue can be effective in conveying your concerns to the legislator. And staff members often have more time to spend listening to your views.

Be aware that 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 them patience, respect, and understanding of their situation while making a request or advocating for your position.

### ***Briefing a Group of Staff***

You may also be able reach a larger number of congressional or state legislative offices at once with a staff briefing. A staff briefing can be a good way to share the contents of polling or other research, discuss a new report, or talk about the formation of a new coalition and its plans. It 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. Be sure to have plenty of materials. Make your presentation brief to encourage questions and conversation. Have a sign-in list 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, e-mail 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

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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.

## Sample Sign-on Letter to Congress

July \_\_, 2011

Senator \_\_\_\_\_

XXX \_\_\_\_\_

Washington, D.C., 20510

Re: The ADA Amendments Act of 2008 **State Purpose, i.e. bill you are addressing**

Dear Senator \_\_\_\_\_,

**Who you are as a coalition:** The undersigned groups, representing a broad scope of business, disability, civil rights, faith-related, veterans and other interests, write in support of the ADA Amendments Act of 2008 (H.R. 3195).

**What the bill does and why it is important:** The ADA Amendments Act maintains the individual functionality that entities covered under the law, including employers and public accommodations, deem so necessary for the effective administration of this law, while still providing important protection for individuals with disabilities. In essence, this bill strikes a delicate balance between the needs of individuals with disabilities and the realities experienced by entities covered under the law, including employers and public accommodations.

**Request for support:** As you know, the bill recently passed the House by a vote of 402 to 17. The proposed legislation has now moved to the Senate for consideration. We urge your support in making enactment of the ADA Amendments Act this year a reality and we stand ready to work with you towards that end.

Sincerely,

Name of Organization/Leader **List all of the organizations who support the statement.**

\_\_\_\_\_, the President, org \_\_\_\_\_ **You can also include the leader of the organization.**



## 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.
- Do enough research to understand the legislator's interests, positions, and voting record on the issue you are advocating for. Has your legislature made a comment on the issue?
- 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 opponents of your campaign or issue 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.
- 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. Is there a recent vote or public statement with for which you can start by saying thanks?
- 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 the legislative status of an issue, ask for an explanation.
- If you're not sure how to answer, say so honestly, promise to get the information quickly, and then be sure to follow through.
- Leave several copies of your materials and contact information for yourself and your coalition members.
- Be sure to thank the legislator and staff for spending time with you.

### Following Up:

- Be sure to 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.
- Be sure to 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.

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## Calling Your Member of Congress

It's most effective to call your own senators and representatives. But there may be times when calls to congressional leadership are also important. Therefore, there may be times when you are asked to reach out to constituents in key states to encourage them to call their member of Congress. 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 able to speak directly with your senator or representative, but it's most likely that you'll 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.

## Notes

[illegible]