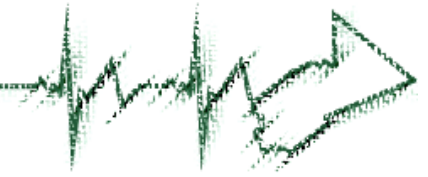


# Communicating with Elected Officials

CTG Communication Training Series  
Stanislaus Advocacy Action Team

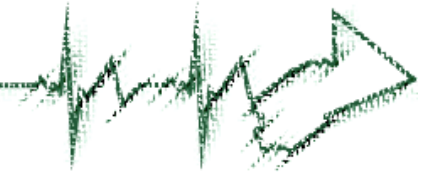
# Training Goals

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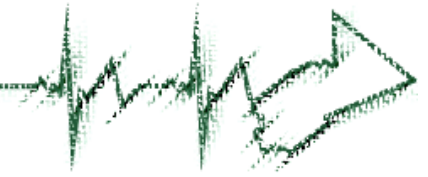
- Review policy advocacy basics and free tools available to help plan campaigns
- Share strategies for engaging elected officials in public health issues
- Identify techniques to use when informing and educating elected officials

# Policy Types



- **Voluntary Policies**
  - Adopted and enforced by an individual property or business owner
- **Local Ordinance**
  - Adopted by City Council or County Board of Supervisors
- **Resolutions**
  - Adopted by elected boards to show support for property owners who implement voluntary smoke-free housing policies
  - Adopted by community organizations or coalitions to advocate for voluntary policies or ordinance adoption

# Policy Strengths Comparison



## ***Voluntary***

- Easier and quicker adoption process
- Adaptive to individual businesses and properties
- Successful policies require the support of the business or property owner

## ***Ordinance***

- Stronger long-term change
- More enforceable with mandated policies
- More consistent across business and properties within the jurisdiction
- Requires support from key stakeholders and decision makers

# Birth of an Advocacy Initiative


- Identify the problem
- Establish the scope
  - Narrow or general?
- Identify a solution
- Turn the problem into an issue
- Plan your strategy



## Quick Review...

# Midwest Academy Strategy Chart

- Goals
- Organizational Considerations
- Constituents, Allies and Opponents
- Targets
- Tactics



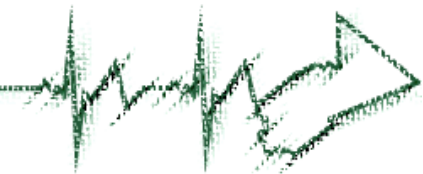
### Sample Strategy Chart

Goals	Organizational Considerations	Constituents, Allies and Opponents	Targets	Tactics
<ol style="list-style-type: none"> <li>List the long-term objectives of your campaign.</li> <li>State the intermediate goals for this issue campaign. What constitutes victory?  How will the campaign:  <ul style="list-style-type: none"> <li>Win concrete improvement in people's lives?</li> <li>Give people a sense of their own power?</li> <li>Alter the relations of power?</li> </ul> </li> <li>What short-term or partial victories can you win as steps toward your long-term goal?</li> </ol>	<ol style="list-style-type: none"> <li>List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, canvass, etc.</li> <li>List the resources that the campaign does not currently have, but will need in order to succeed.</li> <li>List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each. Some examples: <ul style="list-style-type: none"> <li>Expand leadership group</li> <li>Increase experience of existing leadership</li> <li>Build membership base</li> <li>Expand into new constituencies</li> <li>Raise more money</li> </ul> </li> <li>List internal problems that have to be considered if this campaign is to succeed.</li> </ol>	<ol style="list-style-type: none"> <li>Who cares about this issue enough to join in or help the organization? <ul style="list-style-type: none"> <li>Whose problem is it?</li> <li>What do they gain if they win?</li> <li>What risks are they taking?</li> <li>What power do they have over the target?</li> <li>Into what groups are they organized?</li> </ul> </li> <li>Who are your opponents? <ul style="list-style-type: none"> <li>What will your victory cost them?</li> <li>What will they do/spend to oppose you?</li> <li>How strong are they?</li> </ul> </li> </ol>	<p>A target is always a person. It is never an institution or elected body.</p> <ol style="list-style-type: none"> <li>Primary Targets <ul style="list-style-type: none"> <li>Who has the power to give you what you want?</li> <li>What power do you have over them?</li> </ul> </li> <li>Secondary Targets <ul style="list-style-type: none"> <li>Who has power over the people with the power to give you what you want?</li> <li>What power do you have over them?</li> </ul> </li> </ol>	<p>For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p>Tactics must be:</p> <ul style="list-style-type: none"> <li>In context</li> <li>Flexible and creative</li> <li>Directed at a specific target</li> <li>Make sense to the membership</li> <li>Be backed up by a specific form of power</li> </ul> <p>Tactics include:</p> <ul style="list-style-type: none"> <li>Media events</li> <li>Actions for information and demands</li> <li>Public hearings</li> <li>Strikes</li> <li>Voter registration and voter education</li> <li>Lawsuits</li> <li>Accountability sessions</li> <li>Elections</li> <li>Negotiations</li> </ul>

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# Additional Resources



- Assessing the Political Environment Checklist
  - General information
  - Public health and politics
  - Political environment
- Elected Official and Government Staff Profile Form
- Pre-Meeting Checklist  
*(for meeting with elected officials in person)*

Visit: [Center4tobaccopolicy.org](http://Center4tobaccopolicy.org)  
Select Community Organizing in the menu bar at top, then Organizing Tools

**Assessing the Political Environment Checklist**

During the first phase of your campaign you will need to make a decision about in which city or county you will conduct your public health campaign. Before making the final decision, apply this checklist to assess the political environment. Because you may discover things in your research which suggest that you make a different choice, this is done before you make your decision to collect the information. The assessment process is a critical part of the campaign's strategy. Some decisions will require a lot of information to collect the information. The assessment process is a critical part of the campaign's strategy. Some decisions will require a lot of information to collect the information.

**ELECTED OFFICIAL & GOVERNMENT STAFF PROFILE FORM**

An investigation of the political environment tells us how easy or difficult a campaign will be to win. This worksheet helps you develop a profile of your local key decision makers. These decision makers are the people who will be responsible for the success or failure of a campaign. Some decisions will require a lot of information to collect the information. The assessment process is a critical part of the campaign's strategy. Some decisions will require a lot of information to collect the information.

**Pre-Meeting Checklist**  
MEETING WITH OFFICIALS IN PERSON

Meeting with officials (or their staff) in person is a critical part of your campaign. This is your chance to impress the official with your campaign's community strength and political savvy and to persuade the official of the need for your proposed ordinance. Therefore these meetings must be planned strategically and carefully. Below is a checklist to help you prepare and coordinate the logistics of this type of meeting.

- 1. RESEARCH THE ELECTED OFFICIAL**
  - Figure out what groups and individuals have influence with him/her
  - Determine what messages will appeal to him/her
  - Get copies of the statements listing his/her contributors from the city clerk's office
- 2. DETERMINE WHO WILL ATTEND THE MEETING**
  - Select people to attend based on who fits the strategy for this official
  - Make sure you have someone in your group who can lobby
  - Only invite people you know. No wild cards.
- 3. SET UP THE MEETING**
  - Call the official's office to set up the meeting
  - Later, send an e-mail to the office to confirm the meeting
- 4. DECIDE THE MESSAGE FOCUS**
  - Determine what will appeal to this official and which messages to use
  - Decide what you are asking the official to do (Support? Vote? Champion?)
  - Decide what your fallback request will be
- 5. DECIDE WHAT MATERIALS TO BRING**
  - Determine who will develop specific materials (for example, who will breakdown survey results by district)
  - Determine who will bring the materials and put them in a folder
  - Based on your research, predict as best you can what information the official will want and bring that
- 6. DECIDE WHAT PART OF THE MESSAGE EACH PERSON WILL DELIVER**
  - Write talking points for each person and deliver them well before the meeting
  - Rehearse talking points with them days before the meeting either over the phone or in person
- 7. CALL PEOPLE THE DAY BEFORE TO REMIND THEM OF THE MEETING**
  - Make sure they can still attend
  - Remind them where you will be meeting and when (provide directions and parking information)
  - Exchange cell phone numbers for last minute needs
  - Reconfirm your appointment with the offices of the official
- 8. MEET AN HOUR BEFORE THE MEETING AT A NEARBY COFFEE SHOP**
  - Walk through how the meeting will go
  - Talk about the message and goals
  - Walk over to the meeting together
- 9. THINK ABOUT WHAT TO SAY DURING THE CHAT BEFORE THE MEETING STARTS**
  - If anyone in the meeting will know the council member personally prepare that person to engage in a short personal exchange with the official
  - For others, think about what you know about the elected official that you might talk about if the situation arises (for example, figure out if the official has been in the news lately)

**POST-MEETING:**

- Follow up afterwards with the official to thank them and provide any information you promised
- Thank your coalition members

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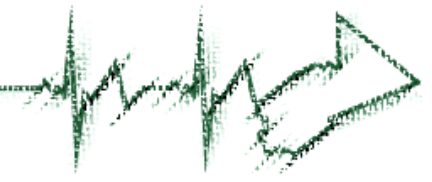
# Challenges and Barriers for Elected Officials

- Competing interests/priorities
- Lack of interest
- Unaware or not knowledgeable about the topic
- This may not be their only job





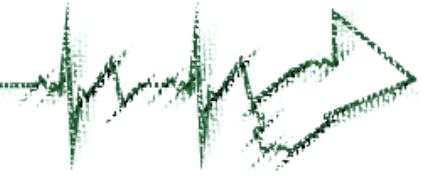
# Break Down the Walls



- Identify opportunities for collaborative publicity
- Seek out strategies to help make the issue a priority for elected officials
  - Relate to other current priorities or issues
- Be relevant



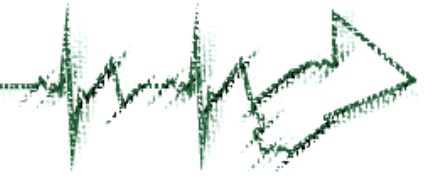
# Set and stay on point



- Why should the official care?
- Why should the people he or she represents care?
- What can they do to make a difference?
- How will you help them make that difference?



# Build Relationships



- Have one on one meetings
  - With the elected or their staff
  - Personalize the issue
  - Know the calendar gatekeeper
- Maintain a two-way dialogue
- Offer resources
  - Be a subject matter expert
- Inform and educate about issues
  - Ask what info would help them most
  - Help them be a better advocate
- Find points they can support



**Thank  
you!**

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