Advocacy “Etiquette”

As the saying goes, you don’t get a second chance to make a first impression—and the way your health advocacy group approaches an issue can greatly influence your chances of success. Your reputation in the community is one of your most valuable assets, and your actions will affect that reputation both positively and negatively. One early episode of clumsiness or unwanted publicity could throw your entire campaign off track, while a reputation for fairness, toughness and competence can smooth the way throughout the campaign.

We present here twenty guidelines for advocacy “etiquette” compiled from our experience and the experience of other advocates (e.g., Alinsky, 1971; Kahn, 1982). This list is by no means complete, and some guidelines may not be relevant to your situation. However, all of these guidelines have been used by successful advocacy organizations, and they may serve at least as a basis for discussing different approaches for achieving community change. We encourage you to refer back to this chapter as you select your tactics and counter-tactics, many of which employ these principles (see Chapters 7 and 8).

Twenty rules of etiquette

1. Accentuate the positive

Whenever possible, respond to positive events related to your group’s mission by thanking others for their actions or paying them public compliments. This is relatively easy, and will differentiate you from the many groups which only speak out when something negative happens. More intrusive or confrontational actions are often best kept for later in a campaign. Having your group perceived as being reasonable (at least some of the time!) will serve it well, if and when you need to take a more confrontational approach.
If you compliment those who support you, acknowledging their wisdom and vision, you are likely to increase their commitment to your goals. For example, a group of citizens concerned about drinking and driving can publicly praise local drinking establishments that have adopted a policy of calling cabs for customers who are drunk. To support this action, they could take out an ad in the local newspaper publicizing the names of these establishments. This low-cost action could very well encourage other establishments to set up a similar policy.

2. Plan for small wins

If there is no evidence of progress, most people can sustain their interest in any issue for only a limited time. Groups are more likely to grow and maintain vitality over time if they experience routine success. One way to achieve this is to develop a plan of action that has steps intermediate to the final goal—and these intermediate victories should be celebrated. Successful efforts will build the confidence and reputation of your group, and make group members more willing to sustain their commitment.

For example, a number of health advocates worked to bring about a small win with McDonalds, the nation’s leading fast food chain. Lowering the amount of saturated fat on their menu has been a key objective of many health advocates. One of these, a wealthy businessman and philanthropist, became a nutrition health activist after his personal experience with heart disease. He funded a series of ads criticizing the levels of fat and cholesterol in fast foods, and the appearance of these ads was celebrated by nutrition health advocates. Partly as a result of these ads, McDonalds stopped frying their food in animal fat, began offering low fat and cholesterol alternatives (e.g., low fat muffins, McLean burgers, nonfat milk), and made nutritional information available to consumers. From that beginning, although still not a place where many nutritionists eat lunch, McDonalds has changed enough to become comfortable interacting with public health advocates. At the 1993 annual meeting of the American Public Health Association, for example, McDonalds offered samples of low fat food!

3. Begin by assuming the best of others

When debating your opponents, it may help, at least initially, to assume that their acts are the result of ignorance rather than malice. Challenging the motivations of others can produce needless resistance. If you appear suspicious and aggressive, you are likely to generate a similar reaction from your opponent, often leading to a no-win situation. Rather than launching into direct confrontation and criticism, begin with attempts to educate. You may need confrontation later, but it can be counterproductive to adopt this stance in initial efforts.
For example, instead of accusing local or federal agencies of inaction on a health issue, provide them with quality information supporting your position. After all, such agencies are usually underfunded, and have limited resources to maintain effective services or surveillance. If you give them a chance to take action on a given issue, and are disappointed with the results, then you can change your approach—but it is unwise to start fights without giving others the chance to make informed decisions.

In San Jose, California, for example, members of San Jose STAT (Stop Teenage Addiction to Tobacco) were concerned with the number of merchants illegally selling cigarettes to minors. Rather than openly criticizing the code enforcement staff, STAT wrote a detailed proposal to the city advocating a plan for charging merchants a fee that would pay for enforcement of the law. Despite initial resistance, the code enforcement staff presented a report to the city council that was generally positive to the proposed plan. Because San Jose STAT had taken a non-confrontational position, working with, rather than against, city staff, the code enforcement staff did not need to develop strong defensive positions, and were able to appreciate the practical suggestions and help offered by STAT.

4. Do your homework and document your findings

The Scout motto, “Be Prepared,” and the statement, “Information is Power” are two pieces of sage advice for the health advocate. It is embarrassing and ineffective to be advocating for an issue on incorrect or incomplete information. The embarrassment of getting the facts wrong can damage a hard-won reputation, direct attention away from the specific issue at hand, and reduce your effectiveness on other issues for which you are advocating, no matter how worthy.

There are many examples of groups whose ability to advocate effectively was compromised because of misinformation. One of the first steps your advocacy group should take is to collect high quality information (see Chapter 3, “Understanding the Issue,” for suggestions on documenting the issue) and to become well versed in communicating it (which is discussed in more detail in Chapter 9, “Using the media.”) It is important to document the source of all information you collect, and to verify it through as many different sources as possible.

Good documentation will strengthen your case, and protect you from denial and counter-charges from the opposition. For example, a consumer group wanting to pass local legislation banning billboards advertising alcohol should compile a list documenting the number and location of billboards, noting which are located near settings where youth congregate (e.g., schools, day care centers,
community centers). This will provide evidence for their assertion that billboards are a serious problem.

5. **Take the high ground**

When you take a position on an issue, try to highlight the general values or principles that relate to your vision—for example, community well-being, health, safe workplaces, a clean community environment, equal access to services, quality of life, and so on. The importance of these values and principles is hard for anyone to deny; thus they serve as a basis for obtaining community consensus. They may also help prevent unresolvable conflicts stemming from disagreements over the details of proposed solutions.

By emphasizing positive values, you will give an air of eloquence to your position that people will find impressive. For example, community well-being, safety, and economic vitality are values usually important to residents faced with the prospect of having a potentially dangerous incinerator located in their community. Keeping these issues in the forefront of discussion can play a key role in the decisions made.

6. **Reframe opponents’ definitions of the issue**

When you are being criticized or attacked by your opponents, try not to respond to the criticism in terms that your opponents have used to define the issue. Rather, reframe it to change the “playing field” (Chapter 7, “Advocacy Tactics,” has suggestions on reframing the issue). A key goal is to move support away from your opponent, and toward your group, or the issue for which you are advocating.

The 1992 presidential election presented several examples of this strategy in action. Rather than responding to personal attacks on character or lack of international experience, candidate Clinton kept bringing the debate back to the economy, a topic he had studied intensively and on which the public had strong feelings. Notices reminding workers, “It’s the economy, stupid!” were prominently displayed in campaign offices, and Clinton’s unwavering attention to that point was a key factor in his election to the presidency.

Another example of turning a negative into a positive occurred in 1965 when Ralph Nader published his book, *Unsafe at any Speed: The Design-in Dangers of the American Automobile.* A private detective was hired by General Motors to find scandal in Nader’s life. The detective was caught spying—and when it was revealed that his client was G.M., its president was called before a congressional committee to explain. There he apologized to Nader. The resulting publicity made Nader a folk hero and launched him in his career. Far from damaging him,
G.M.'s attacks diverted attention away from Nader himself, and towards the automobile manufacturers. (This general strategy is discussed in more detail in Chapter 8, "Dealing with the Opposition.")

7. Keep it simple

Sometimes health advocacy groups are drawn to complex actions before giving simpler and easier options a chance. Remember, it is important to have small successes. Focusing only on complex or longer-term strategies may work against your group in this regard. As an example, consider the options of a group of employees who are exposed to hazardous materials without adequate protection. They might consider organizing a strike—but that's a complex action with a high risk of failure. Instead, the group could start with the simple action of filing a grievance with the Occupational Safety and Health Administration (OSHA). If compliance with government regulations does not occur, other more complex and confrontational strategies can then be employed.

8. Be passionate and persistent

On his deathbed, the great scientist, Pavlov, was asked for the secret of success. He said that success depended upon two qualities: passion and persistence. These qualities are especially relevant to health advocacy. If you look at advocacy groups that have been successful, you will find that most have members who are passionate about the issue on which they are advocating, and leaders who live and breathe it. But passion is only part of the equation—and indeed, too much of it can cloud judgment about the choice of appropriate strategies. Persistence, or the unwavering devotion to the cause regardless of obstacles faced, is just as critical to success. Follow-through is a particularly important element of this persistence. If your group establishes a reputation for not following through on commitments or stated intentions, it will be difficult to gain the support of others. Moreover, your opponents will learn to wait until the predictable event occurs—you give up or go away! It's critical that your opponents believe that you will be a burr in their saddle until the issue is resolved.

As community organizer Saul Alinsky noted, "Tactics should maintain a constant pressure upon the opposition. It is this continuous pressure that results in the reactions from the opposition that are essential for the success of a campaign" (Alinsky, 1971). For example, one advocate, Verna Mize, spearheaded efforts to keep the Reserve Mining Company of Minnesota from continuing to pollute Lake Superior in Silver Bay, Minnesota. Her commitment to saving the lake took her through a long process, during which she collected over 25,000 signatures on petitions, recruited the support of many people, filed several civil suits and appeals,
picketed, and even provided congressional testimony. She succeeded after seven years of persistence and unwavering passion, even though there were many points where quitting would have been an easier option than fighting on.

9. Be willing to compromise

Developing a healthy community requires cooperation and compromise between groups with competing interests. Although it is important to advocate for your group's cause, you should be open to accepting alternative proposals or compromises that may be advantageous. Being willing to compromise may bring you or your group one step closer to your ultimate goal, engender good feelings and support among key community constituencies, and help improve or sustain your public image.

Public support is almost always on the side of those who are most reasonable in their approach and demands, so compromise is a good strategy provided that it doesn't compromise your group's ultimate goal—the bottom line.

For example, when the city of San Francisco was considering a ban on smoking in public places in late 1993, some tobacco control advocates were keen on including bars in the ban. Realizing that they didn't yet have enough public support for including bars (one of the last bastions of smoking in public places—at least in California), the advocates decided to pull back from the demand. In the end, the ordinance passed in part because advocates had been willing to compromise. However, the fight was not over (remember, passion and persistence are key). Over the next year or two, the advocates planned to rally public and political support for an ordinance addressing the problem of smoking in bars.

10. Be opportunistic and creative

A key skill that health advocates should develop is the ability to wait for the appropriate time for action. That may mean delaying action until you have gathered valid and relevant information; framed the issue in a way that attracts interest and concern; won people's trust in your group; and given people an understanding of the cause for which you are advocating.

Waiting can give you ammunition for your campaign. For example, advocates concerned about the safety of nuclear power plants in their community have waited until the companies refused to disclose safety records. Then the advocates have seized upon this refusal as evidence of mismanagement and lack of good faith. When advocates have publicized these concerns, public trust in the company's sincerity and competence has been compromised. In some cases, this controversy, fueled by negative public sentiment, has discouraged investment in other plants.
11. Don't be intimidated

In the process of advocating for health issues, you are likely to encounter opposition from strong individuals or groups. You may choose to avoid confrontation, but it should not be because you are afraid to butt heads with elected officials or corporate executives. Remember that you have access to one powerful weapon: public support. Community health advocates are generally perceived as inherently credible because they are working toward the public good rather than seeking higher profits or social status.

For example, a group of health advocates in Orange County, California approached county health officials with evidence that low income residents were not getting access to health services (Mayster et al., 1990). Addressing this issue involved negotiating with an imposing array of individuals and groups, including local Indigenous Medical Services staff, the Board of Supervisors, the director of the Orange County Health Care Agency, the county administrative officer, the chairman of United Way, the Orange County Medical Association, the Hospital Council of Southern California, and representatives to the state legislature. Had advocates been at all intimidated by working with these powerful individuals and agencies, change might not have occurred.

12. Maintain focus on the issues

Your opponents might try to divert attention from the issue for which you are advocating by attacking group members personally. It is important to avoid falling into that trap. If you take the bait and react to the attacks, confrontation can degenerate into personal animosity, and the group’s public image will suffer. For example, groups advocating for increased enforcement and surveillance of drinking and driving laws have been attacked by the beer and alcohol lobby for being anti-business, or supportive of a “police-state.” Such name-calling distracts from the issue at hand, and defending yourselves can easily divert your resources away from effective strategies. Keep in mind that, in many cases, your opponents’ attempts at discrediting group members are evidence of their inherent vulnerability. While it is tempting to counter accusation with accusation, it is better to avoid being drawn into argument on the issue. Sticking to the high ground and staying focused on the issues at hand is usually more effective in the long run.

13. Make it local and keep it relevant

There’s no better way to present an issue than in terms that are close to home. Whenever possible, use local statistics, local role models, and local volunteers in your advocacy efforts. Local issues can mobilize community members concerned
about or directly affected by the issue. Even if your group has support from an organized national campaign, it is local support that will ultimately determine your success. In two mid-western states, for example, a group of advocates gathered data on the number of children riding without safety devices, and on public support for requiring that they be used. This information was used to promote adoption of laws in these states regarding the safety of child passengers (Fawcett, Seekins and Jason, 1987).

14. Be broadly based and nonpartisan from the beginning

In many communities, key segments of the health care delivery system, government, and business may initially be suspicious of health advocacy efforts. Nonetheless, health advocacy groups should try to cultivate the cooperation and gain the support of these well-established forces in the community. A commitment to finding reasonable and broadly shared solutions to local health issues is critical to gaining the long-term support and trust of existing organizations. For example, a Wichita, Kansas coalition for the prevention of substance abuse, known as Project Freedom, included representatives from the department of health, human service agencies, businesses, government, religious organizations, schools, law enforcement, and youth and community organizations (Fawcett, Paine, Francisco & Vliet, 1993).

15. Develop an independent public identity

Newly created health advocacy groups should avoid the perception of being “one more program” of a sponsoring organization, or being too closely identified with one of their funders. By tying the advocacy group to the coattails of another group, these perceptions might prove limiting for future projects, and can threaten the credibility of the group. It may take careful planning efforts to develop your own identity, but it is worth the effort, even if you are part of a larger movement. For example, since Ralph Nader suggested in 1970 that students at the University of Oregon create Public Interest Research Groups (PIRGs), students at 140 institutions in some 25 states have organized their own PIRGs. Each one controls its own affairs, hires its own staff, and chooses its own issues and positions. In so doing, each has a unique identity that is easily recognizable.

16. Try to stay within the experiences of individuals in your group

The actions of your group should be consistent with the experience, values, and interests of individual group members. In this regard, it is important to assess group preferences regularly. A typical example is when an advocacy group decides to take an action that might result in members being arrested for trespassing or
violating some local ordinance. Some group members may not be ready for such radical action. Group leaders should be careful to avoid this type of situation, which disrupts the group process, and may force some members to leave.

17. Whenever possible, go outside the experience of your opponent

A confused opponent is a weak opponent. Most companies and agencies are not prepared to deal with public opposition to their policies or actions. Likewise, they may not be prepared to deal with unanticipated options dealt to them by advocates. Obviously, going outside the experiences of your opponent requires that you understand your opponents’ strengths and weaknesses and how best you can counter them. (See Chapter 8, “Dealing with the Opposition.”)

18. Make your opponents live by their own rules

Government and other agencies have explicit policies and regulations that dictate procedures and protocols. When dealing with these agencies, make sure you know those rules, and use them to your benefit. For instance, a consumer group can take advantage of mandatory public hearings to present testimony about the benefits or harms of a given proposal. Citizens can also file appropriate grievances with government agencies responsible for enforcing certain regulations. Once you know all about the agency’s procedures and protocols, you may be able to use them to exploit a great many opportunities.

19. Tie advocacy group efforts to related events

Your group should be alert to any event that might be relevant to your objectives or tactics. Linkage to such events can help publicize your cause and strengthen your position. For example, advocates wanting to increase funds and services for patients with a certain disease might publicize a death to draw attention to scarce or unavailable treatment. Similarly, opponents of nuclear power plants can use any reported accident or “near” accident to support their claims.

20. Have a good time

If members of your advocacy group do not take pleasure in their actions, there may be something wrong with your strategy. Saul Alinsky, the legendary community organizer, knew how to make advocacy fun. For example, he once organized a bean feed for his members shortly before they went to a concert also attended by powerful (and dignified) members of the opposition. The result was considerable amusement for the organization’s members—something less for their opponents.
If advocacy is fun, lasting ties are more likely to develop among members, along with a growing sense of individual fulfillment and responsibility. A sense of enjoyment, together with a sense of pride, will sustain individual commitment over long periods of time and thus should be nurtured.

Summary

The twenty rules of etiquette presented here will help you to benefit from the experience of thousands of advocacy groups who have gone before you. There is nothing magical about the rules, so they are not recipes for instant success. But they may help bring into focus the philosophical stance that a health advocacy group can take. At a minimum, they should be examined and discussed among group members before action is taken.
"Ideals are like the stars. We never reach them, but we chart our course by them."
HOPE & TIMMEL, TRAINING FOR TRANSFORMATION

A major challenge for an advocacy organization is to transform the vision and energy of its active members into a strategic action plan. You may not be able to fill in all the details of the plan until you have made decisions about strategic and tactical approaches (see Chapters 6 and 7), but it is important to start on your “road map” now, so that you will have a good sense of direction to guide you through the rest of the process.

This chapter will draw together the work you have done already in developing a vision; and finding and researching an issue. It will guide you through the process of making a mission statement, and setting objectives. It will also help you identify agents of change, targets of change, and settings for change. Finally, it will help you sketch out the broad elements of your campaign. At the end of the chapter, you will find eight worksheets which you may copy and complete as you plan your own campaign. But first, here are some explanations.

Worksheet 1: Your vision and your mission

Vision
Refer back, if necessary, to the discussion of vision in Chapter 1 as you develop (or polish) your own vision statement. Remember, this statement should be concise and easy to communicate, such as “Drug-Free Streets,” “People Power,” or “Healthy Babies”—the sort of message that would fit on a T-shirt. If you have not yet verbalized your vision, do so now with the group, and enter it on Worksheet 1 on page 44.

Mission
While your vision refers to your ultimate goal, your mission statement should add information on the what and the why. It is based on your research into the issue, and your analysis of its cause.
A mission statement will act as a guiding star throughout the campaign. It should be quite short and punchy, but give an idea of your role in relation to the vision. For example, if your vision is "Drug-Free Streets," your mission might be "To serve as a catalyst for creating a drug-free community." Alternative mission statements might be, "To find constructive activities for youth"; or, "To eliminate toxic dumping in Murchison County."

You will find the mission statement is frequently useful, serving as a summary of your purpose whenever you talk to community groups, make presentations, or give interviews to the media. Internally, it is helpful in keeping your group focused on its central purpose. For example, before you plan any major strategic or tactical step, you will be able to ask yourselves if this contemplated effort is consistent with your mission. Similarly, when members disagree over strategies and tactics, a reference to the shared mission can help bring the group back together.

When your group has agreed on a mission statement, write it in the space provided on Worksheet 1.

**Worksheet 2: Identifying objectives**

Objectives refer to specific, measurable steps that help you reach your goal. Good objectives are SMART: specific; measurable (at least potentially), achievable (at least eventually), relevant (to the mission) and timed (with a date for completion). For example:
- "By the year (x) to reduce cigarette smoking to no more than 15 percent among people in Johnson County."
- "By the year (x) to reduce the estimated pregnancy rate among 12 to 17 year olds in Bay City by 30 percent."
- "By the year (x) to eliminate toxic dumping from Murray County."

The ultimate objective may be months, years or even generations from reality—yet, to survive, movements require victories and the encouragement they provide. Hence, we try to identify intermediate goals that will boost us toward our long-term objective. For example, a cancer-prevention initiative, in addition to the long-term objective of reducing the incidence of cancer, might have such intermediate objectives as these:
- Provide free screening of women identified as high-risk;
- Provide training for lifeguards to encourage reduction in the public's exposure to the sun.

If these intermediate goals themselves might not be readily attainable within a short period of time, a group may establish even shorter-term objectives that
boost their power and credibility, and encourage the members. For example, short-term goals related to toxic dumping might include:

- Holding public hearings about the long-term plan for handling toxic waste;
- Forming a committee of physicians and public health officials to provide oversight.

Use Worksheet 2 on page 45 to document short-term, medium-term and long-term objectives. For example:

**Long-term objective:**
Reduce adolescent pregnancy by 75 percent in Geary County by the year x (four years from now).

**Medium-term objective:**
Make contraceptives accessible to all high school students by the year x (two years from now).

**Short-term objective:**
Increase public awareness of the issue of adolescent pregnancy by the year x (one year from now).

Note: your choice of objectives will of course be guided by the extent of your own resources—and those of your allies—in terms of funds, staff and facilities. The research you undertook to document the issue, as described in Chapter 3, will help ensure that your chosen objectives are not out of reach, and that you don’t underestimate the strength of the opposition at this point.

**Worksheet 3:**
**Selecting strategies**

Strategies are a vital part of the context for action planning. As you will see in the next chapter, strategies refer to how the group intends to do its business. They can include such approaches as advocacy, coalition building, community development, coordination, education, networking, public awareness, and policy or legislative change.

We suggest you read and consider Chapter 6, “Strategy” before you complete the worksheet.

**Worksheets 4 and 5:**
**Choosing targets of change, and agents of change**

This part of the planning process may involve referring back to your initial research into the causes and surrounding circumstances of your chosen issue (see Chapter 3).
Through your research, you probably identified certain targets of change (those whose behavior or inaction contributes to the problem) and agents of change (those who are in a position to contribute to the solution).

Examples:
- In a community initiative to control tobacco use by minors, targets of change might include those merchants who sell cigarettes to children;
- In a community effort to reduce risk of injury, agents of change might be parents and teachers who can persuade children to wear bicycle helmets.

Paradoxically, when we consider the list of potential agents or targets of change, we may find some of our most effective "agents" among those who at first sight could be considered "targets." For example, an initiative to address youth violence might draw on the leadership of gang members, or a tobacco control initiative might find an agent of change in a merchant whose knowledge of the business could help advocates devise an approach to other merchants.

Note that the list of targets of change can become quite long, because it will include all those individuals, groups, agencies, businesses or organizations whose behavior needs to change if the mission of the advocacy initiative is to be achieved.

Worksheet 6:
Identifying sectors for change

The more precise you can be in identifying sectors of the community where you want change to take place, the better. Rather than wasting energy by spreading your efforts too wide, you can concentrate on those sectors that are most relevant to your mission, directing your advocacy activities towards them. By keeping your efforts focused, you will avoid the danger of biting off more than you can chew.

For an adolescent pregnancy initiative, for example, the best sectors for change might be schools and religious organizations, because these sectors provide access to key targets of change (the youth) and agents of change (peers, parents, teachers, and religious leaders).

The criteria for deciding to involve a community sector are whether (a) it provides access to key targets of change such as youth, merchants or elected officials, and (b) whether it will help you involve key agents of change such as peers, or law-enforcement officials.

Remember not to make your selection of sectors too narrow. Health problems are the result of deficiencies in a variety of environments, and may require changes in multiple sectors, at multiple levels. However, a note of caution is appropriate: although a group's aims must be comprehensive, they should also be focused. While you may have a wide array of aims, you should also set priorities for the sectors
where changes are sought, deciding where you should put your energies in each year of the campaign.

Worksheet 6 notes sectors of the community that might be relevant to your advocacy organization, and provides an opportunity for your group to discuss which sectors you will need to target in order to accomplish your mission.

**Worksheet 7: Selecting community changes to be sought**

A comprehensive action plan includes an array of changes to be sought in each community sector that is relevant to the organization’s mission. A substance abuse coalition, for example, might attempt to bring about a variety of changes in programs, policies and practices in many sectors of the community, including schools, law enforcement, and religious organizations. The challenge now is to decide on a set of changes that will maximize each sector’s contribution to the mission.

Here, it is important to avoid a “solution bias” about what changes can be made in each sector, and to keep an open mind. In other words, we should not assume that schools can only provide information; that criminal justice agencies can only enforce laws; that the business community can only provide jobs, and so on. That sort of narrow thinking will limit our ability to maximize each sector’s potential contribution to change.

Specific tactics can be filled in at a later date (you will find a list of forty to start with in Chapter 7), but we suggest that here you consider the eight broad categories of tactics that we use in the following example, which shows what changes a substance abuse coalition might seek in each category:

1. Providing information and skills training
   Arranging for training of parents and teachers in monitoring for substance abuse.

2. Providing incentives and disincentives
   Providing incentives, such as after-hours jobs, for youth who are drug free.

3. Facilitating support from influential others
   Establishing peer support groups for youths and parents.

4. Changing the physical design of the environment
   Providing adequate night lighting and security on school grounds.

5. Improving services
   Developing after-school employment and recreational programs for youth.
6. Modifying organizational policies
   Establishing a policy of mandatory expulsion from athletics for violating the drug free code.

7. Providing public information and feedback
   Providing a community scorecard reporting drug and alcohol-related offenses in the community.

8. Modifying broader public policies
   Changing reporting laws to facilitate public exposure of drug dealers.

Worksheet 8:
Preparing action steps

At this point the group should have identified a set of changes that reflect its long- and short-term goals, and its agreed-on priorities. Once the group has achieved this consensus, it is useful to clarify the action steps required to bring about the desired change.

As you consider each action step, ask yourselves the following questions to help you assess the feasibility of the plan, and assign responsibility for its implementation:

- What action needs to be done?
- Who will take that action?
- By what date will that action need to be done?
- What resources and support are needed?
- What resources and support are available?
- What individuals and organizations might resist?

Some groups will not be ready for this step at this time. Consideration of specific actions may need to wait until you have reviewed the possible options available to you, as discussed in the later chapters on the choice of tactics, and the use of media. If that is the case, come back to this chapter later, and complete Worksheet 8, on page 51.

Guiding the process of action planning

The planning process outlined in this chapter may prove to be one that involves hard work, and perhaps high emotions for your group. Frequently, disagreements may lead to discussions of philosophical differences. If these discussions blossom
into full-fledged arguments, there is a risk of damaging the unity of the group. Here are six general guidelines to help you cope as amicably as possible with the process of planning outlined in this chapter:

1. Be inclusive
   Seek a diversity of viewpoints about what the organization should accomplish.

2. Manage conflict
   When conflict occurs among members of the group, try to bring them back to the shared vision and sense of mission, and find common ground.

3. Use brainstorming rules
   All members should be able to express ideas without criticism.

4. Be efficient
   Negotiate and stick to starting and ending times of meetings.

5. Communicate products of planning
   Communicate the results of planning to members and constituents, letting them know when plans are complete.

6. Provide support and encouragement
   Let people know who did what and the value it had for the organization.

Completing the plans

As you proceed to complete the worksheets on the following pages, here are two suggestions:
1. Feel free to copy these sheets;
2. Don’t feel you need to complete them all at one sitting
   It may require many meetings, over many weeks or months, before you are satisfied with your plans as a group. For some of the plans, as we said above, you may need more time to explore the options outlined in Chapters 6 through 9.
Worksheet 1
Reviewing your group's vision and mission

Vision
Refer back to Chapter 1 for information on the nature of a vision for advocacy. The vision captures the dream or ideal. It should be very concise, and shared by all.
Examples: Drug-free streets; Clean water; Opportunity for all

YOUR GROUP'S VISION


Mission
The mission statement describes what the advocacy organization needs to do, and why. It should be concise, but expressed in more detail than the Vision.
Examples: “To advocate for a smoke-free Burlington;” “To eliminate toxic waste dumping in Bluff County.”

YOUR GROUP'S MISSION:
Worksheet 2

Identifying objectives

Refer to page 38 for help on developing objectives. To remind you, they should be SMART: Specific, measurable (at least potentially), achievable (at least eventually), relevant (to the mission) and timed (including a date for completion). They should answer the questions, "What? Who? Where? By how much? And by when?" Some advocacy campaigns may have several objectives; others may be focused on one or two.

Example: By the year x, to reduce the number of children and youth who start using tobacco in Monroe County by 50 percent.

LONG TERM OBJECTIVES

1. 

2. 

MEDIUM TERM OBJECTIVES

1. 

2. 

SHORT TERM OBJECTIVES

1. 

2. 
Worksheet 3

Selecting strategies

See Chapter 6 for information about selection of strategies. A strategy should provide the broad road by which you will reach your objectives—for example through coalition building; educational approaches; policy change, and so on. Remember that multiple approaches are generally more effective than one single approach.

Example: "Increase awareness of dumping through public demonstrations."

YOUR GROUP'S STRATEGIES:

1.

2.

3.

4.
Worksheet 4
Choosing targets of change

Targets of change include all those who need to change, either because they are at risk (i.e. adolescents, children, pregnant mothers) or because a change in their behavior would reduce the risk to others (merchants, government agencies, service providers, etc.)

YOUR GROUP’S TARGETS OF CHANGE

1. 

2. 

3. 

4. 

5. 

6. 

7. 

8. 

Worksheet 5

Choosing agents of change

Agents of change are those who are in the best position to contribute to a solution. They might be peers, parents, caregivers, service providers, business people, elected officials, etc.

AGENTS OF CHANGE RELEVANT TO YOUR GROUP'S OBJECTIVES

1. 
2. 
3. 
4. 
5. 
6. 
7. 
8. 
Worksheet 6
Identifying sectors for change

Below is a diagram of community sectors that might be targeted by your advocacy organization. Ask yourselves which community sectors should be used to address your group's mission? Which of these offer good prospects for changing the behavior of your "targets of change"? Which might be valuable in reaching and involving your potential "agents of change"?

On this diagram, mark those sectors that will be addressed by your advocacy organization (and add additional sectors, if the ones you plan to involve are not represented.)
Worksheet 7

Selecting community changes to be sought

Use this planning page to identify the specific community changes to be sought in each sector. Indicate your plans in each of the eight areas of action identified on pages 41-42. Use the examples given on those pages as your guide. Copy this page, and use one worksheet for the changes you plan in each community sector.

<table>
<thead>
<tr>
<th>COMMUNITY SECTOR:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing information and skills training:</td>
</tr>
<tr>
<td>Providing incentives and disincentives:</td>
</tr>
<tr>
<td>Facilitating support from influential others:</td>
</tr>
<tr>
<td>Changing the physical design of the environment:</td>
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<tr>
<td>Improving services:</td>
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<tr>
<td>Modifying policies of related organizations:</td>
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<tr>
<td>Providing public information and feedback:</td>
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<tr>
<td>Modifying broader public policies:</td>
</tr>
</tbody>
</table>
 Worksheet 8

Selecting action steps

Make a copy of this sheet for each of the community sectors where you will seek changes. Provide information in the categories described on page 42.

<table>
<thead>
<tr>
<th>COMMUNITY SECTOR:</th>
<th>CHANGE TO BE SOUGHT:</th>
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<table>
<thead>
<tr>
<th>Action</th>
<th>By whom</th>
<th>By when</th>
<th>Resources &amp; support needed/available</th>
<th>Organizations or people who might resist</th>
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