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Connecting Clients to Power:

How Service Providers Can Mobilize Clients for Advocacy

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Note: This handbook should come with a CD that includes an educational presentation, a presentation on why service providers should engage client volunteers, and an electronic copy of this handbook.

Section I: Introduction to Volunteer Advocacy

Preface

Thank you for picking up a copy of this handbook. It is meant to lead you through the process of engaging clients in advocacy.

The outline of this book will guide you through this process, step by step. The first section shows why you should create a volunteer committee, and explains some of the first steps you'll take once you've decided to create a committee. Next, there's a conceptual discussion of techniques you can use to make the meetings of your committee successful. Then, it lays out some ideas for what to include in your meetings to help your committee develop. The next section gives concrete examples of the content of initial meetings, based on what happened at the first three meetings of the Citizen's Advocacy Network (CAN) at Oregon Food Bank. The final section contains some guidelines for how to mobilize and engage your group in several types of advocacy.

The information in this handbook is based mostly on the experiences I had establishing the CAN at Oregon Food Bank. Other information comes from interviews with experienced advocates at Oregon Food Bank and other local anti-poverty organizations. Some also comes from written resources on anti-poverty advocacy.

The contribution this handbook makes is mostly in how to get started. Community or group-based advocacy is a complex, well-studied subject. Other tutorials explain the topics covered in this handbook in more detail and range. Each section includes extra materials and references to these helpful resources.

Finally, advocacy is the right thing to do, and it's good for your organization. If you make a long-term commitment to volunteer advocacy, follow through with time and

effort, and have some successes, you will create an effective and cohesive group of volunteer advocates. Effective advocacy will create public policies that lessen demand for your services,

attract attention to your organization from potential donors and volunteers, and strengthen your ties to your community. And you will make the world a better place.

And remember that advocacy is fun and exciting! Enjoy it!

Sincerely,

Matt Lewis

"Be the change you wish to see in the world."

—Mahatma Gandhi.

Why volunteer advocacy?

What is advocacy?

Advocacy is the act of speaking up on someone else's behalf. Almost everyone who provides services has done some advocacy. If you've ever helped someone acquire governmental benefits, or helped them find a service from a different non-profit, you've been someone's advocate.

As community spokespeople, non-profits have the moral authority to be effective advocates for the clients they serve. People listen to non-profits, because they trust them. Effective advocacy can help create public policies that put more money in the pockets of vulnerable people, which, in turn, lessens demand for your services. Doing advocacy can also bring media coverage that attracts attention to your cause and organization, which can generate more donations and volunteers. Put a little into advocacy, and your cause will get a lot in return.

What is volunteer advocacy?

Fundamentally, this type of advocacy is based on **who** is doing it: volunteers who may have experienced or may be experiencing poverty. It is also a question **how** they're doing it: in this case, a committee of volunteers supported (or led) by a nonprofit service provider. And of course, there's **what** they're

doing: in this case, it's any type of anti-poverty advocacy.

Why should non-profits engage volunteers in advocacy?

"If you have ever spoken up on behalf of someone you cared about, then you have been an advocate. It's that simple."
-Nancy Amidei, So You Want to Make a Difference: Advocacy is the Key!

A volunteer advocacy committee can bring a number of assets to your organization and its advocacy efforts.

Volunteers know what you don't. You, important stakeholders, and the public can learn from volunteers. Your volunteers may understand poverty in a personal, comprehensive

way. They may know the emotional dimensions of poverty. They may see the barriers that both cause people to become and remain poor. They'll have ideas on how to address these barriers. They may have the stories about poverty that people need to hear to understand it. They can inform people about aspects of poverty that may be overlooked or misunderstood.

Volunteers do what you need.

Because of their knowledge and experience, low-income volunteer advocates have a unique power to change minds. In the wealthiest nation on earth, many people are skeptical that Americans really do experience hunger and poverty. Unpaid, low-income volunteers are often perceived as disinterested and possessing of genuine knowledge. They can prove that there is a problem by showing up and speaking out.

They have the **credibility** that conventional ways of demonstrating a problem may lack.

Volunteers also have the power **to reach people on an emotional level.**

Volunteers can be adept at expressing the emotional impact of a policy decision. They can appeal to a politician's conscience. They can even make them feel guilty about bad decisions. These appeals have the power to change minds.

Plus, low-income volunteers have **the power to get attention.** The media loves to hear stories about poverty that only volunteers can provide. Articles based on these stories can bring lots of attention to an anti-poverty issue and your organization.

Finally, there is **power in numbers.** Volunteers are voters, and reasonable politicians want to treat voters with respect and listen to what they have to say. And volunteer advocates increase an organization's capacity to advocate. You'll have more advocates, and you may be able to take on more issues with an eye towards cost-efficiency.

It's the right thing to do.

Clients of service providers ought to be empowered to advocate for themselves. Doing advocacy can counteract the feelings of hopelessness and disenfranchisement that weigh on many low-income people. A

successful advocate feels responsible for making the world a better place, which can renew hope and a sense of agency.

More importantly, real change in low-income communities is possible when everyone is involved. To renew a broken community, a service provider not only needs to advocate on its behalf, but give the community the tools and opportunities it needs to advocate for itself. In part, service providers and professional advocates can't do it alone. You need the assets that volunteers from your community can bring. But in a larger sense, an empowered community is a better community. Empowerment brings people together, gives people more control over their lives, and can create a sense of shared interest and identity. You need to provide these things if your community is to prosper.

A CAN member's experience: In my search to find something worthwhile to do with my life, I came across an old friend, Julie Massa, the co-facilitator of the CAN, and with her guidance I found out that possibly my experiences could help others. I am disabled, I have been homeless, I relied on food stamps at times, I have faced the possible loss of my home, and I have fought for my rights for programs such as weatherization for my home and help paying my utilities. I have been caught in the trap of "payday loans." It is living through the stress of survival that I realized that there are many people who cannot, or are not able to speak out and reach out for help.

It was scary, but I testified at a January hearing of the Oregon House Subcommittee on Payday Loans, and I believe they heard what I had to say, and I believe that my statements made an impression. It is by hearing of personal experiences that elected officials learn the realities of struggles, and then try to change the laws that do not work. I learned that if I speak from my heart that the words touch people who can do something about the issues.

CAN is a wonderful, diverse group of people, who together can create changes in the system by getting the message across that we will fight for our rights and fight for those who are not able to fight for their rights. We each have something to offer, and by meeting and advocating together we can initiate progress and equality.

Nancy Willhite, CAN member. February 3rd, 2006.

Section II:

Getting Started

First Steps

Now that you've decided to engage low-income volunteers in advocacy, you'll have to

do a few things before you start having meetings.

Demonstrating Legality

Advocacy is legal, but your organization might not be so sure. Consult with one of the many organizations that provide information on advocacy to 501c3 organizations, a number of which are listed at the end of this section.

What resources do I need?

Staff hours. How many staff hours you'll need to establish a committee depends on how much work your organization has already been done with volunteer advocates. If you already have relationships with volunteers, or if you've worked with volunteer advocates before, it may be much easier to get started.

Additional Funds. If you decide to offer compensation for meeting or event attendance, you may need an additional allocation of funding. Total volunteer compensation will depend, of course, on what you offer, and how many people accept compensation. You may also need funds to generate outreach materials, to order guides and books on advocacy, and to purchase food for meetings.

Formulating a group vision

Before you begin recruiting for your committee, it's helpful to have a clear vision of the mission and structure of your group.

Potential volunteers will want to know what they're signing up for, and you should have some idea what to plan for the group's future.

What do we want the mission of the

group to be? The group I helped establish, the CAN, had a broad, anti-poverty mission. We were interested in just about any issue connected to reducing poverty, including food stamp issues, Medicaid issues, or even payday loan regulation. You may want a more focused group that puts special emphasis on certain social issues, such as hunger, health care, or housing.

What are the goals of the committee?

In addition to a mission, you should think about what you'd like the committee to accomplish. The CAN's goals were four-fold: engage more volunteers in advocacy, develop leaders in the low-income community, get information from Oregon Food Bank's advocacy department's out to the grassroots, and gather information about the issues low-income people face in escaping poverty.

How will you share decision-making with

your group? Again, you don't have to have a definitive vision for how to share decision-making with your group. It is helpful to know where you'd like to see the group end up. What should the members of the committee have the power to choose? And what will your organization choose? In a larger sense, this is a question of whether you'd like the group to be an extension of your organization's advocacy efforts, much like a speaker's bureau is to a development department, or an independent, empowered group that can make some important decisions of its own.

Recruitment: Bringing people to the table

This may be obvious, but it's ***important that a meeting be well-attended. Half of the battle is getting people just to show up at a meeting.*** This section will show you some of the basics of bringing many people to the table at your initial meetings. First, a few key points:

Never stop recruiting: Membership in a volunteer advocacy committee tends to be very fluid. Not everybody can make it to every meeting. People might have higher priorities or lose interest. To replace leaving members, it's crucial to always be on the look out for new members.

Relationships: Good recruiting is built on relationships. Try to recruit people you already have a relationship with, and build relationships with recruits you don't quite know yet. You may also want to ask people you know at other service providers to help with your recruitment.

Where do you start looking for volunteers?

You first want to start looking within your organization. Try to recruit among clients of your organization. You may want to start with clients with whom you already have a relationship. Ideally, you'll have a database of people you know pretty well. Use the contact information from that database to promote your group. If you don't, it's a good idea to put all the contacts you already have into a database. You'll be using it a great deal.

You may also want to recruit among your volunteers who do direct service. Often, there's a fine line between a volunteer and a

client. Many former clients like to give back to the

organization or cause that helped them. Shop your idea around here; some of the best volunteer advocates for Oregon Food Bank are also service volunteers.

For more volunteers, you may want to visit other service providers or programs that work with low-income people. Here's a list of groups that tend to attract potential advocates:

Head Start
Domestic Violence Programs
Poverty Action Committees
Community Colleges
Housing Advocacy Groups
Tenant Organizations
Health Care Advocacy Groups (AARP, Etc.)
Community Organizations (ACORN, USAction)

Who should I look for?

Anyone can do advocacy, but you may want to favor people who have moved out of a crisis and secured a stable income. People with few familial obligations, fairly good health, and a light work schedule tend to be even more reliable. However, people in crisis can also be strikingly effective advocates, so it's important to not write anybody off.

You may want to seek out people with certain talents. Adept communicators strengthen an advocacy campaign. People with good interpersonal skills can make future facilitators and community leaders. Again, be sure not to exclude anyone based on their skill sets. You can engage in advocacy in any number of ways, and it will

be your job to find where an advocate's talents can be best applied.

Advocacy also requires a certain frame of mind. Look for people who question things, who expect more from society or their lives, or who think that poverty is unjust. Look for people who pay attention to politics, like to talk about it, and may have participated in it already. People who believe that poverty is "just the way things are" may not be ready for advocacy.

Reimbursing Participation

For some volunteers, it costs too much to do advocacy. Gas mileage, bus fare, lost wages, child care expenses- these small expenses take on much greater significance when your income is low. You may want to compensate volunteers for these costs at your meeting.

At our meetings, we compensated for gas mileage, which we did at the same rate that the federal government offers. We also compensated for child care expenses, lost wages, and bus fares. Volunteers filled out a form, and we brought petty cash with us to compensate some folks immediately. For others, we took their addresses, and sent them a check in the mail.

Your compensation costs will most likely go down after your first few meetings. You'll probably find that people will refuse compensation. They'll be doing advocacy for its inherent rewards. Other types of compensation, though, do not seem to lose their appeal. Make sure to always give leftover food to meeting attendants.

You may also want to consider **giving people rides to your meeting.** Some people might not be able to come, otherwise. Let them know that you can give

them a ride, but it may mean that they will have to come to the meeting early.

How do I look for recruits?

The easiest way to reach a lot of people at the same time is by email. If you have a database of email addresses of potential recruits, send out an announcement about the first meeting. Be brief, and include all relevant information about the meeting (time, place, length). Highlight that you'll offer food and compensation.

What email has in scope, it lacks in impact. People tend to breeze right through emails, and they may not remember what you wrote. *The most effective way to make an impression on someone is by meeting with them, face-to-face.* After that, a phone conversation, a letter, and a personalized email message (For recruitment materials, see Materials @#@#).

You also may try to advertise your group through newsletters. In-house newsletters work very well. Also, lots of service providers belong to networks that put out newsletters. If they won't help you recruit people, ask them to put something you've written on your organization in their newsletter.

You may also try to place advertisements in agency lobbies, or in other publications. Try to make these posters eye-catching, use lots of pictures, and keep your message brief and to the point. The quicker you can explain the group and the meeting, the more likely people will stop to look at the poster (see the sample poster at the end of this section).

What do I say?

When you're recruiting, always make sure to let people know when and where you'll be meeting, as well as some information on what issues the meeting will address. Also, let them know about reimbursement and rides to the meeting. When you're trying to pitch the group, the most significant barrier to recruitment may be hopelessness. Many people don't get involved in politics because they think that their participation doesn't make a difference. You will have to persuade them that what they do will matter (Also See Why Citizen Advocacy?, Section I, for more ideas).

- **Stress the power of a group**

"It's a chance to make change happen, because you'll be a part of a big group of dedicated leaders that has my organization's support. We'll be speaking as a group, and many voices are always louder than one. Legislators may not pay much attention to one person, but they can't afford to ignore a whole lot of them."

- **Stress the assets that will make them effective advocates.**

"You're going to bring a perspective that'll be hard to ignore. You have the experience, and you have the knowledge, which will help make you an effective advocate."

- **Emphasize the skills that volunteers will learn.**

"We're training leaders for the anti-poverty movement. It'd be a great opportunity to learn how to advocate for the issues that may affect your life. We'll have trainings on public speaking, on government programs, on speaking with legislators- all that you need to know in order to change your community."

- **Emphasize the social aspects of working in a group.**

"Letting off steam feels good. You'll have the support and understanding of lots of other active, informed people who understand what you've gone through. They can help you cope with the stresses that

sometimes prevent people from doing advocacy."

- **Stress the information about benefits and services that they may learn from you or other volunteers.**

"You may also learn a lot about available benefits and services from our outreach staff."

- **Talk about fairness.**

"It's a chance to make Oregon work fairly for everyone. Big businesses, special interests and rich people pay lobbyists to talk to legislators on their behalf, for their causes. Legislators often don't get to hear from people who are working hard just to get by. The network would represent a side of the debate that's often not at the table. It's only fair that there be equal chances for both sides to let legislators know how they feel."

Outsourcing Your

Recruitment

Somebody you know might be able to help recruit volunteers. Everybody listens to people they trust and know more than people they don't. You may find it best to recruit through an intermediary who has personal relationships with potential volunteers.

If someone at your agency does outreach, they may have many strong relationships with potential volunteers. Ask them to get the word out about your committee. You may also know people at other agencies who have strong ties in your community. Ask them to help your recruitment effort, accompany you at a meeting, or introduce you to some potential volunteers. Try to make it as easy as possible to help. Prepare a letter of invitation, or a brief description of your network, for an outreach worker to pass out

Who: All citizens with a stake in ending hunger and poverty.

Where: Oregon Food Bank (7900 NE 33rd Drive)

When: _____ at _____

Why: To advocate for policies that alleviate poverty, the root cause of hunger and food insecurity

Questions: Contact
Matt Lewis at 503-
282-0555x281 or
mlewis@oregonfoodbank.org

SPEAKUP!

Join the Citizen's Advocacy Network
(**CAN**) of the Oregon Food Bank!

Section III:

Meeting Techniques

Preparing for a meeting

Having meetings is an essential component of engaging volunteers in advocacy.

Meetings help

you distribute information to your volunteers, and help develop a relationship between you and your volunteers. You'll need relationships and a reliable way of distributing information to engage your volunteers over and over again. And as many advocates insist, this persistence is the key to effective advocacy.

"In advocacy, being persistent is the most important thing. You need to show up again and again, and that's hard to do if you don't have an ongoing relationship with your advocates."

-Bill Tibbetts, Coordinator of the Anti-Hunger Action Committee, Salt Lake City, Utah

should have one. Write out the length of time each item will take, and if you want to, provide a brief explanation of the itinerary. Include the date, time, and place of the meeting in a heading at the top of the page. See an example agenda in the materials section.

You may want to write two agendas: a public agenda with the

information the members need to know, and a staff agenda with the information you and your co-facilitators ought to know. A staff agenda can include materials for the meeting and a greater description of agenda

items. Next to each item on the staff agenda, write who will be responsible for administering it. See Section XX for examples of staff and public agendas.

Who decides what goes on the agenda is a big deal. At each meeting, and in between, you should try to assess what people want on the next agenda. Ultimately, there may come a point when volunteers will decide what goes on the agenda and draft it themselves. In the beginning, you will probably make most of these decisions. But you should try to incorporate into the agenda what the group has said it's interested in, which you've gathered through feedback sessions.

What you include in the agenda should be a **balance of action and planning**. By action, I mean engaging in an activity that is intended to *directly* make society better in some small way. By planning, I mean planning advocacy activities and building up the capacity of your group to

Set a time and place

As you know, you'll need a time and a place to have your meeting. For most meetings, you'll have decided when and where the meeting will be at the end of your last meeting. But for the first meeting, you'll have to decide for yourself. You'll probably want to have the meeting when people aren't working, such as the evening or on the weekend, and at a place that's convenient and accessible by public transportation. Of course, check your schedule for possible conflicts. And make sure to let people know when and where the meeting will be when you're recruiting.

Create an agenda

Every meeting should have an agenda. It will give your meeting order. Your agenda should be written, and everyone at the meeting

do advocacy. *Both action and planning are necessary, and it's almost essential that you find a way to balance them **each meeting**.* Sections IV will provide you with many examples of action and process-oriented agenda items.

What to bring?

- **Outreach Materials**

You'll want to bring lots of outreach/advocacy materials that will help the volunteers on the committee engage in advocacy. A copy of a legislative update, or an advocacy alert, or postcards may be appropriate. Bring more than enough. If you're making a presentation, hand out paper copies of it, so people can take notes and follow along. You may also want to bring buttons, patches or other fun advocacy gifts.

- **Facilitator materials**

You may need all sorts of materials to facilitate your meeting. Some of this may seem obvious, but it's important to not leave it to the last minute to collect these materials. You may need a dry erase board, big pad of paper for writing things the group can see, pens, a computer, a projector, or screen to project on.

- **Sign-in Sheet**

Bring a sheet of paper for everybody sign in on. That way, you won't forget anyone who came to the meeting, and you'll have their contact info.

- **Name tags**

Not everybody is going to know each other's names. It's helpful to have everybody wear name tags. Leave them by the sign in sheet with a pen.

- **Food**

You have to have some food at each meeting, particularly if it's early in the morning. You may need to bring silverware, cups, and plates, too.

- **Reimbursement**

Have your compensation forms ready, if you're going to write people checks, or some spare cash handy. And make sure to have some arrangement made if you're going to provide child-care on site. Volunteers may need to bring their children to the meeting.

What tasks do I need to do?

- **Remind people of meeting**

People forget about meetings. Try to give every member a call the week before the meeting. Send out a reminder email. When you see them, ask them if they're coming to the meeting. And when you're reminding people about meetings, let them know about compensation and that you can give them a ride to the meeting.

- **Do your homework**

Nothing's worse than an unprepared speaker. If you're going to give people an update, know what you're talking about. Practice it. If you're going to lead a discussion, have more than enough questions ready.

- **Reserve a meeting room**

This may seem obvious, but if you don't have a suitable meeting room at your office, it may take more time to reserve a place to having meeting. It may also require funding. Make sure to give yourself some time to look for the best place. You may want to ask another service provider or community organization for space.

- **Delegate meeting tasks**

You may also want to have members lead some of the agenda items, or contribute

something to an agenda item. For example, at one meeting, the members of the CAN contributed to a legislative update, since they attended the hearing on which the update was based. Make sure to let people know ahead of the meeting that you'd like them to help lead an agenda item. Write down on the agenda who you've delegated a task to.

- **Send out your agenda**

Lastly, you may want to send your agenda out to the membership prior to the meeting. More people may come to your meeting if they know what they may get out of it.

Supplement: What's an alternative to creating a network?

A viable alternative to network-based volunteer advocacy is "event-based" advocacy. Instead of creating a committee that meets and communicates regularly, you could form a loose network of advocates that come together only to engage in a specific advocacy activity. For example, if you need volunteers to testify at a public hearing, you could get everyone together for the sole purpose of testifying. No meetings, no group- just some people you know who can do advocacy in their spare time. This can be an effective, cost-efficient way to engage low-income volunteers, if you don't have many resources, and if there's not much advocacy to do in your community.

- **Relationships matter more**

Such a network will be based almost entirely on the personal relationships you have with low-income volunteers. It may also be based on the relationships you have with professionals who know low-income people. If you have to find somebody to do advocacy, go through any of your relevant connections. Cultivate these connections, as your network's networks viability will depend almost entirely on it.

- **Communication will be harder**

You'll still need to have some communication structure to let people know about advocacy opportunities. An email list or a database of phone numbers could suffice. However, you won't be able to communicate through meetings.

Leading a Meeting

Being a strong meeting facilitator is

challenging and complex. This section is only an introduction to good facilitation. There are many internet resources available on facilitation skills, and some colleges offer classes in facilitation. You might consider looking through a more comprehensive guide to facilitation prior to your first meeting.

In any event, I've included a few of the tools that I've found are necessary to lead a good meeting. I've also included a few pointers that I've found help a meeting go smoothly.

The agenda

It's helpful to think of the agenda as a contract between you and the group. The group has, unless otherwise stated, delegated you the authority to move them through the meeting. For example, if an item is running long, you've been implicitly tapped to move the meeting to the next item. In other words, since you've all agreed to follow the agenda, you are acting on behalf of the group, and not yourself.

You may be forced to interrupt the meeting if it isn't proceeding according to the agenda. Make sure that you explain that what you're doing is in the group's interests. You could say, "Thanks for that contribution, and I know everyone's got a lot more to say about this. We can talk about it at our next meeting, if you'd like. But I want to get you all out of the meeting when I said I would. Would it be alright if we moved to the next agenda item?" Everybody should understand that by enforcing the agenda, you're not

making a personal attack on anyone. You're fulfilling a promise.

Ground rules

The **ground rules** are very valuable, too. In your first meeting, you should have a discussion about what rules should guide group behavior at a meeting. In general, there are a couple of subjects your rules should cover:

Meeting and Discussion Behavior: Some rules on what people can and can't say, and when they can say it, are appropriate and helpful. For example, we had a rule that you couldn't interrupt other people while they were speaking, and that nobody was allowed to speak twice in a row. We also created some rules on staying on topic during a discussion.

Meeting Attendance and Logistics: We tried to create some rules on how much people should come to a meeting. Though they were not strict, we decided that everybody should try to come to as many meetings as possible, and that we would alternate when we were having each meeting from weekends to weekdays, as not everybody could make weekend meetings.

Now that you have your rules, write these rules down on a big piece of paper, and, if necessary, keep them posted at each meeting. This is a product of the group. Like the agenda, it's a contract between you and the group, and it's your job to enforce it at a meeting. If somebody breaks the rules, you should remind them about what you all agreed on at the first meeting. That way, it's the group's decision to limit behavior, not yours. **The less it seems that you are doing what *only you* want, the better.**

It can be a challenge to enforce the ground rules. It may take some time for you to feel comfortable interrupting the meeting if you don't know the members of your group well. Something you might say, if, for example, somebody was speaking too often, "I hear that you've got a lot to say on this issue. But I want to make sure that everybody gets a chance to speak their mind, which we said we'd like to do in the ground rules. Could we come back to your comments in a bit?" It's always good to explain what you're doing. If the group disagrees with your decision, it's not the end of the world. Facilitators make mistakes, and you can always be flexible.

Some additional pointers

- **When people walk in to your meeting, try to greet them.** If you don't know them, you ought to introduce yourself.
- **You'll be in charge of beginning the meeting.** Make sure to begin your meetings on time, but try not to be rude if someone's having a conversation when you'd like to start. If you start talking, they might end their conversation. You could also ask them politely to direct their attention to you and the meeting.
- **At the beginning of the meeting, ask members if they'd like to add anything to the agenda.** It's a great way of incorporating group interests if you've neglected them.
- **People may show up late. You should have them quickly introduce themselves, and then get back to the meeting.** You also may need to help them get a seat, any outreach materials they need, and an agenda.
- **At every meeting, you'll need to schedule the next meeting.** You can do this right as you close the meeting. Ask everybody when they'd like to meet again. Make sure to take into account any rules you've adopted to schedule meetings in a certain way. Also, bring your schedule along, so you know when you're available.
- **You'll also be in charge of ending the meeting.** Try to do so on time. Don't rush people out of where you're meeting if you don't have to. If people linger to talk to each other, it's a sign that they liked the meeting.

Facilitating Discussions

It's essential to know how to facilitate a

discussion well, as your first meetings will involve many discussions. In this section, I'll introduce some of the basics of facilitation as it relates to working with volunteer advocates. For further information, you may want to read a good book on facilitation, of which there's a list at the end of this section.

Take notes

I find it really helpful to take notes while I'm facilitating a discussion. It mostly helps you summarize the discussion once it ends, but it also focuses your thinking and can be added to the meeting minutes. It can be very helpful for the group if you take notes that everyone can see. You can put the notes on a giant pad of paper, a dry erase board, or even on a transparency that's projected on a screen.

Enforcing the contracts

Your two contracts will come in handy when you're facilitating a discussion. Try to keep your discussions limited to the time you've allowed in the agenda. It'll be your job to get the group to move to the next agenda item.

The ground rules are especially helpful, as many of them should relate specifically to discussion behavior. It, again, is your job to enforce those rules. When you're enforcing the ground rules, make sure to let people know that what you're doing is required by the ground rules. You could say, "I hear that you feel strongly about this subject, Ms. Y, but in the ground rules we said we'd try to let other people talk after we've said our piece.

Ms. X, it looks like you've been waiting patiently to say something."

It's also helpful to have your ground rules give you the authority to keep the discussion on track. If the discussion is veering too far off topic, you can say "These ideas are important, but let's hold off on them for another meeting. Is it okay if I put them in 'the parking lot' for now, and bring them up at a later discussion?"

Listen rather than lecture

Your role as the facilitator of a discussion is to **get everyone else to talk**. The best way to do that is to ask as many questions as needed, and keep your statements to a minimum. Bring a list of more questions than you'll need. You should be prepared to fill any awkward silence.

Try to practice "active listening."

That means asking follow up questions when you don't quite understand something. Dig deeper when somebody says something interesting. Summarize what they saying, "So what I hear you saying is that access to food is a big issue in your community." Or say "do I understand you correctly, that you're saying that access to food is a big issue in your community?" Or to dig deeper, "It seems like access is a big issue. Why is that?"

Make sure that you achieve maximum participation from all group members. If someone is silent, they're probably losing interest. Sometimes it's helpful to ask them a direct question, as in "Have you found X to be true in your experience, Ms. Y?" Recognize, though, that some people may need some time to feel comfortable speaking out.

Try to create a “no-judgment zone.”

One way to make people feel comfortable is to create a judgment-free atmosphere. When we created our ground rules, we talked about trying to foster an atmosphere of non-judgment, and I never heard any complaints from volunteers about feeling judged afterwards.

You also may want to have a brief discussion about the stereotypes that people encounter. Everybody in your group should understand that certain things they say could be offensive. And raising that topic can

reassure volunteers that you’re dedicated to fostering a tolerant, understanding atmosphere at your meetings.

Summarize your discussion

A great way to end a discussion is to summarize it. Try not to wind up the discussion in the middle of a big idea, but once the pace of the discussion dies down a bit, you should try to summarize what people said. This gives everyone something to take away from the discussion. You don’t need to be too detailed- highlight 4 or 5 themes that the group seemed to think were important.

Facilitation Resources

The Art of Focused Conversations: 100 Ways to Access Group Wisdom in the Workplace by R. Brian Stanfield

The Facilitative Way: Leadership That Makes a Difference by Priscilla Wilson

Organizing for Social Change by Kim Bobo, Jackie Kendall, and Steve Max

*SAMPLE LIST OF QUESTIONS FOR
FACILITATED DISCUSSION*

Questions for Trainings Discussion:

1. What are some skills that you'd like to have?
 - a. What do you not like doing?
 - b. What kinds of skills trainings would put you at ease?
 - c. How much would you like to know about how to mount a campaign to make a policy change?
 - d. Which skills would you want to learn now, and which later?

If someone asks for an unusual training, ask:

 - i. How will that skill make you a better advocate?
2. Which of these skills are most important?
 - a. Will this skill help you advocate immediately?

What are we doing now that would be affected by developing this skill?
 - b. Will this skill not be useful now, but very useful later?
3. What can OFB/CAN do to develop those skills?
 - a. Julie, can you think of an event? A training? A speaker? Who should we bring in? What wouldn't be too much trouble for CAN members?
- c. How long will it take for this skill to develop?

Retaining Members

You'll probably find that there are lots of

people who'll come to a meeting. The hard part is retaining them. Volunteers, of course, can come and go as they please. So how can you ensure they come back?

Make sure it's worth it

First, recognize that individual priorities and contributions matter. The more valuable a volunteer thinks participating is, and the more they care about what they're working on, the more likely you'll retain them.

- **Get feedback.** Try to get lots of feedback on your group's priorities, the advocacy activities you're engaging in, and the structure of the group. Try to make the changes that people ask for. See the section entitled "Building a Strong Group Identity" for more information on how to get feedback.
- **Give them responsibility.** If a volunteer has more responsibility, they may feel that they're making a greater contribution to the work of the group, and therefore a more valuable group member. It may help to start with minor responsibilities, like contributing some thoughts to an informational session at a meeting.
- **Follow up with a leaving member.** If a member wants to leave the group, you might want to ask them if

Small successes retain members.

Ultimately, retention will depend on how successful your meetings and advocacy activities are. To ensure volunteer retention, you may want to engage in some small, winnable issues early on. Now, success can be measured any number of ways. Sometimes, I've found that a small, winnable success can mean just showing up and speaking out at an advocacy event. It felt like a success when CAN members spoke at an Oregon House hearing, even though no policy change has yet resulted. See Section IV for more ideas on advocacy events that produce small successes.

there's any other way they'd like to contribute. They also might have a problem you could help solve, if only you ask. Make sure to follow up with them if they don't come back to a meeting.

Relationships

In the long run, many volunteers will stay with a committee because of a relationship. They may have a strong relationship with you, somebody in the group, the group itself, or a cause. Try to foster relationships among people in the group and between yourself and

group members. Let people stay a while after the meeting to talk. Take every opportunity to listen to and get to know a volunteer.

- **Following up.**

Many volunteers cite the follow-up that a group leader did as the reason they kept coming to meetings. When you follow up, you're giving

somebody individualized attention, which everybody likes. You're showing them you care about their opinion. You can also get to know them better in a private setting, and they can get to know you. It builds relationships.

Reward Participation

You may also try to reward participation. When people do something for the group, you can reward them any number of ways. Sometimes a certificate, or just public praise, is enough of a reward. Other times, you may

want to offer gift cards to volunteers, if they've made an extra effort. Let people know about material rewards tactfully.

Another way to reward people is by letting them talk about the advocacy they've done. At meetings, we had everybody who had done some advocacy talk about it in a review session. And you may consider giving them more responsibilities as they participate in advocacy more, if that's what they'd like to do.

Section IV:

What happens at meetings? Possible agenda items

Keeping yourself and your group informed

You have access to a wealth of information that your volunteers will want to know. Part of your job will be to distribute that information to your volunteers in an accessible and engaging way. You'll also want to collect information from your group on important issues related to poverty in your community.

Using accessible language

Make sure that you're always speaking in an accessible way. This does not mean dumb things down; try to explain complex topics in accessible language. For example, I tried to explain the budget reconciliation process, which is complicated, detailed and can require lots of jargon. It wasn't worth explaining everything about it. I used only the jargon that was absolutely necessary, and defined these terms when it was appropriate. I explained what the process meant mostly in terms of its impact, which everybody seemed to understand.

Legislative updates

One of the most important things you may do is brief your advocates on the political actions they ought to be aware of. The update should provide mostly background information on an advocacy activity that you'd like to engage your volunteers in. Again, make sure that you're explaining things in a way that anybody can understand. And don't overwhelm people with too much information, or irrelevant information. Providing a

supplemental handout with more information can be helpful, which you can develop on your own or take from another organization (See materials and resource list).

The Center on Budget and Policy

Priorities, for example, provides lots of informational notices that you can turn into legislative updates.

Advocacy Alerts

At every meeting, you're going to want to let the volunteers know about advocacy actions they could take. Explain the intended impact of the action, and provide relevant background information, which can be done in a Legislative Update. And if you want to, talk about how the action fits into the big picture of a broader goal or campaign. Your volunteers will probably want to know what the intended effect of the action will be.

Make it easy for your volunteers to participate. Give them lots of relevant information; you can write out how to contact the public officials in question, what to say, and why you are saying it (see materials). Another way to make sure volunteers are engaging is to make contact with a public official at the meeting. Bring cell phones to call them, computers to send them emails, or postcards or letters to fill out at your meeting.

To find out about advocacy opportunities, you may want to subscribe to an advocacy alert newsletter, which can be electronic or on paper. Look for local organizations that provide an advocacy alert. You may want to monitor governmental websites or sign up for a newsletter from a public official for more information. If you're in Oregon, make sure to sign up for Oregon

Food Bank's Advocacy Alert, and sign up to receive other messages about advocacy opportunities.

Educational Presentation and Skills Training

Early on, you may want to give your volunteers some background information on the issues you'll be advocating on. Advocacy can be a confusing term, so explaining what you mean when you say it can help volunteers a great deal. And everybody ought to have some baseline knowledge about how government works and the governmental programs that you'll be paying attention to.

Later, you may want to train the volunteers on how to advocate effectively. It may be helpful to first have a discussion about what people would like to learn. You may find that you're unable to teach them what they'd like to learn, in which case it may be a good idea to consider attending or holding an advocacy skills conference. You may have access to people who can run a training or educational session; consider inviting them for a group training.

Finding out about poverty issues in the community

You may also want to facilitate discussions about the problems volunteers face as people living in poverty. By having these discussions, you may find out about new issues for your organization to advocate on. It can also help your organization focus the advocacy it's already doing on issues that are more important to your community.

Some organizations find this information out through other means, like focus groups, or a

citizen's advisory board. Your organization can perform those duties in addition to its primary purpose of engaging in advocacy.

After a meeting, you should take advantage of the access you have to important stakeholders. In discussing the problems they see in their communities, your volunteers may let you know about problems with government programs, with other service providers, or just in the community.

You can bring this information to the attention of relevant stakeholders, so that they can take action. Not only does doing so improve your community, but it may build better relationships between you, your volunteers, and other stakeholders.

For Materials Related to Legislative Updates and Advocacy Alerts:

Center on Budget and Policy Priorities. A Washington DC think tank that provides great information on state and federal poverty issues and strategies for successful advocacy. www.cbpp.org.

Food Resource Action Center. A Washington DC think tank that provides information on state and federal anti-hunger issues. www.frac.org.

Oregon Food Bank. Sign up for the Oregon Food Bank's Advocacy Alert, which distributes lots of information on advocacy opportunities. www.oregonfoodbank.org

Oregon Center for Public Policy. An Oregon think tank that provides great information on policies that affect vulnerable people. It provides policy updates if you sign up for its alerts. www.ocpp.org

Oregon State Public Interest Research Group. An Oregon institute that does great research on progressive issues. www.ospirg.org

SAMPLE HANDOUT FOR

ADVOCACY ALERT/LEGISLATIVE UPDATE

Reconciliation Explainer & Action Guide

What is budget reconciliation? What's been happening in Congress for the last couple of weeks is a process called **budget reconciliation**, which is how Congress makes some budgetary changes to entitlement programs. An entitlement program is one that **distributes goods and services based on eligibility** (as opposed to a discretionary program, which distributes goods and services based on funding). The main way to change how much money an entitlement program spends is to **change the eligibility rules**. This year, budget reconciliation is in part dealing with three entitlement programs: Food Stamps, Medicaid, and welfare (TANF). The House and Senate have passed different versions of this year's reconciliation bill, and a Congressional committee is hammering out the differences between the bills right now.

How does it affect Food Stamps? The House's version of the reconciliation bill **eliminates categorical eligibility** (or cat el, as some call it), which makes it easy for some people who use social services to get food stamps. The bill would also require that **citizen immigrants be in the country for seven years before they can get food stamps**- up from 5 years. According to the Oregon Center for Public Policy, these changes would make **35,000 Oregonians lose their Food Stamp benefits**. The Senate version of this same bill does not contain any Food Stamp cuts.

And Medicaid? The **House** reconciliation bill lets states ask for **a higher contribution from Medicaid (OHP) recipients to participate in the program**. This will most likely **cut vulnerable people off of the program**, since many people can't afford these contributions no matter how much they need services. Oregon showed that much in 2003, when it raised OHP premiums, and people in need dropped off OHP. The federal government is basically letting all states do just that. In addition, the bill would let states reduce benefits if they want. Add it all up, and under these cuts, about **25,000 Oregonians would lose health care coverage, and many might lose some benefits**, depending on what the state government decides to do. Again, the Senate version doesn't contain changes that would make people drop off the program- it in fact would expand Medicaid to cover more disabled children.

And Welfare? The issues around welfare are a little different. Congress has to **reauthorize** most federal programs, which means it changes a few parts of a program here and there, and then votes on it. The federal government's welfare program- TANF, or Temporary Assistance for Needy Families- was supposed be reauthorized in 2002, but Congress didn't really want to talk about it. Now, Congress still doesn't want to talk about it, but it has to reauthorize it SOMETIME. So at the last minute, **the House slipped TANF (welfare) reauthorization into the reconciliation process, too**. They put it into the really big bill with Medicaid and Food Stamps, which would make it hard to vote against. And only a small committee really gets to debate and discuss what's in it- it was never brought to the floor of the House for discussion, and it wasn't even in the Senate

version. Of course, the House's reauthorization is pretty bad- **it makes work requirements stricter and reduces benefits that help welfare recipients get by on their own, like child care benefits.** What many people are asking for, as a first step, is **that Congress take reauthorization out of the reconciliation process,** give everyone a chance to debate and discuss it, and let everybody vote on it as a single bill. Some people think that it even violates Congressional rules to include welfare in reconciliation. We may soon see a ruling on this issue from the Congressional parliamentarian, who decides if something the Senate does breaks parliamentary rules.

So what's going to happen now? Both the House and Senate versions are going into a committee, where about 10 representatives from each chamber iron out the differences between these bills. The committee produces a new bill that both bodies have to approve before it's sent to the President for his signature. Fortunately, **Sen. Gordon Smith has publicly stated that he opposes the House's cuts** and will vote against any bill that contains these cuts. The other important fact is that the **House version passed by the slimmest of margins- 2 votes.** Only one Oregonian representative voted for the House version: **Rep. Greg Walden.** However, most analysts think our best chance to defeat the cuts is with Sen. Smith in the Senate.

And since the House and Senate passed their respective versions before the Thanksgiving recess, moderates in both bodies have been **making a lot of noise about how they don't like these cuts.** Gordon Smith, as I said before, has been among the **7 Senate republican's who signed a letter that states their opposition to cuts...** and a similar letter is now circulating in the House. Also, today the Senate overwhelmingly passed three motions to instruct, which are basically public statements that the Senate votes on to send a bill conference committee some message. This time, all of the motions said no to cuts.

SO really, **the Senate is where the best chance is to stop these cuts.** It's really unbelievable. Senate moderates seem to taking a strong stand on this very important issue, at a time when a whole lot of the most vulnerable people in America, like Katrina victims, aren't doing well at all, to put it mildly.

So what's the Food Bank been doing to make sure that these cuts don't pass? Well, the Food Bank's advocates are trying to get as many people as possible to send thank you notes to Senator Smith for standing up for Oregon by facing down his party's leadership so far, which is not the easiest thing to do. **He's the most important Oregonian representative on this issue, and we've been focusing on him.** But we're also sending thank you letters to congressional democrats. Everybody who's helping is going to know how important what they're doing is. And they're going to know that a lot of people are paying attention to what they're saying now, and will be paying attention when they vote on the final bill.

!!ACTION!!

Call your Congressional Representative!

Most Oregonian representatives have said they will vote against the cuts. We should be letting all Oregonian representatives know that we support that decision, and that we're paying attention!

However, Rep. Greg Walden and Sen. Gordon Smith are the most important Oregonian representatives on this issue. We should focus our efforts on calling them. If you know anyone who lives in Rep. Walden's district, have them call his office!

Call the Capitol Switchboard toll free at **1-888-233-1221** and ask for your Member's office. Let them know that they should stand up for good values and good people by voting against any bill that contains cuts.

Building a strong group identity

Building a group identity is more art than science. Simply being together over and over again can create a sense of shared interest and identity in your committee members. The relationships that volunteers create with each other also add to a group's identity. All this may seem rather hard to control. However, there are some techniques that can speed up the process of forming a group identity.

Presenting your organization's vision

At your first meeting, it's important to brief all volunteers on what your organization hopes the committee will do- your vision for the group. You may also want to share your organization's intentions for sharing responsibilities with the group.

In a speech about your vision, the questions you'll want to address are nearly the same as those you discussed during the visioning process: What does your organization expect of the group? Who will decide what's on the agenda? Who will decide what the group engages in? What issues are your organization's highest priorities for the group? You should let people know if you don't quite know the answers to these questions, which is fine. It's helpful to give everyone some idea of what your hopes are, even if it means letting them know that you

don't know what those hopes are yet. You should open the floor for questions after you've presented your vision.

Getting Feedback

Try to get feedback on your vision for the group. I found that for the first three meetings, the group didn't know exactly what to think about our vision. This may have been due to my confusion about what the group's goals were. But it also may have happened because we did not have a facilitated conversation, complete with a question and answer session, on our group's identity at our first meeting. It turned out that people wanted to discuss the mission, goals, and structure of the committee. At our third meeting, we decided to discuss the group vision. We may not have been ready to decide exactly what our group identity would be, but having a discussion greatly helped us on our way to forming a better group identity.

The I/We Divide

One of the greatest challenges for any facilitator is to get people to look past their immediate interests. Many advocates may come to your group to fight a private battle. They were burned by the state human services agency, for example, and want to either get the treatment they think they deserve or only want to change that agency. These people are difficult to work with in a group setting, because they tend to only answer to themselves, and not to the group.

Education is one way to encourage your volunteers to identify with your group's causes. Most of the issues that you'll be

interested in are consequences of poverty. If you take a look at the bigger picture, almost all issues related to poverty have some impact on each other. If you have more food stamps, for example, you may have more money for housing. Or if you get health care coverage, you can heat your house. Many volunteers already know how interdependent most aspects poverty are. It's your job then to show that since almost any issue can have some relevance, it should be alright to do advocacy on more issues than they just the ones they find personally compelling.

Through education, you can also show a volunteer that it's not just about them- it's about their entire community. Explain the structural causes of poverty. Show them that usually, what happened to one person is a part of a larger pattern involving many other people. A personal grievance may have been caused by an institutional policy. Therefore, they ought to think about changing many policies, not just fixing their situation.

You might also let them know that they represent all the people who've had bad things happen to them, some of whom aren't able to advocate. Many people share the same problems as the members of your organization. Many of these people don't have the time, money, or opportunity to do advocacy. Show them that they represent many people when they advocate, which is a noble and inspiring thing.

Individual follow-up

Another great way to get feedback is to privately follow up with a volunteer after a meeting. Following up is also helpful when you want to get feedback on specific aspects of your meetings, and not just its goals or priorities. You can call or email them, but the best way to do it is to meet in person. Try to start a follow up session informally. Ask them about how they're doing, and other social things. Part of following up is to try to build a relationship with the volunteer, which will make both yours and their experience richer.

Bring a list of questions that you'd like to ask them, and try to record their answers. Ask them what they'd like to see happen in the next meeting, and how the last meeting went. Try to incorporate any suggestions they might have your next meeting's agenda. The follow-up shouldn't be for show only- it's important that they see results.

You should be aware that doing effective follow-up can mean a significant time commitment. You may find that some volunteers will want to talk to you longer than your schedule may allow. Once you have a good relationship with a volunteer, a simple follow-up conversation can run 2 hours. You might want to allot yourself a specific amount of time, and hold yourself to it.

Building strong group structures

As your group develops, you may consider creating an internal infrastructure to support it. You'll want to communicate with volunteers, and they may want to communicate with each other. You'll also want to begin ceding some responsibilities to group members. All these actions may require formal structures that you'll have to develop.

Group Communication Structure

Face-to-face contact is always the best way to communicate. But in between meetings, regular chatter between you and the group will mostly occur through email and over the phone. Setting up a group **listserv** is free and doesn't take very long (on google.com, or yahoo.com). See P. XX for more information. Another way to communicate over email is to keep a group **email distribution list** to send out reminders and advocacy opportunities to people when they come your way. In any case, make sure to keep **a database of everyone's email, phone number, and address**, if possible. Some volunteers won't have regular access to email or even phone, so conventional mail will be your best bet. You might want to have a conversation with your volunteers on how to best facilitate group communication.

The more people you know, the stronger your network should be. Add anyone who's shown interest in your group to the group database- they may not come to meetings, but they could help in an advocacy event. When you want people to take action,

you may find that have an extensive database will help you find people better than a smaller database of advocates who participate more often.

Codifying Group Identity

As the last section explained, the group should feel like it's involved in issues it cares about. This may be a challenge, since there may be varying and conflicting ideas of what the group should be working on. Everybody will have their issue- welfare, health care, food stamps, or what have you. Not everybody is going to want the group to put effort into every issue.

If you're unable to achieve a strong sense of common identity and interest in too many members, it may be best to try to juggle many issues and campaigns at the same time. Try to include opportunities to advocate on a variety of causes at each meeting. At our first meetings, we covered many topics to get more people interested. Most people found something they were interested in.

On the other hand, if you are able to achieve a strong sense of group identity, **you might consider drafting and adopting a mission statement**. Codifying a group identity can make sense later on in your development, as it can be helpful in settling disputes and making decisions. You don't need to initiate the process of creating a mission statement in your first meetings. The CAN, for example, did not develop sufficiently to draft a mission statement in its first three meetings. Try not to draft a mission statement prematurely. If your group isn't very cohesive, it can be counterproductive to write a mission statement, as it can take a while to write one that everyone agrees on.

Establishing a Group

Decision-Making Process

Most likely, the issue of who controls the group is a concern of the volunteers. Does the group feel like it has some control over its direction? Is it included in the decision-making process? Are its needs being heard and addressed? In your first few meetings, the group should have some informal control over the agenda, through things like feedback discussions and individual feedback sessions. You'll probably have compromised on your vision for the group, as you should. If the volunteers feel that they're doing something they don't like, they probably won't come back. You should make the appropriate changes.

If volunteers want more power over the group, though, **you may need formal structures that facilitate collective decisions and help resolve conflicts.** Sometimes, this means electing officers, a board, subcommittees, or a leadership team that could take care of some of your responsibilities. At a group's inception, these processes may be unnecessary and counterproductive, since you'll be making most decisions, and the group may not be cohesive enough to make these decisions

quickly. When the group develops sufficiently, you may want to consult a guide on creating a leadership structure. See the Rural Organizing Project's guide to naming leaders, P. XX.

Choosing Group Priorities

Once you've created a group decision-making process, and formed a coherent group identity, it will be much easier to choose which priorities will form the basis of the advocacy activities your group engages in. At first, these priorities will mostly be a product of what your organization is doing at the time. For example, the first advocacy activities the CAN participated in were related to a campaign to regulate the payday loan industry that Oregon Food Bank had gotten underway long before the CAN formed. It's important to get your group involved in these advocacy activities, as advocacy actions can be exciting and rewarding. Farther down the road, you'll want them to decide for themselves which of the issues your organization is moving on they'd like to help with. See the Midwest Academy's [Organizing for Social Change](#) for a guide to facilitating a conversation about group priorities.

Named Leadership Teams

Background: The Rural Organizing Project exists to develop and support vibrant social justice groups in rural Oregon. In the first 10 years we have learned a lot on what allows a group to thrive and what allows a group to fade away! Three components seem basic to any group having staying power: 1. a named leadership team, 2. a plan of action, and 3. a regularly used communication system for both supporters and the broader community. This memo looks at what it means to have a functional, named leadership team.

What: A named leadership team might best describe a 'Board'. It should be a group of 7-15 people that each commit to a specified period of stewardship for the organization. This working group makes routine decisions and sets directions for the organization.

Why: Regardless of what you call it (Board, Steering Committee, Leadership Team), a named leadership team is needed to provide structure. Without structure a group can complete nice isolated projects, but sustaining an ongoing presence that can impact community culture is hard without basic structure. Having the leadership be named allows those names to be made public which makes the group accessible to potential supporters and people in need. It also allows the group to have a decision making process. And, it helps define for members what is expected of them so that they are better able to contribute to the work of the group.

Who: It is important that the right people are on a leadership team. There are many perspectives on who is 'right' for the job. Here are some screening approaches that the ROP uses. Does the person share the values of the group? Does the person function well in meetings? Some people hate meetings despite their dedication to the group, other people enjoy meetings; the leadership team needs folks that can cope in a meeting setting. Can the person make a time commitment? (If the person is wearing too many other hats, this might not be the best time for them to take a turn on the leadership team.) Is the person willing to make decisions? Is the person willing to cooperate? Do they have the specific skills needed for the role they are being asked to play?

How: Once you find that it makes sense to have a leadership team, it is important to define what they (board members) would do. Consider writing job descriptions for the various roles, as you would in hiring someone for a job. These can be simple, but should clearly state what is expected of each member, so they can decide if they're up to the task. You might want to define the length of term for the position and include recruiting new leadership in the responsibilities of each person.

The next question is how do you find these folks when everyone seems so busy? Rule number one – don't beg. Take the time to have enough conversations to find the folks where this commitment matches where they are in their lives. Many other folks might be honored to be considered but need to be supported in understanding what the job would require and being honest if it fits in

with their current life. People who decline now might be able to start making the space for a future year's turn at leadership. Start by brainstorming a list of prospects. Divide the list of prospects up and set up formal times to meet with these people and discuss the group, its history, its potential and what it would mean to commit to being on a leadership team. Enter into the one on one meetings with a friendly timeline to allow for them to happen. It would be good to have a first meeting date set for folks who say 'yes' to plan around. Following up with a letter of confirmation as a reminder of the meeting helps.

- Brainstorm names of prospects
- Divide who will meet with which prospect
- Conduct meetings
- Host meeting with new recruits who sign on

When: Many groups go through cycles of ebbing and flowing – being more active and less so. When a group is struggling to establish directions, complete projects or get critical mass to a meeting (or even to have a meeting!), it is a good time to consider beefing up your leadership team.

For more support in getting a leadership team operational in your community contact the ROP: POB
1350, Scappoose, OR 97056,
office@rop.org, 503 543-8417



ROP Organizing Tips

Making the most of your e- mail communication

E-mail has become one of the main ways we communicate with each other and with our members. Therefore we need to think strategically about how we use email as an organizing tool. The goal is to have messages read and used. (As opposed to sending the most messages on the broadest variety of topics!) The effectiveness of email in our organizing relies on leaders committed to building a reputation for short, relevant, and focused posts.

Tips for all e-mail communication

- *Think about the subject line.* Is it catchy? Descriptive? Personal? Leaving out the subject line or using a generic heading like “hello” or “how are you?” may make your reader think the message is spam or a virus and delete the message without reading it. A boring subject line like “next meeting,” or “funds needed” will only attract your most dedicated readers. Use something that will draw people in, like “Local victory for farmworker rights!” “Flakes for Peace” or “Tracking YOUR Wal-Mart.”
- *Make it short. (But not too short.)* Anything longer than one screen worth of text is probably too long for a message that goes out to a broad audience. But, don’t be so brief that

your message is cryptic, or that only an insider will know what you’re talking about. Write your message so that the least informed person on your list will understand what you are saying or asking.

- *Be human.* Use warmth, personality, and your own colloquial style to make messages appealing and to help build relationships. E-mail can be very cold, impersonal. Write like you’re talking to someone you care about, and your readers will respond. At ROP we call it being “chatty.”
- *Choose carefully.* Everyone is overloaded with information these days. Forwarding too many messages or bombarding people with information is likely to lead to your messages getting deleted.
- *Forward with care.* If you have something you need to forward, delete the Fwd: from the subject line, and cut and paste the text into a new message, so your reader doesn’t have to look past all the hash marks to read the subject. Delete any unnecessary info, especially other people’s names or e-mail addresses. Try to put it into context: “Below you will find important information because...”

Personalized e-mail

- Best option to use when you need a direct answer to a specific question or you want someone to do something.
- Good for recruiting volunteers. Asking someone directly for his or her help is much more effective than sending a message out to your whole list saying, “I need help.” It’s too easy for everyone to assume that someone else will step up.

- Use for turnout. In addition to more broad methods, such as announcements to your listserve and in the local paper, consider sending personal invitations to everyone on your list. You can use the same message for many people by cutting and pasting core text; just take the time to write a personal hello and greeting.
- Good for reminding volunteers about commitments.
- More time consuming, but also more effective.

Internal list. This is a clear list of leaders vs. everyone connected to your organization.

- Good for committees, leadership teams.
- Allows for private, internal conversations.
- Helpful for internal business that may not be interesting or relevant to your larger base of supporters.

Organizational listserve. This is a list of your group's members and supporters that you use to share key information about the group's activities.

- Messages should be limited to information specific to the mission and purpose of the group.
- Each message should reflect your group's perspective, priorities. See it as the public voice of your organization, like a newsletter.
- Limited to no more than a few messages per week or a short weekly digest.
- Needs a volunteer or a small team to post to group, review suggested messages (a moderator).

- Messages should be edited for length, relevance and clarity.
- Assume that most, but not all, people who get the messages will be familiar with your group. If you're being effective, your messages will get forwarded. Make sure your organization's contact info is on all the messages, with information on how to subscribe.
- Unlike a discussion listserve, only selected members can post to the list. This keeps there from being too many messages and from becoming somebody's soapbox.

Discussion listserve. This is the broadest group. Geared toward those seeking information to develop their analysis and with enough time to keep up with a larger number of messages.

- Great tool for sharing information and/or articles broadly.
- Good for discussion/debate.
- Democratic forum, chance for everyone to be heard.
- Can easily become a forum for the most vocal.
- Debates can turn to arguments and turn off listeners.
- Easy to spread rumors, hard to ensure accuracy of sources.
- Unmoderated list can easily get nasty; readers subject to personal attacks and debates
- Guidelines can be helpful in reminding people what is appropriate for the list
- Best to have a moderator, though this can be a time-consuming job.

Section V: Your First Few Meetings

Your first meetings

Intro: The following section is an examination of the first 3 meetings of the CAN at Oregon Food Bank. These meetings should give you concrete examples of what you might want to do at your first few meetings. Each agenda item is described and discussed, showing what worked and why.

For your first meeting, it's essential that you explain what the

purpose of the group is, get feedback on it, and find out why the volunteers decided to come to the meeting. It's also your first chance to help everyone to get to know each other, for which you should take some time to let everyone introduce themselves. The focus of the rest of the meeting is up to you. You may decide to focus on educate the members of the group on basic civics, advocacy, or the sociology of poverty. You might also focus on engaging in an advocacy activity, or having a broad discussion. Also, make sure to have your first meeting at a convenient time and place (weekend mornings seemed to work best for our volunteers).

For our first meeting, we decided to begin with introductions and a presentation to get everyone situated. Then we talked a bit about what the group's mission was, and had a discussion on what everyone else's goals for the group were.

Long Introductions: We set aside the first 20 minutes of the meeting for introductions. We asked people to state their name, the reasons why they came to the meeting, and something fun that happened to them over the weekend. Not everybody showed up on time, so people who came a little late didn't miss much of the meeting. And the long introductions gave everybody a chance to get more familiar with each other, as few people knew each other. Also, some people really wanted a chance to vent their personal issues. While it didn't eliminate all personal venting, it probably reduced it.

A presentation on poverty, government programs and advocacy in Oregon: Most people seemed interested for the first 20 minutes, but I think I lost everyone's attention for the last 15 minutes. It was too long, and I think people got bored, and even a little offended, when I discussed statistics related to poverty in Oregon for too long. Some participants said they "didn't need to be reminded that they were poor." If you try an educational program, you may want to keep it between 20 and 25 minutes, and only briefly discuss the state of poverty in your community. Most people know what's going on already. Focus on governmental programs and what it means to do advocacy. One of the more successful sections was on the shared interest everyone had in advocating for lots of different anti-poverty policies, which was intended to address the I/We divide that some volunteers may feel (See Building group identity). A copy of the presentation comes with the CD included in this handbook.

Information on our vision: My co-facilitator and I spoke for about 10 minutes on our plans for the group. In retrospect, we should have discussed what people thought, taken more questions, and then had a discussion about everyone's goals for the group.

Discussion about priorities and ground rules: Here, we established some ground rules, and then started talking about our priorities for the group. Both discussions went pretty well, though we probably should have been talking more about our vision for the group than the issues we cared about. We would learn at future meetings that people wanted to discuss the vision as well as group priorities. In retrospect, it might have been helpful to do what we did at the third meeting, where we went around the room and everyone stated a question they had about the group. That format let us discuss lots of different issues, give everyone got a chance to participate, and understand what the group needed to figure out to do advocacy. Plus, many of the people who come to your first meeting will not be present later on, and new people will show up at later meetings. You may want to hold off on a discussion of group priorities until you have a group of people who consistently come to meetings.

SAMPLE PUBLIC AGENDA

First Meeting of the Citizen's Advocacy Network

Community Room of Oregon Food Bank

Saturday, November 12th, 10:00 A.M.

Agenda

10:00	Introductions
10:25	Presentation
11:00	Meeting Norms and Vision
11:15	Goals Discussion
11:45	Debrief

For our second meeting, we focused on informing people on

action steps related to recent developments in the state and federal government. This was a product of circumstances; we happened to hold the meeting when the federal government was taking many important steps, and as our campaign to regulate payday loans was getting into full swing. Advocates at Oregon Food Bank thought it would be a good idea to engage members of the CAN in the many upcoming opportunities to influence the political developments that we were paying attention to. We also thought that focusing on action would make our volunteers feel like meetings were worth coming to. Since many of the volunteers did participate in advocacy activities later, this focus may very well have paid off. All of the volunteers we mobilized showed up at the third meeting, and they brought friends.

Introductions: We allowed less time for introductions here than the first meeting (10 minutes), and it seemed to work fine. People just said who they were, and a little about something they did over the weekend.

Advocacy Review: We gave everybody a chance to talk about an advocacy activity that they had done between then and the last meeting. Quite a few volunteers had done something, and we had a lively discussion about what had happened.

Legislative Update and Advocacy Alert: Oregon Food Bank had lots of things to update volunteers on, and we had a guest speaker from the SEIU talk about a campaign to organize unlicensed child care workers. We tried to do too much, and went far over the time we had allotted. This may have worked better if we had prepared our speaker more. Make sure to let them know how much time they have. They might overshoot, otherwise. Also, be careful who you work with. The guest speaker was from SEIU, and some service providers who brought volunteers to our meeting were upset that we were working with them, even though we never made a formal partnership with the union.

We talked about the federal budget bill and passed out an info sheet on it. We talked about a campaign to send postcards to public officials that would show support for payday loan regulation, as the City of Portland was considering adopting limited regulation of the industry. We passed out the postcards, and had advocates fill some of them out. We asked them to find other people to sign postcards, and provided them a manila envelope to send the filled out postcards back to us. This didn't work very well. We only received one of the envelopes back. We also mobilized people for a hearing of the Oregon House Committee on Payday loans, which we didn't know about until the day before the meeting. And we tried to explain what was happening with the E-Board, a quirk of Oregon state politics that could lead to drastic cuts to important state programs. It was a lot of information, and it might have overwhelmed people, but we did succeed in mobilizing volunteers for a House hearing.

Discussion of Trainings: After the extended advocacy alert, we had very little time left for the discussion we had planned. Interestingly, for the time that we did talk, the topic of conversation moved right into the purpose of the group. It seemed clear that people still had questions about the group's mission, as well as questions about the formal structure of the group. People wondered, how much power will the group have over which issues we address? What are our issues? We decided to bring these questions up at the next meeting and postpone the discussion on trainings until these more important questions had been sufficiently answered.

SAMPLE STAFF AGENDA FROM SECOND MEETING

2nd Meeting of the Citizen's Advocacy Network
State of Oregon Office Building, Room 140
December 13th, 2005. 6:00 PM

CAN Agenda

6:00 Announcements/Introductions

6:15 Immediate Advocacy Opportunities (w/ guest speaker Abby Solomon of the SEIU)

 -A brief discussion with Abby Solomon of the SEIU, who is doing work on preventing cuts to federal child care subsidy programs

 -Julie will talk some about what actions the Food Bank is taking now. Payday loan ordinances, etc. We'll talk to Angela about this soon.

 -TANF update

 -Food Stamps/Medicare Reconciliation Bill

 -CASH

 -Washington poverty event

6:45 Advocacy Action Heroes: What advocacy have we done?

 -Goal: Share stories about the advocacy we've participated in since our last meeting

 -the stuff we talked about, and the stuff you've done aside from that

7:00 Advocacy Skills: First Actions Discussion

7:20 Closing

 -recruitment?

 -next meeting?

 -how do we feel about the way we've been communicating?

7:30 Adjourn

Materials

Paper+Board, pens

Mercy Corp stuff

How an idea becomes a law, etc

Advocacy Alert/Advocacy Menu

Food

Plates, Cups, Silverware

Sign-in sheet

Name tags

List of questions for the discussion

Some research on the reconciliation bills

SAMPLE PUBLIC AGENDA

2nd Meeting of the Citizen's Advocacy Network
State of Oregon Office Building, Room 140
December 13th, 2005. 6:00 PM

CAN Agenda

- 6:00 Announcements/Introductions
- 6:15 Immediate Advocacy Opportunities (w/ guest speaker Abby Solomon of
the Service Employees International Union (SEIU))
 Goal: Inform everyone about advocacy campaigns/opportunities.
- 6:45 Advocacy Action Recap: What advocacy have we done?
 Goal: Share stories about the advocacy we've participated in.
- 7:00 Advocacy Skills: First Actions Discussion
 Goal: Have a discussion about the skills people need in order to
advocate.
- 7:20 Closing
 Goal: Sum everything up and plan our next meeting.
- 7:30 Adjourn

For the third meeting, we decided to keep things simple. We focused

on getting information about advocacy opportunities out to the members of the CAN and having a group discussion about the mission and structure of the group. Mostly, we decided to focus on these things in reaction to what happened at the second meeting, where many volunteers voiced concerns that they wanted to know more about certain aspects of the group. We decided that we needed to know the questions that everybody had. We were also wary about time; at the last meeting, some agenda items went far too long. An agenda with few items helped us manage time better. Also, we were worried about attendance, as fewer than expected volunteers showed up to the last meeting. Prior to the meeting, we made extra recruitment and reminder calls to everyone active in the group. We also held the meeting on the weekend, and at a location that was much more convenient for almost everyone. As a result, we had our highest attendance yet- 17 people.

Introductions/Review of Advocacy Activities: We kept them short. Some people came late, and we made sure to have them give their names when they came. People again seemed to like talking about the advocacy activities they had done.

Advocacy Alert and Legislative Update: We passed out more campaign literature and action materials, like postcards and posters. Everyone was very enthusiastic about the literature. They took lots of it. However, it's not clear how much of an impact this type of exercise is making. We really don't know how many of these postcards are actually being sent. And the hotline for stories about payday loans, which is what the posters promoted, hasn't received any calls yet. What seems to work the best is to do advocacy activities at the meeting, like filling out postcards and handing them back to the facilitator.

Discussion: We went around the meeting room and had everybody state a question they had about the group. It worked much better than the discussions we had where we asked people to talk about their goals for the group. We recorded all the issues that people had with the group. At the end of the discussion, I summarized what happened. It turned out that there was a wide variety of questions. We decided to try to hold off on answering them, in part because we didn't have an answer for them just yet. It did give us a great place to start moving into our next meeting. Each of the important topics raised may require a full discussion to answer, and we now know which discussions we needed to continue having.

Closing/Resource Sharing/Optional Speaking Engagement: One thing we've always wanted to do was give people a chance to share their knowledge about resources available to low-income people. We didn't actually get to this, because of time, but you may consider doing something similar. The optional speaking engagement, on the other hand, was a complete success. We scheduled the meeting at the SEIU's office (again, not having partnered with them) in part because it was a convenient location and in part because the SEIU was speaking with a state representative's staffer that afternoon. After the meeting, about 6 of the volunteers who attended

the meeting went to speak with the staffer. They observed SEIU as they prepared for the meeting, which some found helpful, and then spoke to the representatives about issues that were important to them, as well as child care. Everyone truly seemed to enjoy the experience. Many of the volunteers even identified themselves as members of the CAN instead of individuals, which made us think that we were well on our way to creating a solid group identity.

SAMPLE 3rd MEETING STAFF AGENDA

CAN Meeting

SEIU Office

January 14th, 2006. 1:30 PM.

Agenda

1:30 Introductions (Matt)

1:45 Review of CAN advocacy participation (Matt)

2:00 Discussion: What do we want the CAN to be? (Matt and Julie, with Julie as principle facilitator)

- Introduce the intent of the discussion. We're looking to find ways to share control of the group. Want to have CAN gain more structure. We don't have a solid answer for either of these issues. This should be a part of an ongoing discussion.
- Go around the room stating one question we have about CAN.
- Try to narrow questions down, and begin discussion. Make sure to say that we're not looking to answer any questions. Ensure equal participation. State our desires to focus on several anti-poverty issues and to have CAN members participate in OFB advocacy events.
- Assign minute-taker rotation

2:35 Legislative Update (Matt, Julie, Dena)

- Julie will talk about E-Board
- Matt will speak briefly on federal issues
- Dena will speak about payday loans. Matt may add some things.

2:45 Next Steps: What advocacy is there to do? (Matt and Julie)

- E-board things: Advocacy Alert
- Payday loan campaign: check up on postcards, more postcards? And story line.

2:55 Closing/Optional resource sharing session (Julie)

Materials

Food?	Agendas	Advocacy alerts
Sign-in sheet	Fliers	Extra postcards
Reimbursement forms	Story line posters	Handouts

Supplemental Section: Leading An Advocacy Event

Mobilization and Activation: Getting Ready to Advocate

Congratulations. If your group is meeting regularly, you're past the hardest part of building a volunteer advocate network. Now comes the pay off: planning and executing your own advocacy activities.

As the coordinator of an advocacy activity, it'll be your job to do two things: **give people the opportunity to speak up, and help them be the best advocates they can be.** This next section will lay out a few of the basic keys to successfully mobilizing and engaging low-income volunteers in advocacy. At the end of the section, there's a list of resources that can help you with some of the more complex aspects of organizing a campaign. Please note that this section is not intended to explain mobilization and activation completely, but rather give you an introduction into how you committee can engage in a campaign during its first few meetings.

Giving volunteers an opportunity: Planning and Mobilizing

Making the Choice. In planning an advocacy event or campaign, the first thing you'll want to do is make a decision on what to advocate on. A facilitated discussion can bring out the personal priorities of each member. From there, you may move to have the group decide what its priorities should be, if you believe the group is ready.

After you've agreed on your top priority, your next step is to plan an advocacy campaign. Planning an advocacy activity or campaign may also require guidance from a manual like [Organizing for Social](#)

[Change](#). See the references at the end of this section for some worksheets that could help you through the process.

Ready-made Decisions: Outsource Your Planning. When you're just starting out, the easiest, if not best, way to decide what to do and plan a campaign is to have someone else do it for you. Latch on to a campaign that's already underway. Your

The Butter Myth: A Lesson in Advocacy

(Note: There are many interpretations of this story in the advocacy community, but I think this version is most instructive. I think I heard this version from Ed Cooney, the director of the Congressional Hunger Center.)

A Junior Senator is at his first big Washington dinner. A waiter is passing out butter to all the guests, and the Senator asks for an extra pad.

The waiter refuses to give him any more butter. "1 per guest," he says. The Senator is indignant. "But you don't understand. I'm a United States Senator," he says.

To which the waiter replies: "No, you don't understand. I'm the guy who gives out the butter. And you get what everyone else does."

The Senator never received the butter he wanted. The lesson of the story is, it doesn't matter who you are: if you want to get what you want, you have to know a) *who best to ask* and b) *how best to ask*. An advocate has to know both of these things to be successful.

organization may also have activities or a campaign planned for the group. If you're located in Oregon, Oregon Food Bank in Portland has a permanent staff of three professional advocates whose job it is to constantly run some campaign- they'll have ideas for you.

Mobilization

Here are some tips on how to make sure that volunteers attend an advocacy event.

Mobilize at your meeting. A great opportunity to mobilize is at a meeting. As you know, that's the whole point of giving an "advocacy alert" or a "legislative update."

Mobilize through your

communication structure. Always support the mobilization you've done at a meeting with your communication structure. Send out emails about an advocacy event. Make calls to likely volunteers. You may want to purchase the program CapWHIZ, which makes it very easy for people to email or write their representatives.

What do I say? In your advocacy pitch, try to be **brief** and **engaging**. You have about 30 seconds to get somebody's attention. If you lose them in the beginning, you may not get their attention back, so get to the point quickly. A mobilization material that's too "wordy" may turn people off right off the bat. Keep your wording to a minimum, and make the material eye-catching with pictures, frames, and different font sizes, etc.

Furthermore, everybody engages in advocacy for different reasons. *Focus your material on the **impact** participation will make, rather than the reasons why you should participate.* If you single out a few reasons, you may miss people who would participate for other reasons. If you focus on impact, you'll let people know that an advocacy event will be worth their time. Convince them that they will make an impact.

Ensuring engagement. As with all volunteer advocacy, you can't be sure that everyone will show up to an event. Some

volunteers may not have reliable transportation, or they may have a hectic, unpredictable schedule to deal with. **You will probably want to give some people a ride,** especially if you're traveling a large distance.

And you should be persistent in calling people. ***Call them again and again and again.*** Call them the day of the event. Call them the day before. You may alienate some more sensitive volunteers, but most people like the attention. It shows that you really do care about their participation.

Making It Successful:

Some Tips

Most of the advocacy a volunteer does revolves around their experiences. The basis of testimony, writing a letter, talking to the media, and speaking with a legislator is a volunteer's story. Your job will be to help them shape those experiences into a good story, and to make sure that every story asks for a change of some sort.

Shaping a Story. First, check for literacy and disability. Some volunteers could have difficulty with seeing, reading or writing. Then ask the volunteer to type up what they want to say. Ask them to do it in their voice, and if possible, to make a request of the person they'll be taking to.

Next, after they've given you the story, **edit** it for grammar and punctuation. Try to make it pretty short and snappy- cut out irrelevant information and boil down the story to its essential elements. **Find what's compelling in the story-** what's emotionally moving, or what's new and interesting. Some compelling things are the struggle that a volunteer has gone through, or the impact a

policy has had on them or their children. Make that compelling aspect stand out.

Furthermore, try to make the story both universal and unique. Keep the story unique; it should have a human face. But make it illustrate a larger problem in the community. This may be hard to do. When people get in crisis mode, it's hard for them to think about other people. Try your best, but there's only so much you can do.

Then, add anything they left out. Sometimes, it's good to add something about how the volunteer doesn't like getting help, but has to. Some advocates speak more about their problem than what they want changed. **It's your job to make sure that they ask for a policy change of some sort.** What you ask for should be specific and obtainable. If many advocates are speaking to legislators, it helps if everyone is asking for the same specific policy change, though not completely necessary.

Send your changes back to the volunteer advocate. Explain why you made the more significant ones, preferably over the phone. They may not accept everything you suggested, but most likely, you'll have made an impact. If an advocate doesn't accept your changes, ask them if they'd like to testify how they'd like to, and submit your version in writing. Find a suitable middle ground. And it will get easier with time. As advocates gain more experience, they'll be able to tell their stories better.

Stories in Action: Testifying and Visiting a Legislator. Testifying in front of a committee of powerful, often hostile, people is hard no matter what your income is. Even talking to your legislator is hard. In fact, some people may not want to testify- ask them if they'd be willing to submit

something in writing instead, which most committees and legislators accept.

Try to **rehearse** the speech or testimony with the volunteer. Coach them on proper attire and formalities. Give them constructive suggestions on how to improve their body language or speaking. Try to anticipate the questions they might be asked, and work on possible answers. Let them know to not be afraid to be rude. Sometimes, that's the only way to have your voice heard. Otherwise, it's best to be respectful and polite.

As a volunteer is answering question, there's a chance they might veer off topic, or "off message." That's not entirely a bad thing. Speaking off the cuff seems more credible than a scripted speech. ***More importantly, a volunteer doesn't need to sound professional- one of their greatest assets is that they aren't professionals.*** You may want to discourage off-topic discussions, but there's no need to be too strict about it.

Also, let them know that **it's ok to say "I don't know."** You don't have to answer every question. You could even say "That's a really good question. I'll get back to you on that." An unanswered question may give the volunteer an opportunity to follow up with the official, which could lead to a stronger relationship between them.

Support them every step of the way. Give them a pep talk right before the meeting, and lay the praise on thick afterwards. Be their cheerleader. If they seemed really nervous, you might say "Sounds like you had a hard time. I'd feel the same way." However, if someone gave damaging testimony, you should let them know that you were disappointed. Sometimes, if an advocate says too much of

the wrong thing, you may have to forget about having them testify again. Don't be afraid to set some boundaries. After all, it's your organization's money and time that's supporting what they're doing.

Finally, never set anyone up for failure. Make sure that they'll be speaking to people who'll listen to them, and not try to score political points by saying hurtful things to them.

Talking to the Media. See attached materials.

Writing letters and calling. It's much easier to write letters or call, so it might be a good activity to start off with. Check out one of the resources listed in this section for guides on this subject.

Support/Follow-Up. Make sure that you follow up with an advocate after they've completed an activity. Ask them how it went, and if they enjoyed it, or whatever else you'd like to know. Giving them individual attention shows that you cared that they participated. They should know that their voice matters to you.

Also, make sure to reward people when they make an extra effort. Gift cards seem to work very well. Even if somebody just submitted written testimony, they probably deserve a gift card.

Finding the right role for an advocate. Some people might not be comfortable speaking in front of a group of people. Or they may not have enough time to participate in an involved advocacy activity. It'll be your job to try to plug them in somehow if they're interested in advocacy. You may have to get creative.

Submitting written testimony is a good option. You can sometimes read testimony to public officials on behalf of a

volunteer. You can almost always submit a written copy of a testimonial to whoever is recording the event. Or you can have the volunteer write a letter.

Mobilization and Engagement Resources

Regional Organizations

Our Oregon. A great resource for mobilization and engagement materials. www.ouroregon.org.

Rural Organizing Project. An Oregon organizing project. www.rop.org.

Western States Center. A resource and training center for the western U.S. based in Portland, Oregon. www.westernstatescenter.org.

Children's Alliance. Based in Washington State, an advocacy group that offers many useful resources. www.childrensalliance.org.

National

Center on Budget and Policy Priorities. A Washington DC-based think-tank that provides great information and strategies on state and federal poverty issues. www.cbpp.org.

Food Resource Action Center. A Washington DC think tank that provides information on state and federal anti-hunger issues. www.frac.org.

So You Want to Make A Difference: Advocacy is the Key by Nancy Amidei. A very helpful guide to all things advocacy. Available at www.ombwatch.org.

Midwest Academy. An anti-poverty advocacy institute. www.midwestacademy.com.

Media tips for Volunteer Advocates

We all love hearing stories. Stories draw us in, help us get our arms around a big problem and visualize an issue, help us understand it in concrete terms, make us laugh, make us cry and move us to action.

One of the most effective ways for an agency to convey its message to the public is through stories told by people who have experienced hunger and poverty. It's one thing to hear that hunger, for example, is a huge issue. But it's much easier to believe the problem is real when you hear a mother tell her story about her daily struggles to feed her family.

Often, when you go to the media to convey a message, the reporter will ask you to find an individual or family who exemplifies the problem and is willing to tell his or her story.

What you need to know about the news media

If you decide to ask volunteer advocates to help you tell their stories to the media, there are some important things you and your advocates need to know about the media:

- *News is news because it is new, has conflict, is unusual, tells a human story or affects a large number of people in the community.* “An elephant on the playground will always make the news.”
- Some news days are filled with “breaking news” (for example, a jet crashes into a neighborhood), and a reporter or editor will have no time for you at all. Some news days are slow with little breaking news, which means you may get a longer story than anticipated. *News is relative.*
- *Reporters work on a short timeline.* They work on many stories a day and must work very, very quickly. An hour to find a family may seem very short to you, but an hour is actually a very long time for a reporter. Reporters' timelines may seem totally unreasonable to you, but that is the nature of their job.
- News priorities change throughout the day. It's not unusual for a reporter to set up an interview and then cancel because of a major breaking story. It's also not unusual for a story that has already been prepared for broadcast to get “bumped” for another story. The bottom line is that there are no guarantees in the news business. *No reporter can promise you a story and guarantee it will air.*
- Don't expect reporters to know your issues. Most reporters are generalists. *It's your job to explain the issue, briefly, succinctly, accurately, clearly so reporters get it right.* Stay focused. Stay on message. Repeat your essential message at least three times.

- It's unethical for a reporter to show you a story before publication. But give the reporters your phone number and tell them to call you to check facts or to ask additional questions.
- Thank the reporter for helping readers understand an important issue. Avoid complaining about tiny errors. Save your complaints for big errors.

How to prepare volunteer advocates for a media interview

- Talk to the public relations professional in your organization in advance. If your organization has a public relations professional, work closely with him or her. It is his or her job to contact the news media. Public Relations professionals have spent years working with demanding reporters and editors have lots of experience and can give you good advice.
- Talk to your volunteer advocate in advance.
 - Is the volunteer advocate willing to tell his or her story?
 - Does the volunteer advocate understand your message?
 - Does the volunteer advocate agree with your message?
 - Is the volunteer advocate a believable spokesperson?
- Put "the portrait" in "the frame." In other words, make sure you add context to the story.

When people hear stories about an individual's problems, they may "blame" an individual for his or her situation. But you want people hearing the story to understand that *the system, not the person*, is to blame. "Bad things happen to good people"

When people hear stories about an individual's problems, they may want to write a check to the individual or offer the individual a job. That's great. But you may want people to write letters to their Congressman, write a check to your organization or respond in other ways.

The important thing is to put the "portrait" (an individual's story) in "the frame" (context of the issue).

For example, "Mary tells a moving story. But she is not alone. She is one of millions of people who work hard at low-wage jobs with no retirement benefits or no healthcare coverage. We have a system that has disenfranchised millions of hard-working people who are doing all the right things but still can't make it. That's why we need this program that I'm describing."

- Protect your volunteer advocate
 - Add context (see above)

- Find out if the volunteer advocate's situation really is an example of the message you are trying to convey. (i.e. It not only wastes the time of the advocate and the reporter if the reporter, but it also undercuts your argument if the reporter later learns, for example, that the advocate makes too much to be affected by the budget cut you are trying to fight.)
- Find out if the volunteer advocate has a criminal record, a child custody issue or anything that would hurt the volunteer advocate or your agency if that information becomes part of the news story.
- Prepare your volunteer advocates
 - Give them a list of questions that a reporter might likely ask
 - Make sure they know that reporters may ask probing questions
 - Let them know that they have the right to decline to answer a question.
 - "I'm not the expert on that." "I can't answer that question, but I will find out who can answer that for you." "That question is just too personal, but what I can tell you is ... that money was very tight during that time."
 - Have them practice telling their story to you.
 - Make sure they have realistic expectations and that they understand that a reporter can't guarantee when a story run or if it will air or be published at all.

Created by
Jean Kempe-Ware, public relations manager
Oregon Food Bank
2/10/2006

Conclusion

Congratulations! By

now, you are the leader of a volunteer advocacy group with enormous potential. As your group becomes more successful, other service providers should gain interest in forming networks of their own. Pass this handbook on! And pass on your knowledge! On this last page, feel free to add any insights that you've learned while bringing together your volunteers.

If you're struggling with your group, try not to get discouraged. Developing a strong group takes a long time, as the relationships on which your organization is based take a while to build up. If you're feeling very discouraged, you might want to get some help. Call someone who's done this kind of advocacy before, or talk to your supervisor about sharing responsibility for the organization with other staff members. Don't give up: when you're doing righteous work, you'll always find someone to help.

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

