

Advocating for Equitable Development



A PolicyLink Manual

PolicyLink is a national nonprofit research, communications, capacity building, and advocacy organization, dedicated to advancing policies to achieve economic and social equity based on the wisdom, voice, and experience of local constituencies.

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Preface

Everyday, all across the country, people use advocacy to improve the quality of life for themselves, their families, friends, and communities. Effective advocacy involves planning strategies, building coalitions, and working with media to raise awareness about problems and build support for implementing solutions.

Advocating for Equitable Development is a manual for advocates who are interested in building and applying these skills to achieve economic and social equity. Equitable development relies on the wisdom, voice, and experience of local constituencies to find solutions to community problems. It addresses the needs of people in the context of the places where they live, sees communities not in isolation but as interdependent parts of the region, and promotes investments that produce benefits for residents and investors.

Using advocacy to increase economic and social equity for low-income communities and communities of color ultimately benefits everyone in the nation. When communities address the need for affordable housing, to remove environmental hazards that threaten health, or to improve public transportation, for example, the outcomes have impact beyond the areas where advocates' live and work.

United community voices are a powerful force. But there are equally powerful forces opposing such community strength, which is why organizing and coalition building are critical for effective advocacy. There is, indeed, strength in numbers.

Strength also comes from knowing and using the tools of advocacy, which is why we have prepared this manual. The tools in *Advocating for Equitable Development* have been proven successful as is evident from the case studies found throughout this publication. I hope that you will use the manual to increase your effectiveness as an advocate for equitable development and that you will share it with others as well. Advocating for equitable development is nothing less than realizing democracy's promise of full inclusion and participation in a just society. That is a goal that we should all share.



Angela Glover Blackwell

President
PolicyLink

Introduction

"You see things and you say, 'why?' But I dream things that never were; and I say, 'why not?' "

George Bernard Shaw.
Back to Methuselah (1921), part 1, act I

In many communities across the United States, social and economic opportunities are strongly influenced by where one lives. In metropolitan regions across the country the economic landscape is changing. Growth and prosperity have shifted, sometimes being concentrated in the outer edges of a region, other times scattered. Some communities continue to face challenges, such as a declining tax base and areas of concentrated poverty. Living in concentrated poverty, residents are typically cut off from jobs with livable wages, quality education, adequate health care, and other services. Crime rates are often high, transportation poor, and housing substandard and overcrowded.

Fortunately, an increasing number of community leaders are realizing that communities are interconnected and that regions prosper when residents in all communities have access to good jobs, economic opportunities, affordable housing, excellent schools, efficient transportation, and safe environments. Community leaders are increasingly looking beyond their neighborhoods and cities to understand the larger regional context, to understand problems, build from existing assets, and find effective solutions. To improve the lives of residents in their communities, they are thinking and acting regionally.

Community leaders are working toward such goals as:

- A transportation system whose benefits and burdens (jobs, service, and pollution) are distributed fairly across all income levels and all neighborhoods;
- Affordable housing that is available to residents throughout the region;
- An environment free from toxic substances that can trigger health problems such as asthma; and
- Access to the education and skills necessary to participate in opportunities in the regional economy.

They are looking to a new framework—equitable development—to help them achieve these goals. Equitable development seeks to ensure that residents in all communities in a region can participate in and benefit from economic growth and activity. It is grounded in four guiding principles:

- Policies and programs that focus on the physical environment and those that focus on families and individuals should be integrated to affect both the place and the people who live there;
- Strategies should concentrate on reducing both local and regional disparities in income, wealth, and access to opportunity;
- Investments should generate a “double bottom line”: both economic returns and community benefits; and
- Decision-making should include meaningful community participation and community leadership.

KEY INFORMATION

Advocacy Principles: Guidelines for Success

Advocacy is the art of persuasion (persuading potential supporters, opponents, reporters, policymakers, and the public at large). Success requires creativity, hard work, and perseverance. It also requires judgment and integrity. Following are some principles to guide you as you advocate for better solutions to the challenges your community faces.

Basic Personal Principles

- Factual accuracy
- Total honesty
- Responsible tone (keep inflammatory rhetoric in check)
- Respect for confidences
- Careful listening

Basic Work Principles

- Work within a coalition
- Seek to understand your partners' perspectives and goals
- Define the problem
- Have a plan with defined interim and final goals
- Include community-building
- Be flexible about strategies
- Don't humiliate opponents

Basic Campaign Principles

- Frame the issue: tell a story
- Stay on the offensive
- Raise the stakes
- Stay on mission: don't get sidetracked
- Avoid party politics

Basic Sustaining Principles

- Maintain perspective
- Have three to five key advisors
- Celebrate each success
- Have a life
- Never think it's over
- Never quit

Advocating for Equitable Development continues the ongoing PolicyLink effort to help communities achieve these ends. (See the *Equitable Development Toolkit* at www.policylink.org.)

Policies to promote equitable development don't happen on their own. In neighborhoods, cities, regions, and states across the country—in Atlanta, Boston, Los Angeles, Minnesota, New Mexico, Oregon, Washington, D.C., and elsewhere—people concerned about the lack of jobs, affordable housing, and efficient public transportation have worked together to persuade legislators, city officials, heads of departments, and others with official power to act. Working together, they have gathered the facts, developed solutions, focused public attention, and secured changes that have created opportunities and enabled all residents, particularly low-income residents and those from communities of color, to participate in and benefit from regional economic activities.

Bringing about needed changes involves advocacy. Advocating for change can happen in many different ways. It can involve seeking changes in government agency policies or practices, working with private businesses, changing laws, introducing ballot initiatives, creating public pressure, and, when necessary, litigating. Choosing the best advocacy strategy will depend on the specific problem, the solutions sought, the resources available, the receptivity of decision-makers, and other factors.

Advocating for Equitable Development describes the basic advocacy strategies, their advantages and disadvantages, what to consider in choosing among them, and the basic steps for an advocacy campaign. Throughout this manual there are examples of how advocates have used these strategies to bring about concrete results in their communities. In addition to the information provided in each chapter, this manual includes extensive references, and those interested in more detail about specific strategies, can also consult the PolicyLink online resource, *Advocating for Change* (see www.policylink.org).

Bringing about needed changes (especially meaningful change) is hard work and takes time, but the rewards are great. Advocacy can lead to the results we seek and can move us closer to ensuring that people of all races and income levels, and regions as a whole, grow and prosper.

What is an advocate?

An advocate is someone who speaks for or pleads the case of another. While lawyers do this for a living, far more often it is parents, teachers, neighbors, workers, and church, civic, nonprofit, and community leaders who are called on to advocate for the changes needed to achieve greater equity in their communities. They advocate on issues that matter to them, such as employment, education, housing, health care, and transportation. Most people have the basic skills to be an advocate—knowing what is important, working with others, planning, and the ability to communicate what needs to be done.

This manual shows how to use those skills to make a compelling case to decision-makers and persuade them to take corrective action. Advocacy is most effective when a broad range of people lend their individual skills, time, and support to a campaign focused on making change happen.

Effective advocacy is based on four elements:

- Getting the facts;
- Organizing support;
- Making a plan; and
- Communicating a clear and compelling story of what is wrong and what should be done.

KEY INFORMATION

Restrictions on Legislative Advocacy

Nonprofit charitable organizations (those covered under Internal Revenue Code 501(c)(3)) can lobby. In fact, Congress has passed legislation that gives these charitable organizations the right to lobby (within designated limits) and has stated that influencing legislation is an appropriate and legitimate activity.

There are many ways to lobby or advocate in legislatures without violating Internal Revenue Service (IRS) rules. Under IRS definitions there are two types of legislative advocacy or lobbying—direct and grassroots and there are annual limits on the amount that can be spent on each by charitable organizations. Direct lobbying includes three elements: expressing a point of view on a specific piece of legislation; direct communication to a legislator, her or his staff, or another involved government employee; and requesting an action (such as to support, oppose, or amend a bill). Grassroots lobbying is defined as expressing a point of view on a piece of legislation and seeking to influence others (the public) to take specific action, such as writing to a legislator to oppose a specific bill.

These restrictions do *not* apply to many other (non-lobbying) forms of advocacy, such as organizing and building community support, creating public pressure, or talking to the staff of a government agency about regulatory changes.

Electioneering—supporting or opposing a candidate for public office—is strictly prohibited and carries serious potential penalties, including an organization losing its charitable nonprofit status.

To find out more about what is permitted, limited, and prohibited, and what rules might apply to your organization see *Worry-Free Lobbying for Nonprofits* and other materials published by The Alliance for Justice. These materials clearly describe the guidelines for 501(c)(3) organizations to follow when advocating in city councils, county boards of supervisors, state legislatures, the Congress, or on ballot measures. (See www.allianceforjustice.org/.)

In addition, some states and local governments may require you to register as a lobbyist. Check the website or contact the office of the city or the county clerk, or the secretary of state, for more information.

Getting the Facts

The first step, is to get the facts. Finding out what is wrong, who is hurt, and the extent and cause of the advocacy problem is critical to effective advocacy. Solid facts, data, and strong analysis will help you define the problem, identify solutions, enlist others to support your efforts, overcome opposition, communicate to reporters, and convince decision-makers.

You can get the facts in several ways. On any given issue, there is already a lot of information in newspaper articles, published reports, scientific studies, and government documents. Much of this is quickly and easily accessible, readable, and understandable. In addition to reviewing these sources, it can be useful to gather information firsthand (for example, by interviewing people in your community to see who is being hurt by a problem and how).

You can get the facts by getting answers to the following types of questions:

- Who is being hurt and what needs to be corrected?
- How are they being hurt? How can you describe the problem? For example, is the problem a lack of transportation to jobs, a shortage of affordable housing, high unemployment, pollution, obstacles to economic development?
- How serious and widespread is the problem?
- If left unaddressed, will the problem get more serious or less?
- If more serious, how?
- How is the community affected?

To design an effective campaign strategy, you should know the following.

About the problem:

- If it is long-standing, why hasn't it been resolved?
- What agencies, businesses, corporations, or organizations are causing or responsible for addressing it?
- Are there any laws or rules related to it?
- What reasons are given to justify it?
- Who knows about it?
- Who thinks that there is a problem?
- Who thinks that there isn't?

About possible solutions:

- What are they?
- How much will they cost? What will be the benefits? Are there ancillary benefits?
- What are the politics of the situation (i.e., who has the power to correct the problem and what constituencies, facts, arguments, etc., are likely to persuade her or him to take action)?
- Have any actions been taken? If so, with what results?
- What reports or news accounts have there been?
- What has happened in other areas? Have workable solutions been found?

CASE STUDY:

Data Supports Call for Affordable Housing Policy

Washington, DC, is at the forefront of older cities experiencing a resurgence of economic investment. After years of decline, private and public investments have reinvigorated the city. New housing developments accompanying this economic activity have pushed longtime district residents from their homes as rental and purchase prices have increased dramatically in neighborhoods throughout the city.

In 2003, several prominent organizations in the district, lead by DC Agenda and ACORN, began meeting to consider whether inclusionary zoning could be a viable strategy to help meet the affordable housing needs of low-income and moderate-income DC residents. The coalition asked PolicyLink to prepare a report examining the feasibility of inclusionary zoning for the district and to make recommendations for an effective policy.

The report, *Expanding Housing Opportunity in Washington, DC: The Case for Inclusionary Zoning*, looked at inclusionary zoning policies in jurisdictions across the United States and identified success stories as well as continuing challenges in the implementation of the policy. It also described an analysis of the city's neighborhoods that indicated concentrations of communities of color as well as the distribution of different income groups. Finally, it reviewed the history of development in the city, highlighting that while there had been a surge of development it had been focused in higher income areas, thus increasing the need to ensure benefits for lower-income residents. Based on these findings, the report offered several recommendations that became the basis for a set of policy principles that the coalition presented to the mayor and city council members.

Government agencies are often a source of valuable information. Local and national agencies collect data, conduct or fund research studies, and publish policy papers and reports. Also check with local colleges and universities. Many professors and graduate students are interested in working on problems that are immediately relevant to the wider community. When combined with the information you have gathered at the community level, this kind of research can be extremely powerful in documenting the seriousness of the problem you are concerned about and the effectiveness of the solutions you propose.

If necessary, put together a small team of people and divide up the work. Use the list above as a checklist, modifying it to fit the problem you are concerned about. Chances are that you won't find all of the answers at once. Keep asking questions. Meet regularly to share what you have learned, mark your progress, and plan the next steps.

At this stage, you are trying to find out as much as you can about the problem. Be thorough and keep an open mind. Later you will ask community members, potential supporters, reporters, decision-makers, and the public at large to rely on what you say. Your credibility will be on the line and with it your ability to be effective.

Where to Find the Information

Books, newspapers, and periodicals. Read the literature on the problem and its history, not only to know everything you can, but also to identify those who may be helpful and those who may be part of the problem.

The Internet. A search may uncover information about your problem and links to relevant organizations in other places.

Government reports and documents. Your efforts will gain credibility if they are supported by information from government sources. Building a credible campaign means building the case to make it difficult to deny that a problem exists.

Community members. Conversations with people— young and old and of different races and ethnicities—who are harmed by the problem are critical to understanding the nature and extent of the problem. They can bring real-life experiences into the discussion and offer meaningful solutions. Keep an eye out for stories you may want to highlight later and for potential spokespersons for news conferences, interviews with reporters, hearings, and meetings with decision-makers.

Organizations and individuals. It is extremely important to learn the views of other organizations and individuals interested in the problem you are concerned about. You'll want to confer with like-minded individuals and organizations, both to get the benefit of their experience and to enlist their support. The best information about community conditions and resources often comes from local nonprofit organizations and research groups. You should also find out the positions of potential opponents both to better understand their perspectives and to help you incorporate effective arguments against their positions in your campaign.

Experts. One way to identify the experts on your issue is to take note of the names mentioned or quoted in news articles, studies, reports, etc. Another is to ask a state or national organization whom they would go to for information on this kind of problem.

Putting together accurate information with accessible language will help you make your case and achieve the desired results.

CASE STUDY:

Making the Case for Greater Corporate Accountability

In 1999, Minnesota passed one of the strongest corporate responsibility laws in the country to assure that tax subsidies resulted in real benefits to communities. To pass the law, the Minnesota Alliance for Progressive Action (MAPA), a coalition to build progressive power,

- Organized throughout the state of Minnesota and used popular education workshops to help participants understand how the lack of accountability was affecting their communities.
- Prepared a report showing that \$176 million in state subsidies to corporations were used to create low-wage jobs, and establishing the need for greater accountability in the use of public dollars, and
- Participated in the bipartisan Corporate Subsidy Reform Commission, whose work led to the Corporate Welfare Reform Act.

The new law requires higher standards for corporate subsidies, greater public input, detailed reporting, and stronger enforcement. If a company fails to meet its wage and job creation goals within two years, it must pay back, with interest, the pro-rated amount of the subsidy.

As a result of the law, Minnesota cities must seek to attract high-wage businesses and industries, offer reasonable subsidies, and use pay-as-you-go financing to avoid getting into debt.

Reach Out: Organizing and Coalition Building

A single individual or organization can call for action alone, but the likelihood of success is far greater if a coalition of groups and individuals join in the effort.

Organizing builds power. Uniting large numbers of people around equitable development and a specific issue or campaign enables you to wield the kind of influence that other people have because they make large campaign contributions or have powerful positions in business, society, or government.

Organizing alerts decision-makers to the potential political consequences of their actions. It reminds elected and appointed officials that you can affect how long they stay in office or whether they advance to a higher one. The media are more likely to take notice when you can draw a crowd that shows strong support for your cause.

Organizing gives you staying power. To achieve and maintain reforms requires sustained effort. Few organizations have the staff and resources to accomplish this alone. Organizing identifies and develops the leaders, staff skills, and resources you need to sustain progress over the long haul.

Organizing can produce real improvement in people's lives in addition to tangible changes that joint efforts achieve. Organizing also builds community through collective problem-solving and instills in people a personal sense of power to effect change.

Organizing is bringing people together to develop a collective vision for their community, to achieve a common goal, and to fight a battle that is more likely to be won if many stand up together instead of just a few. Organizing is working with others in the community to learn what is wrong, what needs to be done, and how to work together. It is recruiting others to join and keeping people motivated to stay with it over the long haul.

Coalition building takes the concept of organizing from individuals to organizations. It brings organizations together to focus on an issue or problem. Sometimes coalition members share a specific goal, such as building an affordable housing development. Other times they may join because of principles, such as the need for affordable housing in general or a desire to end homelessness. Coalitions focused on equitable development typically bring together organizations across different issues such as: affordable housing, transportation, and community benefits from developments.

Coalitions allow you to pool resources, skills, experience, contacts, strategies, and ideas for solutions. A broad-based coalition can add tremendous power to your effort: decision-makers notice when organizations representing multiple constituencies they care about become unified with a list of shared concerns or demands. Coalitions give decision-makers added incentive to agree to proposed solutions because they can thereby meet the demands of several constituencies at once. Coalitions are critical to attacking problems that affect more than one community.

CASE STUDY:

Organizing for An Equitable Development Zone

Located in the San Francisco Bay Area, Richmond, California, is a city in transition. It sits in an optimal geographic location with access to regional job centers, major freeways, bridges, rail, and other area transit systems. Yet the city has lagged behind the general prosperity and economic health of the region. Richmond's median income of \$46,659 is 65 percent of the median family income for the Bay Area. The majority of residents are people of color, including many immigrants. In addition, many of the more affordable neighborhoods in Richmond have high crime, poor schools, and limited employment opportunities.

Developers have begun to see the many opportunities that Richmond provides and new housing has cropped up in certain neighborhoods, bringing new, wealthier residents. Housing costs have risen across the city, increasing cost pressures on long-time low-income residents.

Against this backdrop, the Richmond Improvement Association (RIA) and Contra Costa Faith Works! began to work with Urban Habitat, PolicyLink, and other organizations to establish an Equitable Development Zone (EDZ), to build low-income residents' assets, improve services, and increase access to regional economic opportunities. Moreover, the groups sought to ensure residents' participation in local decision-making and to push for benefits from investments in their community.

In February of 2003, RIA, the California State Treasurer, and the State Secretary of Health and Human Services, jointly sponsored a forum on revitalizations strategies. In March, forty pastors who are members of RIA traveled to Sacramento to meet with these state officials and enlist their support in the establishment of an EDZ in Richmond. Since then, efforts have continued to seek connections to state funding streams and to secure the support of local housing and redevelopment officials. A second local forum explored possible policy options to increase affordable housing, as well as opportunities for mixed income housing development. A land inventory is now being compiled, and new, affordable housing opportunities are emerging with public, private, and nonprofit partnerships. Combining faith-based organizing, coalition building, advocacy, and multi-level strategies to build public attention and pressure holds the promise of bringing long sought-after results.

Successful Coalition Components

Begin building your coalition by reaching out to individuals and organizations that are recognized and respected, both by your community and the wider public. Having a prominent person as a leader and strong organizations as members can make it easier for others to join the coalition. Meet with them to discuss the problem, seek their ideas and opinions, and ask for their support.

Try to include organizations considered knowledgeable. Agencies and the media will treat you more seriously if the coalition includes organizations with a history of action and experience. (Sometimes these organizations don't exist. Sometimes your problem may be so new or localized that you are the first one to attack it. If so, reach out to organizations in neighboring communities or with related interests, inform them about the problem you are concerned about, and, if they seem supportive, invite them to join your coalition.)

Many groups working for greater equity will be willing to be part of an effort focused on equitable development, especially if you recognize that different organizations can help in different ways. Seek to understand each organization's specific interests and needs. Because of limited resources and ongoing work on other issues, organizations will vary the depth of their involvement in different efforts. Choose strategies that build from as many organizations' strengths and priorities, as possible. Be prepared to facilitate and coordinate an ongoing process to build understanding and trust across different organizations and community leaders. This process will take time, but a broad coalition will bring greater strength than one that just includes organizations focused on a specific issue. As you build your coalition, reach out to include politically diverse groups. The broader the ethnic, racial, economic, political, and geographic representation is, the more powerful the coalition. It is much harder to dismiss an effort supported by a wide range of organizations, especially if those organizations are often not on the same side.

KEY INFORMATION

Basic Coalition Principles

At the outset, all members agree on:

- Their commitment to the campaign;
- The policy agenda;
- The structure of the coalition;
- The roles to be played by individual members, and
- Resources to be committed by individual members.

Throughout the campaign, coalition leaders:

- Delegate tasks to the best-qualified people;
- Communicate with members regularly;
- Actively build capacity and skills of members and groups;
- Share credit, share visibility, share victories, share setbacks; and
- Regularly review strategies, roles, communication, and other operations.

CASE STUDY:

Building a Regional Coalition Across Issues and Constituencies

The unprecedented economic boom of the 1990s revitalized the Greater Boston economy, reestablishing one of the nation's preferred metropolitan regions. Simultaneously, existing inequities deepened as the gulf between high skill, high-wage jobs and low skill, low-wage service positions widened. This gulf exacerbated race and income disparities. Affordable housing remained disconnected from economic opportunities spread throughout the region as Massachusetts became the least affordable housing market in the nation.

Advocacy efforts led to public forums that brought together 165 diverse representatives from nonprofit and government to explore opportunities that realign public policies to advance equitable development. As a result, some of the area's leading advocacy organizations—working to achieve affordable housing, economic development, environmental justice, transportation equity, and community development—created a new coalition, Action for Regional Equity (Action!).

Forming a regional coalition focused on equitable development across multiple jurisdictions and different issues has not been without challenges. Initial steps involved building trust and relationships and highlighting the connections across interests, issues, and constituencies. Developing the coalition's agenda required constant attention to balancing each organization's priorities and finding common ground in each year's policy objective.

In 2004, Action! advocated for equity principles in the adoption of new incentives for housing near public transportation. Action! questioned the equity of proposed fare hikes, pushed for balanced transit-oriented development, and called for new housing revenue sources, serving families at levels affordable to their income. Collective planning strengthened the coalition.

In 2005, the coalition plans to work to augment the statewide housing trust fund and push for legislation to mandate the collection of racial data to track beneficiaries of the state's housing programs. New leadership is emerging, new alliances are being developed and old ones strengthened. A multi-issue, regional coalition is making significant progress toward equitable development.

Coalitions are strongest when:

- All coalition members agree on the fundamental goal and the plan to achieve it.
- There is leadership with the time, skills, experience, resources, and coalition support to do the job.
- There is a clear understanding about each coalition member's level of participation. For example, some organizations may want to sign on from the beginning; others may be more comfortable sending letters of support; some may be able to do some limited surveys in their community; some may be able to have a representative testify if there is a public hearing; others may want to play a leadership role and participate fully. Those representing business may want to play only an insider role. Make it possible for members to contribute to the effort in many different ways according to their resources and priorities.
- There is a commitment to full, thorough communication.
- Members understand how decisions will be made. There will likely be instances when decisions need to be made quickly. Will the leadership of the coalition (a person, one organization, or a small executive committee of members) have the authority to make the decision? If so, what kinds of decisions can it make? Should coalition members be polled before some kinds of decisions are made? If so, which decisions, and how should members be polled (e-mail, fax, phone)? How quickly will coalition members need to respond?
- Coalition members present a united front and choose speakers or representatives, giving them the necessary decision-making authority.
- Members agree on the style of the campaign. Will it be hard and aggressive or soft and diplomatic? Will the campaign aim for high visibility or work behind the scenes?
- Work is divided according to each member's strengths, resources, capacity, and experience in organizing, research, use of the media, negotiating skills, and leadership.
- Credit is shared, and each member is recognized for her or his contribution.
- All members are in it for the long haul and support each other's interests, until the job is done, with no selling out or side deals.
- Successes are celebrated.

A strong coalition makes the work easier and more likely to succeed. Begin the process of building a coalition early. Share your information with supporters. Ask them what they think about your proposed solution. Invite their ideas. Define the problem and solution jointly instead of going it alone.

Coalitions can be formal, having their own letterhead, staff, and separate office, or as informal as simply an agreement to support a single goal. If possible, you want supporters to sign on as sponsors of an effort or campaign, but, if an organization cannot join fully in the work, welcome a letter of support or testimony at a public hearing. Always be conscious that each organization's priorities and capabilities will differ; not every group will participate in the front line of the campaign.

Tensions

Creating equitable development policy and practices is difficult work. Coalitions must support a shared vision of what to do and how to do it. Based on your fact-finding and analysis, you may have reached conclusions about what is wrong and what needs to be done. However, before you become wedded to your conclusions and goals and launch your effort, present your supporters with the information you have gathered and see what they think the problems and solutions are.

Advocacy is a joint effort, and your partners need to help make key decisions and take ownership of the campaign. If there is no agreement on the problem or solution, or if community members or organizations can't agree on roles, leadership, or strategy, the work will be much more difficult and less likely to succeed. Reaching an agreement on these issues may require patience, compromise, and time. Different styles and

approaches may have to be bridged. Racial issues may have to be explored and addressed. Cultural differences may have to be understood and appreciated. Moreover, strategies and knowledge gained in one issue area will need to be integrated into a broader equitable development effort.

Keeping a coalition together is an ongoing effort. Even when there is initial agreement about the problem and goals, members may have different views about strategic decisions, the specific language for a news release, or the message or tone for the campaign. Some may express their opinions strongly and seem unwilling to consider the views of others. Some partners may be raring to get started while others may be unable to participate because of short-term deadlines they need to meet on other issues. Working through these differences will take time but make your campaign for equitable development stronger in the end.

KEY INFORMATION

Conducting a Power Analysis

Before setting out to organize your community or build a coalition, it's important to know which people and organizations have power and influence. Many individuals and institutions have influence, whether in the community, the government, or the private sector. Analyze who holds power, both formal and informal. Examine your own power, both what you already have and what you need. Analyzing the formal power structure will tell you who is officially in charge; analyzing the informal power structure will tell you the underlying reality of how decisions are really made and how things actually get done. Including people and organizations with either formal or informal power in your coalition will increase your power and the likelihood of success.

For more information on conducting a power analysis, consult *Advocating for Change*, at www.policylink.org and "Power Analysis" in *Dynamics of Organizing*, available at www.tenant.net/Organize/orgdyn.html; "Conduct a power analysis" in *How—and why—to Influence Public Policy: An Action Guide for Community Organizations*, www.communitychange.org/publications/pubpolicy.htm; and *Power and Organizing*, available at www.grassrootspolicy.org/publications/power.html.

Red Flags

When the opposition to your efforts is strong or perhaps hostile, you need to maintain internal accord. Allies, partners, coworkers, or supporters who become unhappy and break away from the agreed-on plan may undercut your work. Warning signals should go up:

- If coalition communications are not up to date;
- If information is not fully shared and available; and
- If differences of opinion among coalition members are set aside unresolved.

Remember:

This is a campaign. You are trying to persuade decision-makers, the media, and the public about the seriousness of the problem and the need for equitable development solutions to be adopted.

This is building your community. In addition to solving a specific problem, advocacy campaigns build the community's capacity to work together to achieve important goals and to develop the leadership skills of those involved.

A strong coalition of groups and individuals makes the work easier, more exciting, and more likely to succeed.

CASE STUDY:

Saving Transit and Gaining Community-Oriented Development in Chicago

When the Chicago Transit Authority (CTA) announced plans to close a local station and an entire line, the Green Line, the community reacted strongly. The Green Line was one of residents' lifelines, linking them to opportunities in downtown and other area job centers.

A concentrated advocacy campaign began. A variety of stakeholders—transit riders and leadership from a variety of community organizations, block clubs, senior citizen groups, and community-based organizations—pulled together to protest and advocate for change. In an historic alliance, suburban community, business, and public officials also joined the efforts. Together, the coalition fought to keep the station open, and won. After considerable additional advocacy and increased pressure, the CTA agreed to commit funds to rebuild two other lines in the broader area.

With more than 2,000 people passing through each day, community leaders reasoned that the station slated to be closed was a natural magnet for development. Groups in the coalition initiated a neighborhood planning process. The resulting neighborhood vision called for attractive housing close to the station. Drawing on public and private resources, Bethel New Life, a local community development corporation, and its community partners began a transit-oriented development with clusters of supportive services, affordable housing, and places to shop and work around the station.

What began as a potential process of neighborhood decline became a successful equitable development advocacy campaign with new neighborhood investment and building as an added part of the success story.

Make Your Plan: Developing Goals and Strategy

Every advocacy campaign, whether statewide or local, requires a plan to get from the problem to the solution and a road map of the steps to be taken along the way. The plan should include:

- A clearly defined problem;
- A clearly defined solution and interim goals;
- An assessment of resources; and
- A clear strategy.

Define the Problem

Defining the problem may sound easy. In fact, there may be important differences in the way people in the same community view the issue. For example, the attitude of local merchants toward affordable housing may differ from that of residents; higher-income homeowners may see things differently from the way lower-income tenants do. Indeed, some may not perceive a problem where others do or may believe in different approaches to identifying and solving it. Try to identify these differences early and work toward a consensus.

Working through these differences will test whether you are on the right track. Taking the time to define the problem will also help bring people together and convince others about exactly what needs to be fixed.

Define the Solution and Interim Goals

Next, define the equitable development solution to the problem. If the problem is complicated, set specific interim and long-term goals that will bring you closer to achieving the solution. Examples of short-term goals might be to educate and organize community members; form a coalition of community groups; reach out to organizations in neighboring communities and to regional and statewide groups; conduct surveys of residents and businesses in the community to document their support for specific solutions; and identify and educate reporters about the issue. Meeting measurable goals will allow the coalition to see that it is moving toward the ultimate solution and to demonstrate to the community that this equitable development campaign is serious about addressing the identified problem.

Regularly review your goals and assess your progress. Make changes to the plan if necessary.

Assess Your Resources

Assess the resources of the community and coalition members, particularly the ability to work together. Is there a history of working together? Can there be agreement on leadership? Are there enough people with the skills and experience to succeed? In addition to leadership, you need people with the skills to do surveys and gather facts and information to document the problems. Demonstrating support for your proposal will be important. Someone will need to get people out for meetings and for news conferences and other community events. You will need speakers who can represent the community or coalition. Is there a way to pay for supplies and reimburse out-of-pocket expenses, places to meet, and computers? Are there phones to call the media or the community to announce meetings? Is there someone who can manage e-mails and a website? If necessary, you may have to ask those who have these capabilities to join the campaign.

Local churches, community organizations, and individuals can often provide logistical help. People's time for fact-gathering and community surveys, organizing, writing notices of meetings, and fulfilling other needs must be realistically assessed. The actual out-of-pocket dollar costs for an equitable development advocacy campaign may be minimal, from nothing to a few hundred dollars for telephones and copying. It is people time that is needed most. But sometimes funds are needed—to support activities, bring in needed expertise, or provide staff support.

It is possible to find funds for advocacy campaigns. Individual donors may be willing to contribute to an effort to solve an important community problem. Special public fund-raising efforts can be initiated to

pay for such components of a campaign as placing an initiative on the ballot. Foundations interested in systems change, civil society, public policy, or specific issues can be consulted about funding elements of an advocacy campaign or ongoing advocacy work. Often coalition members, such as labor organizations, might contribute needed funds or services for a campaign.

Depending on the forum you choose, you may need one or more persons with special skills, such as a lawyer, experienced lobbyist, fundraiser, campaign manager, or media expert. One or more of the coalition members with advocacy experience may even have a staff with these skills.

A Clear Strategy

Next, decide where you want to focus your efforts. Should you concentrate on local officials or state government, the state legislature, city council, or a government agency, the courts, private businesses, or some other institution? The basic ways to bring about change are:

- *Working with private companies;*
- *Working with government agencies;*
- *Going to court;*
- *Changing the law;*
- *Using the initiative or referendum process;*
- *Creating your own forum;*
- *Choosing the right advocacy strategy.*

CASE STUDY:

Advocating for Living Wages, Local Hiring, and Affordable Housing

In Los Angeles, the Figueroa Corridor Coalition for Economic Justice reached a historic agreement with the developers of a four million square foot “Sports and Entertainment District” to be built adjacent to the Staples Center, a large existing sports arena. When the original Staples Center was developed, it encountered diffused and fragmented complaints from the community that resulted in minimal concessions. However, two years later, when a new expansion was proposed, the community was prepared. Community members had organized and educated themselves about the proposed expansion, developed a shared platform, and through unity, came strength. Twenty-nine community groups, including local churches, environmental justice groups, and tenant-rights organizations, five labor unions, and 300 predominantly immigrant residents came together to advocate for living wages, jobs, affordable housing, and neighborhood parks. They argued that the developers, who were to receive at least \$75 million in subsidies from the city, must be accountable to surrounding communities and deliver benefits to residents.

After nearly a hundred hours of negotiations, the Figueroa Coalition and developers agreed to the following:

- **Living Wage Jobs:** Seventy percent of the 5,500 permanent jobs at the development will be union or pay at least a living wage, one that covers basic needs such as housing, food, transportation, and health care.
- **Local Hiring:** Local residents will be notified of jobs through a first-source hiring program set up by the coalition with \$100,000 in seed money.
- **Affordable Housing:** Twenty percent of the housing units in the development will be affordable. An interest-free revolving predevelopment loan fund of \$650,000 will help local nonprofits develop from 130 to 325 additional affordable units.
- **Parks and Recreation:** More than \$1 million will be dedicated for the creation or improvement of parks within a mile of the project. The design process must include community input.

For community residents, higher wages, employment, affordable housing, and better parks were the result of organizing, coalition-building, and effective advocacy. While the project has not been built yet, the agreement was designed with timing mechanisms so that the community would benefit, regardless.

Working with Private Companies

Private businesses have an enormous stake in improving transportation, housing, land use, environment, and other equitable development issues. Convincing private businesses to change their policies may require meeting with executives or department heads to solve a specific problem. It may also be necessary to urge businesses to be part of a larger alliance to reform the system itself through new laws, rules, structural changes, or incentives.

Considerations

Negotiating with a business will almost always result in less than what the community thinks is needed to solve the specific problem. Even if a solution proposed by a company is not ideal, it may improve the situation. Are you settling for too little or is it more than you can get through other strategies? Does accepting the company's offer foreclose you from pursuing other strategies? If so, for how long?

Pluses

- Since its public image is a valuable asset, a business may be especially willing to help address a specific problem if it enhances that image with consumers, shareholders, employees, government officials, and the media.
- Large corporations have resources that can be enormously helpful in bringing about change—money, of course, and also media and public relations resources, lobbying and governmental affairs staffs, and high-level contacts with other large businesses, foundations, and government.

- Getting one corporation to change may set standards for others to meet.
- Change by a large corporation can have an effect on its many suppliers.

Minuses

- Every business seeks profits. Typically, businesses will oppose proposals that might harm their economic interests, support those that further them, and be indifferent to ones that don't affect those interests.
- Businesses want public credit for working with community groups, sometimes even when they do little or nothing to address community concerns. Simply meeting with community groups, for instance, can be inflated by a corporate public relations department into "working closely with [your organization] to attack [your problem] in [your neighborhood.]"
- Many businesses have little or no experience working with community groups. They may therefore be hostile, suspicious, or slow to understand how their interests overlap with those of the community.

For more information on working with private companies, consult Corporate Accountability Project, Researching Corporations at www.corporations.org/research.html, the Data Center, Impact Research for Social Justice at www.datacenter.org, and Environmental Defense, Alliance for Environmental Innovation at www.environmentaldefense.org/alliance.

Working with Government Agencies

In the federal, state, and local governments, there are administrative agencies (departments, commissions, boards, etc.) that are responsible for specific areas (housing, transportation, environment, planning and land use, health, etc.). Established by Congress, state legislatures, or city councils, administrative agencies are usually given broad powers to oversee business practices and address problems in specified issue areas.

For example, many state agencies have the power to adopt, amend, or repeal rules and regulations that carry the same power as laws adopted by legislatures or city councils. They can also bring enforcement actions to stop practices that violate the law or agency rules and can fine and revoke the licenses of violators. Agencies also have the power to investigate problems and advise the executive branch (president, governor, or mayor) and the legislature on the need for new laws, programs, and other governmental actions to improve their effectiveness.

There are several ways to try to influence how an agency serves your community. You may want to ask an elected representative to write or call an agency director and schedule a meeting, inviting community coalition leaders to join; or the coalition may ask directly for a meeting. The coalition or an elected official may arrange a Town Hall meeting and invite the agency director to attend and participate. You may also encourage a reporter to investigate and do a story on the problem your community has identified. A more formal way to encourage change is to file an administrative petition.

Many states give the public the right to petition agencies to request the adoption, amendment, or repeal of a rule. Also, Congress has given the public the right to petition federal agencies. Using these rights, advocates have filed administrative petitions to bring about important reforms.

CASE STUDY:

Administrative Petitions in Action

Recalling unsafe vehicles. Consumers for Auto Reliability and Safety petitioned the National Highway Traffic Safety Administration to recall Peugeot 405 cars with defective automatic restraint systems. The petition was granted, a recall notice went out to owners, and Peugeot was required to fix the defect.

Protecting patients in managed care. Maine Consumers for Affordable Health Care petitioned the Maine Bureau of Medical Services to establish standards for access to care, complaint and grievance procedures, eligibility, and other key issues. The petition resulted in improved health care rights for the state's consumers.

Using public assets for public health. Consumers Union and a coalition of health care and seniors' groups petitioned the California Department of Corporations to ensure that the public assets of nonprofit health maintenance organizations would be dedicated to charitable purposes when a nonprofit decided to convert into a for-profit company. The petition led the department to regulate future health care company conversions and to establish two health foundations with assets of over \$4 billion.

Considerations

To get a government agency to solve or prevent a problem, you must convince agency officials that there is a serious problem, that they are responsible for solving or preventing it, and that they can take meaningful steps to implement a viable solution. Community members sometimes may view the agency itself as the problem. Nonetheless, it is almost always a good idea to talk to agency decision-makers once you've gathered your information, done your analysis, and pulled together your supporters. If you are unsuccessful and have to try another strategy, you can make the point that "We tried to work with the agency, but they refused to protect our community. That is why we have come here to [court, the legislature, city council, etc.] for action."

Pluses

- Filing an administrative petition is a formal action that is taken seriously by agency officials and the media.
- Since agencies typically have broad authority to act in the public interest, the petitioning process can be used to address identified problems.
- Petitioners do not have to be represented by lawyers.
- The administrative petitioning process—from filing to agency action—can be fairly short (a few months, rather than the years sometimes required for a lawsuit).
- Depending on the issue, petitioning may be less swayed by political or vested interests than the legislative process is. Moreover, friendly legislators can still help your cause before the agency by voicing their support.
- Administrative petitions may be filed at any time, can request immediate action in an emergency, and can address problems statewide or locally.

Minuses

- Since most agency heads are appointed by the executive branch (typically by governors or mayors) and are subject to oversight by the legislature, they are subject to political pressure.
- Because of their backgrounds, agency heads and staff members may be sympathetic with the industry or profession they are responsible for regulating.
- The legislative branch may sometimes have expressly limited an agency's power over a specific practice or type of entity.

For more in-depth information about the administrative petitioning process and working with administrative agencies, consult *Advocating for Change*, Administrative Petitioning: Making Rules Stronger at www.policylink.org, and Harry Snyder with Carl Oshiro and Ruth Holton, *Getting Action: How to Petition Government and Get Results*.

CASE STUDY:

Pushing for Better Transportation

In 1996, the Bus Riders Union/Sindicato de Pasajeros filed a civil rights lawsuit against the Los Angeles Metropolitan Transit Authority (MTA). The union's lawsuit was based on extensive research showing that the MTA discriminated against inner city and low-income bus riders.

Brought with the help of the NAACP Legal Defense Fund, the suit called for system improvements, elimination of overcrowding, and a formal place at the MTA transit policy table for the Bus Riders Union. As a result of the lawsuit, the MTA signed a consent decree that led to the replacement of 782 decrepit buses with new clean-fuel buses, expansion of the fleet with almost 300 new buses, and the preservation of monthly passes for riders and implementation of a weekly pass.

The union continues to monitor the provisions in the consent decree. When the MTA failed to meet some of them, union members engaged in direct action at MTA board meetings, pressured MTA board members, and conducted civil disobedience to bring public attention to the MTA's failure to serve low-income bus riders. In March 2004, the union sought an extension of the consent decree because of the MTA's inaction on many of the decree's provisions.

Going to Court

Another way to bring about change is to file a lawsuit.

In a lawsuit, the plaintiff must do more than simply argue that what the defendant is doing is wrong or harmful. A lawsuit contends that the defendant's actions violate the law.

Typically, lawsuits are brought either to stop actions that violate existing laws or to implement actions that are required by them.

Considerations

Community members may sometimes feel that taking the matter to court is necessary to show that the community is strong and is forcefully pursuing its rights and the need for equitable development. Sometimes decision-makers agree with what you are trying to achieve but because of political considerations want the courts to force them to act. When agency officials or business executives are sued, they may feel attacked or betrayed, become angry and defensive, and refuse to deal with you except through their lawyers. Because this is a typical reaction, consider other approaches before going to court.

Pluses

- A lawsuit can be filed any business day of the year.
- Plaintiffs can ask for an emergency order or injunction to prevent irreparable harm.
- Courts may be less overtly political than other venues. (However, the election of judges is becoming more politicized and their appointment by elected officials can also become politically charged.)
- A lawsuit can result in an important legal precedent that leads to reforms in other areas.
- In some types of cases, there is the potential for recovering lawyer's fees and costs of litigation.

Minuses

- It is difficult for courts to address matters of pure policy. Judges can't issue orders simply on what they think is best for the public. They are supposed to only interpret and enforce existing laws.
- Unless sufficient funding is available, your lawyer will have to be willing to work pro-bono or for a contingent or reduced fee.
- Once a suit is filed, the focus tends to shift to the court and the lawyers, making it harder for members of the community to be involved.
- A well-funded defendant can use tactics that drive up costs in an effort to exhaust a plaintiff's funds.
- Lawsuits can take a long time—sometimes years—especially if there are appeals.

CASE STUDY:

Advocating for a \$100 Million Housing Trust Fund

By the beginning of 2000, Housing LA had built the largest coalition Los Angeles had seen in decades. In early 2002 the coalition successfully pressured the Los Angeles city government to establish a \$100 million a year housing trust fund. By understanding the political climate and using the upcoming mayoral election to highlight affordable housing, Housing LA first built strong support around their issue, then lobbied the new mayor and council members for needed votes to establish the trust fund.

At the beginning of the campaign, the leadership of Housing LA chose these five strategies as essential to the success of the campaign:

- Bring together different constituencies with different interests around affordable housing production as a common goal;
- Spend the first two years building up the coalition. Once the new mayor and council members are sworn in, meet with legislators and focus on getting actual votes;
- Make affordable housing a key issue during the 2001 mayoral election and push for a vote on the trust fund by December 2001, six months after the new mayor and council would take office;
- Focus on the amount of funding required rather than how the city will raise the money, and
- Defeat or co-opt opposition from the city's business establishment.

To translate these strategies into a victory for affordable housing, Housing LA worked with each constituency to understand their concerns, answer their questions, and assure them that the campaign would be built to protect their interests. The coalition recognized that to be successful, they needed active participation from leaders, especially from tenant organizations.

Taking advantage of the mayoral and council elections, Housing LA organized slum housing tours and distributed literature that educated voters on the candidate's positions on affordable housing. Candidates were taken to buildings, where they met with tenants who described such daily realities as rats skittering through their kitchens and told of their hopes for a better place to live. These visits were followed by trips to well-designed and well-managed nonprofit housing, usually within a few blocks of the slum.

To assess the depth of potential opposition from the business community, Housing LA organized the Housing/Business Summit with the city's two leading business lobby groups. Housing LA framed the issue in such a way that business leaders began to talk publicly about the need for affordable housing. To stay on the offensive, the campaign focused only on the goal of \$100 million for housing rather than the fee or tax that would make the fund possible. The coalition argued that identifying the funding sources was the responsibility of the mayor and city council.

After the new mayor was elected, coalition members conducted weekly lobbying visits for three months. Every week a different constituency (e.g., tenants, academics, religious leaders) visited City Hall, each making different but coordinated arguments to elected officials. As the coalition approached their December 2001 deadline, they put increasing pressure on the mayor's office to take action.

As a result of these strategies, Housing LA won the establishment of a housing trust fund and the full \$100 million a year, within two weeks of their original deadline. Not only did they win everything they asked for; they also put housing policy on the agenda of all the groups that joined the coalition and developed valuable long-term relationships and trust among the members.

Changing the Law

Another means of bringing about change is to try to persuade the state legislature, city council, or county board of supervisors either to pass a new law or to change an existing one.

Considerations

The legislator (assemblyperson, senator, city council member) who agrees to carry your proposed legislation must have the credibility, time, energy, and staff to get it passed and signed into law. She or he should want to be the champion of your issue. The law must meet the community's needs, not just the legislator's political needs. If passed, the law should bring meaningful change and be, if not a full solution to the problem, a significant step forward.

Pluses

- Legislators and local legislative officials are elected and therefore accountable to voters.
- In smaller communities, elected officials may be easily accessible to members of the public.
- Unlike the courts, the legislature can look beyond existing law and broadly examine public policy to find the best solution.
- A law enacted by the state legislature may address a problem in communities statewide.
- A law enacted by a city council can be a model for other localities and may even pave the way for state legislation. Likewise, a new law enacted by one state legislature can be a model for other states.

Minuses

- Drafting and passing legislation is a highly political process. Elected officials will weigh how their actions will affect their standing with voters, campaign contributors, and supporters.
- In some states, the state legislature is in session for only part of the year or may convene for only a few months every two years. There are also deadlines for introducing bills and for proposed bills to make their way through the legislative process putting constraints on timing for introduction and passage of measures.
- Legislative rules typically make it easier to stop proposed laws or ordinances than to pass them.
- Elected officials like to please everyone, which makes it more difficult to pass controversial legislation.
- The state capital may be so far from your community that it is difficult for community leaders and supporters to meet with legislators and attend hearings there.

CASE STUDY:

Advocating for Housing Bond Issues

In 2002, a broad coalition helped pass Proposition 46, a California ballot initiative for \$2.1 billion in state affordable housing bonds, the largest housing bond issue in the history of the state, and the nation. Advocates for nonprofit housing and the homeless and for-profit developers formed the leadership of the coalition. They worked for legislative approval to put the measure on the ballot. The leader of the state senate was the measure's champion.

The Affordable Housing Collaborative spearheaded the legislation, Senate Bill (SB) 1227 (Burton), with key support from the building and high-tech industries. Support from the latter two groups helped convince pro-business legislators to vote for the measure, providing the two-thirds support in each house needed for it to be placed on the ballot.

The campaign leadership came from both for-profit businesses and nonprofit housing organizations. Over six hundred other groups and elected leaders supported the measure; they included battered women's shelters, senior groups, labor unions, law enforcement and local government officials, religious organizations, and environmentalists. Organizations that signed the ballot arguments in favor of the measure included AARP, the League of Women Voters, the Association to Aid Victims of Domestic Violence, Habitat for Humanity, and the California Professional Firefighters.

Regional coalitions worked to gather key endorsements, generate editorial support, and get out the vote. There was no financed opposition campaign. The proposition passed by more than a million votes, a sign of public support, solid organizing, and effective coalition-building.

The money from the bonds is supporting a wide range of housing strategies for various populations. They include homeless services, low-income rental housing construction, and funds to make home ownership affordable to working families. The diversity and cohesiveness of the coalition, in which groups advocating for these populations saw their concerns and interests addressed, was essential to the bond measure's success.

Using the Initiative and Referendum Process

Many states give voters the power to adopt new laws by initiative and to repeal existing laws by referendum. The charters of many local governments also provide for direct lawmaking by voters through the initiative and referendum process.

Like any proposed law, an initiative measure needs to be carefully drafted to achieve the result you are seeking and to avoid including things that opponents can attack. Sponsors of an initiative need to collect at least a specified number of signatures to have the proposal put on the ballot. More than 50 percent must vote yes for it to pass. In some areas, super majorities of at least two-thirds of the votes are required for passage of certain measures, particularly those that would impose taxes or certify issuance of bonds.

Considerations

Getting a ballot measure passed requires significant time and energy. Initiative campaigns require intense efforts that can be overwhelming as well as exhilarating. Working on an initiative is a very public process where everything and every group are subject to scrutiny by the media and the public. The leadership and the members of the coalition must be prepared to have their actions and statements subject to potentially extensive public review.

Pluses

- The initiative process can circumvent the regular legislative process and tap into public outrage about a problem. It gives the public the opportunity to use their vote to “speak” about a problem and a proposed solution.
- Some initiatives (typically on noncontroversial issues) do not draw meaningful opposition or require a huge expenditure of money.
- If passed, an initiative can have a lasting effect.

Minuses

- Huge amounts of time and money may have to be expended to qualify and pass an initiative.
- Often voters are unsympathetic to complicated measures, spending additional tax dollars, or passing new laws.
- If a proposal may harm a major economic interest, expect strong, well-financed opposition.
- Failure can have a significant and long-lasting effect since it is viewed as a lack of public support for a proposed solution, and even as a lack of public recognition of the underlying problem.

Creating Your Own Forum

It may be necessary to create your own forum to focus public attention on an equitable development issue. For example, if filing a lawsuit, going to the legislature, or filing an administrative petition is not feasible, you might explore whether a respected local organization or institution (e.g., the League of Women Voters, PTA, newspaper, community clinic, church, or union) would sponsor a public hearing on the issue. Ideally, the sponsoring institution will work closely with community leaders to schedule the hearing; invite speakers, elected officials, policymakers, and the media; plan the agenda, and convene and chair the hearings.

Other possibilities include:

- Establishing an organization to focus community and public attention;
- Having candidates focus and comment on your issue during the election season;
- Asking investigative reporters to write articles about your issue;
- Engaging in public actions or protests;
- Developing an issue-oriented website; and
- Persuading elected officials to introduce and pass resolutions calling for action.

CASE STUDY:

Creating Your Own Forum— Building Responsibility, Equality, and Dignity (BREAD)

A congregation-based community organization, Building Responsibility, Equality, and Dignity (BREAD), composed of 35 member congregations in the metropolitan area of Columbus, Ohio, focuses on direct action campaigns. To redirect federal transportation funds to serve inner city residents, BREAD engaged in effective advocacy with regional planning agencies.

The organization sought to impact decisions concerning the allocation of federal transportation funds. Their goal was to force the Central Ohio Transit Authority (COTA) to redirect funds to areas and projects that would provide better transportation linkages between the inner city and suburban job centers. They targeted politicians in the city of Columbus, COTA, and the federal transit authorities to produce the desired results.

BREAD began its year-long campaign with the goal of winning a meeting with the mayor on these transportation issues. When the mayor hesitated, BREAD publicized the mayor's lack of responsiveness. Soon afterwards, the mayor came to BREAD's own forum. He addressed a community meeting attended by more than 1,500 community members, and agreed to support BREAD's proposal. As a result, the regional transportation agency supported a program to develop a bus route between the inner city and several suburban area job centers. Additional bus routes were added later. By creating their own forum and putting pressure on key policymakers to attend, BREAD affected the official decision-makers and achieved the desired equitable development results for their community.

Considerations

The success of your forum will typically be judged by the number of people who turn out, the importance of the participants, and the tenor of the event. You are asking the media and the public to pay attention to your event, so a lot of planning and organizing is essential to present the best possible case. You want to counter the notion that you are holding your own event because you have neither community nor official support.

Pluses

- Community leaders have lots of input into aspects of the hearing, including subject matter, how issues will be presented, and who will be invited.
- Organizing a public event can utilize the community's resources and build its capacity to advocate for itself.
- A carefully planned and well-conducted hearing can educate government officials, local politicians, reporters, and the public about your particular problem.
- Public officials can be called on for their views. They may be given the opportunity to tell those attending the hearing what action (if any) they plan to take to address the problem.
- You can schedule your forum when you need to highlight the issue, involve the community, and engage policymakers.

Minuses

- The logistics can be daunting: Community leaders and the sponsoring institution will have to decide where and when to hold the hearing; whether the facility can safely accommodate the number of persons expected; what the tone of the hearing should be; who should be invited to attend and speak; who should chair the hearing; how it should be opened; who should speak, in what order, and for how long; and how to control speakers who try to dominate or divert it.
- Scheduling a hearing and inviting people to attend is easy. Actually getting them to prepare, attend, and participate in a manner that will result in an effective hearing requires lots of one-on-one effort.
- Holding a public hearing is not an end in itself. It should set the stage for other actions, including legislation, litigation, petitioning administrative agencies, and working with private businesses to bring about change. Be ready to take the next steps.
- Be careful that you don't engage in activities that are prohibited for nonprofits. If your event includes candidates running for office, give all candidates equal opportunity to attend and speak. Nonprofits should never support or oppose a political candidate and should avoid even the appearance of doing so. It's a fine line: make sure you know the rules so that you do not cross it. Many publications and organizations provide detailed information on the do's and don'ts of nonprofit advocacy. A recommended place to start is The Alliance for Justice at www.allianceforjustice.org/nonprofit/index.html or call 202/822-6070.

Choosing the Right Advocacy Strategy

Which advocacy strategy is best will depend on the solution and goals you want to achieve, the resources available to you, the kind of opposition you expect, who the decision-makers are, and how receptive they will be to your arguments. You will also need to consider how much time each process will take.

There will be other questions. Is the coalition more comfortable starting off by talking to the company or public official before creating public pressure? Is there an imminent risk, one requiring immediate strong action, like a public demonstration? Can you keep up with the work to handle the follow-through steps if the strategy is to present your facts and arguments at meetings and hearings in the state capital? If you go to court, will the coalition have to take a back seat to lawyers? Will the coalition be perceived as weak if you don't go to court?

Sometimes using more than one strategy can increase pressure, maintain momentum and media and public interest, and enhance your organizing and coalition-building. Successful campaigns often require coordinated work in more than one forum at a time. Thus, it is essential that the work in different forums be well-planned and coordinated so that scarce resources are efficiently used, decision-makers are held accountable, and the campaign presents a focused and forceful presence. Choosing the right strategy is a difficult process. Take your time to carefully think and talk through the options. When you want more information on any specific strategy or additional guidance on factors to consider in your decision, you can also consult the PolicyLink online advocacy manual, *Advocating for Change*. You will learn as you go and refine your own sense of priorities and key decision factors for choosing one strategy over another.

CASE STUDY:

Combining Litigation with Other Strategies: Funds for School Construction

In November of 1998, California voters passed Proposition 1A authorizing \$2.9 billion in state bonds for the construction of new educational facilities for grades K-12. The state began to allocate these funds to schools on a first-come, first-served basis. Because it often took several years for schools in urban areas to acquire the necessary land, this policy put urban schools at a disadvantage compared to schools in suburban areas.

In March 2000, attorneys affiliated with the Advancement Project (AP) filed a lawsuit against state officials claiming that the first-come, first-served procedure was contrary to state law. The court agreed with AP that when funds are scarce, the law requires the state to use a priority ranking system to determine which schools receive funding and ordered state officials to implement such a system for the remaining Proposition 1A funds (about \$1 billion).

Shortly after the Proposition 1A litigation was settled, the legislature began to consider a new bond measure to fund construction after the Proposition 1A funds were exhausted. It soon became clear that many legislators were opposed to the continuation of the court-enforced priority ranking system that had been written into Proposition 1A (and which would expire when the Proposition 1A funds were exhausted). Over the next year, while the new bond legislation was taking shape, AP lawyers analyzed the extent of statewide school overcrowding, enrollment trends, and construction costs, and met frequently with state officials, legislators, school district representatives, and other stakeholders to develop a new distribution system that would meet the needs of both urban and suburban schools.

As a result of this process, in April 2002, the state legislature approved Assembly Bill 16, which authorized \$25 billion in state bonds for new school construction and modernization to be put on the 2002 and 2004 ballots. AB 16 established two new construction funds for K-12 schools: a first-come, first-served fund and a Critically Overcrowded Schools Fund, which would reserve funds for overcrowded districts that needed additional time to complete their funding applications. Both ballot measures were approved by the voters.

Build Support: Communications

Regardless of the venue or forum, your campaign will need to influence the public and decision-makers. With broad support and lots of public attention, a just cause can be more powerful than lots of money and political contacts. The challenge is to craft a way to communicate your concerns and goals so that they are understood, credible, and move people to take action to support you. There are three foundations for successful communications strategies:

- Your information must be accurate;
- You must present your issue in the context of a broadly acknowledged value; and
- You must tell a simple and compelling story.

Using accurate information and reasoned analysis is important for the credibility of your campaign. Your credibility will affect your ability to organize and build a coalition. It will also affect how the public, the media, and decision-makers view you. It will be harder to earn support if you exaggerate or omit essential facts.

A broadly acknowledged value may be one as direct as providing safe and affordable housing, or creating more jobs, or reducing the number of children suffering from asthma. Anyone, from any viewpoint, will support an effort related to improving communities if it is clearly stated. There may be differences about whether a specific solution is feasible, affordable, adequate, or fair, but your campaign will have the broadest possible support if

the underlying cause is based on a broadly acknowledged value. If the value is indisputable, those who oppose your campaign will need to come up with other solutions rather than simply defeat the proposed solution.

The facts and values are the foundations for telling a simple and compelling story. The real people and institutions that have been or will be affected complete the picture. Successful campaigns are built on and fueled by making a case that people can understand, relate to, and want to see solved.

First Establish the Problem

Concentrate first on establishing that there is a problem, what it is, and who is being affected, before proposing a particular solution. Until you have communicated in a clear and convincing way that a problem exists, the public, the media, and decision-makers will not give credence to or may even be confused by a discussion of how to solve it. If you tell a simple and compelling story, people will want to find a solution.

You can build support for your campaign by talking directly to individuals, groups, opinion leaders, and decision-makers and also by using the media and the Internet. Whatever method you use, the purpose is to convince the audience to support your advocacy.

CASE STUDY:

Coalition Seizes Opportunity to Create Affordable Housing

Where people live determines their access to opportunities: the kinds of schools their children attend and access to transportation, services, and jobs. Available affordable housing in all neighborhoods, not just those with concentrated poverty, has therefore been a key issue in equitable development campaigns.

As some central cities have seen a renaissance over the last decade, housing costs have risen sharply. New construction has increased with demand. Some localities have passed inclusionary zoning policies to require that a certain percentage of new housing be made available to low-income and moderate-income residents.

In New York City, inclusionary zoning became the focus of an advocacy campaign with the announcement of plans to rezone neighborhoods throughout the city. Advocates saw the proposed rezoning as an opportunity to increase the supply of affordable housing in desirable neighborhoods since the rezoning would create new residential developments with the likelihood of significant financial returns. A coalition of over 50 organizations called the Campaign for Inclusionary Zoning was formed to demand that the city adopt an inclusionary zoning policy.

To carry out a multi-faceted advocacy campaign, the groups knew they needed to increase public education and support for inclusionary zoning. Getting their message into the media became an important goal. They decided to hold two press conferences, both on the steps of City Hall. The first announced the start of the campaign; the second, several months later, was held to release *Increasing Housing Opportunity in New York City: The Case for Inclusionary Zoning*, a report by PolicyLink and the Pratt Institute Center for Community and Environmental Development that makes inclusionary zoning recommendations for the city.

To coordinate the news conferences and other media work, a subcommittee was formed. Despite New York City's crowded media environment, the group had two things in their favor: the upzoning issue had already generated media attention and many of the groups in the coalition were well-known, well-respected, and several had worked consistently to build relationships with reporters and media outlets.

While the first press conference garnered little attention, the second drew reporters from print, broadcast, and electronic outlets. Media outreach included distributing press releases with copies of the report widely, with special attention to ethnic and alternative media. The document generated significant attention; many media outlets carried the story—including two of the city's leading Spanish-language papers—thus, increasing public education for inclusionary zoning and pressure on city officials to adopt it.

Talking with People

There are many ways to educate and convince individuals that there is a problem they should care about. Think through who is likely to be affected by the problem and where you can meet and talk with them. By talking to individuals one on one, you will find out what facts and arguments are important to them. Use these conversations to garner support and gather information to present your case in the most effective way.

A good deal of organizing and coalition building is done by getting the message out person to person through house and block meetings, door-to-door canvassing, or passing out information in front of supermarkets and at flea markets. In some communities, church meetings, passing out or posting one-page flyers, talking to youth groups, or visiting senior centers are effective ways to reach people. One project to address domestic violence sent organizers to self-service laundries to reach women in the community to find out their views, experiences, and needs. It worked. An effective program was developed.

Opinion Leaders and Decision-Makers

Direct communication with opinion leaders and decision-makers is crucial to building support for your position and persuading people with the power to act on your behalf. An opinion leader might be a person respected and looked to for leadership in their community, such as the director of a local program, a religious leader, the president of the League of Women Voters, or an elected official. These influential people can play a leadership role in your campaign or add weight to your effort. For example, an opinion leader may be the right person to lead or be the spokesperson for the coalition. This can give more visibility and importance to your coalition and help convince others to join in.

You also want to communicate with the decision-makers, i.e., the people who can take the action you need to address the problem. You need to find out who will influence or make the decisions on your issues. They may be government staff, corporate executives, or elected officials. Once you find out who the key people are, arrange to meet with them.

KEY INFORMATION

Plan Facts

Information must be both accurate and presented in a way that builds knowledge and understanding. For example, "Government researchers have released a study that shows that:

- Air pollution from automobile exhaust in Metropolis, California, now averages 200,000 tons of nitrogen oxide pollution per year from vehicle exhaust;
- This is an increase of 15 percent from last year;
- Current levels are more than double the safe levels set by state government;
- Incidents of asthma in children under 12 has doubled in the last three years; and
- Data over the past ten years show a direct link between air pollution and asthma in children under 12."

Stating information in a straightforward way will help to establish the broadly acknowledged value that increased asthma in children is undesirable and set the stage for telling a simple and compelling story of the individual children who suffer from this serious disease that is triggered by factors, such as high levels of automobile exhaust, which can be controlled or prevented.

KEY INFORMATION

Common Ways to Reach the Media

News releases. A news release tells the story of what is wrong, who says so, and what should be done. News releases are usually no more than two pages and are a good way to keep reporters and editors up to date on the progress of the campaign and important events.

News conferences. At news conferences, people supporting your position talk to reporters about the facts and analysis of the problem and its solution. The speakers have an opportunity to explain data, describe who is being hurt, and why the proposed solution will work. The purposes of the campaign can be laid out, members of the coalition can be introduced, and reporters can ask questions. News conferences should be reserved for significant events.

Talking to reporters and editors. It is important to call and meet with the people who decide if your campaign is newsworthy and how it will be covered. These conversations give you a chance to find out what journalists think about what you are doing. It also gives you a chance to find out what others are saying about your campaign.

Contacting editorial writers. You can try to get a newspaper or other media source to publicly support your position and urge the action you seek. You need to present your facts and analysis with other supporting documents, and be prepared to talk to editorial writers either over the phone or in person.

Letters to the editor. You can respond to any related event reported in a newspaper by writing a short letter to the editor with your comments. This can be a reminder to the public and others concerned about the issue and the need for your solution.

Writing an opinion piece. Newspapers and some radio and TV stations will carry a well-thought out essay describing your issue and views. You may want to contact the opinion editor to discuss whether she or he might be interested in an essay or article. You can check with the newspaper's or station's website for information about length, how to submit it, and contact information.

When you communicate with decision-makers, you want to be prepared with information and analysis and have strong supporters from your coalition with you. Whether at a lunch meeting, an office visit, or a formal hearing, your presentation should be carefully planned. Before the meeting, decide on:

- The purpose of the meeting;
- The main points to discuss;
- How to clearly describe the problem;
- What papers or materials you will bring;
- Who will lead your group at the meeting;
- Who will speak, on what points, and in what order;
- What your group will ask for.

When meeting with decision-makers, stick to the facts. Do not overstate the problem or use inflammatory rhetoric. Assume that once the decision-maker is convinced of the seriousness of the issue, your sincerity, and the feasibility of your proposed solutions, she or he will want to help solve the problem. Media coverage can help show opinion leaders and decision-makers that you are working on an important issue that the public cares about and that their steps to solve it will be noticed and appreciated.

The Role of the Media

Coalitions use the news media to inform the public about their campaign, mobilize support, and pressure decision-makers to act. Most news stories come about as a result of hard work to reach and educate reporters and editors. Getting free media rather than buying an advertisement for your cause enables you to reach a lot of people at once in a way that demonstrates that the issue you are working on and your proposed solution are important. Elected officials, their staffs, the courts, government agency

staffs, leaders of nonprofit agencies, and business leaders pay close attention to the news and editorial commentary as measures of public interest and the need and possibilities for reform. Public officials are far more reactive than proactive. The media is a powerful tool to help convince decision-makers that they need to act and that they should endorse your proposed solution.

KEY INFORMATION

Will the Media Pay Attention?

Media coverage is an essential element for a successful advocacy campaign. The media covers some issues; others are largely ignored. Here are some questions to ask to determine whether you are likely to get media coverage.

Is this an interesting and important story showing evidence of serious problems that endanger individuals and the community?

Are there credible spokespersons who can describe the problem and people who can talk about the effect on individuals, the community, and the public at large?

Is it an ongoing problem? Has there been any news coverage of it?

Have there been similar problems in other areas?

How has the media covered other complaints about this issue?

The answers to these questions will help assess how much media coverage you can expect. Getting the media to cover a new issue takes time and personal attention. Reporters need to gain an understanding of the problem and be convinced that the time is right for writing or talking about an issue.

CASE STUDY:

Defeat of Prop 54 is a Win for Innovative Communications Strategy

When Proposition 54 qualified for the California ballot many equity advocates were concerned. The initiative would have banned the collection of data on race, ethnicity, and gender for any efforts receiving state support, including those associated with housing and other infrastructure expenditures. Proposition 54 followed a string of California ballot measures on race-based topics. Equity advocates had tried to defeat Proposition 209 in 1996, which outlawed affirmative action in public institutions, as well as Proposition 187 in 1994, which sought to limit undocumented immigrants' access to basic services. Advocates brought the lessons learned and the alliances built from these failed attempts to the fight against Proposition 54.

A strong coalition of civil rights, labor, health, and community-based groups formed the Coalition for An Informed California. They organized their constituencies and used print, broadcast, and electronic media to galvanize the public and defeat Proposition 54. Campaign organizers invested heavily in research to determine the potential impact of passage of the ban and conducted polls and focus groups to determine messages that would resonate with different communities across the state.

When it became clear that the public was very concerned about the ramifications of virtually eliminating the ability of health researchers to understand and study race and gender-associated diseases, the campaign focused its primary media messages and messengers on this theme. The campaign was able to secure the well-respected and well-known Dr. C. Everett Koop, former United States Surgeon General, as a spokesperson opposing the initiative.

The campaign also developed and implemented an Internet strategy that allowed people to sign on to the campaign, enhancing the coalition's ability to build a database of progressive individuals. A flash animation piece was developed with "mainstream" messages about the dangers of failing to collect racial and ethnic data. In addition, three different flash pieces targeting Asian, Latino, and African American communities were developed. The targeted flash pieces proved particularly potent with many recipients sending the message on to friends, colleagues, and family—at far higher rates than the "mainstream" flash piece was forwarded.

As part of the campaign's paid media strategy, advertisements were purchased on African American radio and Spanish-language television. Campaign allies also purchased advertisements in ethnic print media, and grassroots organizing efforts included more traditional efforts such as community outreach and education, and distributing bumper stickers and No on Prop 54 flyers.

In the end, Prop 54 was defeated. The huge push to gather support from across the state, a push that incorporated new technology but that was also explicit about reaching California's broad array of racial and ethnic groups, proved to be the key components of success.

Using the Internet

The Internet is an efficient and inexpensive way to reach your supporters, the public, the media, decision-makers in government, and corporations. With a little extra effort the Internet can also be used for fund-raising. The two main tools of Internet advocacy are e-mail and websites. You can use e-mail to educate and enlist new supporters to your campaign, to communicate with coalition members, and to communicate with other campaign members by personal mail, Listservs, discussion forums, and action alerts.

A website can be a powerful tool for communicating your campaign goals, plans, information on how to get involved, how to contact and contribute to the campaign, how and when to contact decision-makers, and when to show up at meetings, rallies, and hearings. A website provides the media and policymakers initial access to your campaign and a way to follow up and contact you directly for more information.

The Internet enhances and expands your campaign's communications, which are essential to advocacy. It is not, however, a substitute for the direct personal contact needed to successfully organize, educate, and persuade supporters, the media, and decision-makers.

Remember not to overuse e-mail by inundating your supporters and the media with an outpouring of nonessential information. You also need to be aware that IRS rules for nonprofit advocacy activities also apply to the use of the Internet. (For more guidance see "E-Advocacy for Nonprofits: The Law of Lobbying and Election Related Activity on the Net," published by The Alliance for Justice, Washington, D.C. (www.afj.org).) Emails need not just be full of text. New technologies allow short videos to be transmitted. These can be targeted for different audiences and can be compelling enough that they are sent from reader to reader, sparking a sort of advocacy virus, spreading information and building support.

To be successful, your campaign must use every available method to tell the story of how existing conditions are hurting people and how they can be improved. The Internet and the tools it provides change and evolve rapidly. Watch for, and learn about, new innovations and then try them as advocacy tools in your efforts.

KEY INFORMATION

Writing a News Release

The news release can be one to two pages long and should be written in a journalistic style that includes quotes from your key spokespersons. Make the release as interesting as you possibly can. Connect it to issues or stories that are already being covered, an upcoming event, or have someone who is prominent and well-respected be one of the spokespeople. Occasionally, press releases are picked up and released in newspapers almost as written, so be sure the release is clear and well-written.

Things to remember:

- Print the release on your letterhead.
- List a contact person and a phone number.
- Be sure that someone will be available if the media calls.
- Include the date and note whether the information is “for immediate release” or “embargoed until [date].” Use the later if you want the media to hold the information until the date of your event or announcement.

Send the release to reporters, editors, news directors, and producers after finding out their preferences for fax or email. If you send it via email, cut and paste the release into the email; journalists don't want to risk opening attachments. Develop your media list from media directories and by identifying reporters from local media that you read, watch, or listen to regularly. Be sure to include ethnic, alternative, and community outlets on your media list.

Follow up sending the release with a phone call. Ask if it was received, if coverage is likely, and if more information would be helpful.

Never Quit

Successful advocacy often requires going from one strategy to another, and back again. If you win, you have to make sure that the changes won are implemented. If they aren't, you may have to go to court, city hall, the legislature, or petition the responsible government agency to demand action. You may need new allies along the way, which will mean additional organizing, communicating, and building trust.

Your opponents may try to undo any progress you make. If you succeed in passing a new law, they may take the issue to the ballot or to the courts. On the other hand, even if you lose a battle, there's always another day, another strategy, another set of circumstances with new opportunities. Through all the ups and downs, successes and setbacks, keep going; advocacy is a powerful force for change. It can help you, your community, and your organization achieve equitable development.

Remember, too, that the wins you and your colleagues achieve can have implications beyond where you live. It's hard to imagine any equitable development issue that presents itself in only one part of the country. Victory in one region can affect another and the lessons learned are always instructive, regardless of what strategy was used. By connecting with organizations in other parts of your region or state, or with national organizations that work in different communities on equitable development issues, you will be able to extend the impact of your work and learn from others' experiences.

The purpose of advocacy is change and the power of advocacy comes from people working together to make change happen. Advocacy is perhaps the most active form of democracy and the means to secure full inclusion and participation for everyone.

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